

# Project Title: Smart Leave Tracker – Employee Leave Management System

## Phase 2: Org Setup & Configuration


### 1. Salesforce Edition & Developer Org Setup

Objective: Create a dedicated development environment for the Leave Tracker Project.

Action Items:

- Create new Salesforce Developer Org
- Name: LeaveTracker\_DevOrg
- Enable all necessary features for HR automation

### 2. Company Profile Setup

 **SETUP**  
**Company Information**

Company Information

MITS

The organization's profile is below.

[User Licenses \[10+\]](#) | [Permission Set Licenses \[10+\]](#) | [Feature Licenses \[11\]](#) | [Usage-based Entitlements \[10+\]](#)

**Organization Detail**

Organization Name

MITS

Phone

(863) 984-9804

Primary Contact

Gunti Jahnavi

Fax

Division

Default Locale

Hindi (India)

Address

Madanapalle  
Andhra Pradesh  
India

Default Language

English

Fiscal Year Starts In

January

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Activate Multiple Currencies

☐

Currency Locale

Bangla (India) - INR

Enable Data Translation

☐

Used Data Space

342 KB (7%) [\[View\]](#)

Newsletter

☒

Used File Space

17 KB (0%) [\[View\]](#)

Admin Newsletter

☒

API Requests, Last 24 Hours

0 (15,000 max)

Navigation: Setup → Company Information


Configure the following settings:

- Company Name: Your Company – Leave Tracker CRM
- Primary Contact: Manager • Default Locale: English (India) • Currency: INR (₹) • Timezone: Asia/Kolkata

### 3. Business Hours & Holidays Setup

- Business Hours:

Navigation: Setup → Company Settings → Business Hours. Create 'Standard Business Hours': Monday-Friday, 9:00 AM – 6:00 PM.

 **SETUP**

**Business Hours**

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [\[0\]](#)

**Business Hours Detail**

[Edit](#)

Business Hours Name	MITS Standard Business Hours	Time Zone														
Business Hours	<table><tr><td>Sunday</td><td>No Hours</td></tr><tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr></table>	Sunday	No Hours	Monday	9:00 AM to 6:00 PM	Tuesday	9:00 AM to 6:00 PM	Wednesday	9:00 AM to 6:00 PM	Thursday	9:00 AM to 6:00 PM	Friday	9:00 AM to 6:00 PM	Saturday	9:00 AM to 6:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	No Hours															
Monday	9:00 AM to 6:00 PM															
Tuesday	9:00 AM to 6:00 PM															
Wednesday	9:00 AM to 6:00 PM															
Thursday	9:00 AM to 6:00 PM															
Friday	9:00 AM to 6:00 PM															
Saturday	9:00 AM to 6:00 PM															
Default Business Hours		<input checked="" type="checkbox"/>														

Active ☒

Created By [OrgFarm EPIC](#) 9/13/2025, 12:38 PM

Last Modified By [Gunti Jahnavi](#) 9/16/2025, 11:07 PM

[Edit](#)


**Holidays**

[Add/Remove](#)

No records to display

- Holidays:

Navigation: Setup → Company Settings → Holidays. Add relevant national and regional holidays for India.


 **SETUP**

**Holidays**

### Holidays


[Help for this Page](#)

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

 **Holidays**

[New](#)

Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Independence Day</a>	Office closed for Independence Day	8/15/2026 All Day <a href="#">🔄</a>

 **Elapsed Holidays**

Action	Holiday Name	Description	Date and Time
<a href="#">Clone</a>	<a href="#">Ganesh Chaturthi</a>	Office closed for Ganesh Chaturthi	9/16/2025 All Day

## 4. Fiscal Year Settings

Navigation: Setup → Company Settings → Fiscal Year

Configuration: Type: Standard Fiscal Year. Start: April. End:

March (Common fiscal year in India).

**SETUP**  
**Fiscal Year**

Setup  
Organization Fiscal Year Edit: MITS [Help for this Page](#)

To specify the fiscal year type for your organization, choose one of the options below.

