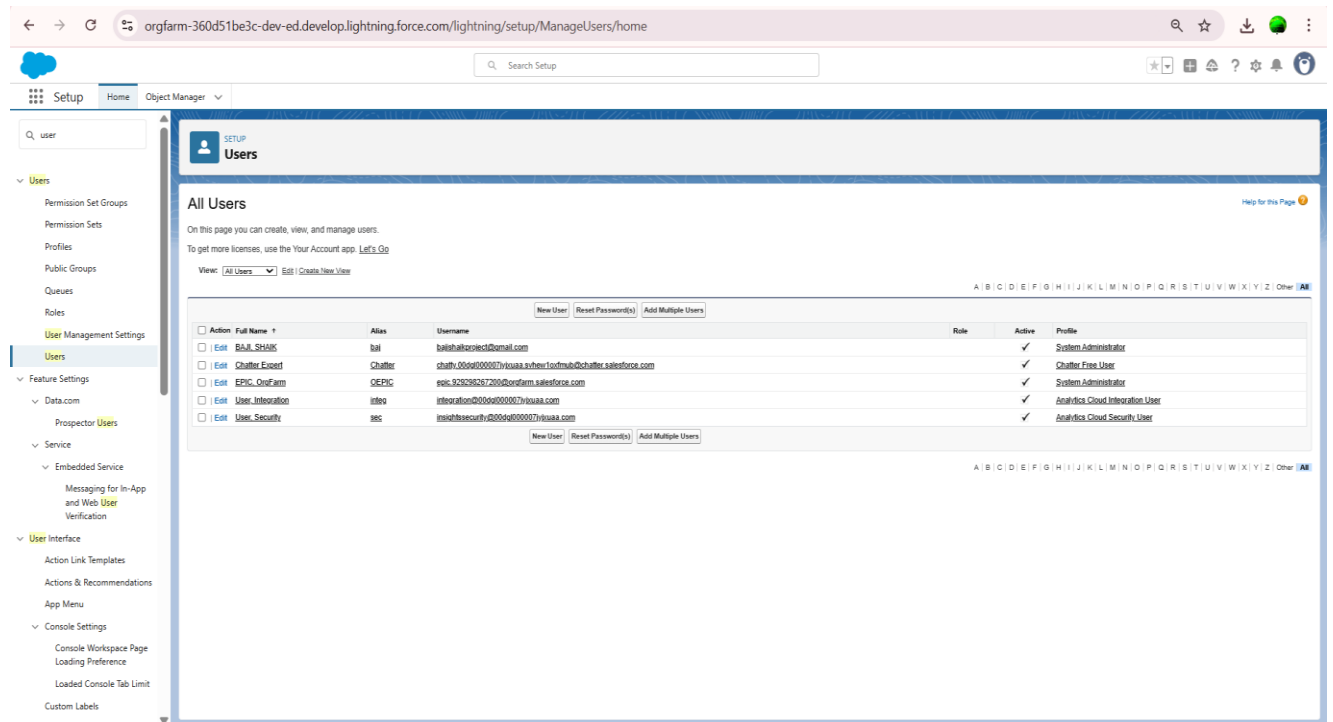


Phase 7: Manager Approval

To approve or reject as a manager, you need a Salesforce user with a “manager” profile or permission set in your dev org. Here’s how to set that up and perform the approval:

Step 1: Create or Identify a Manager User

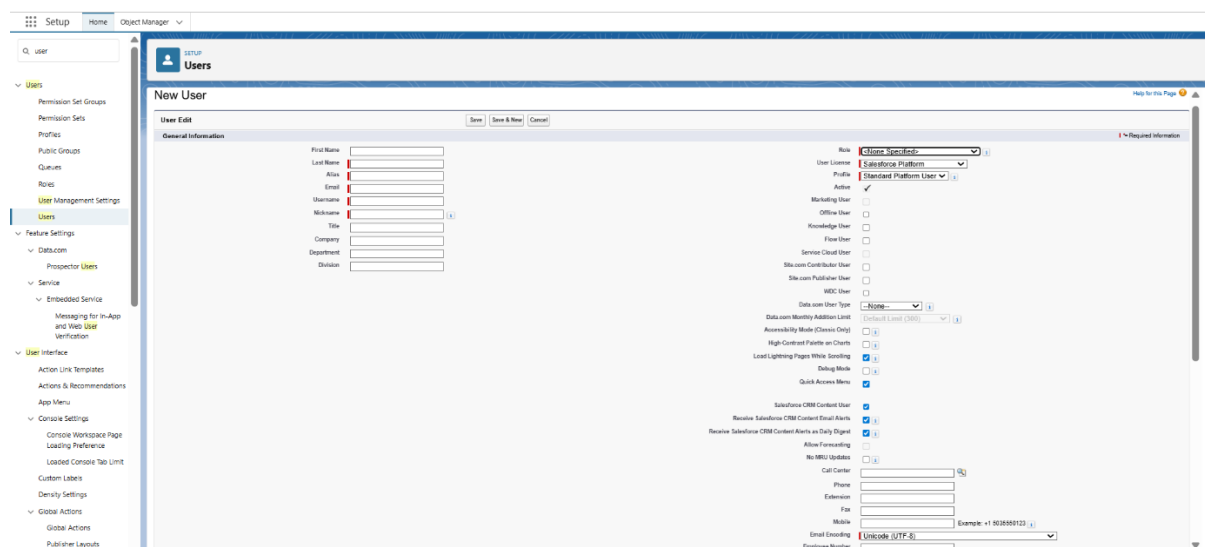
- In Setup, search “Users” and click Users.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with "user" entered and a list of navigation items including Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User Verification, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Console Settings, Console Workspace Page, Loading Preference, Loaded Console Tab Limit, and Custom Labels. The main content area is titled "Users" and displays a table of all users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including System Administrator, Chatter Free User, and Analytics Cloud Integration User. At the bottom of the table, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	BAL SHANK	bal	balshank@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	chatter	chatter.00000000000000000000000000000000@salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC OneTeam	OEPIG	oeig.00000000000000000000000000000000@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	intev	integration.00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	security.00000000000000000000000000000000@salesforce.com		✓	Analytics Cloud Security User

