Phase 2: Org Setup & Configuration

1. Salesforce Editions

Choose: Salesforce Enterprise Edition (best for process automation & user management). Why: Provides extended CRM features, strong security, and flexibility for custom leave management workflows.

2. Company Profile Setup

Set company name to "Your Company Name Pvt. Ltd."
Configure default currency, time zone (IST for India), and locale settings.
Multi-currency not required (leave management focused on one region).

3. Business Hours & Holidays

Define business hours (e.g., Mon–Fri, 9:00 AM–6:00 PM IST).
Add national holidays to ensure leave requests align with working days.
Associate SLA timers with escalation rules for pending approvals.

4. Fiscal Year Settings

Configure standard fiscal year (e.g., April–March for India).
Align leave reporting dashboards with fiscal year periods.

5. User Setup & Licenses

Create user profiles: - Employee - Manager - HR Admin - System Administrator
Assign appropriate Salesforce licenses: Standard User or Platform License.
Ensure Two-Factor Authentication for all users due to sensitive data.

6. Profiles

Define profiles with minimal privileges per functional area:
• Employee Profile: Create/view leave requests.
• Manager Profile: Approve/reject leave requests of direct reports.
• HR Admin Profile: Manage leave policies, view leave history, generate reports.
• System Admin Profile: Full access for configurations.

7. Roles

Role hierarchy:
• CEO/Executive Director
• Head of HR
• Department Manager
• Employee
Managers see their team's leave requests; employees cannot see others' data.

8. Permission Sets

Example Permission Sets:
• "Leave Approval Access" – approve/reject leave requests.
• "Leave Policy Management" – manage leave types and balances.
• "Audit Log Access" – view leave history changes.
Used to give temporary/extra access without changing profiles.

9. Organization-Wide Defaults (OWD)

Set Private for Leave Requests and Leave Balances (to ensure confidentiality).
Controlled by Parent for related records.
Public read-only for non-sensitive reference data (e.g., leave policy definitions).

10. Sharing Rules

Share leave requests upward in hierarchy for approvals.
Grant read-only access to HR and system administrators.
Share leave summary dashboards with executives.

11. Login Access Policies

Enforce MFA for all logins.
Restrict login IP ranges (e.g., office IPs).
Enable login hours to prevent unauthorized access.
Monitor login history for suspicious activities.

12. Developer Org Setup

Set up Developer Org with standard Salesforce.
Create custom objects for:
• Leave Request
• Leave Policy
• Leave History
• Audit Log
Create sample data for testing.

13. Sandbox Usage

Types:
• Developer Sandbox: For unit testing leave flows.
• Partial Copy Sandbox: Testing with sample employee data.
• Full Sandbox: For UAT testing before production deployment.
Use anonymized data in all environments.

14. Deployment Basics

Use Change Sets or Salesforce DevOps Center for Sandbox → Production.
Store metadata in version control (GitHub).
Test leave approval workflows after deployment.
Plan rollbacks in case of issues.