

# Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment for the Leave Tracker App.

## 1. Salesforce Editions

- Use Developer Edition Org (free Dev Org) for building and testing.

## 2. Company Profile Setup

- Go to Company Settings → add company info, set local time zone.
- Set currency to INR/USD (optional, for future payroll/HR integrations).

## 3. Business Hours & Holidays

- Define working hours (e.g., 9 AM – 6 PM).
- Add public holidays → no leave approvals should be processed on these days.

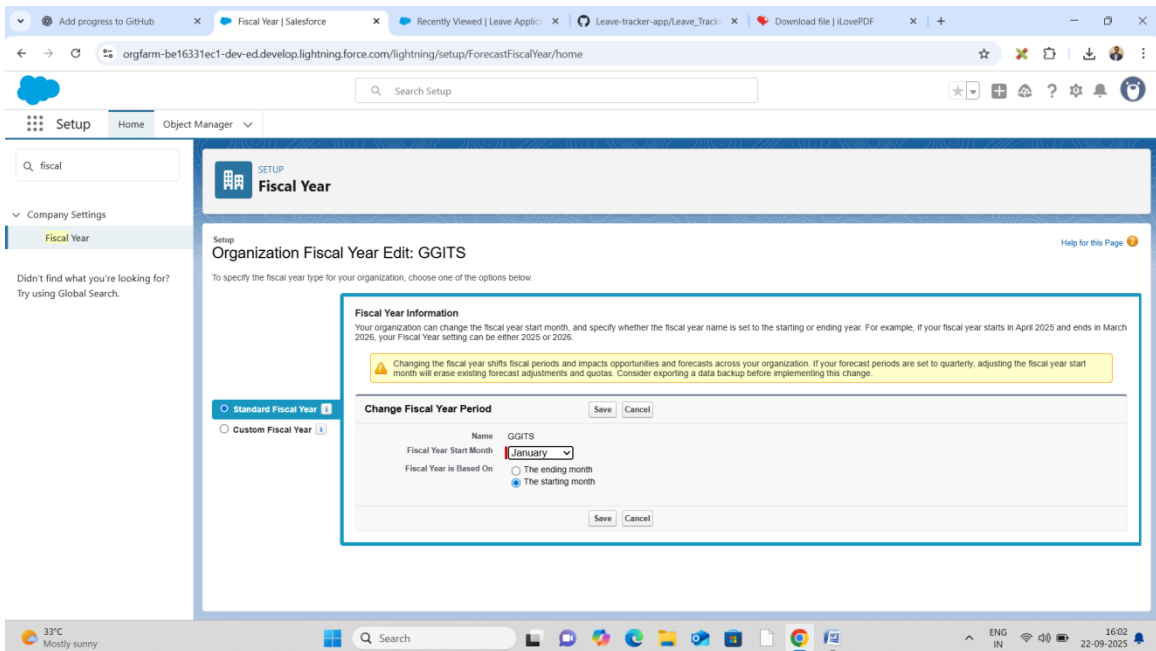
The screenshot shows the Salesforce Setup interface for configuring Business Hours and Holidays. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Business Hours' and includes a search bar. Below the search bar, there are sections for 'Business Hours Detail' and 'Holidays (3)'. The 'Business Hours Detail' section shows a table with columns for Business Hours Name, Office Hours, and Time Zone. The 'Holidays (3)' section shows a table with columns for Holiday Name, Description, and Date and Time.

Business Hours Name	Office Hours	Time Zone
Business Hours	Sunday 24 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 24 Hours	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Holiday Name	Description	Date and Time
Christmas Day	Company closed for Christmas	12/25/2025 All Day
Diwali	Festival holiday	11/12/2025 All Day
Independence Day	National holiday	8/15/2025 All Day
New Year's Day	Company closed for New Year	1/1/2025 All Day
Republic Day	National holiday	1/26/2025 All Day

