Phase 2: Object Creation

- **Step 1 :Get to Your LeaveRequest Object**

1.1 Login to Salesforce

Open your web browser

Go to your Salesforce Developer Org (the one you created in Phase 1

Login with your username and password

1. Log into your Salesforce Developer Org in your web browser.
2. Create a custom object named `LeaveRequest` (API name: LeaveRequest__c):

- Open Setup (gear icon top right).
- In Quick Find box, type Object Manager and open it.
- Click Create > Custom Object.
- Fill in:
- Label: Leave Request
- Plural Label: Leave Requests
- Object Name: LeaveRequest (Salesforce appends __c)
- Record Name: Auto Number (format: LR{0000})
- Start Number: 1
- Check "Allow Search," "Track Field History," "Add Notes," and other options as appropriate.
- Save the object.

3. Create custom fields for the object:

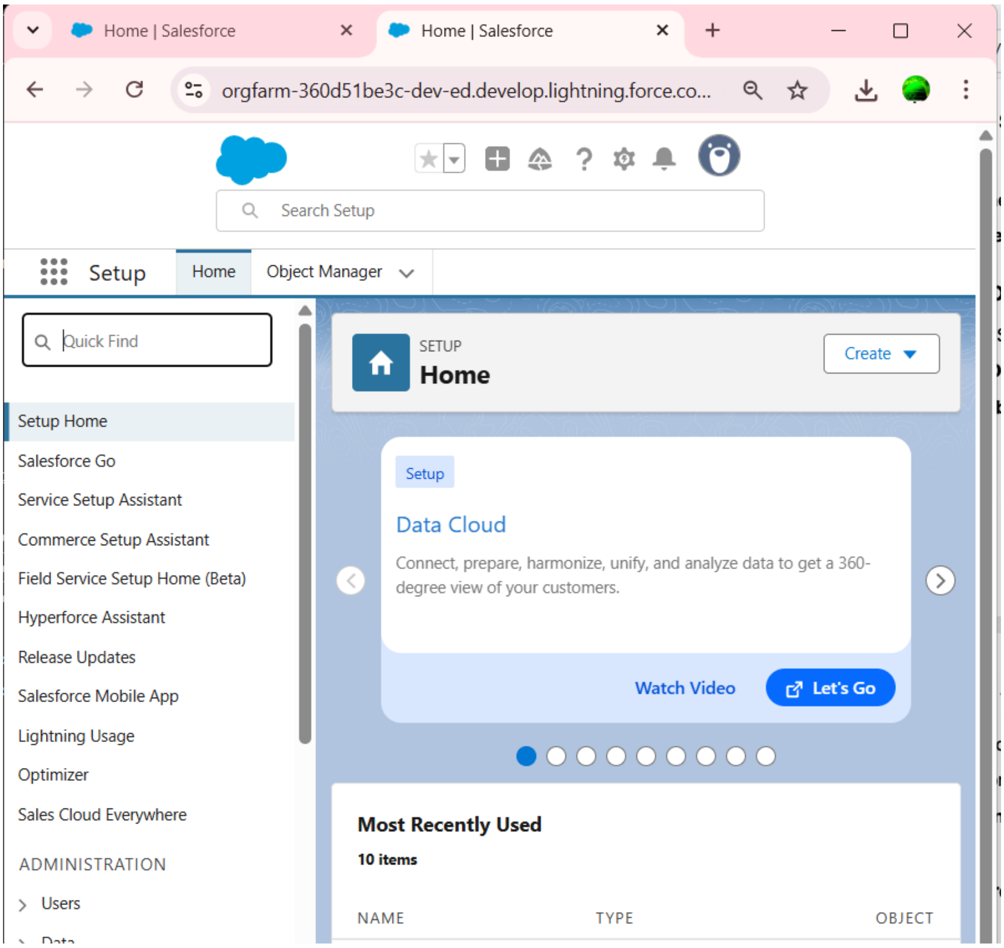
For each, go to the LeaveRequest object, then Fields & Relationships > New:

- From_Date__c — Date, required
- To_Date__c — Date, required
- Reason__c — Long Text Area
- Status__c — Picklist with values "Pending", "Approved", "Rejected" (default: Pending)
- User__c — Lookup(User)
- Manager_Comment__c — Long Text Area

4. Set object and field level security and permissions as needed.
5. Create at least one test LeaveRequest record to verify correctness.

