

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

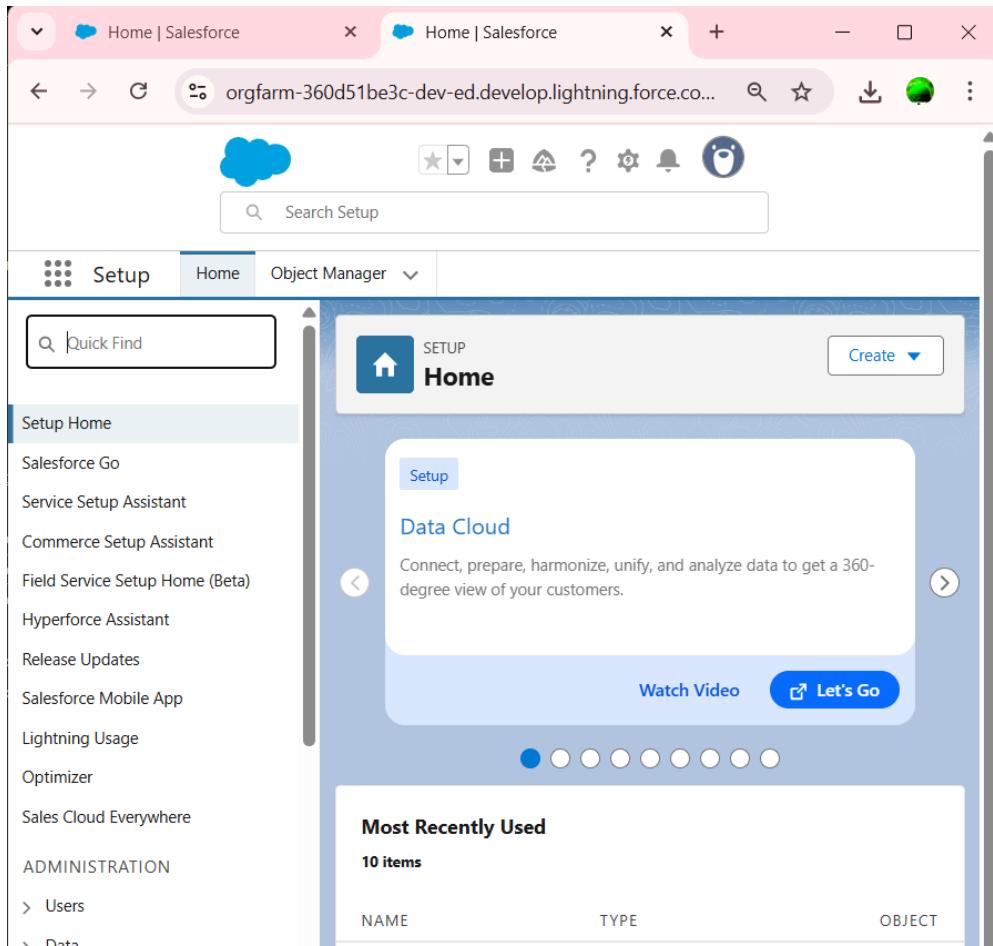
1. Log into your Salesforce Developer Org in your web browser.
2. Create a custom object named `LeaveRequest` (API name: `LeaveRequest__c`):
 - Open `Setup` (gear icon top right).
 - In Quick Find box, type `Object Manager` and open it.
 - Click `Create > Custom Object`.
 - Fill in:
 - Label: `Leave 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)

The screenshot shows the Salesforce Object Manager interface. At the top, there are two tabs: 'Home | Salesforce' and 'Object Manager | Salesforce'. The URL in the address bar is 'orgfarm-360d51be3c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. Below the tabs, there's a search bar with the placeholder 'Search Setup' and a 'Search' icon. The main content area is titled 'Object Manager' with a 'SETUP' icon. It displays a table with one item: 'Leave Request' (Label), 'LeaveRequest_c' (API Name), 'Custom Object' (Type), and '1 Items. Sorted by Label' (Description). The last modified date is '9/23/2025' and the status is 'Deployed' with a checkmark icon. There are buttons for 'Schema Builder' and 'Create' at the top right of the table.