- If you already have a manager user, note their Username. Otherwise click New User to create one:



The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is the same as the previous screenshot. The main content area is titled "New User" and displays a form for creating a new user. The form has a "General Information" section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. There is also a "Role" dropdown menu. The form includes a "Save" button and a "Cancel" button. The form is divided into two columns, with the right column containing additional options and checkboxes for user settings.

- Fill in the required fields (First Name, Last Name, Email, Username).
- For Profile, choose a profile that has permission to update LeaveRequest__c (e.g., System Administrator or a custom “Manager” profile with Edit on LeaveRequest__c).
- Click Save.
- The details I filled are :

SETUP Users

User Edit
OrgFarm EPIC

Save Save & New Cancel

General Information

First Name Orgfarm

Last Name EPIC

Alias OEPIC

Email epic.orgfarm@salesforce.co

Username epic.929298267200@orgfa

Nickname User175324901928767782

Title

Company EPIC Orgfarm

Department

Division

Role Marketing Team

User License Salesforce

Profile System Administrator

Active ☒

Marketing User ☒

Offline User ☒

Knowledge User ☐

Flow User ☐

Service Cloud User ☒

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type -None-

Data.com Monthly Addition Limit 300

Accessibility Mode (Classic Only) ☐

High-Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

Send Apex Warning Emails ☐

Make Setup My Default Landing Page ☒

Quick Access Menu ☒

Development Mode ☐

Show View State in Development Mode ☐

Cache Diagnostics ☐

Salesforce CRM Content User ☒

Step 2:Log in as Manager

You can see in Users section as below:

Users

All Users

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) [Edit](#) [Create New User](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	BAL SHAK	bal	balshak@your.com		✓	System Administrator
Edit	Chatter Expert	Chatter	chatter_009e000007vuaa-nuhev1oofmub@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC_OrgFarm	OEPI	epic.929c298267200@orgfarm.salesforce.com	Marketing Team	✓	System Administrator
Edit	M.Robert	robtor	balshakm@gmail.com	Marketing Team	✓	Custom Marketing Profile
Edit	Sam Robert	robtor	robtor.marcus@your.com	Marketing Team	✓	Custom Sales Profile
Edit	User Integration	info	integration@009v000007vuaa-nuhev1oofmub@chatter.salesforce.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@009v000007vuaa-nuhev1oofmub@chatter.salesforce.com		✓	Analytics Cloud Security User

- From the Users list, find that manager user and click Login (under the Action column) to impersonate them. I considered EPIC. "OrgFarm acts as the manager, responsible for reviewing and either approving or rejecting leave requests."

Edit	EPIC_OrgFarm	OEPI	epic.929c298267200@orgfarm.salesforce.com	Marketing Team	✓	System Administrator
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-You'll be taken into the Lightning Experience as that manager.

Step 3: Navigate to Leave Tracker

- Click the App Launcher (nine-dot waffle) and select Leave Tracker.

-Locate Pending Requests

In the component's data table, find rows where Status is "Pending".

Approve or Reject

-Hover over the desired row; click the Approve button (or Reject).

- A confirmation message appears and the table automatically refreshes.

Verify Status Updates

- Confirm the Status column for that row now shows "Approved" (or "Rejected").

Cloud logo | Search... | Sales | Home | Opportunities | Leads | Tasks | Files | Accounts | Contacts | Campaigns | Dashboards | Reports | Chatter | Groups | Calendar | People | Cases | Forecasts | Students | Leave Requests | Leave Tracker

Leave Request

LR-0005

Related

Details

Auto Number

LR-0005

From Date

9/29/2025

To Date

9/30/2025

Reason

Going outside for eating food.

Status

Pending

User

Manager Comment

Created By

SHAIK BAJI, 9/24/2025, 2:53 AM

Owner

SHAIK BAJI

* From Date

9/29/2025

* To Date

9/30/2025

Reason

Going outside for eating food.

Status

Pending

User

Search People...

Manager Comment

Created By

SHAIK BAJI, 9/24/2025, 2:53 AM

Last Modified By

SHAIK BAJI, 9/24/2025, 2:53 AM

Cancel

Save & New

Save

New Contact

Edit

New Opportunity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Coming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

That completes manager approval using a dev-org user.