1.2 Open Setup

Click Setup from the dropdown menu



1.3 Find Object Manager

On the Setup page, look for the Quick Find box on the left side

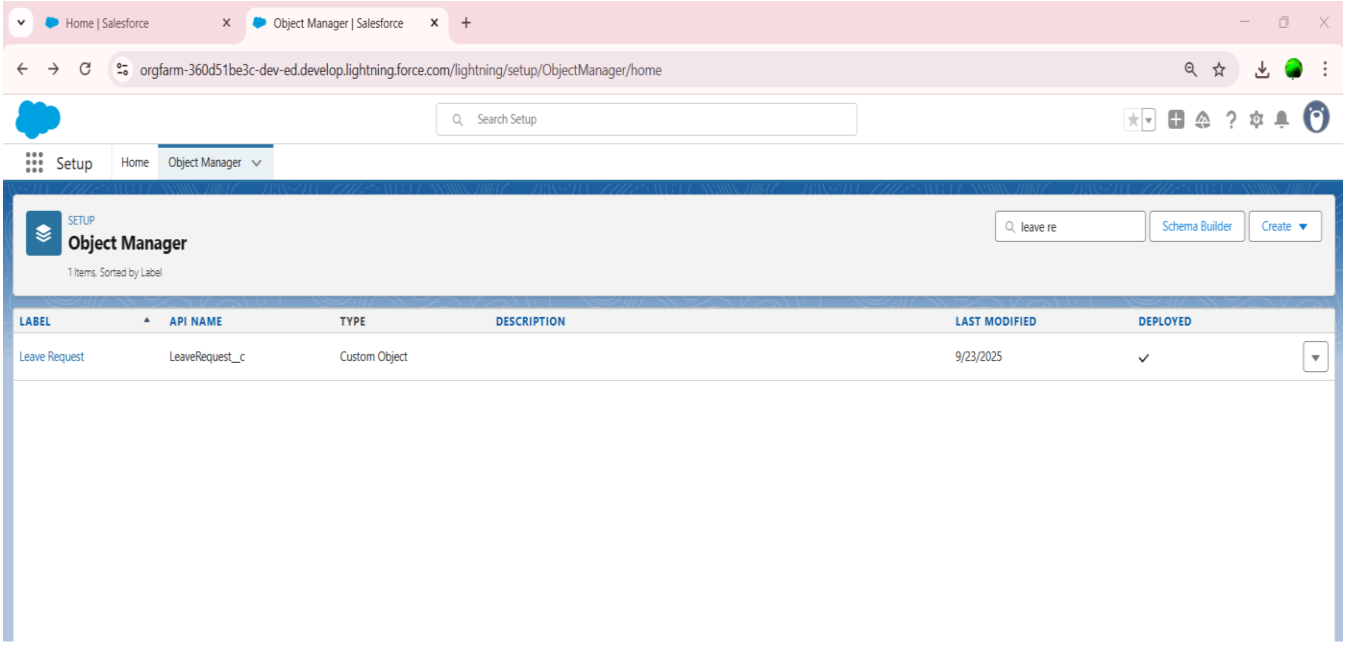
Type: Object Manager

Click Object Manager when it appears

1.4 Open Your LeaveRequest Object

In Object Manager, you'll see a list of objects

Look for Leave Request (the one you just created)



Click on "Leave Request" to open it

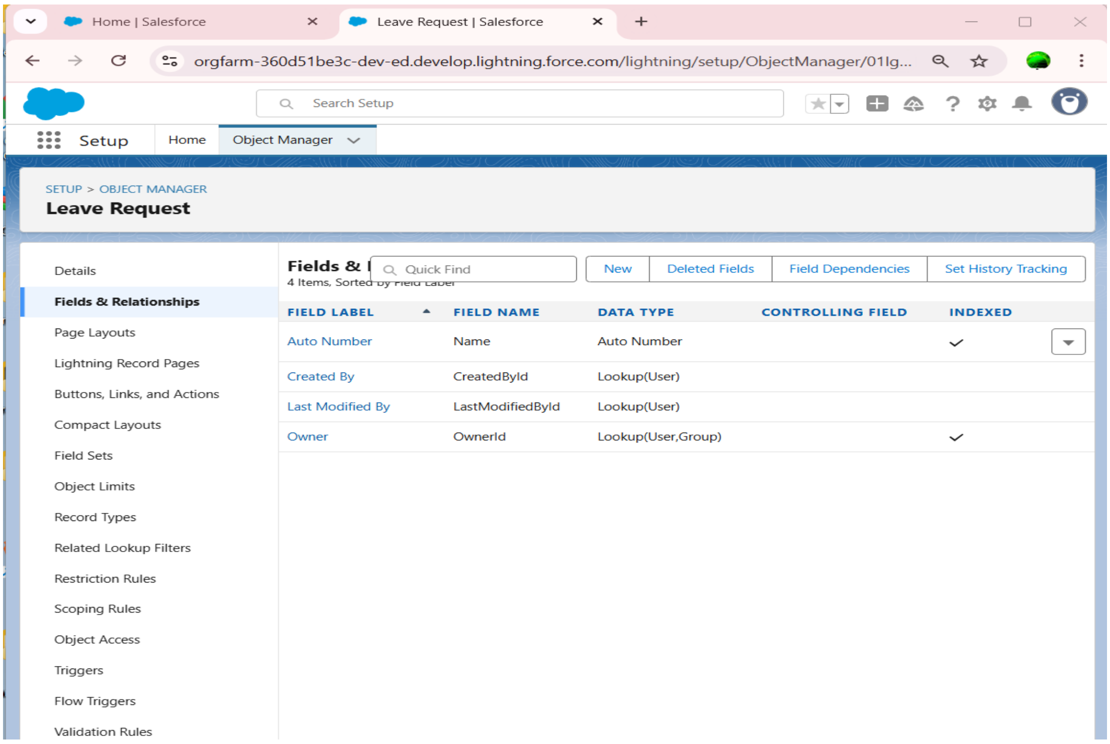
- ❖ **Step 2 Create Field #1 From Date**

