# Phase 2 — Salesforce Org Setup & Configuration

Project: Leave Management using Salesforce LWC

Objective: Implement a Leave Management system in Salesforce using Lightning Web Components (LWC), custom objects, fields, and Apex logic. The app allows employees to apply for leave, view leave history, and enables managers to approve or reject requests.

Step 1 — Sign up & Login

- Sign up for or access a Salesforce Developer Edition org.
- Log in to the Lightning Experience interface.
- Confirm access to the Setup area using the gear icon.
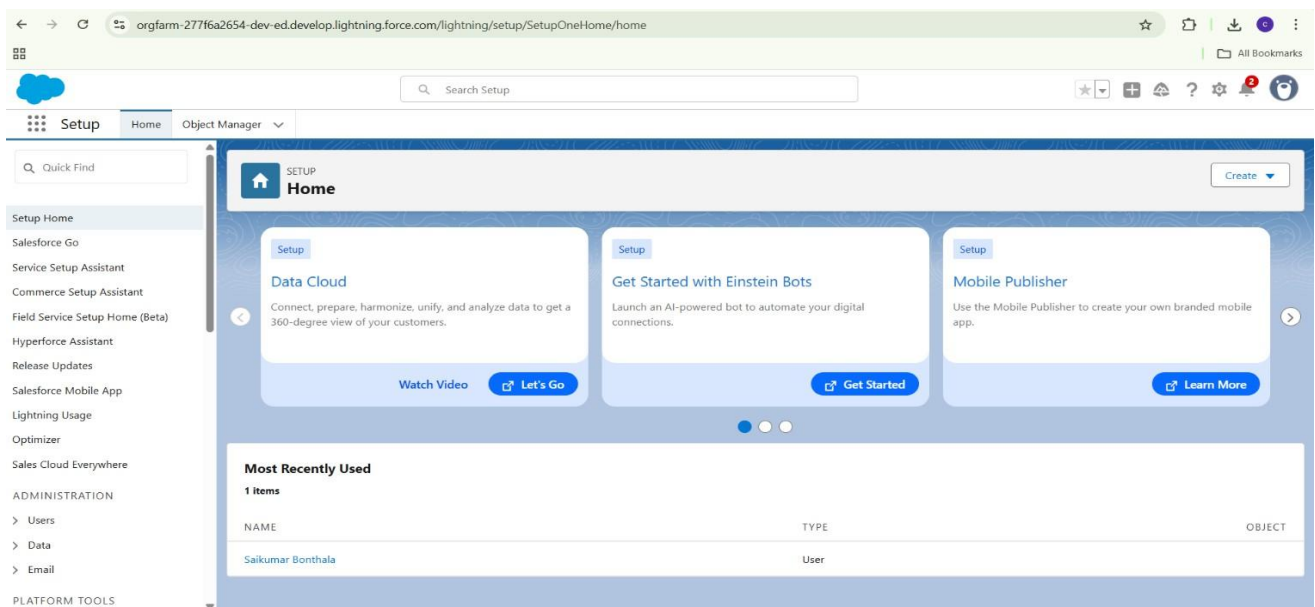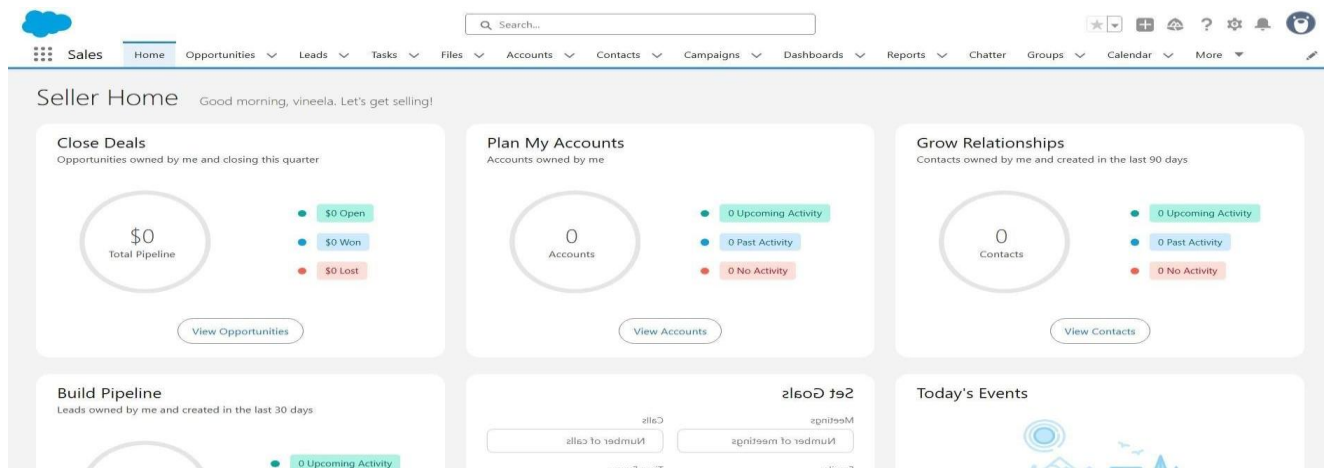
Step 2 — Open Setup & Object Manager

- Open Object Manager from Setup.
- Plan to create custom objects to handle customer journey touchpoints and stages.

