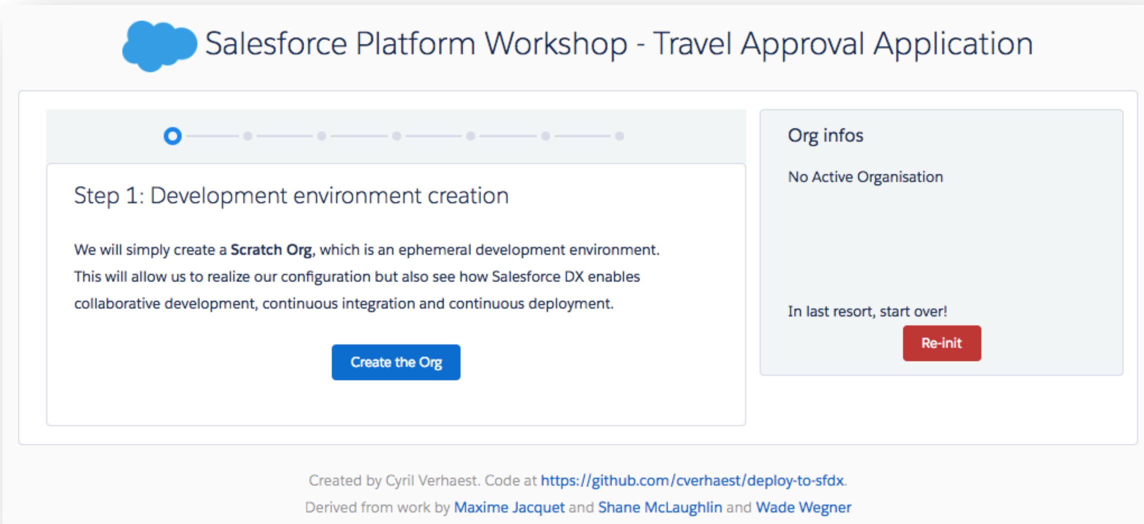
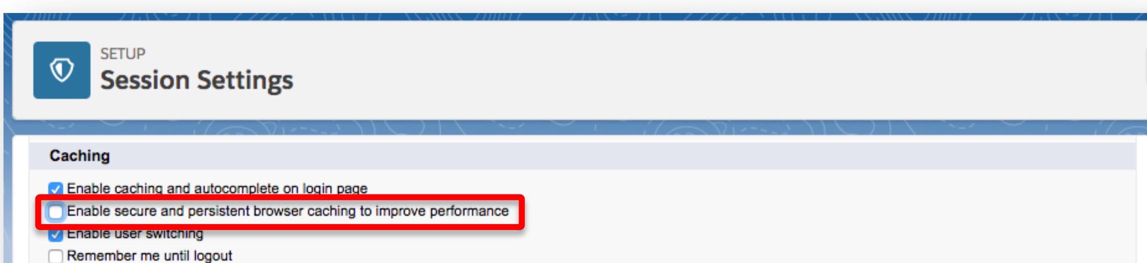
Travel Approval App – Configuration Guide

« Step by Step » deployment tool (« workshop automator »):
https://sfdxappwizard-en.herokuapp.com/