2.1 Start Creating a New Field

On the Leave Request object page, look at the left sidebar

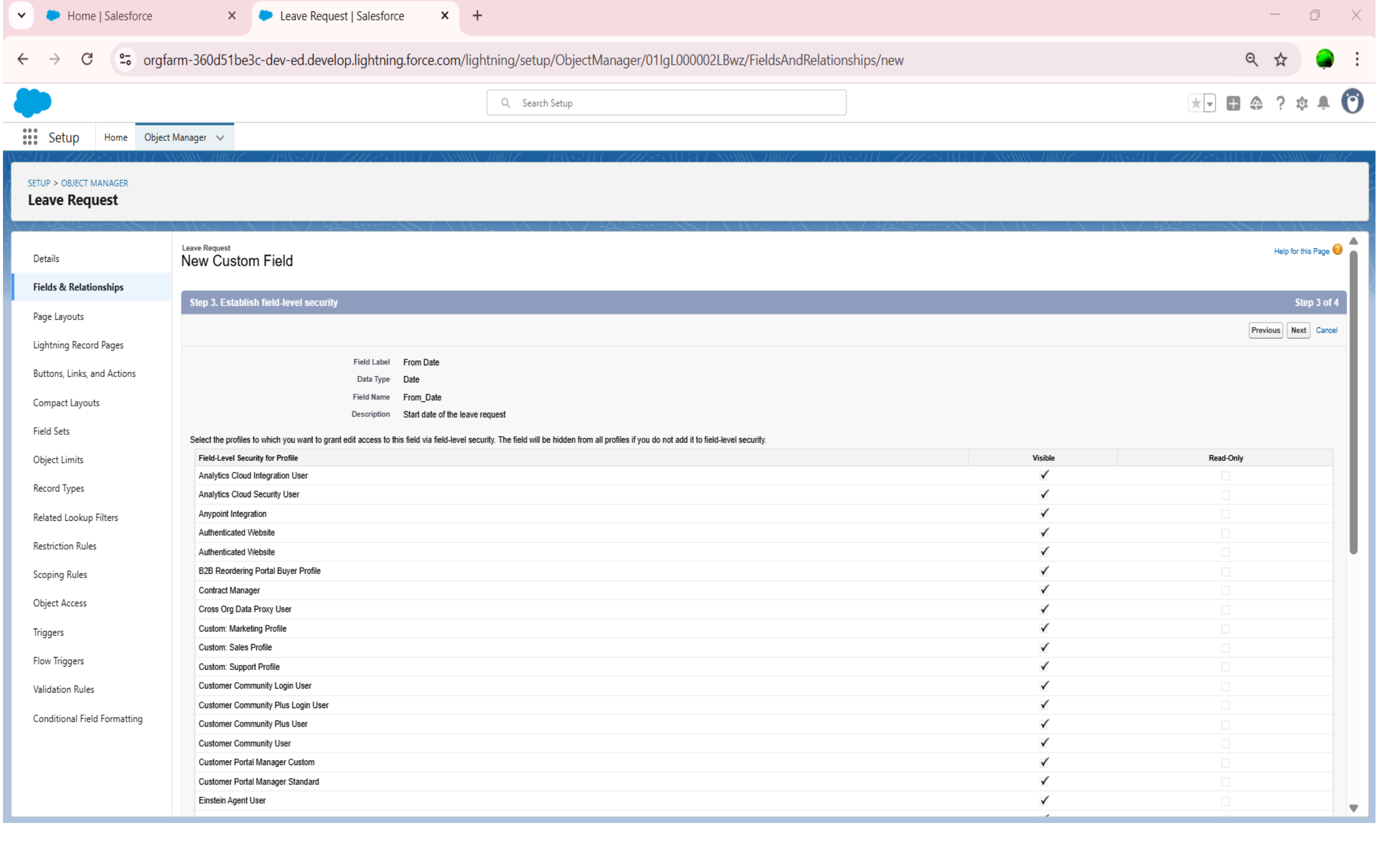
Click Fields & Relationships

At the top of the page, click the New button



2.2 Choose Data Type

You'll see a page titled "New Custom Field"



