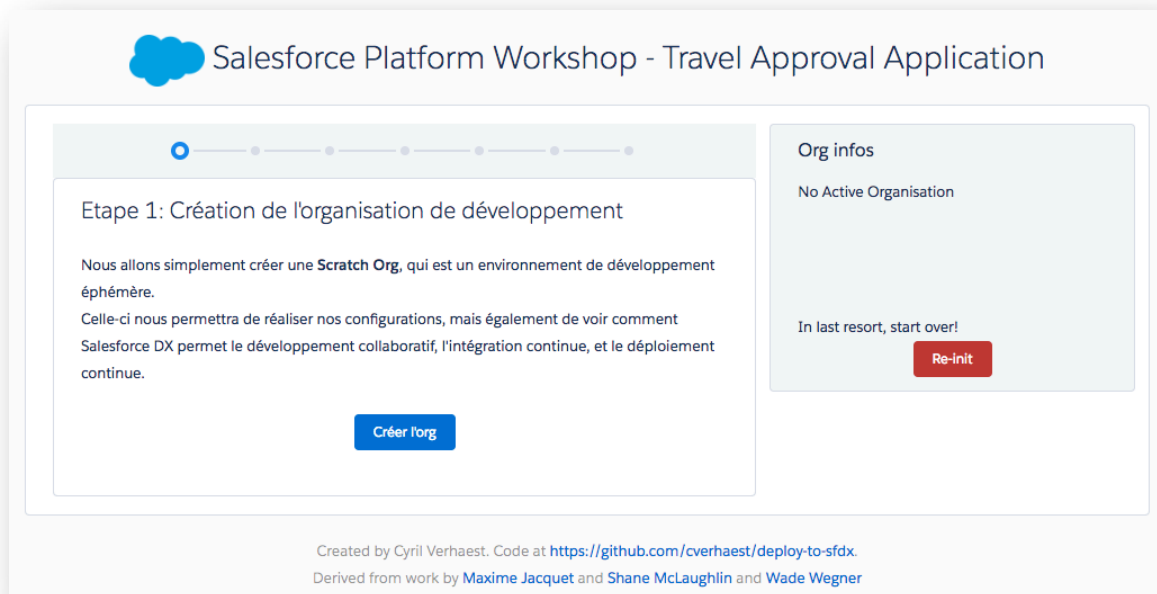


Travel Approval App – Guide de Configuration

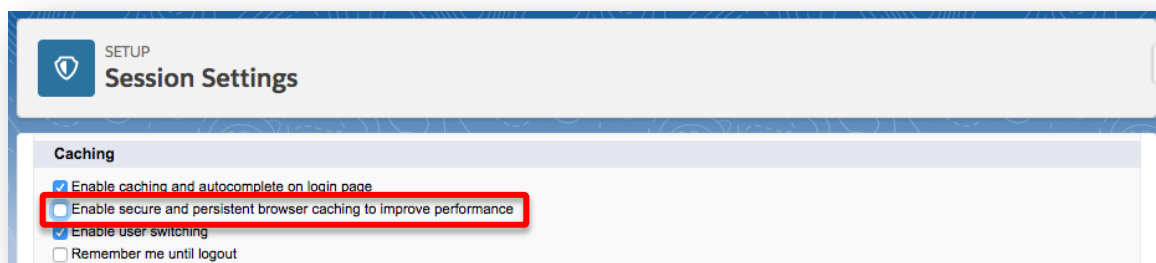
Outil de déploiement « Etape par Etape » :

<https://sfdxappwizard-en.herokuapp.com/>



Etape 1 – CREATION DE L'ORG DE DÉVELOPPEMENT (Scratch Org) et prérequis

- Remarque : utilisez l'outil de déploiement « Etape par Etape ».
- Modifier le paramètre de gestion du cache : Setup / ... / Session Settings
 - **Enable secure and persistent browser caching to improve performance:** ☐ (Décoché)



- Ajouter les langues de traduction : Setup / ... / Translation Language Settings
 - Ajouter « **French** » & « **English** »

Translation Language Settings

Translation Workbench [Help for this Page ?](#)

Click Add to select the languages your organization supports and the users who are responsible for translating that language.

Supported Languages [Add](#)

Action	Language	Active	Translator(s)
Edit	English	<input checked="" type="checkbox"/>	User User
Edit	French	<input checked="" type="checkbox"/>	User User

- Activer « Dynamic Forms »: Setup / ... / Record Page Settings
 - Positionner le curseur sur « **On** » et cliquer sur « **Save** »

Record Page Settings

Dynamic Forms (Non-GA Preview, desktop only)

Break up your record details into individual field and section components that you can put anywhere on the page.