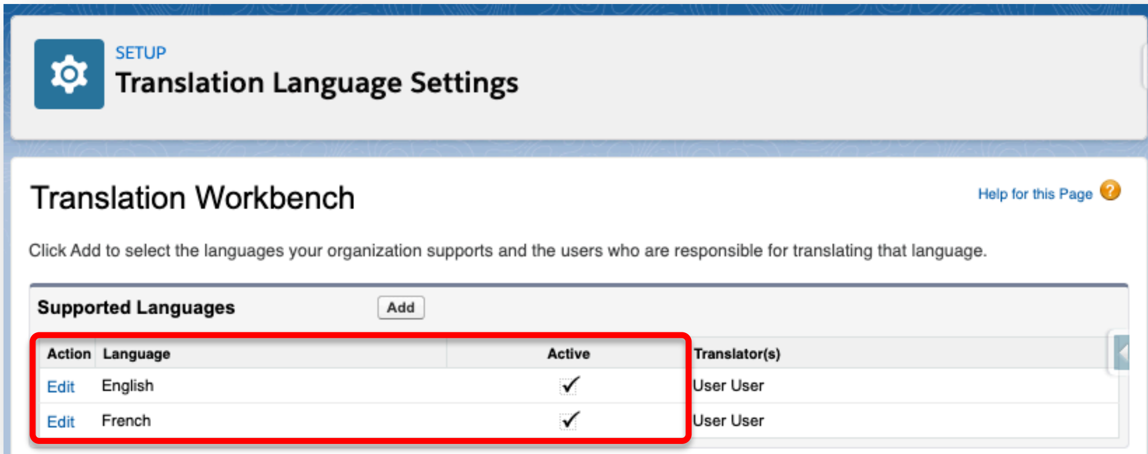


Step 1 – DEVELOPMENT ENVIRONMENT CREATION *(Scratch Org)* and prerequisites

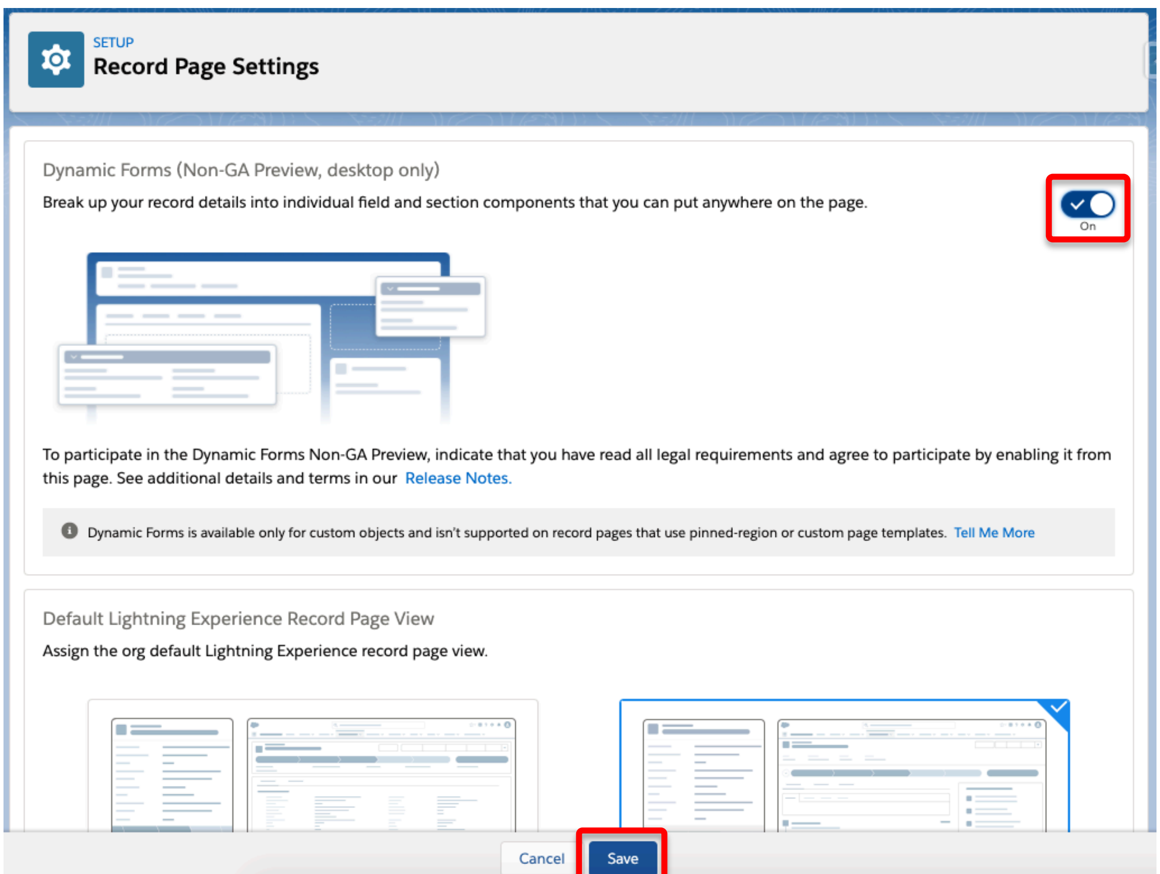
- Remark: use the « Step by Step » deployment tool to create your Salesforce environment.
- Modify the cache management parameter: Setup / … / Session Settings
    - **Enable secure and persistent browser caching to improve performance**: ☐ *(Unchecked)*



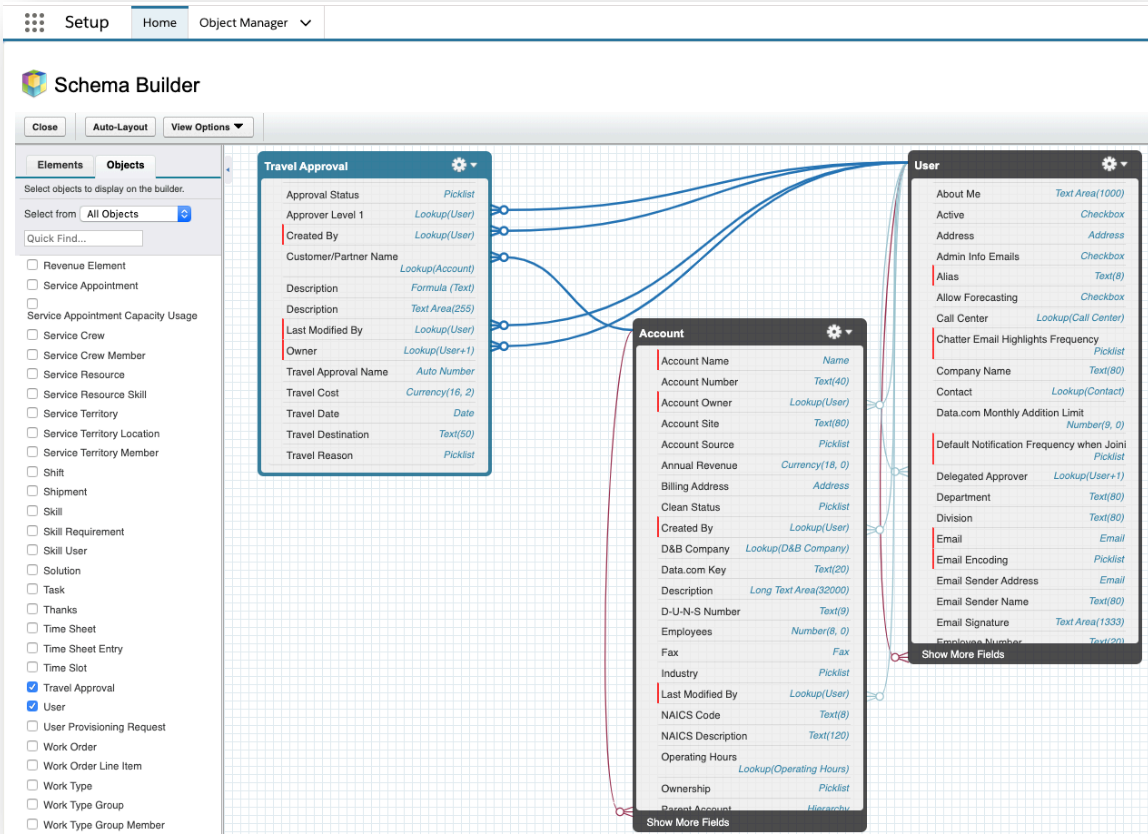
- Add languages for translations: Setup / … / Translation Language Settings
    - Add « **English** » & « **French** »