Look for Date in the data type options

Select the radio button next to Date

Click Next

2.3 Enter Field Details

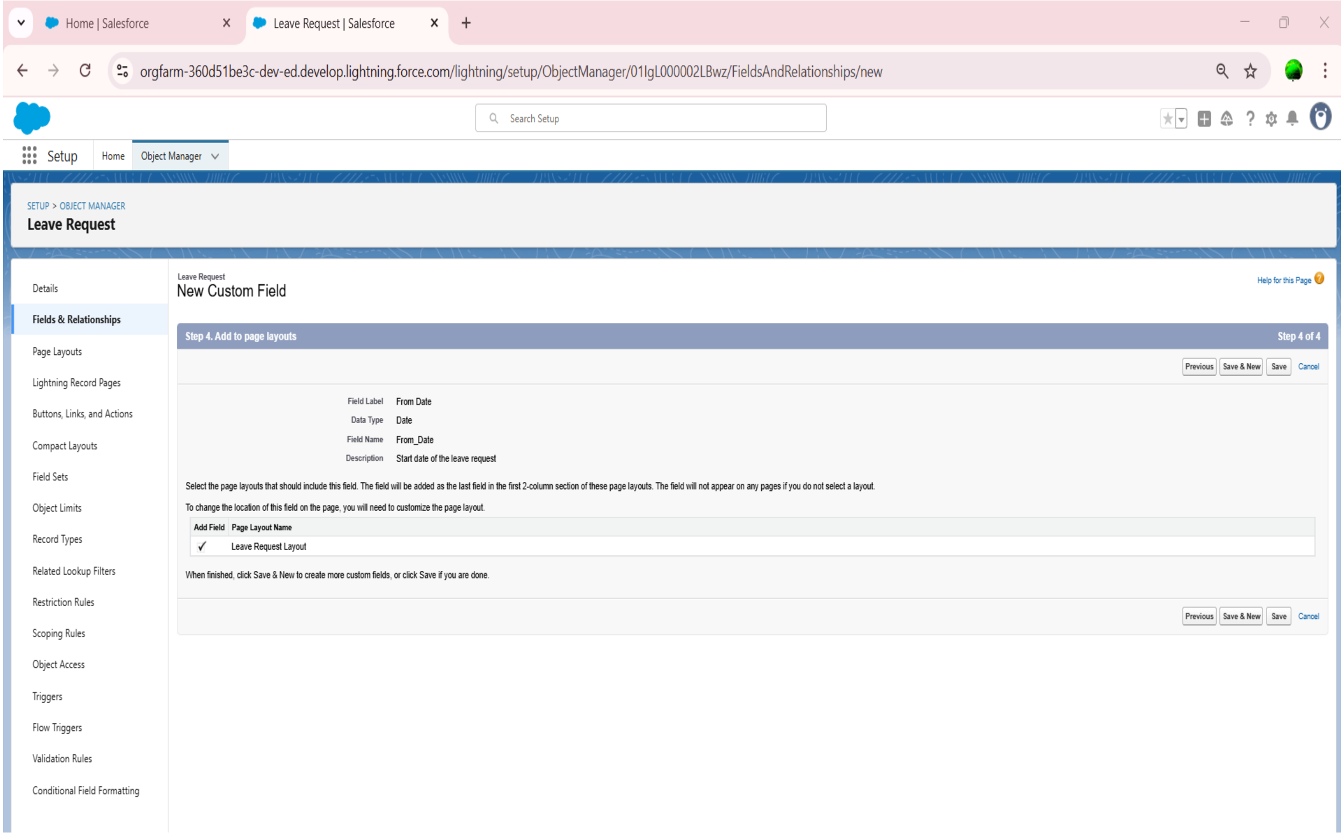
Fill out these boxes exactly:

Field Label:

From Date

Field Name:

From_Date



Salesforce will auto-fill this)

Description:

Start date of the leave request

(optional)

Help Text: Leave blank

Required:

☑

Check this box

Unique: Leave unchecked

External ID Leave unchecked

2.4 Click Next

2.5 Set Field-Level Security

You'll see a list of profiles

Leave everything as default (all profiles should have "Visible" checked)

