

Leave Tracker Project

Phase : 10 : Salesforce Implementation Overview

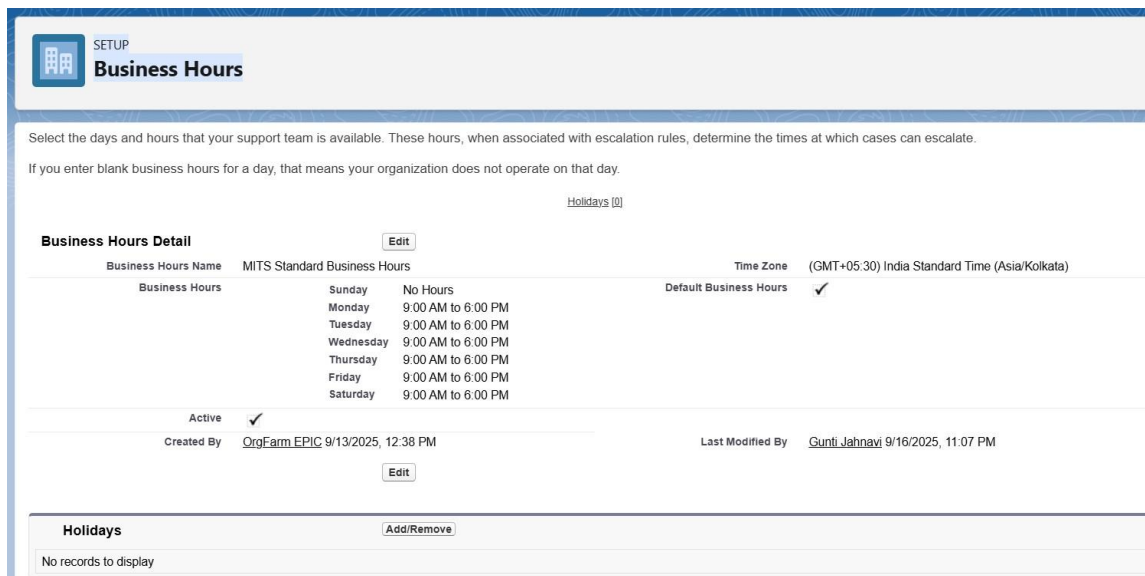
Project Title: Leave Tracker – Employee Leave Management System Industry: HR / Employee Management Project Type:

Salesforce Lightning App for Leave Management Target Users: Employees, Managers, HR Teams

Phase 1: Problem Understanding & Requirement Analysis Purpose:

Understand the need for automated leave management. Overview: Gathered requirements from employees, managers, and HR.

Mapped business processes, identified pain points like manual approvals, lack of tracking, and reporting gaps, and explored similar apps to define the project scope.



The screenshot shows the Salesforce Setup page for Business Hours. The page title is "SETUP Business Hours". Below the title, there is a description: "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." There is a link "Holidays [0]" next to the description. The main section is "Business Hours Detail" with an "Edit" button. It shows a table with columns "Business Hours Name", "Business Hours", and "Time Zone". The table has one row for "MIT Standard Business Hours" with a time zone of "(GMT+05:30) India Standard Time (Asia/Kolkata)". The table lists the business hours for each day of the week: 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), and Saturday (9:00 AM to 6:00 PM). There is an "Active" checkbox which is checked. Below the table, it shows "Created By: OrgFarm EPIC 9/13/2025, 12:38 PM" and "Last Modified By: Gunti Jahnvi 9/16/2025, 11:07 PM". There is an "Edit" button below the "Last Modified By" field. At the bottom, there is a section for "Holidays" with an "Add/Remove" button and a message "No records to display".

Business Hours Name	Business Hours	Time Zone
MIT Standard Business Hours	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)

Phase 2: Org Setup & Configuration Purpose: Set up the Salesforce environment for development. Overview:

SETUP
Company Information

Company Information
MITs
[Help for this Page](#)

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)

Configured Salesforce edition, company profile, business hours, holidays, fiscal year, users, licenses, profiles, roles, permission sets, sharing rules, login policies, and sandbox setup for safe testing.

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	Sunday	No Hours	Default Business Hours	<input checked="" type="checkbox"/>
	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		
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

Phase 3: Data Modeling & Relationships Purpose:

Build the Leave Tracker data structure.

Overview: Created custom objects like Leave Requests and Employees, defined fields (Start Date, End Date, Status, Comments), record types, page layouts, and relationships (Lookup, Master-Detail) using Schema Builder.

Phase 4: Process Automation (Admin) Purpose: Automate approvals and notifications. Overview: Implemented Validation Rules to maintain data accuracy,

Workflow Rules and Process Builder for basic automation, Approval Processes for manager approvals, and Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched) to guide users and automate repetitive tasks.