☒ On

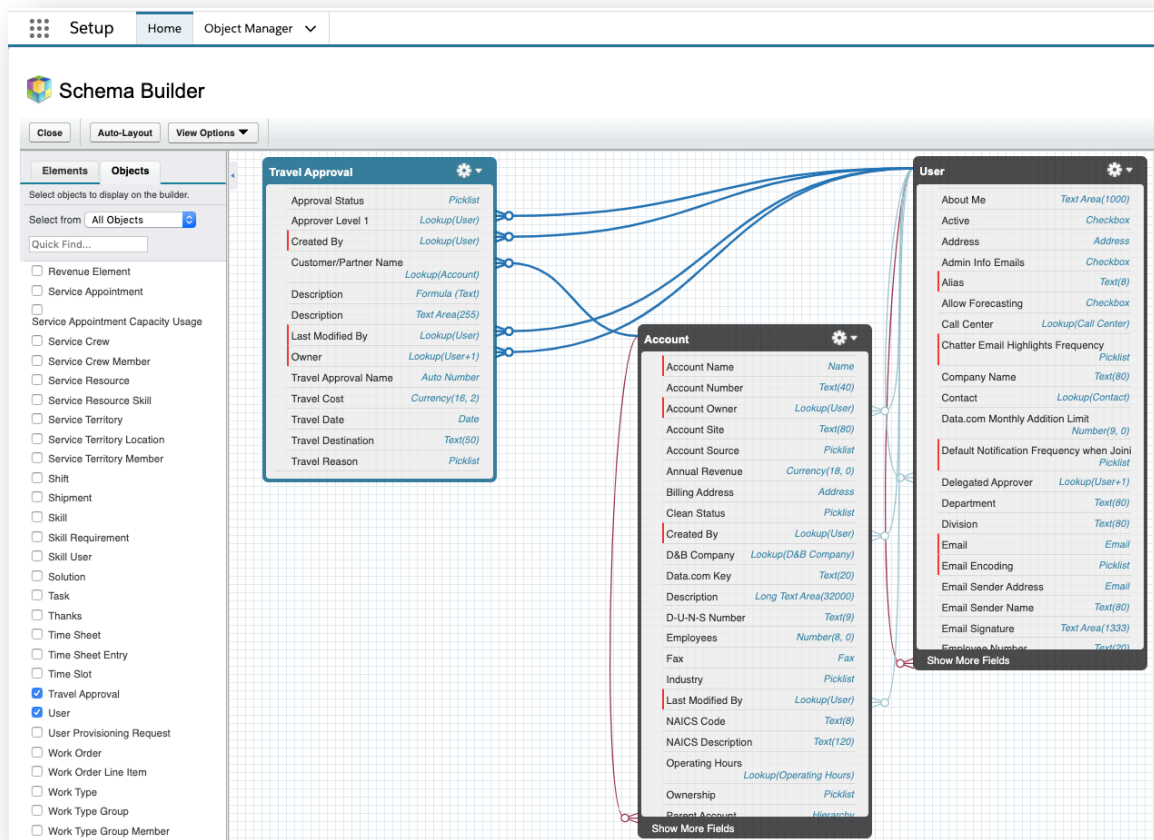
To participate in the Dynamic Forms Non-GA Preview, indicate that you have read all legal requirements and agree to participate by enabling it from this page. See additional details and terms in our [Release Notes](#).

Default Lightning Experience Record Page View

Assign the org default Lightning Experience record page view.

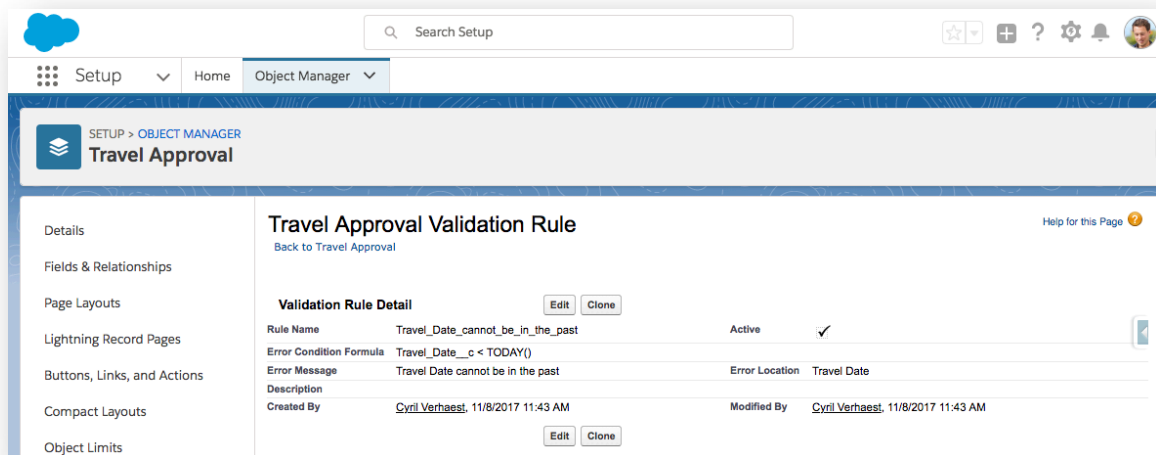
[Cancel](#) [Save](#)