Click Next

2.6 Add to Page Layouts

You'll see page layout options

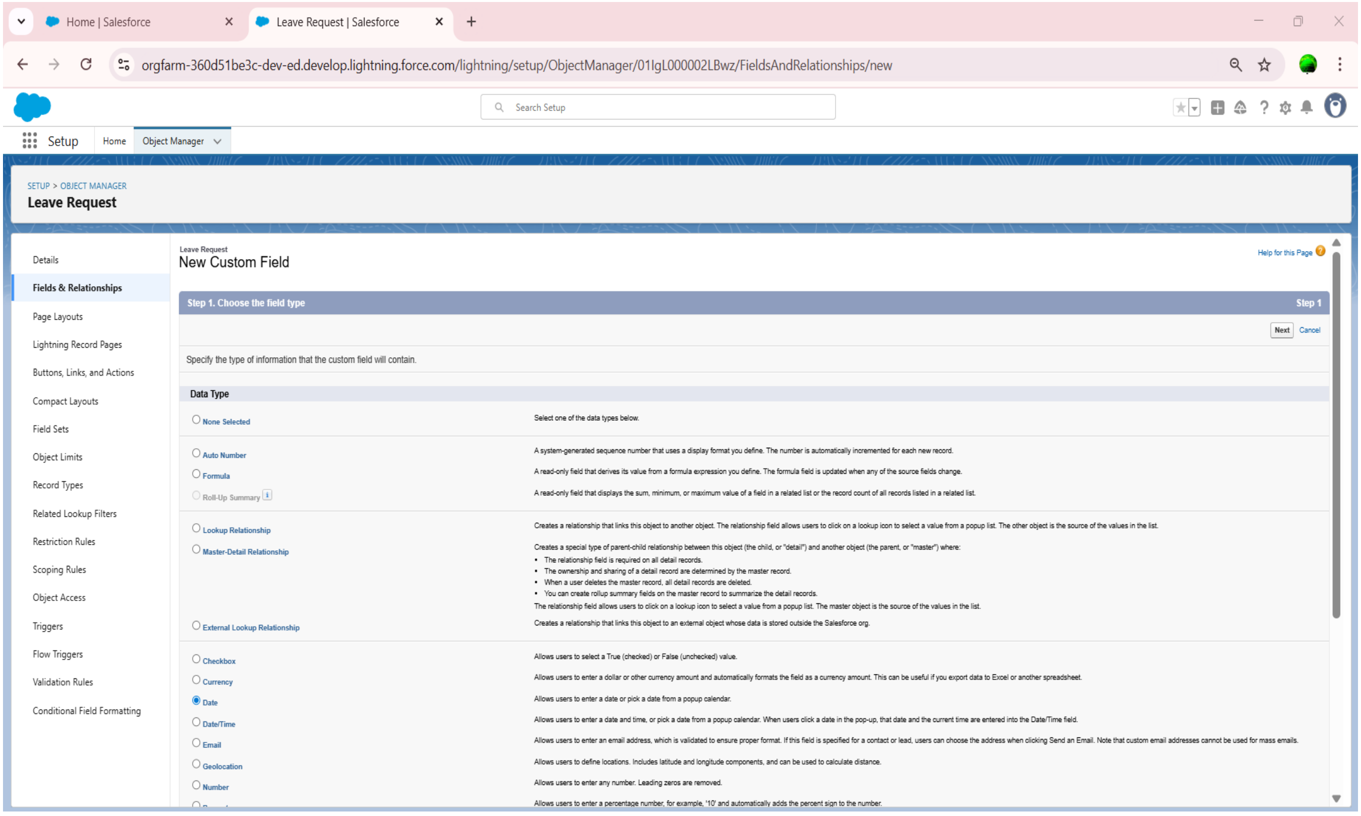
Leave the default layout checked

Click Save & New (this saves the field and lets you create the next one)

- **Step 3 Create Field #2 To Date**

3.1 Choose Data Type

You should be back at the "New Custom Field" page



Select the radio button next to Date

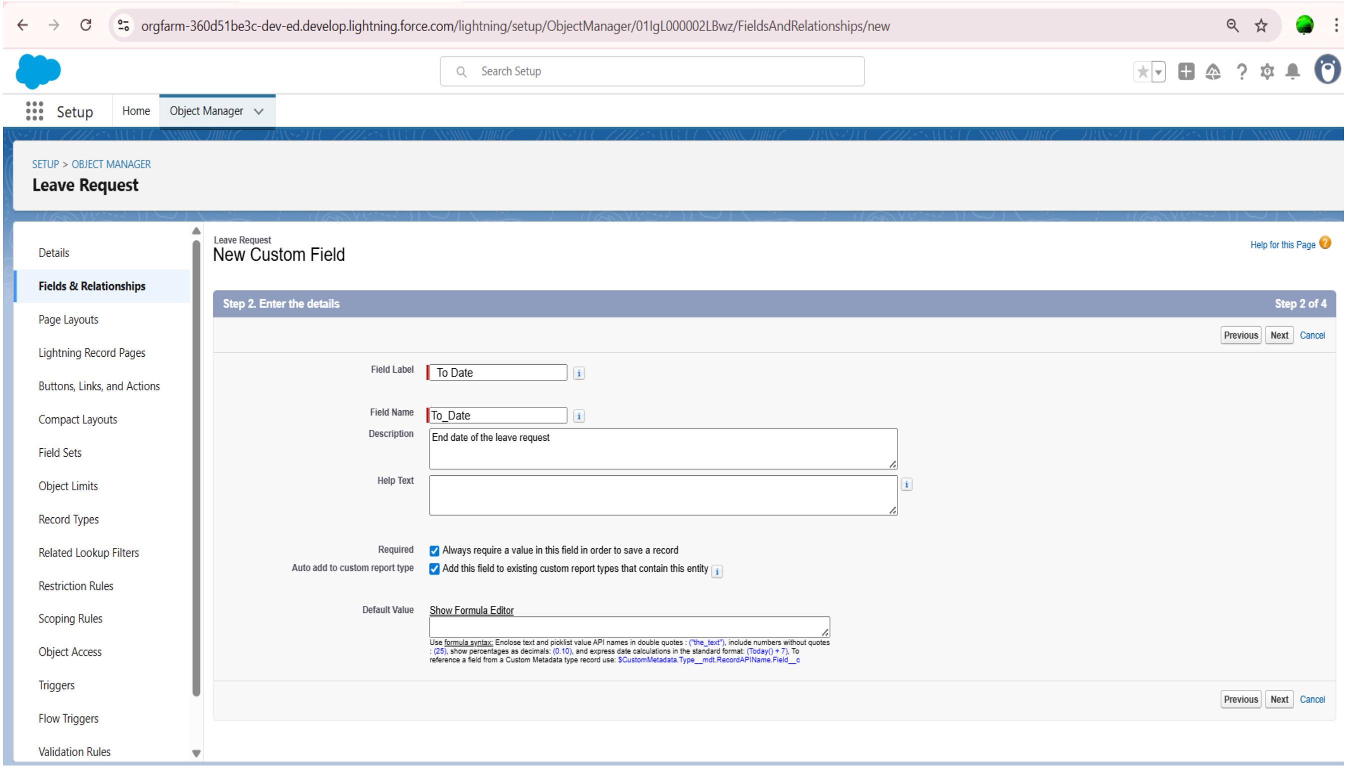
Click Next

3.2 Enter Field Details

Fill out these boxes exactly:

Field Label:

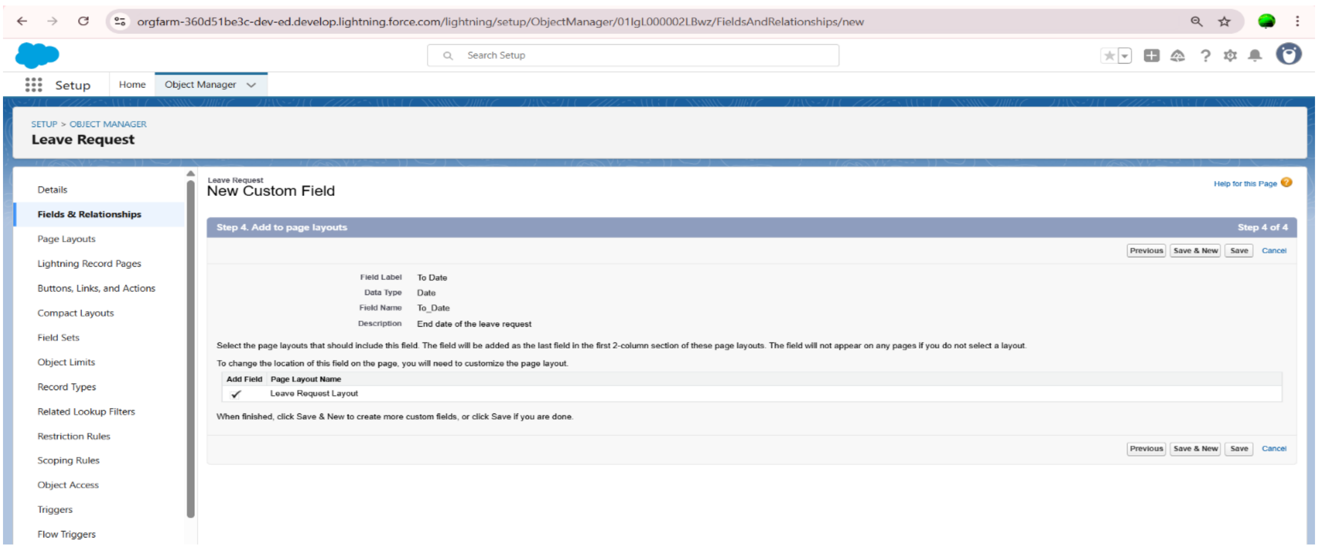
To Date



Field Name:

To_Date

(auto-filled)



Description:

End date of the leave request

(optional)

Required:

☑

Check this box

3.3 Click Next

→

Next

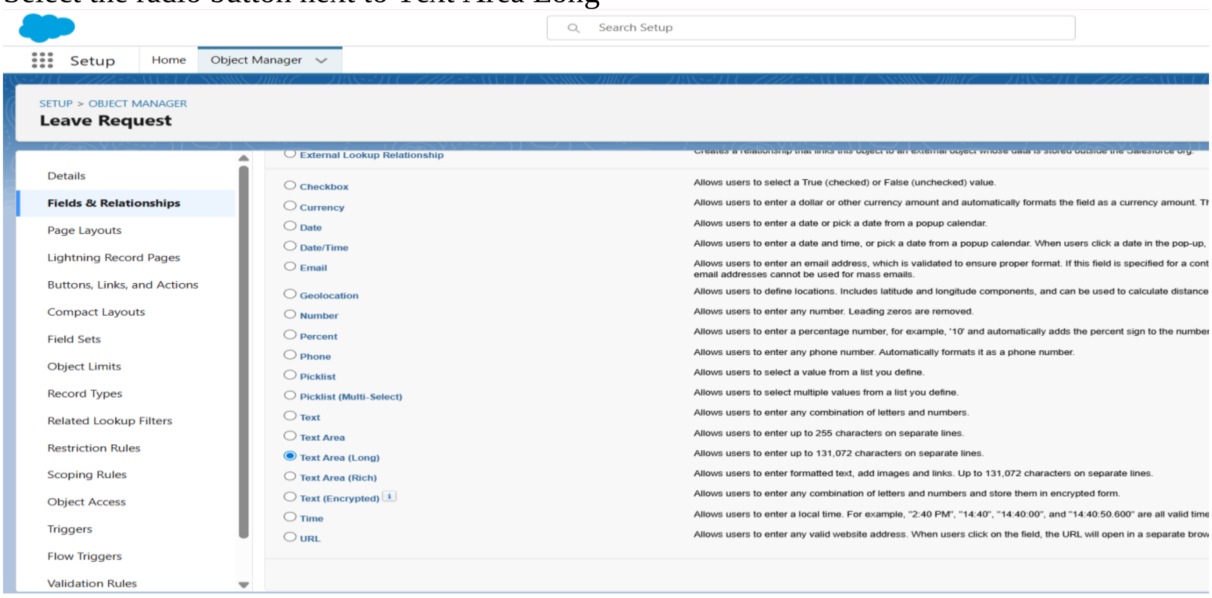
→

Save & New

- ❖ **Step 4 Create Field #3 Reason**

4.1 Choose Data Type

Select the radio button next to Text Area Long



Click Next

4.2 Enter Field Details

Field Label:

Reason

Field Name:

Reason

(auto-filled)

Length:

32,768

(default is fine)

Visible Lines:

3

Description:

Reason for the leave request

(optional)

Required: Leave unchecked (this field is optional)

4.3 Click Next

→

Next

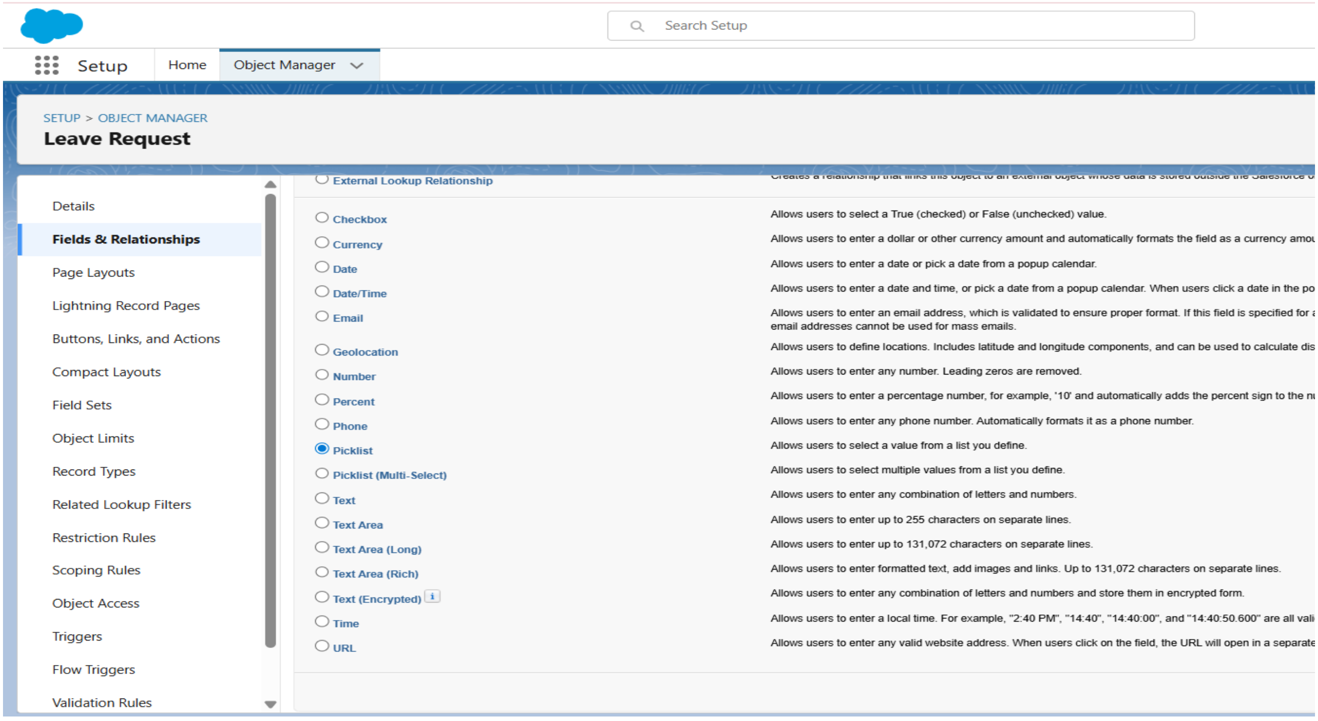
→

Save & New

- **Step 5 Create Field #4 Status Picklist)**

5.1 Choose Data Type

Select the radio button next to Picklist



Click Next

5.2 Enter Field Details

Field Label:

Status

Field Name:

Status

(auto-filled)

5.3 Enter Picklist Values

In the large text box labeled "Enter values, with each value separated by a new line":

Pending

Approved

Rejected

Type exactly as shown above (each on a new line)

5.4 Set Default Value

Use first value as default value:

☑

Check this box

This makes "Pending" the default status

5.5 Set Other Options

Restrict picklist to the values defined in the value set:

☑

Check this

Required: Leave unchecked

5.6 Click Next

→

Next

→

Save & New

- ❖ **Step 6 Create Field #5 User Lookup**

6.1 Choose Data Type

Select the radio button next to Lookup Relationship

Click Next

6.2 Choose Related Object

You'll see a dropdown for "Related To"

Select "User" from the dropdown

Click Next

6.3 Enter Field Details

Field Label:

User

Field Name:

User

(auto-filled)

Description:

Employee who is requesting leave

(optional)

Required: Leave unchecked

Child Relationship Name:

Leave_Requests

(auto-filled)

6.4 Click Next

→

Next

→

Next

→

Save & New

- **Step 7 Create Field #6 Manager Comment**

7.1 Choose Data Type

Select the radio button next to Text Area Long

Click Next

7.2 Enter Field Details

Field Label:

Manager Comment

Field Name:

Manager_Comment

(auto-filled)

Length:

32,768

(default)

Visible Lines:

3

Description:

Manager's comment on the leave request

(optional)

Required: Leave unchecked

7.3 Click Next

→

Next

→

Save (not Save & New this time)