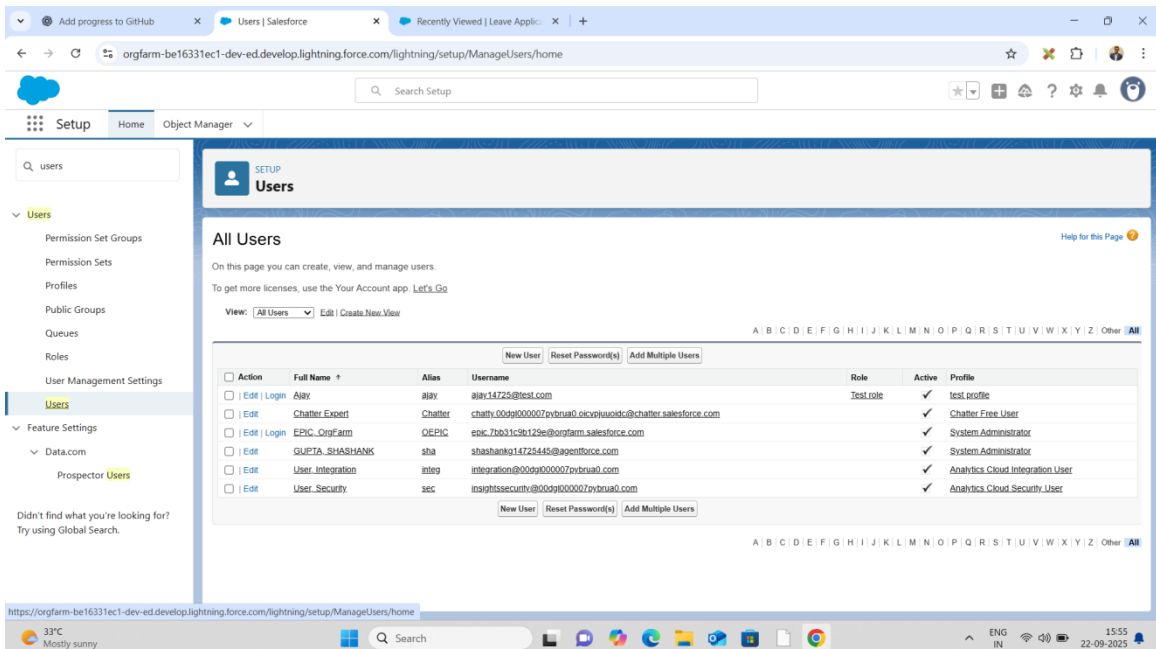
## 4. Fiscal Year Settings

- Standard (Jan–Dec).
- Useful if leave policies reset annually.



## 5. User Setup & Licenses

- Create users:
- Employee (leave requester)
- Manager (approver)
- HR (reporting & compliance)
- Assign Salesforce licenses appropriately.