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

The screenshot shows the 'Leave Request' object page in the Salesforce setup. The top navigation bar includes 'Home | Salesforce' and 'Leave Request | Salesforce'. The URL is 'orgfarm-360d51be3c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lg...'. The page title is 'Leave Request' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various object settings like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' with a 'Quick Find' search bar and a table showing existing fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Auto Number (Name, Auto Number), Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), and Owner (OwnerId, Lookup(User,Group)). There are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' at the top of the table.

2.2 Choose Data Type

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

The screenshot shows the Salesforce Setup interface for the 'Leave Request' object. The left sidebar shows various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Leave Request' and 'New Custom Field'. Step 3 of 4 is selected, titled 'Establish field-level security'. The field details are: Field Label: 'From Date', Data Type: 'Date', Field Name: 'From_Date', Description: 'Start date of the leave request'. Below this, a table lists profiles with checkboxes for 'Visible' and 'Read-Only'. Most profiles have both checkboxes checked.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	□
Analytics Cloud Security User	✓	□
Anypoint Integration	✓	□
Authenticated Website	✓	□
Authenticated Website	✓	□
B2B Reordering Portal Buyer Profile	✓	□
Contact Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□
Custom: Sales Profile	✓	□
Custom: Support Profile	✓	□
Customer Community Login User	✓	□
Customer Community Plus Login User	✓	□
Customer Community Plus User	✓	□
Customer Community User	✓	□
Customer Portal Manager Custom	✓	□
Customer Portal Manager Standard	✓	□
Einstein Agent User	✓	□

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Home | Salesforce', 'Leave Request | Salesforce', and a search bar. Below the navigation is a toolbar with various icons. The main area is titled 'Leave Request' under 'OBJECT MANAGER'. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The current tab is 'Fields & Relationships'. The main content area is titled 'Leave Request New Custom Field' and shows 'Step 4. Add to page layouts'. It details the field's properties: Field Label 'From Date', Data Type 'Date', Field Name 'From_Date', and Description 'Start date of the leave request'. It also shows the 'Leave Request Layout' selected for addition. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

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

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories such as Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Leave Request New Custom Field' and 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. A 'Data Type' section contains several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary' (with a note about it being read-only), 'Lookup Relationship', 'Master-Detail Relationship' (with a note about it being a parent-child relationship), 'External Lookup Relationship' (with a note about it linking to an external object), 'Checkbox', 'Currency', 'Date' (which is selected), 'DateTime', 'Email', 'Geolocation', 'Number', and 'Percent'. Each option has a detailed description below it.

Select the radio button next to Date

Click Next

3.2 Enter Field Details

Fill out these boxes exactly:

Field Label:

To Date

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The page title is "Leave Request New Custom Field". The "Fields & Relationships" tab is selected in the sidebar. The main form is titled "Step 2. Enter the details" and "Step 2 of 4". The "Field Label" is set to "To Date". The "Field Name" is set to "To_Date". The "Description" is "End date of the leave request". The "Help Text" is empty. Under "Required", the checkbox "Always require a value in this field in order to save a record" is checked. Under "Auto add to custom report type", the checkbox "Add this field to existing custom report types that contain this entity" is checked. The "Default Value" section contains a link to "Show Formula Editor" with instructions for formula syntax. Navigation buttons at the bottom right include "Previous", "Next", and "Cancel".

Field Name:

To_Date

(auto-filled)

The screenshot shows the Salesforce Object Manager interface for adding a field to a page layout. The page title is "Leave Request New Custom Field". The "Fields & Relationships" tab is selected in the sidebar. The main form is titled "Step 4. Add to page layouts" and "Step 4 of 4". The "Field Label" is "To Date", "Data Type" is "Date", and "Field Name" is "To_Date". The "Description" is "End date of the leave request". A note states: "Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout." Below this, a table lists "Add Field" and "Page Layout Name" with a checked checkbox next to "Leave Request Layout". A note below says: "When finished, click Save & New to create more custom fields, or click Save if you are done." Navigation buttons at the bottom right include "Previous", "Save & New", "Save", and "Cancel".

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

The screenshot shows the Salesforce Setup interface with the following details:

- Setup Tab:** The user is in the Object Manager section of the Setup tab.
- Object Manager:** Under the 'Leave Request' object.
- Fields & Relationships:** The current tab.
- Field Name:** Leave Request
- Data Type Selection:** The 'Text Area (Long)' option is selected (radio button is checked). Other options shown include Checkbox, Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Rich), Text (Encrypted), Time, and URL.
- Help Text:** Descriptions for each data type are provided, such as "Allows users to enter up to 255 characters on separate lines." and "Allows users to enter up to 131,072 characters on separate lines."

