

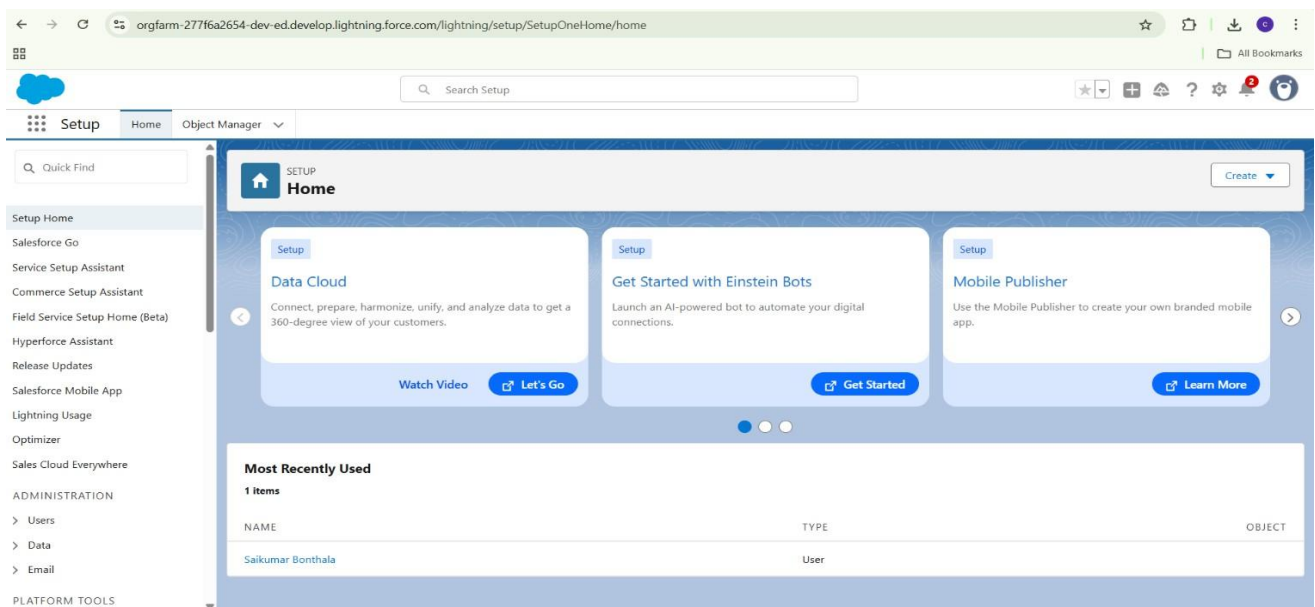
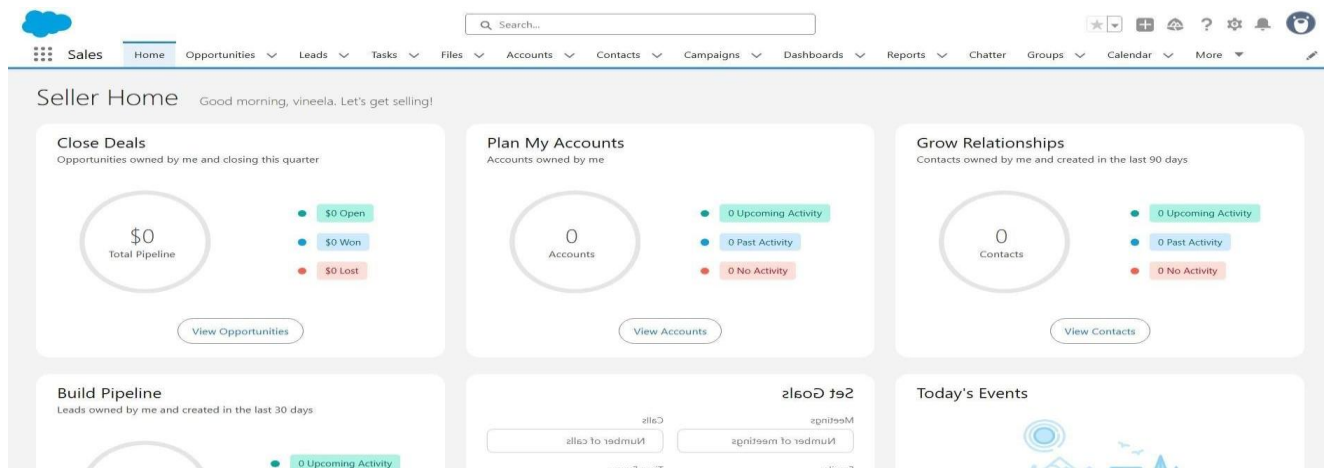
Phase 2 — Salesforce Org Setup & Configuration

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.

The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled "Object Manager" and shows a list of 53+ items, sorted by Label. The table below lists several standard objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			

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

The screenshot shows the "New Custom Field" page for the "Leave Management" object. The browser address bar displays the URL: `orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002QAc5/FieldsAndRelationships/new`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled "Leave Management" and shows the "New Custom Field" page. The page is divided into a left sidebar with navigation options and a main content area for entering field details.

Left Sidebar:

- 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

Main Content Area:

Leave Management
New Custom Field

Step 2. Enter the details (Step 2 of 4)

Field Label:

Field Name:

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value:

Use formula syntax. Enclose text and picklist value API names in double quotes: ("the_text"). Include numbers without quotes: (25). Show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

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

Setup | Home | Object Manager ▾

SETUP > OBJECT MANAGER Leave Management

New Relationship

Step 4. Establish field-level security for reference field Step 4 of 5

Field Label	User	Data Type	Lookup	Field Name	User	Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.						
Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only				
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

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orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002QAc5/FieldsAndRelationships/new

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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

Field Label

No of days

Field Name

No_of_days

Previous

Next

Cancel

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity

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`

☐ DateTime

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
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.

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orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002QAc5/FieldsAndRelationships/view

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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

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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		
Time of leave	Time of leave__c	Bi-List		

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.