Etape 2 - CREATION DU MODELE DE DONNEES



- Créer le « Modèle de donnée » : Setup / ... / Object Manager
 - Create / Custom Object
 - Object Name: **Travel Approval - Demande de voyage**
 - Name: Auto Number - TA-{00000}
 - Allow Reports, Activities, Track Field History, Allow In Chatter Groups
 - Allow Search
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object
 - Tab
 - Globe Icon
 - Default On for All Profiles
 - Create Custom Fields
 - **Approval Status - Statut**
 - Picklist
 - **New, Pending, Approved, Rejected - Nouveau, En attente, Approuvé, Rejeté**
 - Use first value as default value
 - **Travel Date - Date du voyage**
 - Date
 - **Description - Description**
 - Text Area

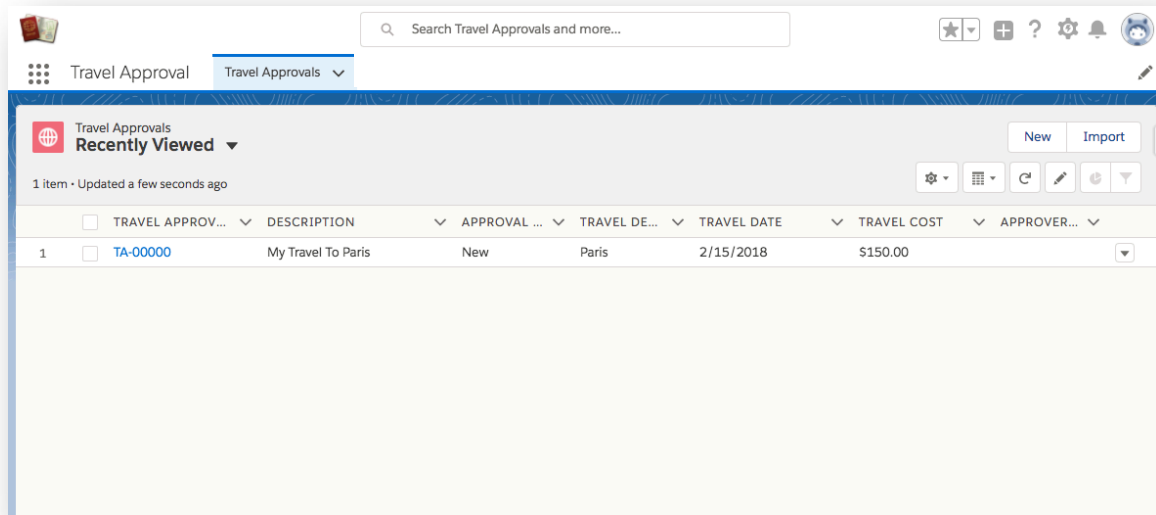
- **Travel Destination - Destination**
 - Text
 - **Travel Reason - Raison du voyage**
 - Picklist
 - Internal Meeting, Customer Meeting, Partner Meeting - *Meeting interne, Meeting client, Meeting partenaire*
 - **Travel Cost - Coût du voyage**
 - Currency (16.2)
 - **Approver Level 1 - Approbateur - Niveau 1**
 - Lookup Relationship / User
 - **Customer/Partner Name - Client/Partenaire**
 - Lookup Relationship / Account
- Création de la « Règle de Validation – Date du voyage ne peut pas être antérieure à la date du jour » : Setup / ... / Object Manager / Travel Approval / Validation Rules / New
 - Validation Rule Name: **Travel_Date_cannot_be_in_the_past**