- Enable « Dynamic Forms »: Setup / … / Record Page Settings
    - Flip the switch to « **On** » and click « **Save** »



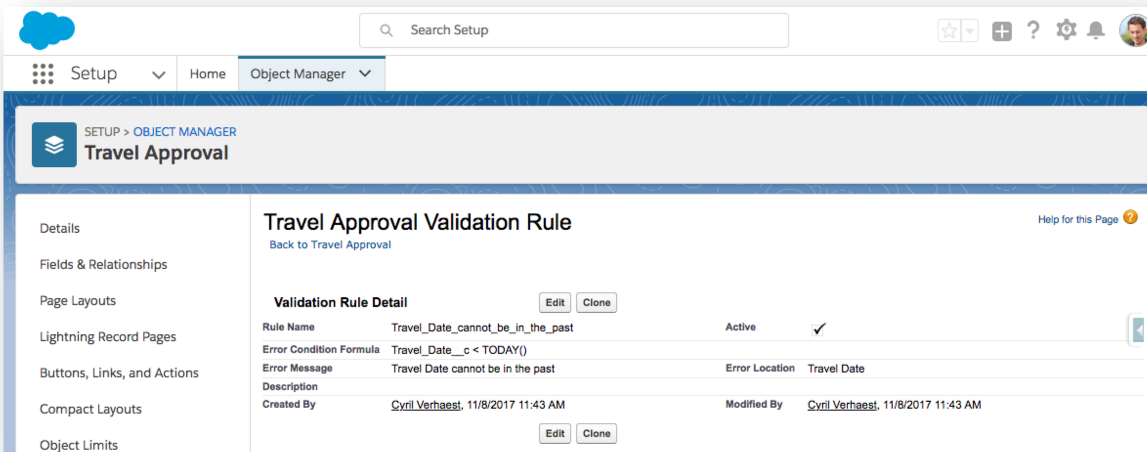
Step 2 – DATA MODEL CREATION



- Create the « Data Model »: 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

- Create a « Validation rule – Travel Date cannot be in the past »: Setup / … / Object Manager / Travel Approval / Validation Rules / New
    - Validation Rule Name: **Travel_Date_cannot_be_in_the_past**



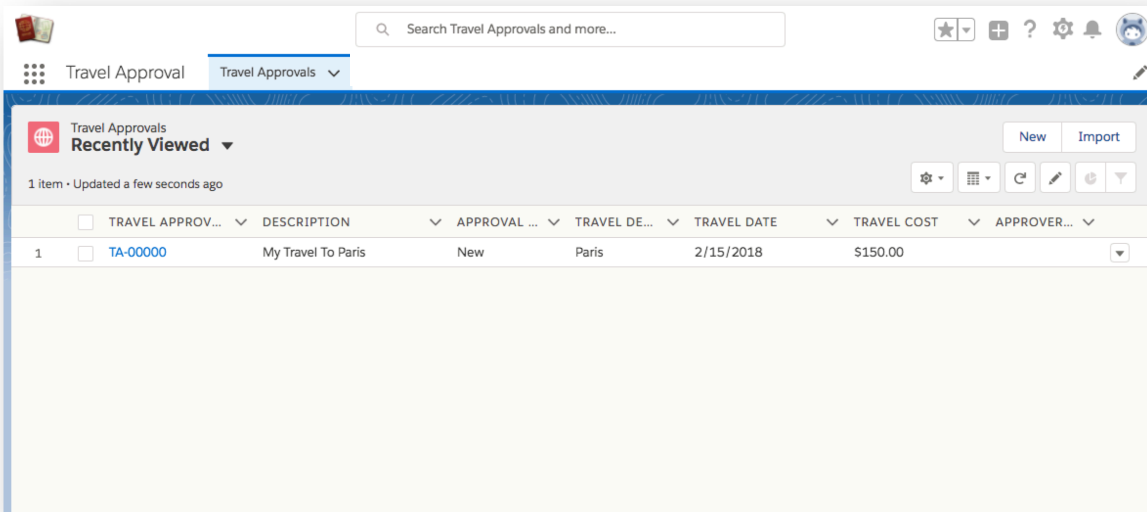
- Add « Translations »: Setup / … / Translate

