

Title - Leave Tracker App – Salesforce CRM Project

Industry - Human Resource Management / Corporate Services

Target Users - Employees, Managers, HR/Admin

Problem Statement

Many organizations struggle with managing employee leave requests efficiently. Current processes are fragmented:

- Employees rely on emails, phone calls, or manual forms to apply for leave.
- Leave balances and policies are not transparent to employees.
- There is no centralized system to track leave history, approvals, and rejections.
- Manual tracking often results in errors, delays, and miscommunication.
- Managers lack visibility into team availability for resource planning.
- HR faces challenges in generating accurate leave and payroll reports.

The company wants a Salesforce CRM solution to:

- Automate the leave application and approval process.
- Maintain a centralized leave record system.
- Provide real-time notifications (Email/SMS) to employees and managers.
- Offer a self-service portal for employees to apply, view leave balances, and track status.
- Enable managers and HR to track leave history, pending requests, and generate analytical reports.

Use Cases

- Employees can submit leave requests through the Salesforce portal.
- Managers can approve/reject requests with comments.
- Employees can view leave balances and history in real-time.
- System sends notifications (Email/SMS) about leave status.
- HR/Admin can generate dashboards and reports for payroll and compliance.
- Automated approval workflows ensure faster processing.

Tech Stack

- Salesforce CRM (Service Cloud + Experience Cloud)
- Custom Objects: Employee, Leave_Request, Leave_Type
- Automation: Assignment Rules, Flows for Leave Application, Approval & Balance Update
- Notifications: Email & SMS Alerts for leave status (Applied, Approved, Rejected)
- Dashboards & Reports: For leave balance, approvals, pending requests, and HR analytics