

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

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

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

Edit

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	<input type="checkbox"/>	Currency Locale	Bangla (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)

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	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div> <div>Sunday</div> <div>No Hours</div> </div> <div> <div>Monday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Tuesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Wednesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Thursday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Friday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Saturday</div> <div>9:00 AM to 6:00 PM</div> </div>	Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>		
Created By	OrgFarm EPIC 9/13/2025, 12:38 PM	Last Modified By	Gunti Jahnavi 9/16/2025, 11:07 PM

Edit

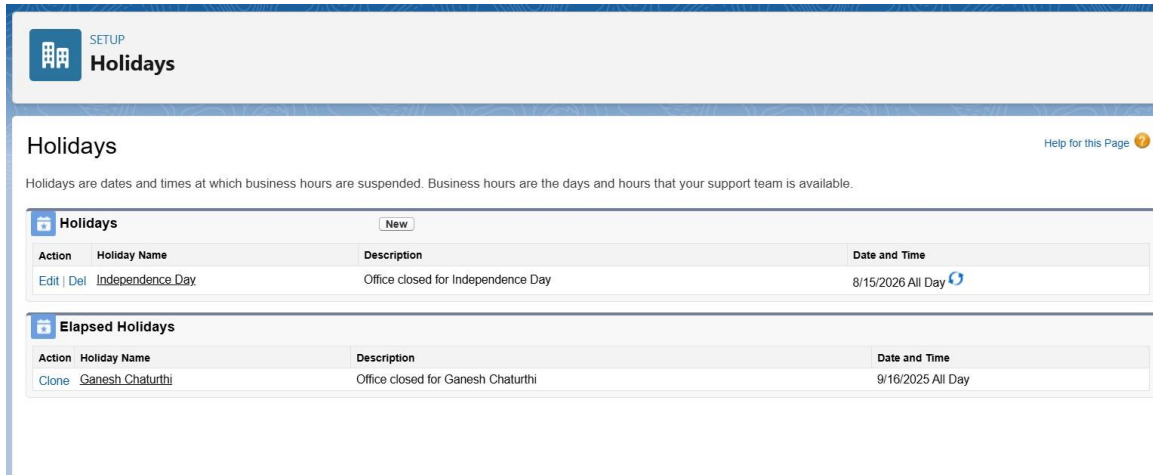
Holidays

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
Edit Del	Independence Day	Office closed for Independence Day	8/15/2026 All Day

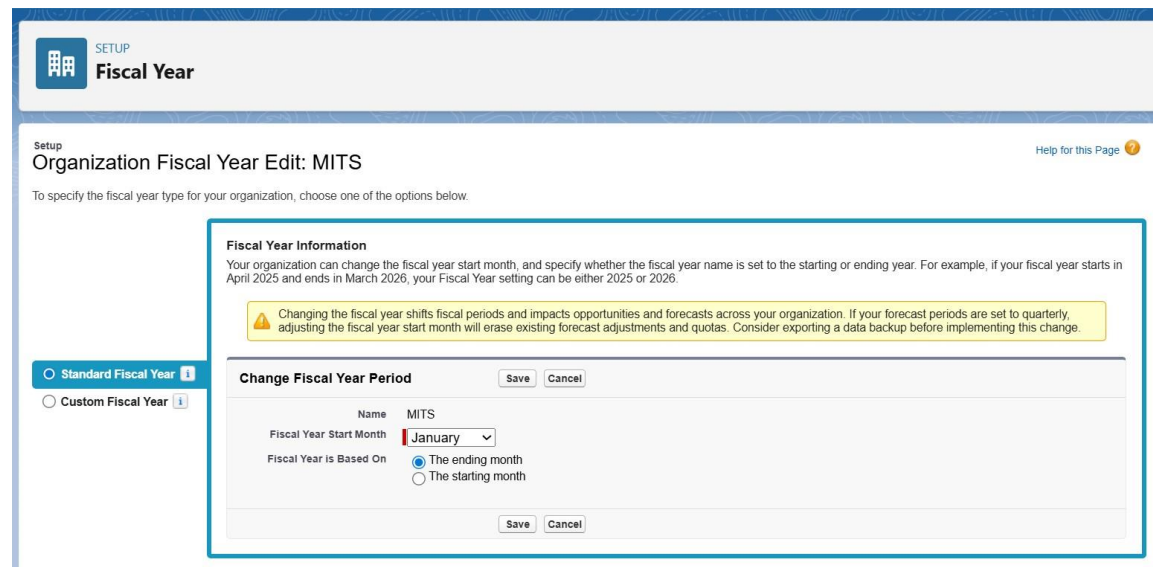
Elapsed Holidays

Action	Holiday Name	Description	Date and Time
Clone	Ganesh Chaturthi	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.

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

☒ **Standard Fiscal Year** [?](#)

☐ **Custom Fiscal Year** [?](#)

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


Users

All Users

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](#)

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name	Alias	Username	Role +	Active	Profile
<input type="checkbox"/> Edit Login	Kumar_Ravi	RaviK	ravi@mits.com.sandbox	Manager	✓	Standard User
<input type="checkbox"/> Edit Login	Siva_Gunti	G Siva	siva19@gmail.com	Employee	✓	Standard User
<input type="checkbox"/> Edit	Jahnavi_Gunti	226	22691a3156454@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k00000bycd8uah.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit Login	Chatter_Expert	Chatter	chatty.00d9k00000bycd8uah.xhxr3f14vk0@chatter.salesforce.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k00000bycd8uah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIC	epic.1dab4cbb3da5@orgfarm.salesforce.com		✓	System Administrator

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

6. Profiles Configuration

Navigation: Setup → Profiles → Clone Standard Profile

Custom Profiles to Create:

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

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

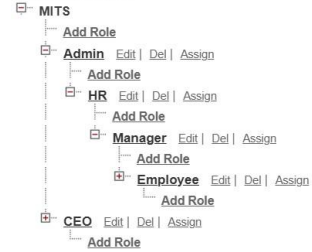
[Help for this Page](#)

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](#)



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 includes a search bar, action buttons (Clone, Edit Properties, Manage Assignments, View Summary), and a "Permission Set Overview" section with fields for Description, License, Session Activation Required, and Permission Set Groups Added To. Below this is the "Apps" section, which contains links to "Assigned Apps", "Assigned Connected Apps", "Object Settings", "App Permissions", and "Apex Class Access".

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

7. Roles Hierarchy

Navigation: Setup → Roles → Set Up Roles

Hierarchy Structure: Manager → Employee.