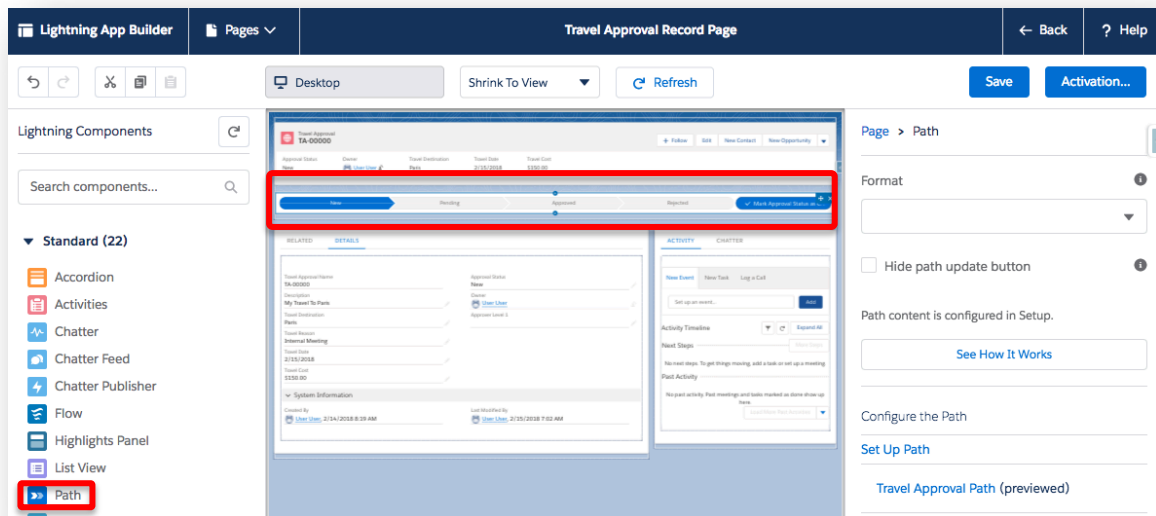
- Saisie des « Traduction » : Setup / ... / Translate
- Remarque n°1 : à ce stade, vous pouvez déjà créer des « Demandes de Voyage », collaborer sur celles-ci, ...
- Remarque n°2 : pour vous faciliter la tâche, utilisez l'outil de déploiement « Etape par Etape ».

Etape 3 – CREATION D'UNE APPLICATION DÉDIÉE

- Créer une application : Setup / ... / App Manager
 - New Lightning App
 - Name: **Travel Approval - Demande de voyage**
 - Next – App Options
 - Navigation Style: Standard Navigation
 - Supported Form Factors: Desktop and phone
 - Next – Navigation Items
 - Selected Items: Travel Approval
 - Next – User Profiles
 - Assigned To User Profiles: System Administrator



- Ajouter le « Path Assistant » à l'écran d'une demande de voyage : Edit Page
 - Drag & Drop the « Path Component » to the Page



- (optionnel) Ajouter une section « Customer or Partner Information » à l'écran d'une demande de voyage
 - Créer une « Quick Action »: Setup / ... / Object Manager / Account / Buttons, Links, and Actions
 - New Action
 - Label: **Travel Approval - Customer or Partner Information**
 - Action Type: Update a Record
 - Sélectionner les informations à afficher dans l'« Action Layout »

Account Fields

Blank Space	Account Source	Created By	Employees	NAICS Code	Parent Account	SIC Co
Account Name	Annual Revenue	D&B Company	Fax	NAICS Description	Phone	SIC De
Account Number	Billing Address	Description	Industry	Operating Hours	Rating	Ticker
Account Site	Clean Status	D-U-N-S Number	Last Modified By	Ownership	Shipping Address	Trades

Account Name ★
Sample Text

Phone
1-415-555-1212

Industry
Sample Text

Type
Sample Text

Website
www.salesforce.com

- Ajouter la section « Customer or Partner Information » à l'écran d'une demande de voyage : Edit Page
 - Drag & Drop the « Related Record Component » to the Page et le configurer

Lightning App Builder

Travel Approval Record Page

Components

- Related List - Single
- Related List Quick Links
- Related Record
- Rich Text
- Rich Text
- Rich Text
- Topics
- Trending Topics
- Visualforce

Custom (5)

- File Upload Lightning Web Comp...
- Generic Rules Lightning Web Co...
- Generic Time Line Component
- TravelApprovalFileUpload_LCMP
- TravelApprovalPath_LCMP

Custom - Managed (0)

No components available.

Get more on the AppExchange

Page > Related Record

Let users view a related record, edit it inline, change the linked record, and create a new related record.

Header Label

Customer or Partner Information

* Lookup Field

Customer/Partner Name

* Update Action

Travel Approval - Customer or Partner Inf...

Create Action

New Account

Choose an object that has a quick action to update the record. Some lookup fields have default actions. If a default action isn't available, create one. You can also edit the layout for existing actions.