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

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce database.

- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (A)
- Time
- URL

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

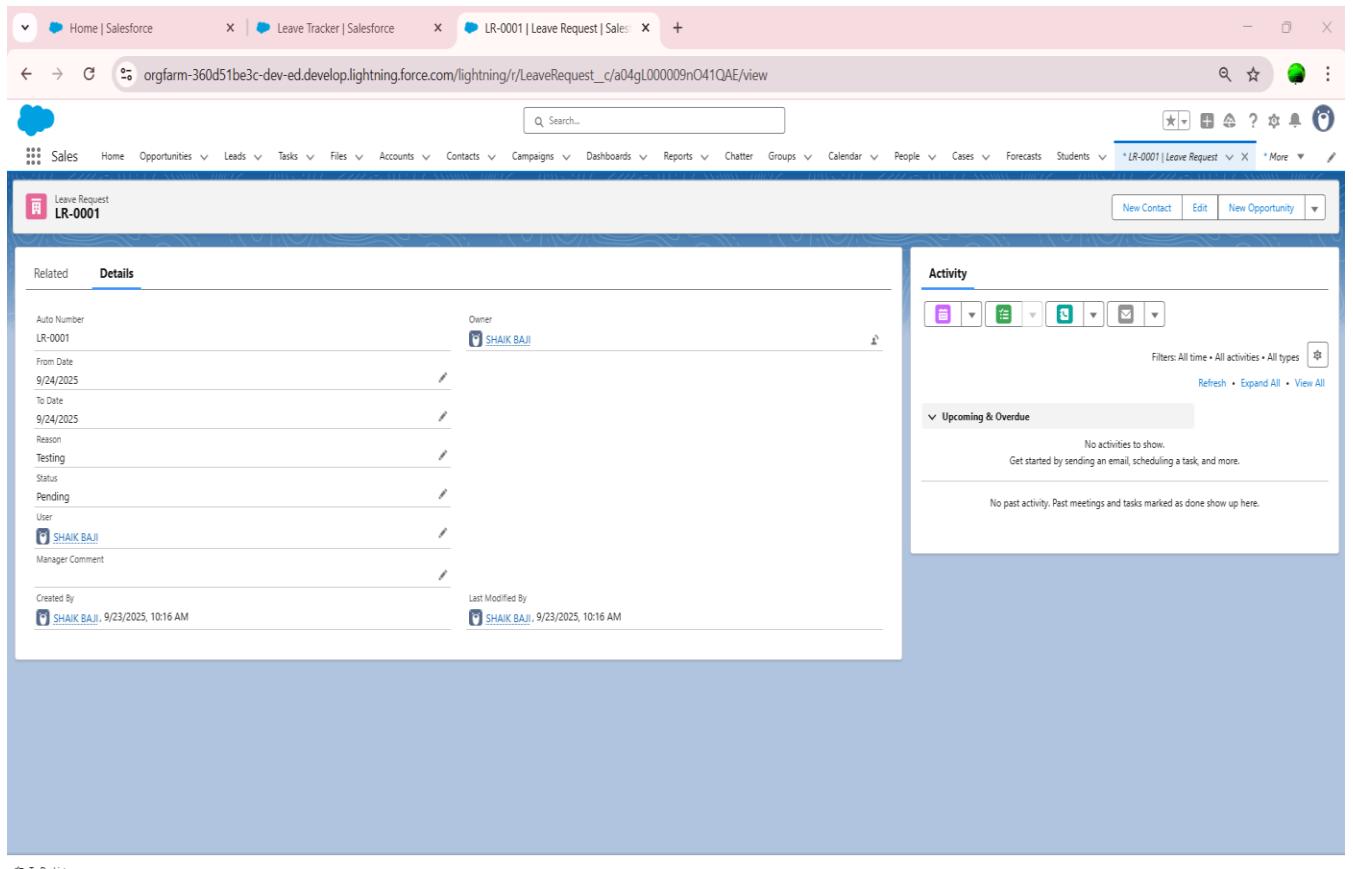
Type "Leave" in the search box

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.