Phase 1: Project Setup and Initialization

❖ STEP 1 Create Your FREE Salesforce Developer Account

Step-by-Step Instructions:

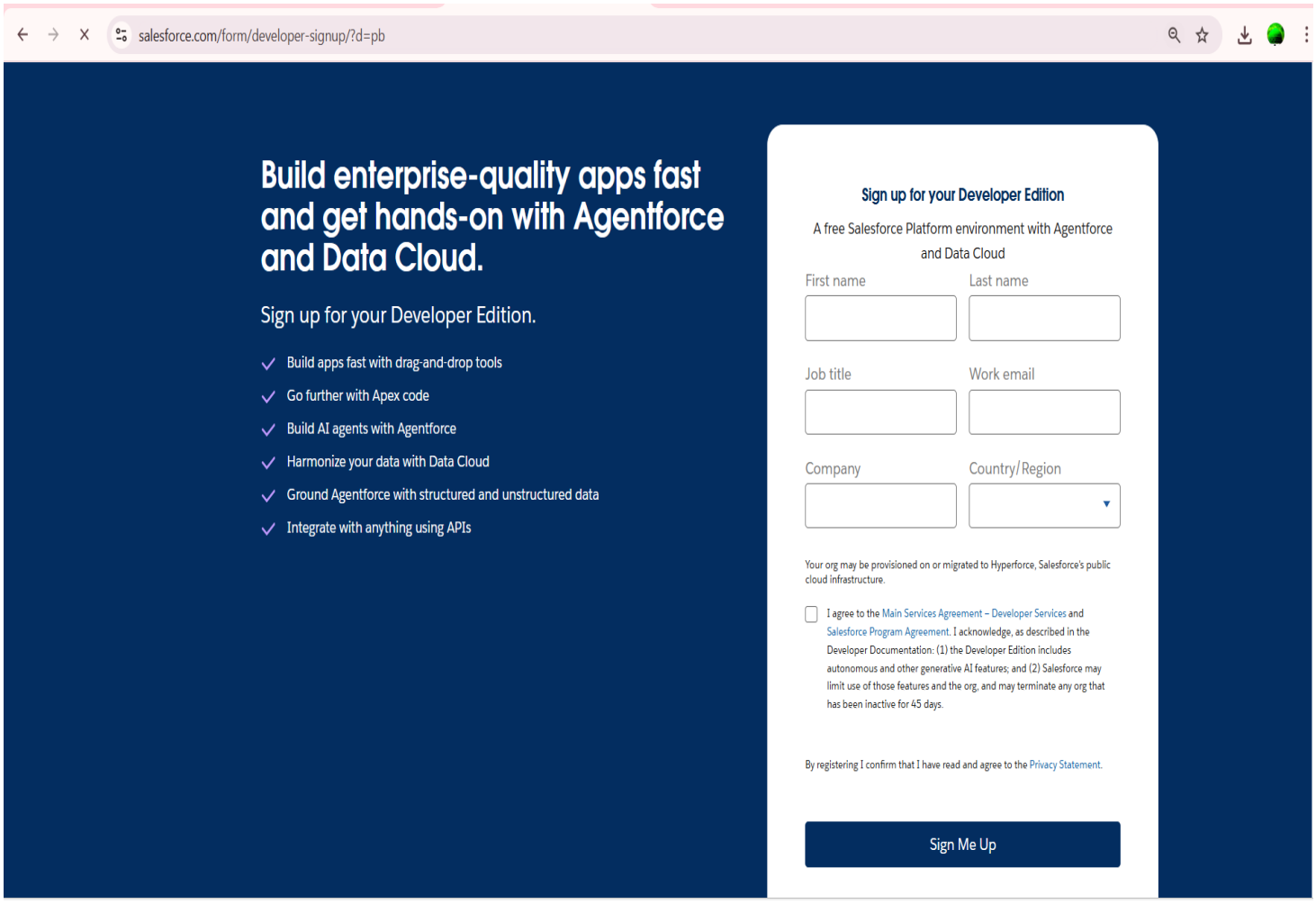
Open your web browser Chrome, Firefox, Safari, Edge - any will work)

Navigate to: https://developer.salesforce.com/signup

Fill out the signup form carefully:

IMPORTANT FIELDS

First Name: Your actual first name



- **Last Name:** Your actual last name
- **Email:** Your real email address (you MUST check this email)

Role: Select "Developer"

- **Company:** Type "Learning" or "Student"

Country: Select your country

- **Postal Code:** Your real postal code
- **Username:** This is CRITICAL! Must be unique worldwide
  Good Examples:
  - yourname.learning2025@gmail.com
  - firstname.lastname.dev@outlook.com
  - yourname.salesforce.practice@yahoo.com

Check the agreement checkbox (this just says you agree to use Salesforce)

Click "Sign Me Up"

IMMEDIATELY check your email - Salesforce sends verification email instantly

Click the verification link in the email (this proves the email belongs to you)

Create your password:

- Must be at least 8 characters
- Include letters, numbers, and symbols

Example: MyLeave2025!