Set Component Visibility

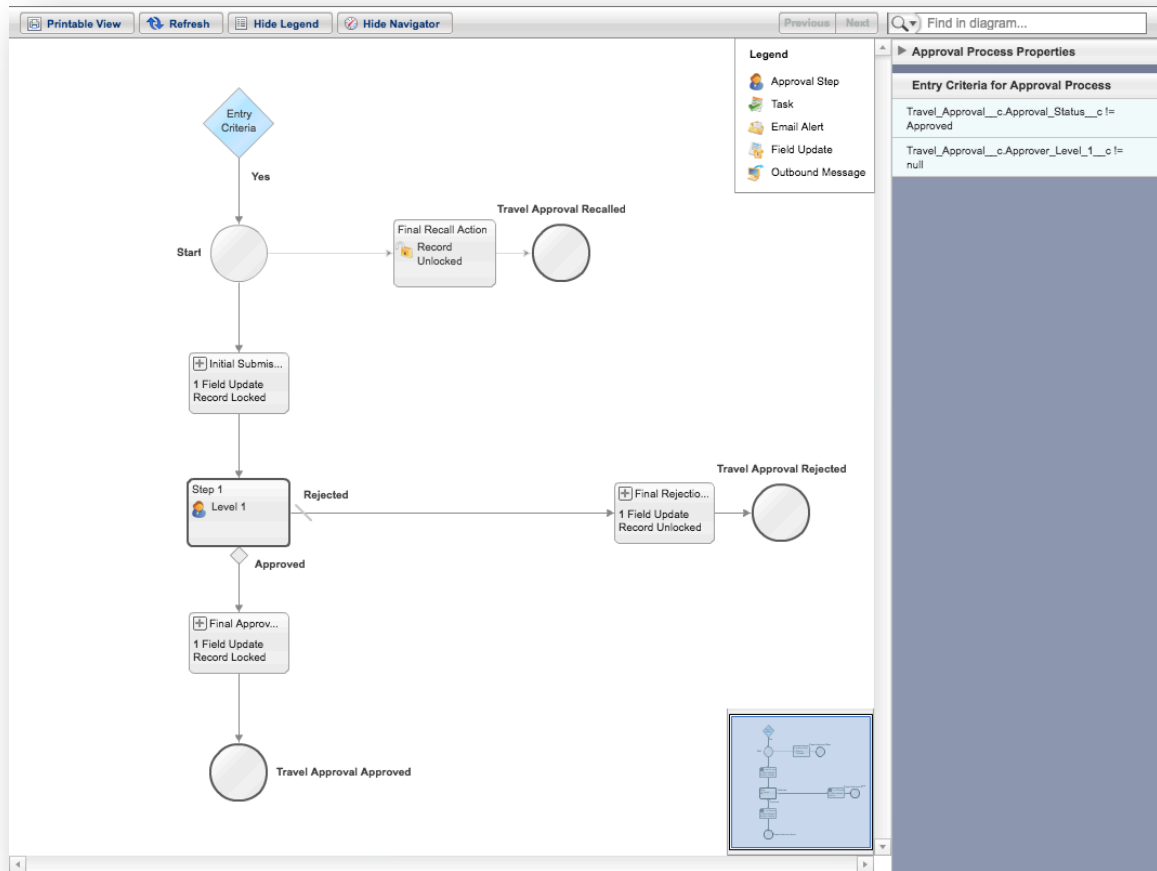
Filters

- Record > Travel Reason Equal Customer Meeting
- Record > Travel Reason Equal Partner Meeting

- Remarque : pour vous faciliter la tâche, utilisez l'outil de déploiement « Etape par Etape ».

Etape 4 – PROCESSUS AUTOMATISES - PROCESS BUILDER & APPROVAL PROCESS

- Approval Process (*Pour soumettre pour approbation la demande de voyage*) : Setup / ... / Approval Processes



Manage Approval Processes For: Travel Approval
Create New Approval Process: Use Standard Setup Wizard

- Step 1 - Process Name: **Travel Approval - Approval Process**
- Step 2 - Entry Criteria: “Approval Status” NOT EQUALS TO “Approved” AND “Approver Level 1” NOT EQUALS TO null
- Step 3 - Administrators **OR** the currently assigned approver can edit records during the approval process.
- Step 5
 - Selected Fields: Ajouter “Description”, “Travel Date”, “Travel Destination”, “Travel Cost”, “Travel Reason”
 - Display approval history information in addition to the fields selected above
 - Allow approvers to access the approval page only from within the Salesforce application. (Recommended)
- Step 6 - Specify Initial Submitters: Travel Approval Owner

Yes, I'd like to create an approval step now.

