Salesforce-CRM-Leave-Management-App

Project Implementation Phases Documentation

Phase 1: Problem Understanding & Industry Analysis

Problem Statement

Traditional methods of managing employee leave, such as spreadsheets or email-based processes, are often inefficient, prone to error, and lack transparency. This can lead to administrative overhead for HR departments and a poor experience for employees. There is a clear need for a unified, secure, and automated system that provides real-time visibility and a seamless workflow for all stakeholders.

This initial phase is about defining the project's scope and goals.

- Requirement Gathering: This involves collecting all the business needs and desired features for the Leave Management App.
- Stakeholder Analysis: Identify all the individuals or groups who will be affected by the project, such as employees, managers, and HR staff.
- Business Process Mapping: Document the current process for managing leave requests, identifying any pain points or inefficiencies that the new app should address.
- Industry-specific Use Case Analysis: Investigate how other companies in your industry handle leave management.
- AppExchange Exploration: Search for existing leave management apps on the Salesforce AppExchange that could be used as a starting point or for inspiration.

Phase 2: Org Setup & Configuration

This phase focuses on setting up the Salesforce environment for the project.

- Company Profile Setup: Configure your company's information in Salesforce.
- User Setup & Licenses: Create user accounts for everyone who will use the app and assign them the correct licenses.
- Profiles, Roles, & Permission Sets: Define the security and access levels for different users (e.g., distinguishing between an employee and a manager).
- Dev Org Setup & Sandbox Usage: Set up a development environment and a sandbox for testing and deployment.