- ❖ **Step 8 Verify All Fields Were Created**

8.1 Check Fields List

You should now be back on the Leave Request object page

Look at Fields & Relationships on the left

You should see your 6 new fields listed:

From_Date__c

To_Date__c

Reason__c

Status__c

User__c

Manager_Comment__c

❖ **Step 9 Test Your Object**

9.1 Go to App Launcher

Click the 9 dots icon (waffle menu) in the top left of Salesforce

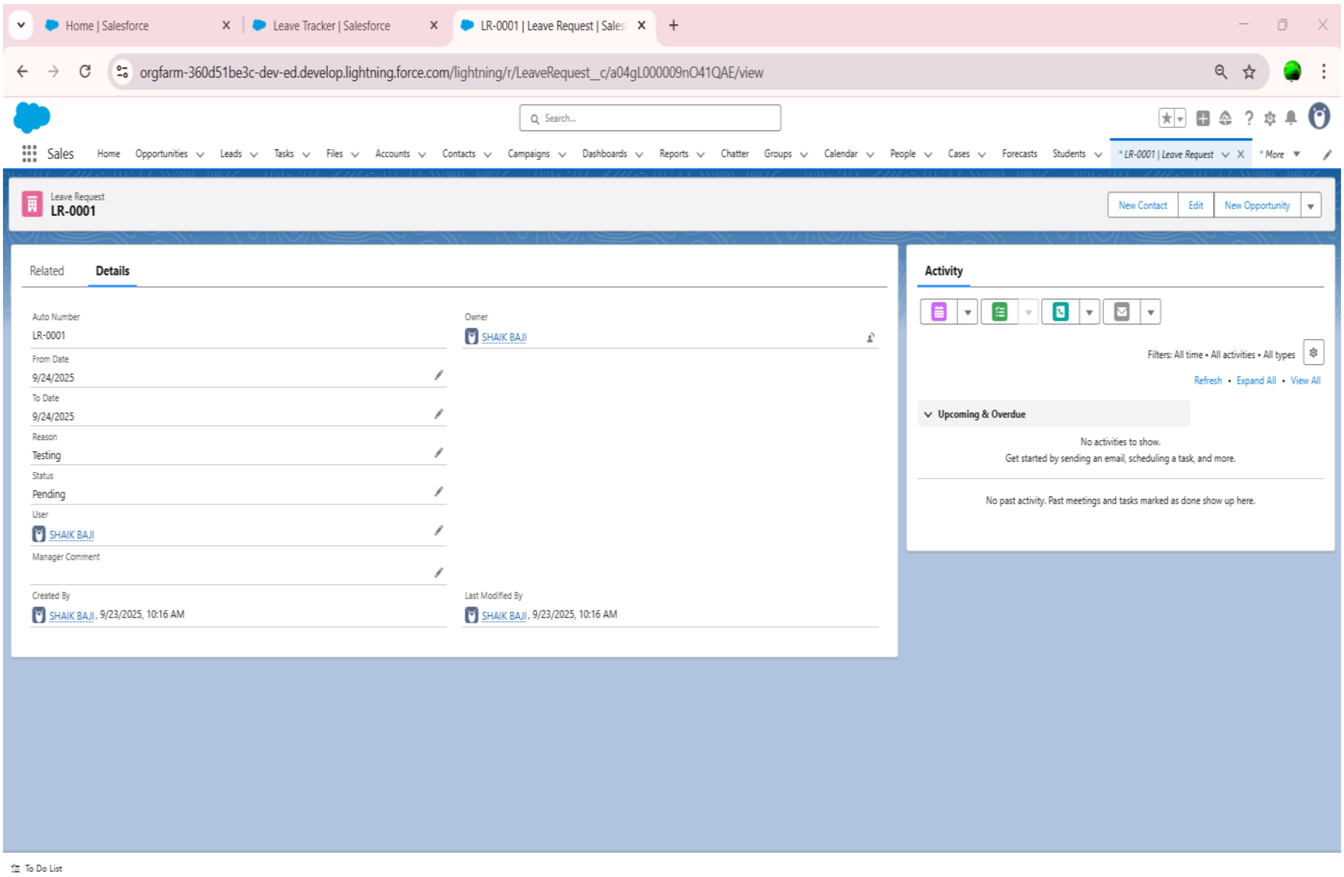
Type "Leave" in the search box

You should see Leave Requests - click it

9.2 Create a Test Record

Click New button

You should see a form with all your fields:



From Date (required)

To Date (required)

Reason

Status (should default to "Pending")

User

Manager Comment

9.3 Fill Out and Save

Fill in the From Date and To Date

Add a reason like "Vacation"

Leave other fields as default

Click Save

9.4 Success Check

You should see your new Leave Request record

It should have an auto-generated name like "LR0001"

Congratulations!

We have successfully completed Phase 2! Your LeaveRequest object now has all the fields needed for the Leave Tracking application.

What We've Accomplished:

- Created 6 custom fields for leave requests
- Set up proper data types and validation
- Configured field security and visibility
- Added fields to page layouts
- Successfully tested creating a leave request

Next Phase:

Phase 3 will involve creating Apex classes to handle the business logic and data operations for your Leave Tracking app.