

# Leave Management System

## Final Project Report

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## Abstract

This project focuses on the development of a **Leave Management System** using Salesforce. The system enables employees to submit leave requests digitally and allows managers to approve or reject them through a structured approval workflow. The system automates notifications, maintains transparency, and reduces manual intervention in HR processes.

## Phase 1: Problem Definition & Motivation

### Existing Challenges

Traditional leave management processes are:

- Manual and time-consuming
- Lacking transparency
- Prone to delays in approval
- Difficult to track historically

### Objective

To build an **automated, digital, and transparent Leave Approval System** that:

- Allows employees to request leave through Salesforce

- Routes requests to assigned approvers
- Sends automatic approval/rejection notifications
- Maintains clear leave history records

## Advantages

Improvement	Benefit
Automation	Eliminates follow-up and manual communication
Transparency	Employees can track request status anytime
Standardization	Approval process becomes uniform and monitored

## Phase 2: Environment Setup & User Roles

- Salesforce **Developer Edition** was used for application setup.
- Two user roles identified:
  - **Employee (Leave Requestor)**
  - **Manager/Approver (Reviewer)**
- Standard Salesforce Profiles and Permissions used.
- A **Custom Tab** was added for easy navigation to Leave Request records.

## Phase 3: Data Model & Object Design

### Custom Object: **Leave\_Request\_\_c**

Field Name	Data Type	Description
Leave Request Number	Auto Number	Unique leave record identifier
Employee Name	Lookup(User)	Request raised by which employee

Approver	Lookup(User)	Manager / authority who approves
Start Date	Date	Leave start date
End Date	Date	Leave end date
Leave Type	Picklist (Sick, Casual, Earned, Emergency)	Type of leave requested
Reason	Long Text Area	Reason for leave
Status	Picklist (Submitted, Approved, Rejected)	System-updated workflow status

#### **Relationships Involved:**

User ↔ Leave Request (Lookup)

Manager ↔ Leave Request (Lookup)

## **Phase 4: Workflow Automation**

### **Approval Process: "Leave Request Approval"**

Stage	Action
Entry Condition	Status = Submitted
Assignee	Approver selected in request
On Approval	Status → Approved + Send Approved Email
On Rejection	Status → Rejected + Send Rejection Email

#### **Email Alerts:**

Template Name	Trigger	Recipient
Leave Approved Notification	Manager approves	Employee
Leave Rejected Notification	Manager rejects	Employee

## **Phase 5: User Interface (UI) Development**

A **Lightning App Page / Dashboard** was created including:

- List View of all Leave Requests
- Status visibility (Submitted, Approved, Rejected)
- Easy navigation for HR / Manager

Also added:

- **Leave Requests Tab** to App Launcher for easy access.

## Phase 6: Testing

Test Case	Input	Expected Output	Status
Submit Leave Request	Employee fills form	Status becomes “Submitted”	✓ Passed
Approve Request	Approver Approves	Status → Approved + Email Sent	✓ Passed
Reject Request	Approver Rejects	Status → Rejected + Email Sent	✓ Passed
Missing Approver	Submit without Approver	System prevents submission	✓ Passed

## Phase 7: Security Considerations

- Requestor can only view their own requests.
- Approver role controls approval rights.
- Approval actions are logged under **Approval History** for audit and transparency.

## Phase 8: Reporting & Dashboard (Future Enhancements)

Possible extensions:

- Leave balance tracking

- Monthly leave report charts
- Approver workload analytics
- Employee Self-Service Portal Integration

## Phase 9: System Workflow Demonstration

1. Employee opens **Leave Request** tab.
2. Fills leave information and selects Approver.
3. Clicks **Submit for Approval**.
4. Approver reviews the request in **Approval History** screen.
5. Approver selects **Approve** or **Reject**.
6. Status updates automatically.
7. Corresponding email alert is delivered.
8. Dashboard updates for real-time visibility.

## Conclusion

The Leave Management System successfully **automates the approval process**, reduces manual HR effort, improves **clarity**, ensures **faster decisions**, and creates a **transparent workflow environment** within Salesforce. This project demonstrates practical understanding of Salesforce Custom Objects, Approval Processes, Email Alerts, Lightning App UI, and User Management.

# Screenshots

SETUP > OBJECT MANAGER

Leave Request

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

11 Items. Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Approver	Approver__c	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name__c	Lookup(User)		✓
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave Request Number	Name	Auto Number		✓
Leave Type	Leave_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Reason	Reason__c	Long Text Area(256)		
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		

Developer Edition

Welcome

Leave Requests

Leave Management Dashboard

Leave Requests

All

New Import Change Owner Printable View Assign Label

2 Items • Sorted by Leave Request Number • Filtered by All leave requests • Updated a few seconds ago

Leave Request Number

1 LR-0001

2 LR-0002

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/7/2025, 7:07 AM	Rejected	bhargav reddy
Approval Request Submitted	11/7/2025, 7:03 AM	Submitted	bhargav reddy

View All

SetupHomeObject Manager

Q email tem

Classic Email TemplatesLightning Email Templates

Didn't find what you're looking for? Try using Global Search.

SETUP

Classic Email Templates

Text Email Template

Leave Requested Notification

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Leave Requested Notification

Template Unique Name

Leave\_Rejected\_Notification

Encoding

Unicode (UTF-8)

Author

bhargav.reddi (Chatter)

Description

Sent when leave is rejected

Created By

bhargav.reddi 11/7/2025, 5:17 AM

Available For Use

✓

Last Used Date

Times Used

Modified By

bhargav.reddi 11/7/2025, 5:26 AM

Email Template

Send Text and Verify Merge Fields

Subject Your Leave Request Has Been Rejected

Plain Text Preview

Hello {!Leave\_Request\_\_c.Employee\_Name\_\_c},  
Your leave request from {!Leave\_Request\_\_c.Start\_Date\_\_c} to {!Leave\_Request\_\_c.End\_Date\_\_c} has been rejected.  
Please contact your approver for details.  
Regards,  
HR Team

Leave Request

LR-0001

RelatedDetails

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/7/2025, 6:53 AM	Approved	bhargav.reddi
Approval Request Submitted	11/7/2025, 6:45 AM	Submitted	bhargav.reddi

View All

Developer EditionWelcomeLeave Requests

Q Search...

Leave Request

LR-0001

RelatedDetails

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/7/2025, 6:53 AM	Approved	bhargav.reddi
Approval Request Submitted	11/7/2025, 6:45 AM	Submitted	bhargav.reddi

View All

Activity

New ContactNew OpportunityNew Case

New Lead

Sharing

Change Owner

Sharing Hierarchy

Edit Labels

Delete

Clone

Edit

Printable View

Filters: All time • All activ

Refresh

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, a

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

Submit for Approval