- Remark n°1: at this stage you can already create a « Travel Approval Request », collaborate around it, …

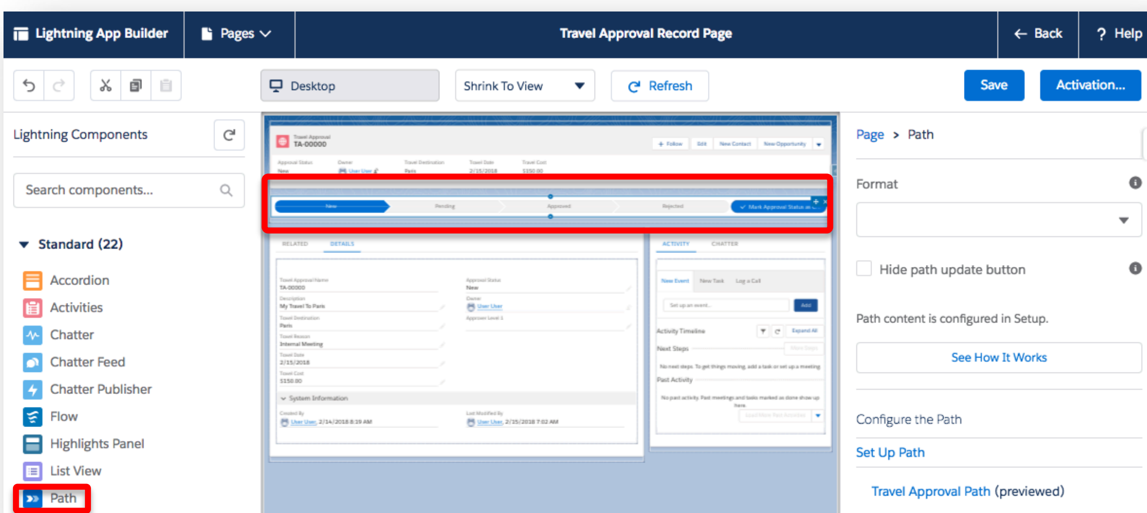
- Remark n°2: to help you, you can use the « Step by Step » deployment tool.

Step 3 – CREATE A DEDICATED APPLICATION

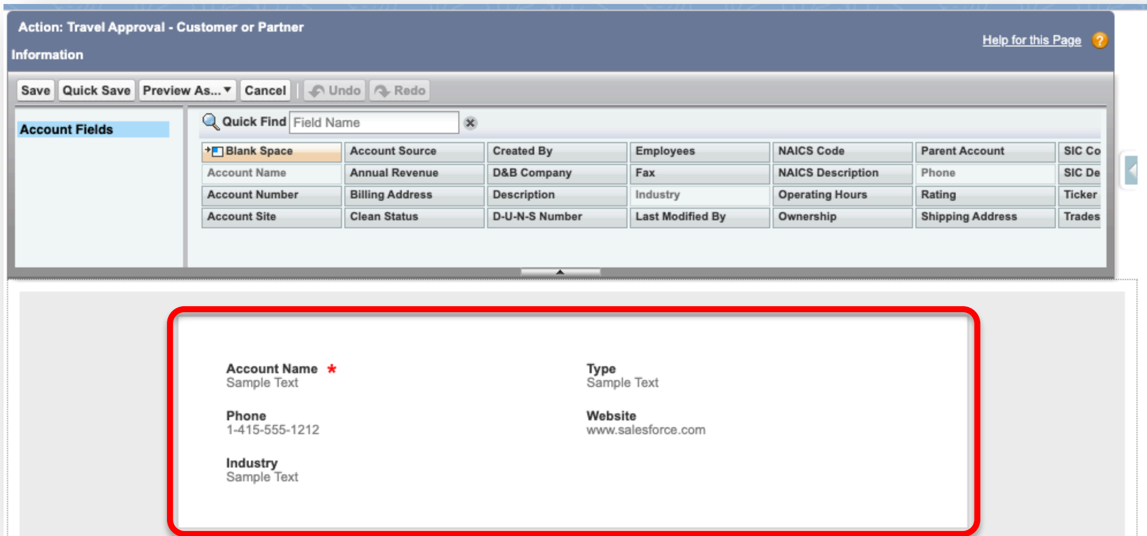
- Create the App: Setup / … / App Manager
  - New Lightning App
    - Name: **Travel Approval** - *Demande de voyage*
    - Next – App Options
      - Navigation Style: Standard Navigation
      - Supported Form Factors: Desktop and phone
    - Next – Navigation Items
      - Selected Items: Travel Approval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