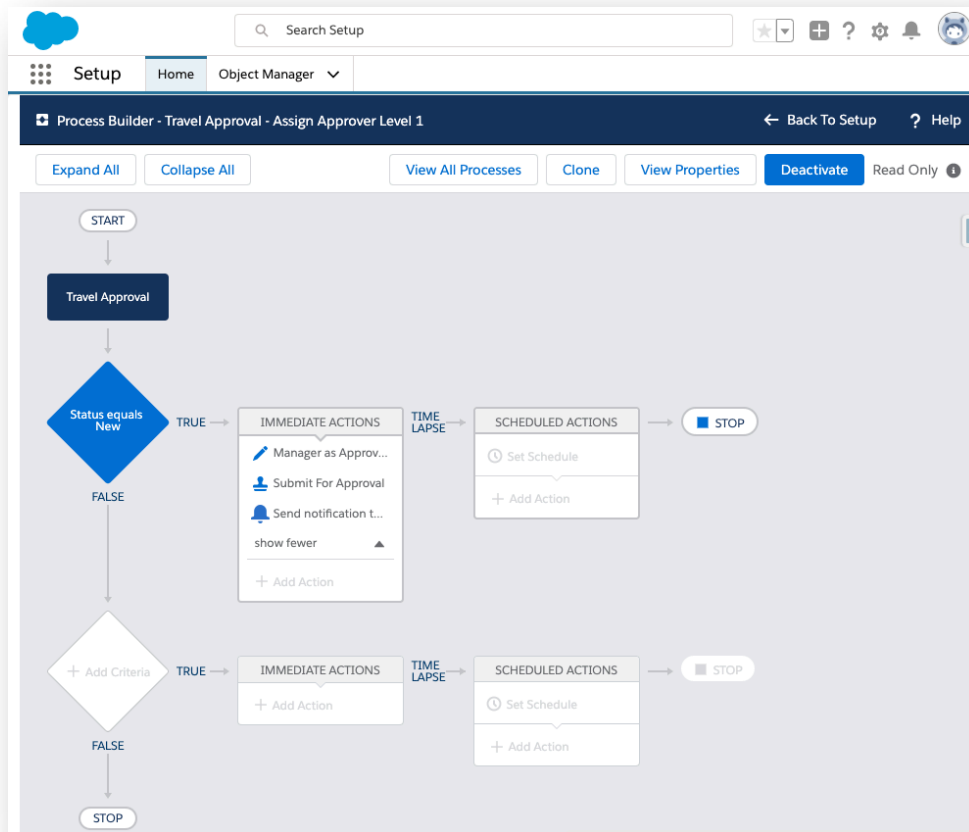
Approval Step 1:

- Step 1 - Name: **Level 1**
- Step 2 - All records should enter this step
- Step 3 - Automatically assign to approver(s): Related User / Approver
Level 1

No, I'll do this later. Take me to the approval process detail page to review what I've just created.

- Add Initial Submission Actions
 - Field Update
 - Name: **Status equals "Pending"**
- Add Final Approval Actions
 - Field Update
 - Name: **Status equals "Approved"**
- Add Final Rejection Actions
 - Field Update
 - Name: **Status equals "Rejected"**
- **Activate**

- Process Builder (*pour alimenter le bon approbateur lors de la création d'une nouvelle demande de voyage et la soumettre pour approbation*) : Setup / ... / Process Builder / New

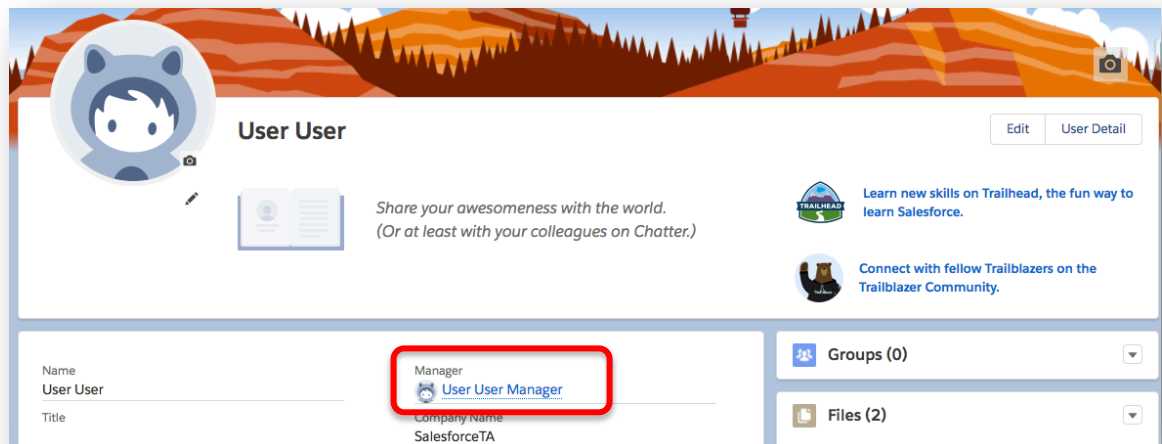


- Process Name: **Travel Approval - Assign Approver Level 1**
- The process starts when: A record changes
- Object: Travel Approval
- Start the process: only when a record is created
- Add Criteria
 - Status equals New
- Immediate Action n°1
 - Action type: Update Records
 - Action name: **Manager as Approver Level 1**
 - Record Type: Select the Travel_Approval__c record that started your process
 - Criteria for Updating Records : No criteria—just update the records!
 - Approval Level 1 equals “Field Reference: [Travel_Approval__c].Owner:User.ManagerId”
- Immediate Action n°2
 - Action type: Submit for Approval
 - Action name: **Submit For Approval**
 - Approval Process - Specific Approval Process - “Travel Approval - Approval Process - Travel_Approval_Approval_Process”
- (optionnel) Immediate Action n°3 – Custom notification
- **Activate**