**Fiscal Year Information**  
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠️ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year [?](#)  
☐ Custom Fiscal Year [?](#)

**Change Fiscal Year Period** [Save](#) [Cancel](#)

Name: MITS  
Fiscal Year Start Month: **January** [?](#)  
Fiscal Year is Based On:  
☒ The ending month  
☐ The starting month

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

## 5. User Setup & Licenses

Navigation: Setup → Users → New User

For this project, only two user types are configured:

- Manager: Salesforce License, Manager Profile
- Employee: Salesforce Platform License, Employee Profile

## All Users

[Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

<a href="#">New User</a> <a href="#">Reset Password(s)</a> <a href="#">Add Multiple Users</a>						
<input type="checkbox"/> Action	Full Name	Alias	Username	Role +	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Kumar, Ravi	RaviK	ravi@mits.com.sandbox	Manager	✓	Standard User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Siva, Gunti	G Siva	siva19@gmail.com	Employee	✓	Standard User
<input type="checkbox"/> <a href="#">Edit</a>	Jahnavi, Gunti	226	22691a3156454@agentforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	User_Security	sec	insightssecurity@000gk00000bycd8uah.com		✓	Analytics Cloud Security User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Chatter_Expert	Chatter	chatty.00dgk00000bycd8uah.xhxr3f114vk0@chatter.salesforce.com		✓	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	integ	integration@000gk00000bycd8uah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	EPIC_OrgEam	OEPIC	epic_1dab4cbb3da5@orgfarm.salesforce.com		✓	System Administrator
<a href="#">New User</a> <a href="#">Reset Password(s)</a> <a href="#">Add Multiple Users</a>						


A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

## 6. Profiles Configuration

Navigation: Setup → Profiles → Clone Standard Profile

Custom Profiles to Create:

- Manager Profile: Read/Write access to team Leave Request
- Employee Profile: Read access only to own Leave Requests



SETUP

Profiles

Profile

Leave\_Request\_User\_Profile

Help for this Page ?

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | 
 [Enabled Apex Class Access \[0\]](#) | 
 [Enabled Visualforce Page Access \[0\]](#) | 
 [Enabled External Data Source Access \[0\]](#) | 
 [Enabled Named Credential Access \[0\]](#) | 
 [Enabled External Credential Principal Access \[0\]](#) | 
 [Enabled Custom Metadata Type Access \[0\]](#) | 
 [Enabled Custom Setting Definitions Access \[0\]](#) | 
 [Enabled Flow Access \[0\]](#) | 
 [Enabled Service Presence Status Access \[0\]](#) | 
 [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

Clone

Delete


View Users

Name	Leave_Request_User_Profile		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	<a href="#">Gunti Jahnavi</a> , 9/25/2025, 4:25 AM	Modified By	<a href="#">Gunti Jahnavi</a> , 9/25/2025, 4:25 AM

Page Layouts

## 7.Roles

1. Click the **Setup (gear icon)** in Salesforce.
2. In the **Quick Find** box, type **Roles**.
3. Click on **Roles** under **Users**.



SETUP

Roles

Creating the Role Hierarchy

Help for this Page ?

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy Show in tree view

[Collapse All](#) [Expand All](#)

- +

MIT

  - +

Add Role
  - +

Admin

Edit | Del | Assign

    - +

Add Role
    - +

HR

Edit | Del | Assign

      - +

Add Role
      - +

Manager

Edit | Del | Assign

        - +

Add Role
        - +

Employee

Edit | Del | Assign

          - +

Add Role
      - +

CEO

Edit | Del | Assign

        - +

Add Role

## 7.Create Permission Set

1. Go to **Setup** → **Permission Sets** → **New**.
2. Name it **Leave Tracker Access**.
3. Leave User License **--None--** (applies to all users).
4. Click **Save**.

The screenshot shows the Salesforce Setup interface for a new Permission Set named "Leave Tracker Access". The page is titled "Permission Sets" with a "SETUP" icon. Below the title, there's a search bar "Find Settings..." and buttons for "Clone", "Edit Properties", "Manage Assignments", and "View Summary".