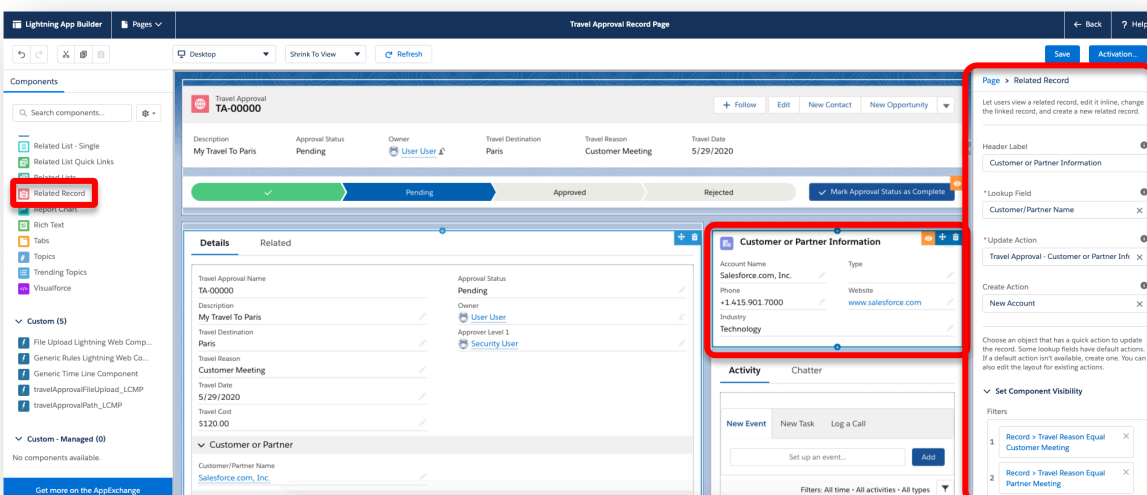
- Add the « Path Assistant » on the « Travel Approval » record page: Edit Page
  - Drag & Drop the « Path Component » to the Page



- *(optional*) Add a « Customer or Partner Information » section on the « Travel Approval » record page
    - Create a « Quick Action »: Setup / … / Object Manager / Account / Buttons, Links, and Actions
        - New Action
            - Label: **Travel Approval - Customer or Partner Information**
            - Action Type: Update a Record
        - Select the fields/information to display in the « Action Layout »



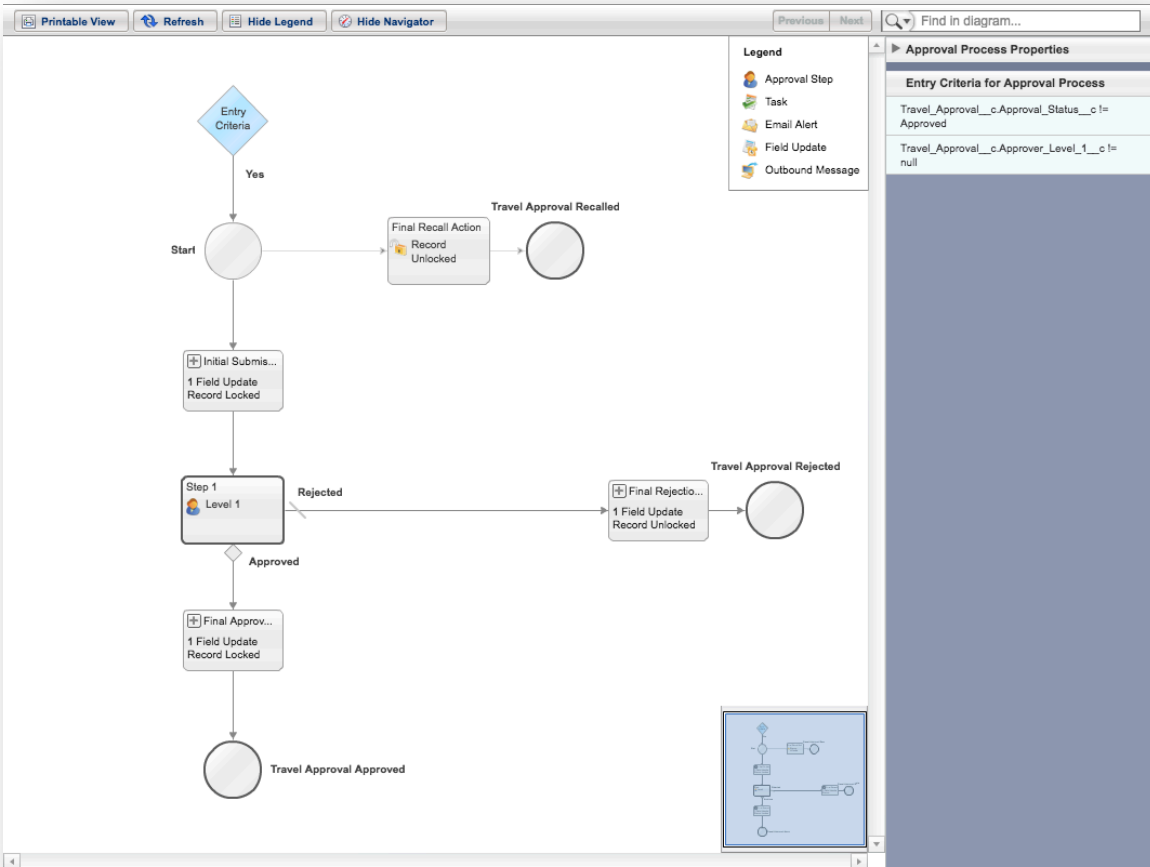
    - Add the « Customer or Partner » information section on the « Travel Approval » record page: Edit Page
        - Drag & Drop the « Related Record Component » to the Page and configure it.