- Remarque : pour vous faciliter la tâche, utilisez l'outil de déploiement « Etape par Etape ».
- Création d'un utilisateur « Manager » : Setup / ... / User / New
 - Firstname: User
 - Lastname: Manager
 - Email: « *Votre adresse email* »
 - Username: **usermanagerXXXXX@example.com**
 - User License: Salesforce
 - Profile: System Administrator
 - ...
 - & lui affecter les Permission Sets

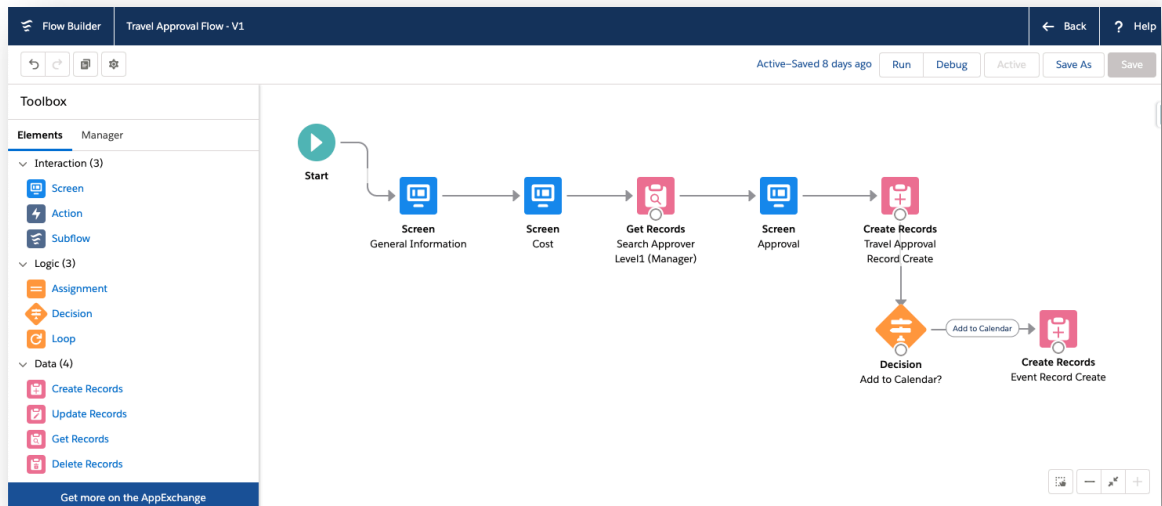
Permission Set Assignments		Edit Assignments
Action	Permission Set Label	
Del	Travel Approval Application Access	
Del	Travel Approval Object Access	

- Affecter l'utilisateur « Manager » à l'utilisateur courant:



Etape 5 – PROCESSUS VISUEL AUTOMATISE – FLOW BUILDER

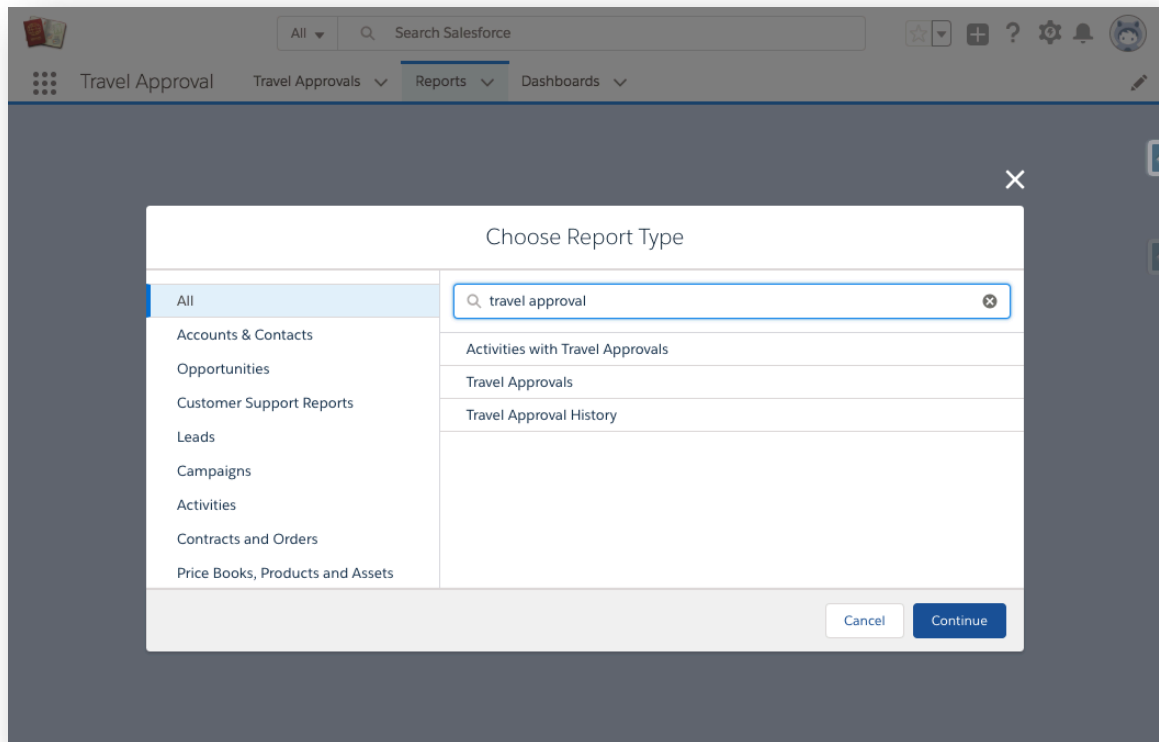
- Flow Builder : Setup / ... / Flows



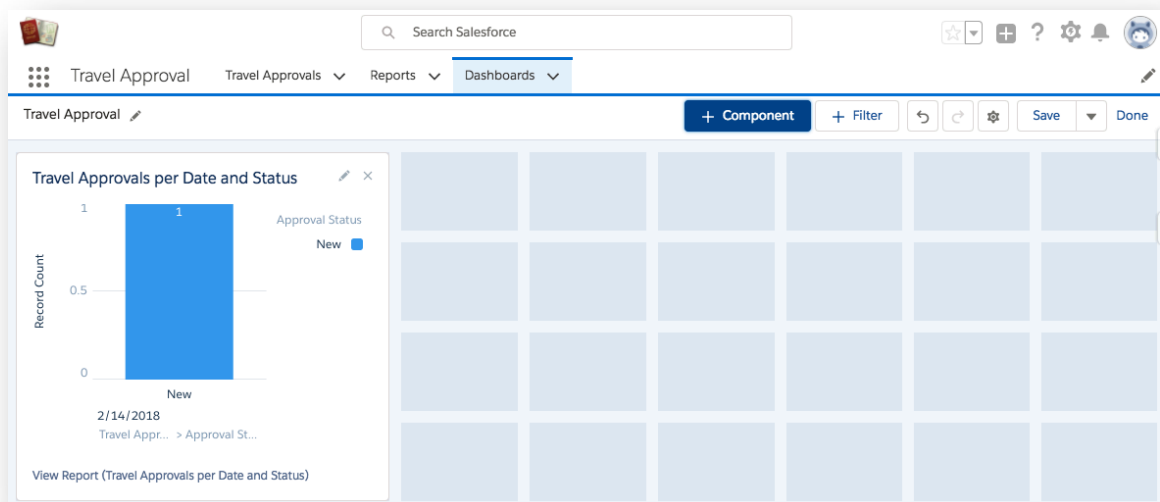
- Remarque : pour vous faciliter la tâche, utilisez l’outil de déploiement « Etape par Etape ».

Etape 6 – RAPPORTS & TABLEAU DE BORD

- Lanceur d'applications - Reports : New Report
 - Report Type: **Travel Approvals**



- Lanceur d'applications - Dashboards : New Dashboard



- Remarque : pour vous faciliter la tâche, utilisez l'outil de déploiement « Etape par Etape ».

Etape 7 – DEVELOPPEMENT SUR LA PLATEFORME

The screenshot displays the Salesforce Travel Approval interface. The top navigation bar includes a search bar and tabs for Travel Approvals, Reports, and Dashboards. The main content area is divided into three sections: Details, System Information, and Related. The Details section is currently active and shows the following information:

Information	
Travel Approval Name	TA-00002
Description	test
Travel Destination	test
Travel Reason	Customer Meeting
Travel Date	7/24/2020
Travel Cost	\$156.00

Approval Status: Approved
Owner: User User
Approver Level 1: Security User

Customer or Partner Information:

Account Name	Type
test account	
Phone	12345
Website	www.site.com
Industry	

Expense Receipt section: Upload the expense receipt. Upload Files Or drop files

Rules (2) section:

RULE	DESCRIPTION
TARule...	As per company policy, all travel requires approval.
TARule...	Book with minimum 7 days in advance.

* Trailhead Module

- Remarque : pour vous faciliter la tâche, utilisez l’outil de déploiement « Etape par Etape ».