**Permission Set Overview**

Permission Set Overview	
Description	API Name: Leave_Tracker_Access
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By: Gunti_Jahnavi, 9/24/2025, 1:20 AM
Permission Set Groups Added To: 0	Last Modified By: Gunti_Jahnavi, 9/24/2025, 2:01 AM

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

## 8. OWD

### Purpose:

Controls **baseline access** to records for all users in Salesforce.

### Steps:

1. Go to **Setup → Security → Sharing Settings**.
2. Find your **Leave Requests** object.
3. Set the **Default Internal Access** and **Default External Access**:
  - **Private** → Users can only see records they own. *(Recommended for sensitive data like Leave Requests)*
  - **Public Read Only** → All users can view but not edit.
  - **Public Read/Write** → All users can view and edit.
4. Click **Save**.

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. At the top, there's a 'SETUP' button and a 'Sharing Settings' header. Below this, a message states: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.' A dropdown menu is set to 'Manage sharing settings for: Leave Requests'. There's a 'Disable External Sharing Model' button. The 'Default Sharing Settings' section includes an 'Edit' button and a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The 'Leave Requests' row shows 'Private' for both internal and external access, and a checkmark for 'Grant Access Using Hierarchies'. Below the table is the 'Other Settings' section with three checkboxes: 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). Help links are available for each section.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Leave Requests	Private	Private	✓

## 9 Sharing Rules

### Purpose:

Allows you to **open access beyond OWD**, e.g., let Managers see their team's leave requests.

### Steps:

1. Go to **Setup → Security → Sharing Settings → Leave Requests → Sharing Rules → New**

2. **Rule Type:** Based on Role, Public Group, or Criteria
3. Define **Access Level**:
  - Read Only → Can view records
  - Read/Write → Can edit records
4. Click **Save**.

SETUP

Sharing Settings

---

Sharing Rules

**Leave Requests Sharing Rules**

New
Recalculate

[Leave Requests Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Role and Internal Subordinates: Employee</a>	<a href="#">Role and Internal Subordinates: Manager</a>	Read Only

Sharing Overrides

**Profiles That Override Leave Requests Sharing**

[Sharing Overrides Help ?](#)

1 Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

[Tell me more!](#)
[Don't show this message again](#)

Profile	Custom Profile	Organization-Wide Permissions		Leave Requests Permissions	
		View All Data	Modify All Data	View All Records	Modify All Records
<a href="#">Analytics Cloud Integration User</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">System Administrator</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 10. Login Access Policies

### Purpose:

Controls whether **admins or support users can log in as other users**.

### Steps:

1. Go to **Setup → Security → Login Access Policies**.
2. Options: **Administrators Can Log in as Any User** → Gives admin full access.



**Users Can Grant Login Access** → Users explicitly allow access for support.

3. Check boxes as per your org policy.
4. Click **Save**.

**SETUP**  
**Login Access Policies**

**Login Access Policies** [Help for this Page](#) ?

Control which support organizations your users can grant login access to.

✓ Changes Saved

**Manage Support Options**

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only <a href="#">i</a>
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

## 11. Dev Org Setup

### Purpose:

Configures **developer orgs** for testing and building customizations.

### Steps:

1. Go to **Setup** → **Company Settings** → **Company Information**.
2. Check your **Org Edition**: Developer Edition, Enterprise Edition, etc.
3. Verify:
  - Users, Profiles, Roles are set up
  - OWD, Sharing Rules configured

- 

## Company Information

MIT S



User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

## Edit

Organization Name	MITS		Phone	(863) 984-9804
Primary Contact	Gunti Jahnvi		Fax	
Division			Default Locale	Hindi (India)
Address	Madanapalle Andhra Pradesh India		Default Language	English
Fiscal Year Starts In	January		Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>		Currency Locale	Bangla (India) - INR
Enable Data Translation	<input type="checkbox"/>		Used Data Space	344 KB (7%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>		Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>		API Requests, Last 24 Hours	0 (15,000 max)

1. Sandbox is a safe copy of your org for testing.
2. Create it via **Setup** → **Sandboxes** and choose type (Developer, Partial, Full).
3. Test changes here before touching Production.

1. Deployment moves changes from Sandbox to Production.
2. Use **Change Sets**: add components in Sandbox → upload → deploy in Production.
3. Always test after deploying to confirm it works