- <u>Remark</u>: to help you, you can use the « Step by Step » deployment tool.

Step 4 – PROCESS AUTOMATION - PROCESS BUILDER & APPROVAL PROCESS

- Approval Process *(To submit for approval a travel approval request)*: Setup / ... / Approval Processes



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

- Step1 - 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: Add “Description” *(first one)*, “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.

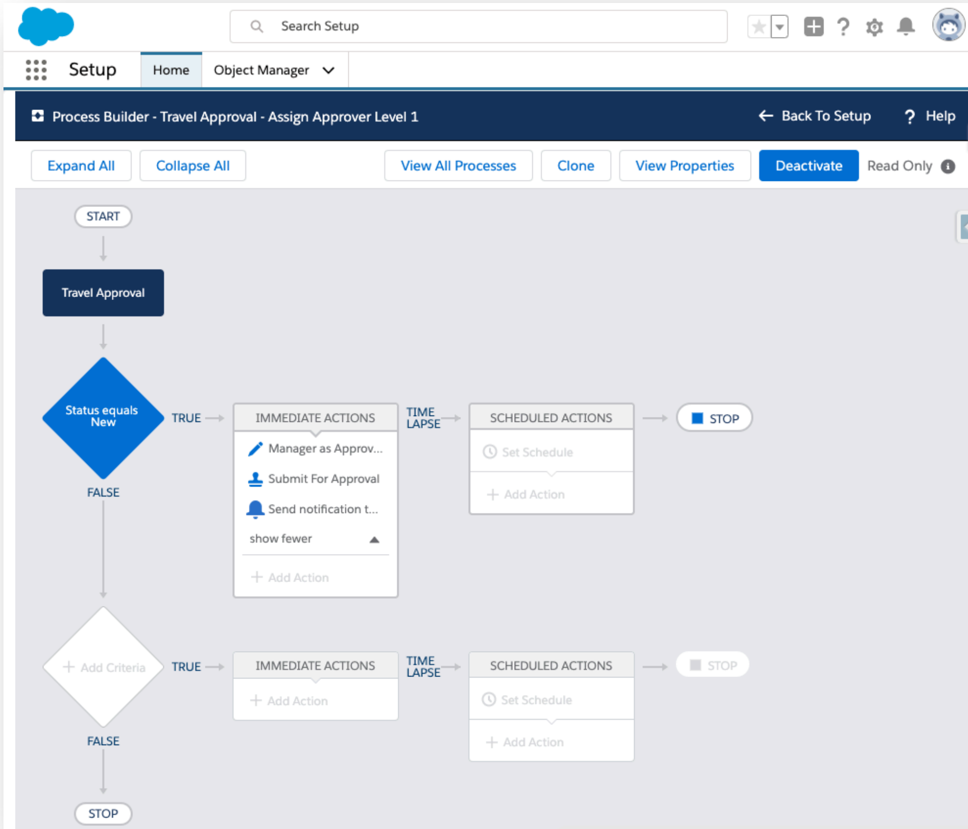
Approval Step 1:

- 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**

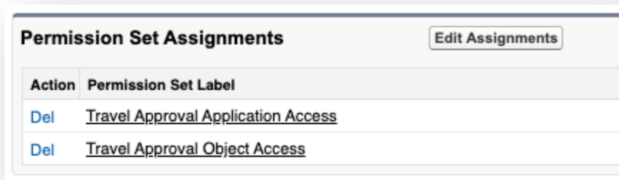
- Process Builder *(to fill the right approver and while creating a new travel approval request to submit it for)*: Setup / … / Process Builder / New



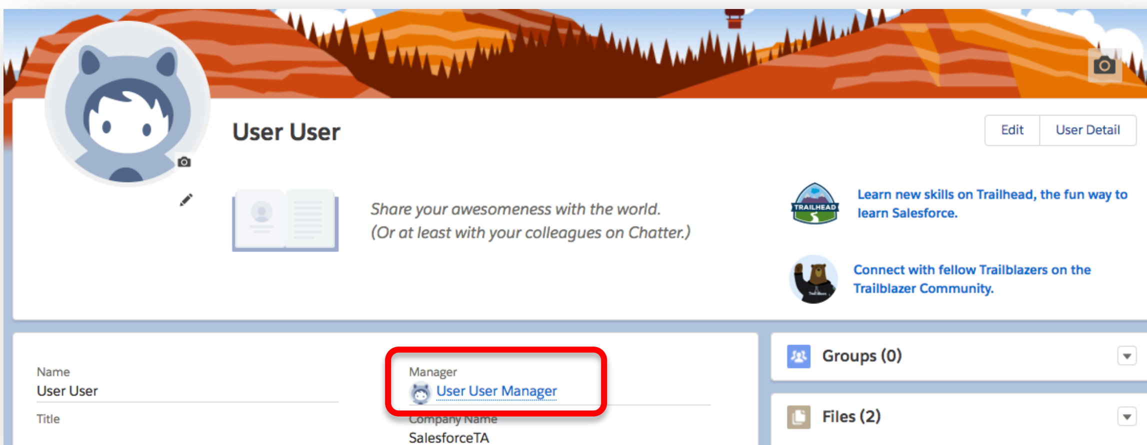
  - Process Name: **Travel Approval - Assign Approver Level 1**
  - The process starts when: A record changes
  - Object: Travel Approval
  - Start the process: only when a record is created
  - Add Criteria
    - Approval Status equals New
  - Immediate Action n°1
    - Action type: Update Records
    - 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”
  - *(optional) Immediate Action n°3 – Custom notification*
  - **Activate**

- Remark: to help you, you can use the « Step by Step » deployment tool.

