

Project Title: Smart Leave Tracker – Employee Leave Management System

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Collect details from HR and managers on current leave policies, approval flows, and leave types.
- Identify pain points in the existing email/spreadsheet process (missed approvals, inaccurate balances, reporting gaps).
- Gather requirements for employee self-service (apply, view history) and for dashboards (HR and management).

Stakeholder Analysis

- Employees – submit leave requests and view balances
- Managers – approve/reject leaves and view team leave calendar.
- HR Team – configure leave policies, monitor leave trends, generate reports.
- IT/Salesforce Admin – maintain the system and handle future enhancements.

Business Process Mapping

- Map current process (email → HR records in sheet → manual approval).
- Map desired process in Salesforce (employee submits request → automatic routing to manager → approval/rejection → leave balance updated → HR dashboard).

Industry-specific Use Case Analysis

- Benchmark against other small-to-mid sized companies automating leave management in Salesforce.
- Identify standard HR practices (leave accrual, carry-forward, different leave types) to include in the system.

AppExchange Exploration

- Explore existing leave/HR management apps on Salesforce AppExchange to see ready-made components or ideas to accelerate development (e.g., prebuilt approval flows, leave calendars).
- Evaluate if any free components (calendar widgets, notification add-ons) can be leveraged instead of building from scratch.