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).

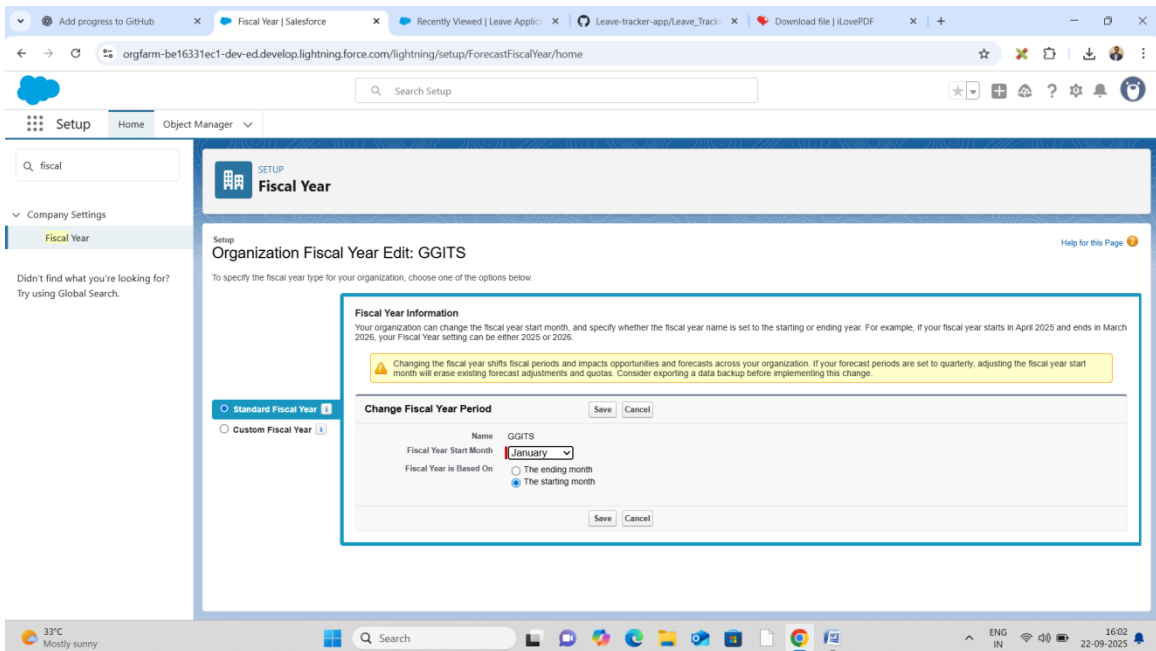• Add public holidays →no leave approvals should be processed on these days.
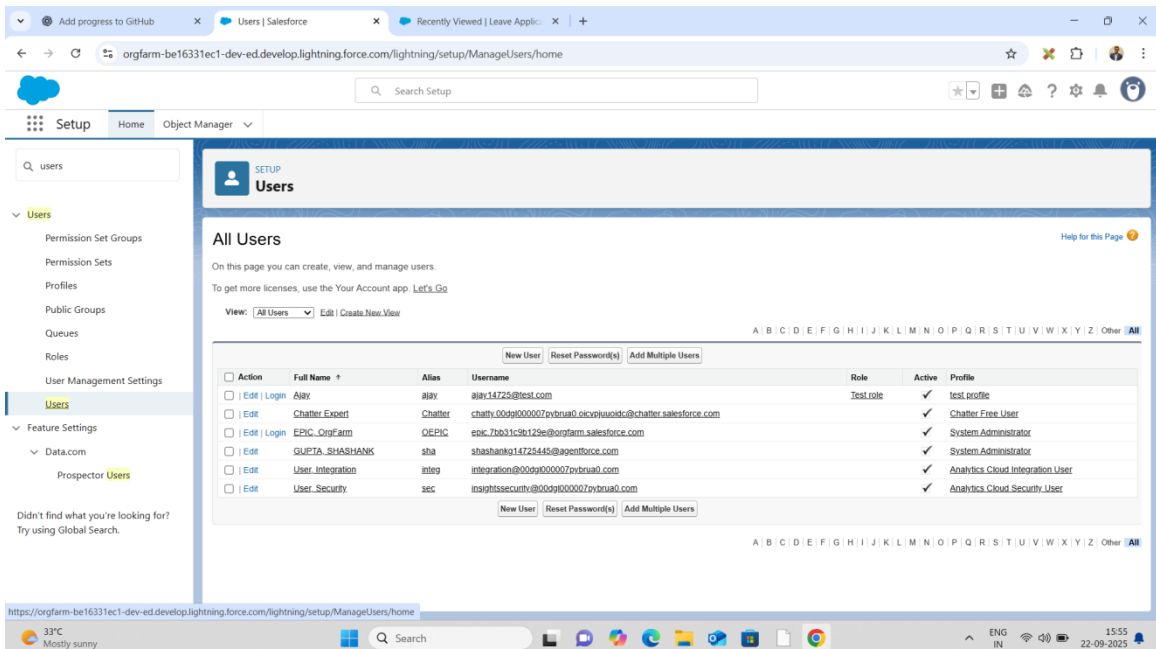