- Create a test "Manager" user: Setup / … / Users / New
  - Firstname: User
  - Lastname: Manager
  - Email: *« Votre adresse email »*
  - Username: **usermanager*XXXXX*@example.com**
  - User License: Salesforce
  - Profile: System Administrator
  - …
  - & assign Permission Sets to him

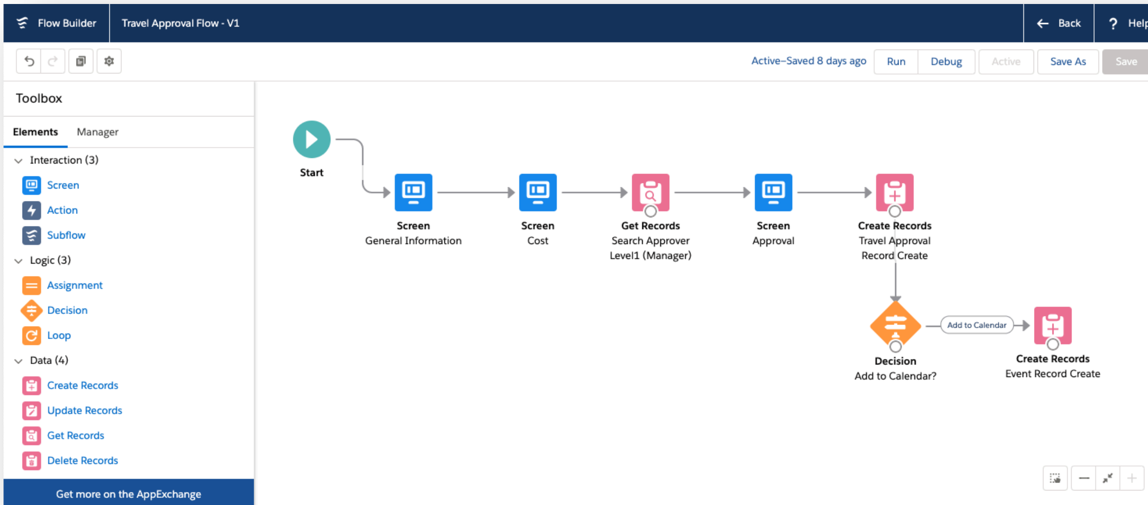


- Assign the « Manager » user as the manager of the current user:



Step 5 – VISUAL PROCESS AUTOMATION – FLOW BUILDER

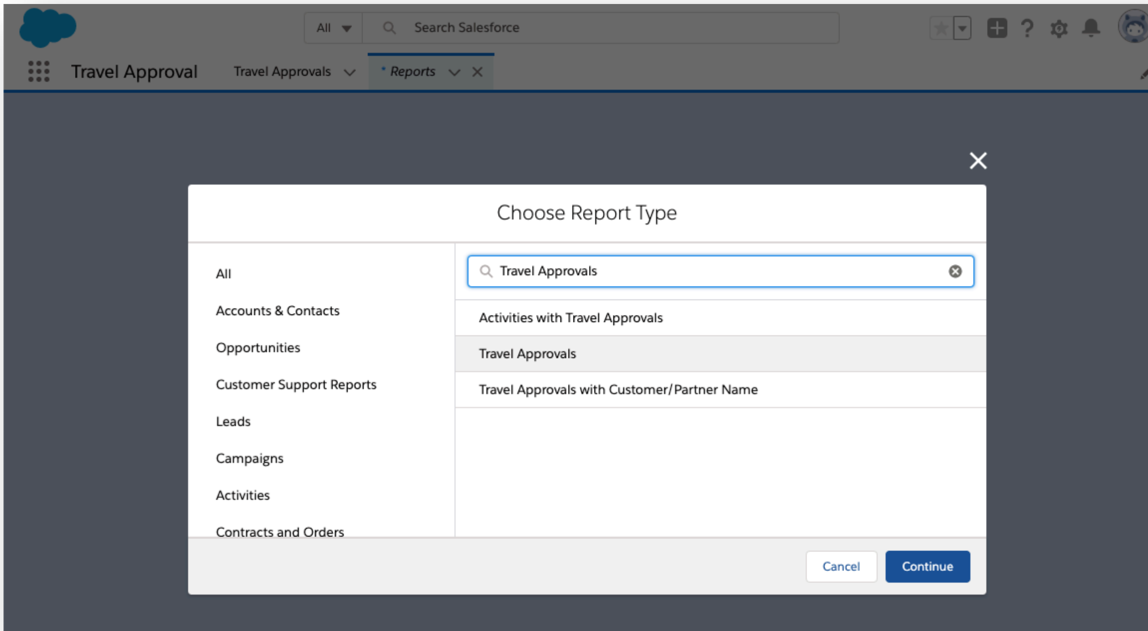
- Flow Builder: Setup / … / Flows



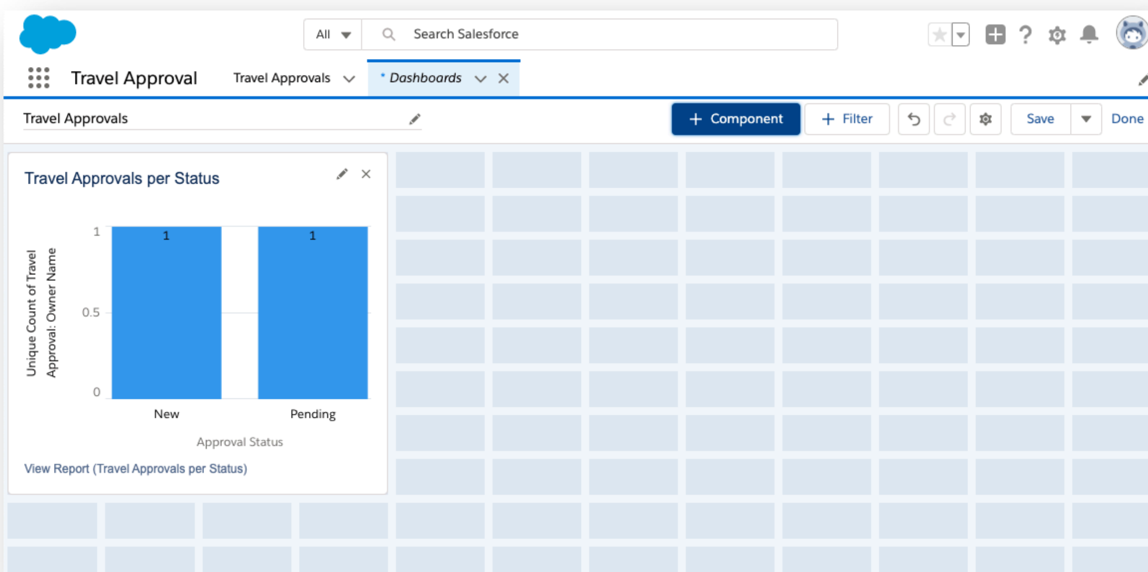
- Remark: use the « Step by Step » deployment tool.

Step 6 – REPORTS & DASHBOARD

- App Launcher - Reports: New Report
  - Report Type: **Travel Approvals**



- App Launcher – Dashboards: New Dashboard
  - Dashboard Name: **Travel Approvals**



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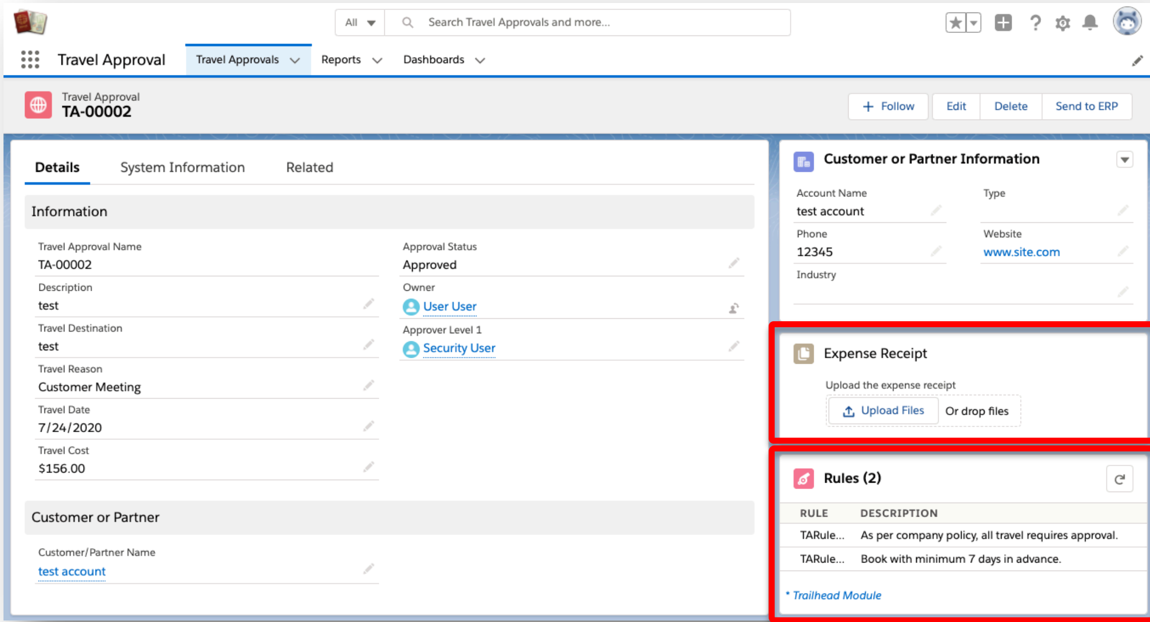
Step 7 – DEVELOPMENT ON THE PLATFORM



- Remark: to help you, you can use the « Step by Step » deployment tool.