Set up security question - choose something you'll remember

❖ **STEP 2 Install Visual Studio Code Your Code Workshop)**

Step-by-Step Instructions:

For Windows Users:

Go to: https://code.visualstudio.com/

Click the big blue button: "Download for Windows"

Once downloaded, run the installer:

- Find the file in your Downloads folder (usually ends in .exe)
- Double-click to run
- Click "I accept the agreement"
- Click "Next" through all screens
- **IMPORTANT** Check "Add to PATH" if you see that option
- Click "Install"
- Wait for installation to complete
- Click "Finish"

For Mac Users:

Go to: https://code.visualstudio.com/

Click: "Download for macOS"

Install the application:

- Open the downloaded .dmg file
- Drag VS Code icon to Applications folder
- Open Applications and launch VS Code
- If Mac asks about opening downloaded app, click "Open"

❖ **STEP 3 Install Salesforce CLI The Bridge Between Your Computer and Salesforce)**

What This Is:

CLI stands for "Command Line Interface."

Why We Need It:

- It's the bridge between your computer and Salesforce
- Allows VS Code to upload/download code to/from Salesforce •

Enables project creation and management

- Required for all professional Salesforce development

For Windows:

Go to: https://developer.salesforce.com/tools/sfdxcli

Click: "Download for Windows"

Run the installer:

- Find the downloaded file (usually sfdx-windows-x64.exe) ∘

Double-click to run

- Click "Next" on welcome screen ∘

Accept license agreement

- Keep default installation path ∘

Click "Install"

- Wait for installation (may take 5 10 minutes) ∘

Click "Finish"

For Mac:

Go to: https://developer.salesforce.com/tools/sfdxcli

Click: "Download for macOS"

Install:

- Double-click the downloaded .pkgfile ∘

Follow installation wizard

- Enter Mac password when prompted

Click "Install Software"

Verify Installation:

Open Terminal/Command Prompt:

- **Windows:** Press Windows key + R, type cmd, press Enter
- **Mac:** Press Cmd + Space, type terminal, press Enter

Type this command: sf --versionand press Enter

You should see: Something like @salesforce/cli/2.15.9

❖ **STEP 4 Install Salesforce Extensions for VS Code**

Step-by-Step Instructions:

Open VS Code (if not already open)

Look at the left sidebar - you'll see several icons

Click the Extensions icon (looks like four squares with one separated)

In the search box at the top, type: Salesforce Extension Pack

Look for: "Salesforce Extension Pack Official)" by Salesforce

It should be the first result

- Has the Salesforce logo
- Says "Official" in the description

Click the blue "Install" button

Wait for installation (takes 2 3 minutes)

You'll see a progress indicator

- Multiple extensions will be installed automatically

❖ **STEP 5 Create Your Salesforce Project**

Step-by-Step Instructions:

In VS Code, open the Command Palette:

Windows: Press `Ctrl + Shift + P`

- **Mac:** Press `Cmd + Shift + P`
- You'll see a search box appear at the top

Type: `SFDX: Create Project`

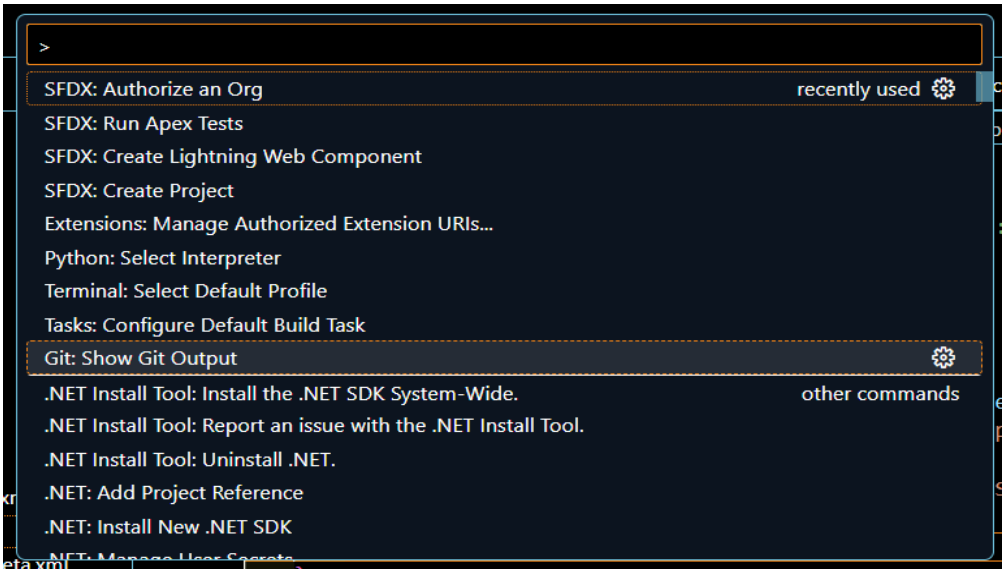
Select: "SFDX Create Project" from the dropdown