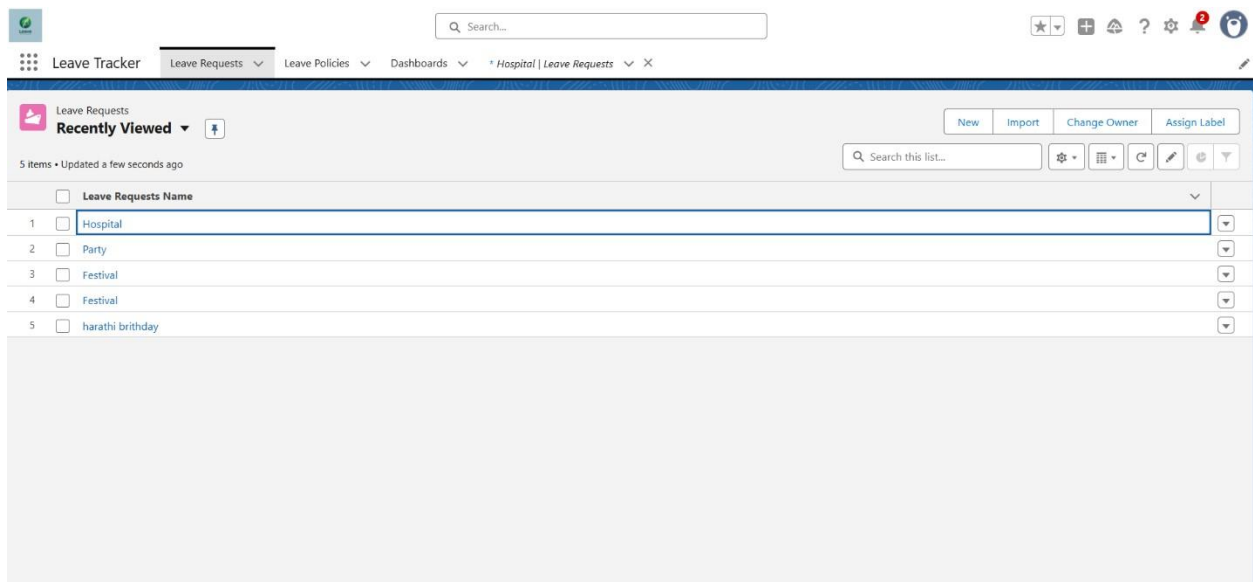
Configured Email Alerts, Field Updates, Tasks, and Custom Notifications.

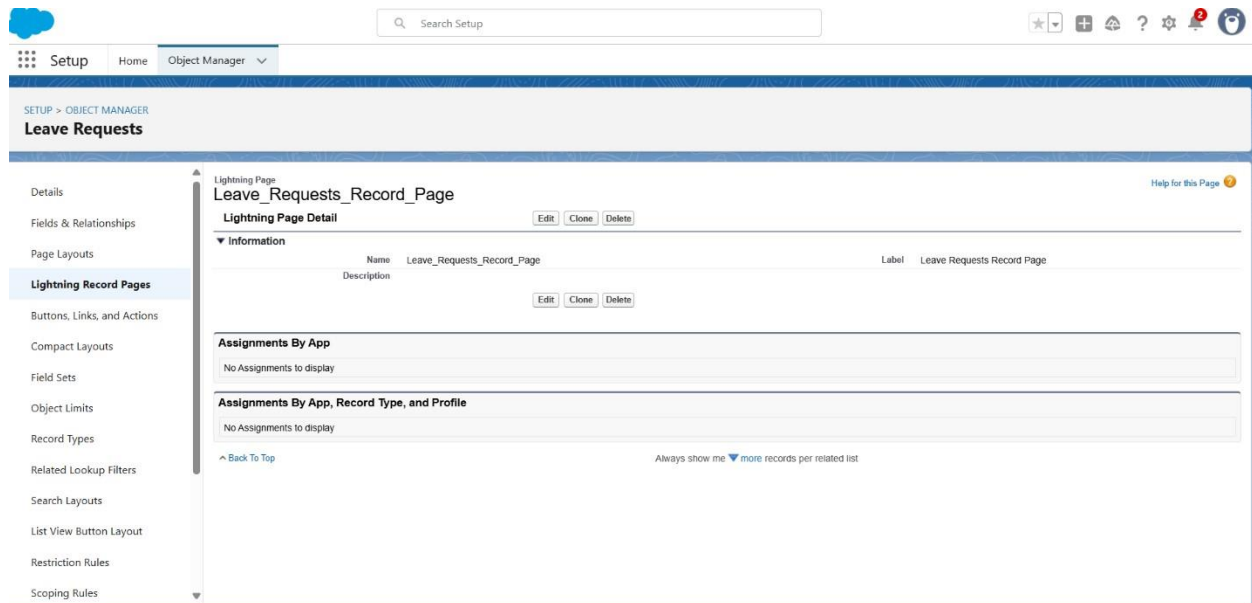
Phase 5: Apex Programming (Developer) Purpose: Handle complex backend logic. Overview: Developed Apex classes and triggers for automation that can't be handled declaratively.

Examples include preventing duplicate leave requests, auto-updating leave status, and sending notifications. Implemented unit tests for >75% code coverage.

Phase 6: User Interface Development Purpose:

Create a smooth and intuitive UI. Overview: Built Lightning Record Pages, Tabs, and Home Page Layouts using Lightning App Builder.





Added components like approval buttons, dashboards, and related lists. Used Lightning Web Components (LWC) for custom functionality and integrated Apex for dynamic actions.

Phase 7: Integration & External Access Purpose:

Enable external connectivity (optional).

Overview: Configured Named Credentials, External Services, REST/SOAP APIs, Callouts, and OAuth settings for integration with external HR or payroll systems.

Phase 8: Data Management & Deployment Purpose:

Ensure accurate leave data and smooth deployment.

Overview: Imported initial employee and leave data using Data Import Wizard and Data Loader. Set up Duplicate Rules, exported backups regularly, and deployed components using Change Sets or Salesforce DX.

Phase 9: Reporting, Dashboards & Security Review Purpose:

Provide insights and maintain data security. Overview: Built reports (Tabular, Summary, Matrix, Joined) to track leave statistics.

Created dashboards and dynamic dashboards for managers. Reviewed Sharing Settings, Field-Level Security, Session Settings, Login IP Ranges, and Audit Trail to ensure only authorized users can access sensitive leave data.