4. Fiscal Year Settings

• 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.
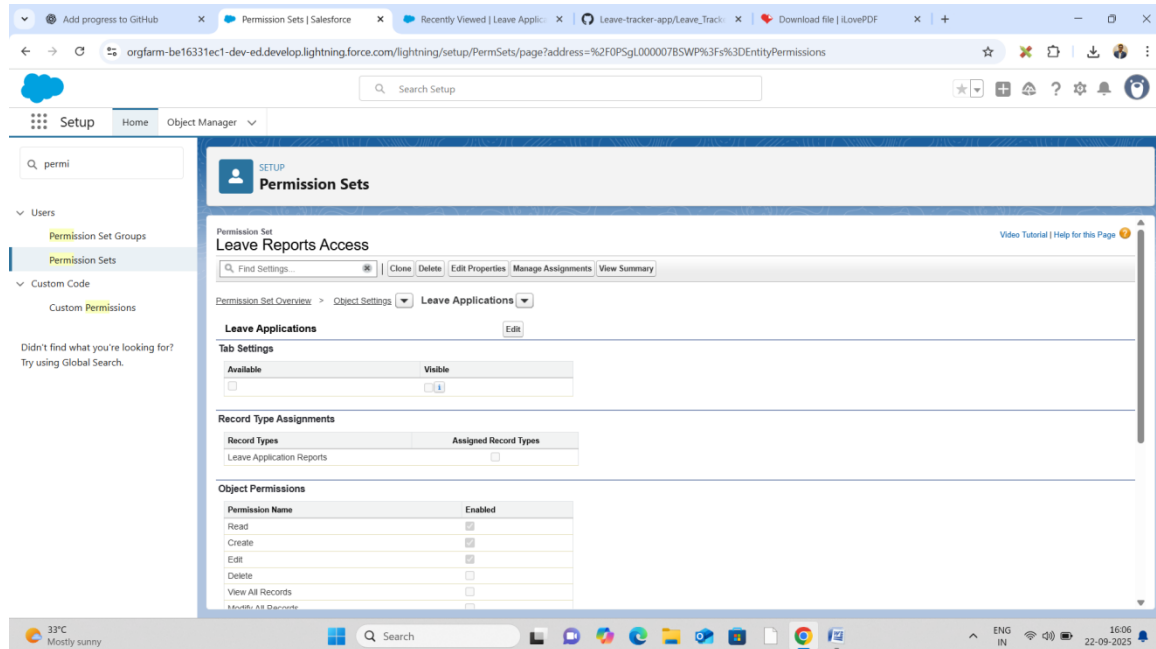
7. Roles

• 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.
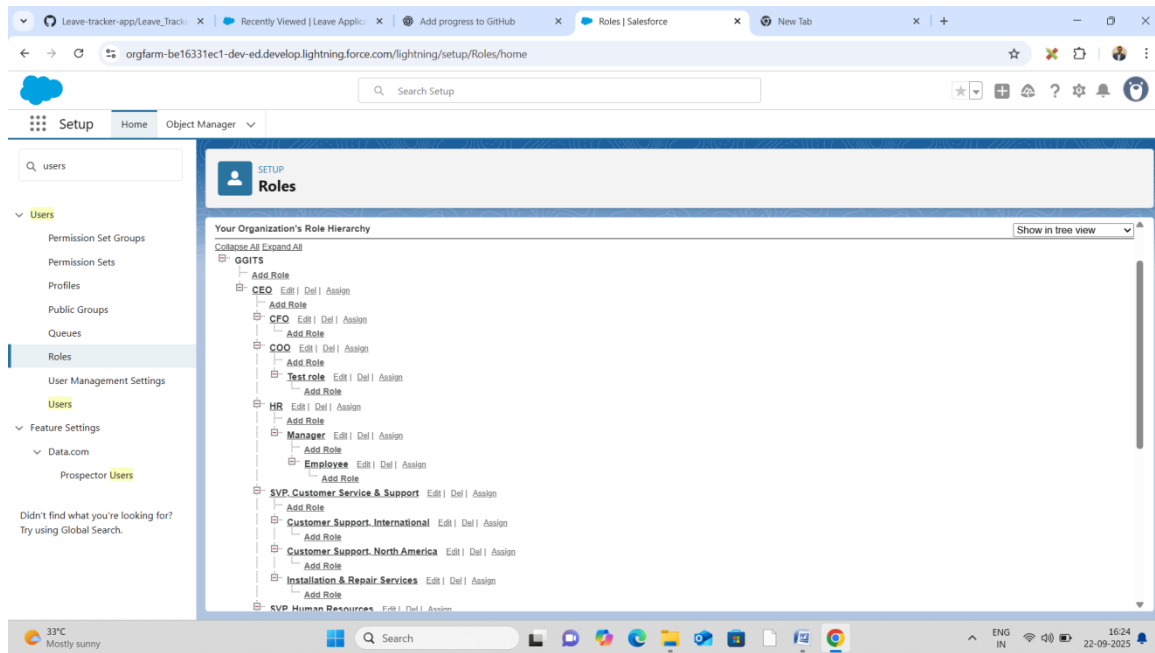
8. Permission Sets

• Ifemployeesneedextraaccess(e.g.,viewleavebalancereports),assignPermissionSets instead of modifying Profiles.

9. OWD (Org-Wide Defaults)

• Leave_Requestcobject: 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

• TheDeveloperOrgactsasasandbox→whereweconfigureobjects,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.