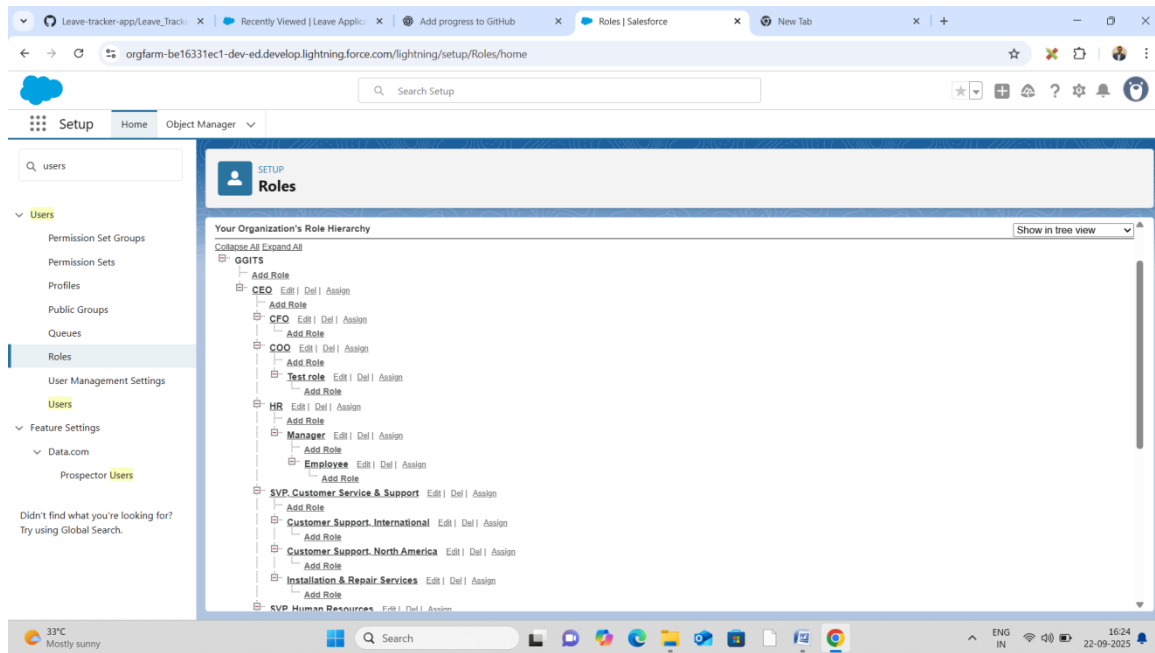


## 6. Profiles

- Employee Profile: Can create/view their own leave requests.
- Manager Profile: Can approve/reject leave requests.
- HR Profile: Full access, including reports and dashboards.

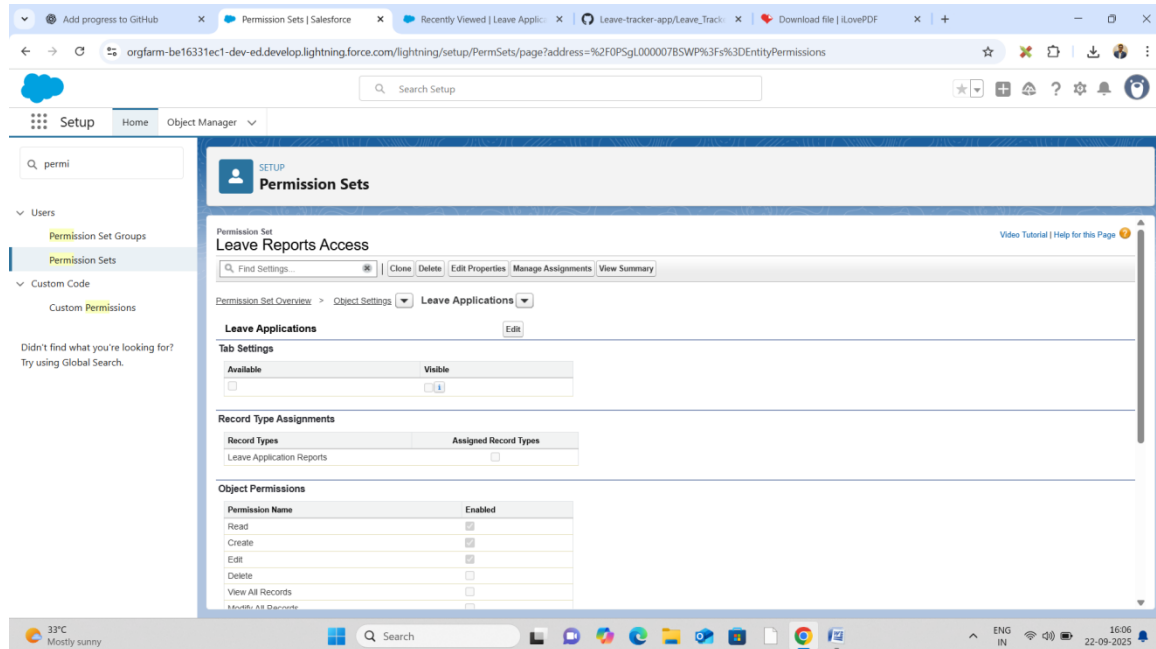
## 7. Roles

- HR on top → can view leave requests across the entire organization.
- Manager below HR → can view and manage leave requests submitted by their team.
- Employees at the bottom → can only view and submit their own leave requests.



## 8. Permission Sets

- If employees need extra access (e.g., view leave balance reports), assign Permission Sets instead of modifying Profiles.



## 9. OWD (Org-Wide Defaults)

- Leave\_Request object: Private → only owner and manager can see.
- Ensures data privacy between employees.

## 10. Sharing Rules

- If certain leave requests need to be visible to HR or specific managers, create Sharing Rules.

## 11. Login Access Policies

- Restrict login hours for Employees (optional, e.g., 9 AM – 6 PM).
- Managers/HR can have extended access.

## 12. Dev Org Setup

- The Developer Org acts as a sandbox → where we configure objects, fields, flows, and automation.

## 13. Sandbox Usage

- In real implementation: Build in Sandbox, test, then deploy to Production.

## 14. Deployment Basics

- Use Change Sets to move configuration from Sandbox → Production.
- This ensures all automation, objects, and flows are migrated properly.