Choose: "Standard" template (this gives you all the basic folders you need)

Enter project name: `LeaveTrackerApp`

- Must be exactly this name (no spaces, capital letters matter)

This matches the tutorial and GitHub repository



Choose location:

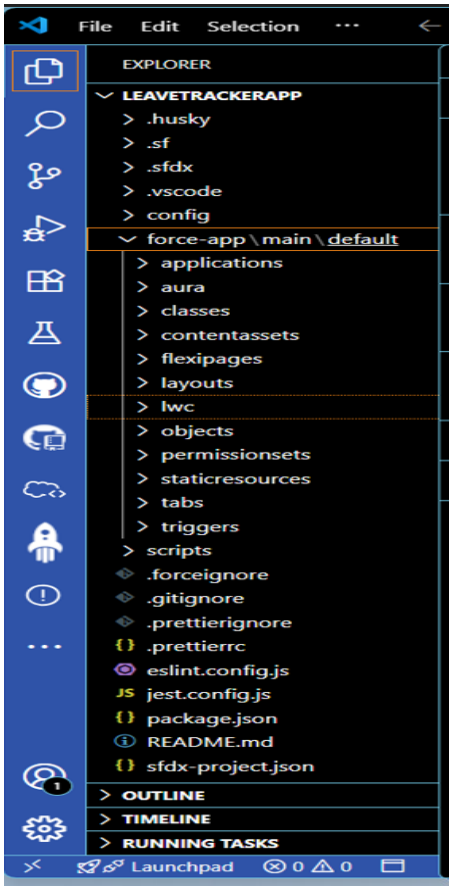
- Pick somewhere easy to find Desktop is fine for learning)
- Click "Create Project"

VS Code will reload and show your new project

What You'll See:

Your project structure will look like:

```
LeaveTrackerApp/
├── force-app/
│   └── main/
│       └── default/
│           ├── lwc/ (Lightning Web Components go here)
│           ├── classes/ (Apex code goes here)
│           └── objects/ (Custom objects go here)
├── config/
├── scripts/
├── .sfdx/
├── sfdx-project.json
└── README.md
```



❖ **STEP 6 Connect Your Project to Your Salesforce Org**

Step-by-Step Instructions:

In VS Code, open the Command Palette: ○

Windows: Press Ctrl + Shift + P

○ **Mac:** Press Cmd + Shift + P

Type: SFDX: Authorize an Org

Select: "SFDX Authorize an Org" from the dropdown

Choose: "Production"

- Even though you have a Developer Org, select "Production"
- This is normal and correct

Press Enter to accept the default login URL

A browser window will open automatically

- This is expected and normal
- Don't close this window

Log in to Salesforce:

- Use the username and password you created in Step 1
- This is your Developer Org credentials

Click "Allow" when Salesforce asks for permissions

- This lets VS Code access your org safely

You should see "Successfully authorized" in the browser

Close the browser tab and return to VS Code

When VS Code asks for an alias, type: LiveProject

- This is just a nickname for your org

❖ **STEP 7 Test Your Connection**

Step-by-Step Instructions:

In VS Code, right-click on: force-app/main/default

Select: "SFDX Create Lightning Web Component"

Enter name: testComponent

Press Enter to accept the default location

You should see new files created in folder lwc/testComponent/

Right-click on the testComponent**folder**

Select: "SFDX Deploy Source to Org"

Wait for the deployment to complete

- You'll see progress messages at the bottom
- Should see "Deploy Succeeded" in green

If Deploy Fails:

- Check the bottom status bar - make sure you're connected to your org Try
- authorizing your org again Step 6
- Restart VS Code and try again

CONGRATULATIONS! PHASE 1 COMPLETE!

We have Accomplished:

- **FREE Salesforce Developer Org** - Your personal Salesforce environment
- **Professional Development Tools** - VS Code with Salesforce extensions
- **Secure Connection** - Your computer can now talk to Salesforce
- **Project Structure** - Ready for building the Leave Tracking app
- **Successful Test** - Everything is verified working

Next Steps:

You're now ready for **Phase 2 Object Creation**, where you'll:

- Create the LeaveRequest custom object in Salesforce
- Add fields like From Date, To Date, Status, etc.
- Set up security and permissions
- Learn how Salesforce stores data