Step 3 — Create Custom Object

- Object Name: Leave Management
- API Name: Leave_Management__c
- Record Naming: Auto-number (e.g., Leave-0001)
- Tab Creation: Add Leave Management tab for target apps only

Step 4 — Add Fields & Relationships (Key fields added)

Field Name	Data Type	Required	Description	Notes
Type of Leave	Picklist	Yes	Type of leave (values manually entered)	e.g., Sick, Casual
From Date	Date	Yes	Start date of leave	
To Date	Date	Yes	End date of leave	
Reason	Text Area	No	Reason for applying	Up to 255 chars
User	Lookup(User)	No	The employee applying	Can be for others
Status	Picklist	Yes	Current status (Pending, Approved, Rejected)	Default: Pending
Number of Days	Formula	Yes	Days of leave (To Date - From Date + 1)	Updates with dates

Q Search Setup

Setup | Home | Object Manager ∨

SETUP > OBJECT MANAGER
Leave Management

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Leave Management
New Custom Field

Help for this Page ❓

Step 2. Choose output type   Step 2 of 5

Previous | Next | Cancel

Field Label | No of days   Field Name | No_of_days | ℹ

Auto add to custom report type   ☑ Add this field to existing custom report types that contain this entity ℹ

Formula Return Type

○ None Selected   Select one of the data types below.

○ Checkbox   Calculate a boolean value
     Example: TODAY() > CloseDate

○ Currency   Calculate a dollar or other currency amount and automatically format the field as a currency amount.
     Example: Gross Margin = Amount - Cost__c

○ Date   Calculate a date, for example, by adding or subtracting days to other dates.
     Example: Reminder Date = CloseDate - 7

○ Date/Time   Calculate a date/time, for example, by adding a number of hours or days to another date/time.
     Example: Next = NOW() + 1

● Number   Calculate a numeric value.
     Example: Fahrenheit = 1.8 * Celsius__c + 32

○ Percent   Calculate a percent and automatically add the percent sign to the number.

Q Search Setup

Setup | Home | Object Manager ∨

SETUP > OBJECT MANAGER
Leave Management

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships
11 Items, Sorted by Field Label

Q Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
From date	From_date__c	Date			▼
Last Modified By	LastModifiedById	Lookup(User)			
Leave Management No	Name	Auto Number		✓	▼
No of days	No_of_days__c	Formula (Number)			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Reason	Reason__c	Text Area(255)			▼
Status	Status__c	Picklist			▼
To date	To_date__c	Date			▼
Type of leave	Type_of_leave__c	Picklist			▼

Step 4 - Field-Level Security & Page Layouts

- Configure field-level security for all profiles as needed.
- Add all required fields to page layout for Leave Management.
- Ensure managers and employees have visibility/edit permissions.

Step 5 — Field Level Security & Page Layouts

1. Go to Object Manager → Customer Journey Touchpoint → Fields & Relationships.
2. Open each field and click Set Field-Level Security.
3. Ensure the fields are visible/editable to relevant profiles.
4. Navigate to Page Layouts, open default layout.
5. Customize the layout by dragging and placing the fields logically for ease of use.
6. Save the layout.

Step 6 - Validation Rules

- Validation: Required fields such as Type of Leave, From Date, and To Date.

- Sample Rule:

    - ISBLANK(TEXT(Type_of_Leave__c))

    - Error Message: "Type of Leave is required".

Step 7 - Profiles & Permission Sets

- Grant object-level permissions to System Administrator profile.

- Create permission sets for Leave Management operations as needed.

- Assign profiles for employees and managers with appropriate access.

Step 8 - Lightning Web Components (LWC)

- **Component Structure:**

    - Tabs: Employee tab (for applying leaves), Manager tab (for approvals)

    - Modal forms: For applying, editing leave records using lightning-record-edit-form

    - Show/Hide logic: Toggle display of forms/data using buttons

    - Button group: Apply, Pending, History

    - Data table: List leave records with status color coding

➔ **Event Handling:**

- Success toast notification with record creation

- Immediate UI update on status change

- Dynamic Labeling: Use button toggles (Show/Hide) to handle UI state.

Step 8 - Apex Class

- Leave Management Handler Class:

    - Method to fetch Pending leaves: @AuraEnabled public static List<Leave_Management__c> getPendingLeaves()

    - Method to fetch full history

    - Query logic based on status field value (filters for Pending).

Step 9 - Testing & Validation

- Create sample leave records.

- Validate formula field for Number of Days (make sure it includes both dates).

- Check profile/tab visibility and access for employees and managers.

- Confirm that toast notifications display correctly on record save.