Salesforce Project Implementation Phases with Concepts (Admin + Developer) Leave Management Tracker

Employee should be able to apply for leave

- Employees must have an easy-to-use interface (Lightning Web Component form or Salesforce record page).

- Form should capture essential details:

  - Leave Type (Casual, Sick, Earned, etc.)

  - Start Date & End Date

  - Reason for Leave

  - Supporting Documents (optional, e.g., medical certificate)

- Once submitted, a new Leave Request record will be created in Salesforce.

- The system should validate:

  - Leave dates do not overlap with existing approved leaves.

  - Leave balance is sufficient.

Manager should be able to approve/reject leave

- Each leave request will be routed to the employee's reporting manager.

- Manager should receive notification (email or Salesforce notification) when a new request is submitted.

- Manager can approve or reject the request directly from:

- ○ Salesforce UI (Record Page or Approval Process screen)

  - ○ Email approval link (if configured)

- System must log the manager's decision along with comments.

System should track leave balance

- Each employee will have a Leave Balance record (part of Employee__c object).

- When a leave is approved, the balance is automatically reduced.

- When a leave is rejected, the balance remains unchanged.

- Balance should be tracked per leave type (e.g., Casual, Sick).

- System should prevent employees from applying if balance is 0 or insufficient.

- Admins should be able to reset or adjust balances annuall

Reports for HR: leave trends, employee leave history

- HR should be able to generate Reports and Dashboards to monitor:

  - ○ Number of leaves taken per employee.

  - ○ Monthly/Yearly leave trends across the organization.

  - ○ Leave type distribution (e.g., more sick leaves in flu season).

  - ○ Pending approvals across departments.

- Reports should be dynamic and filterable by:

  - ○ Department

- ○ Employee

- ○ Leave Type

- ○ Date Range

● Dashboards will provide a visual summary for HR leadership.