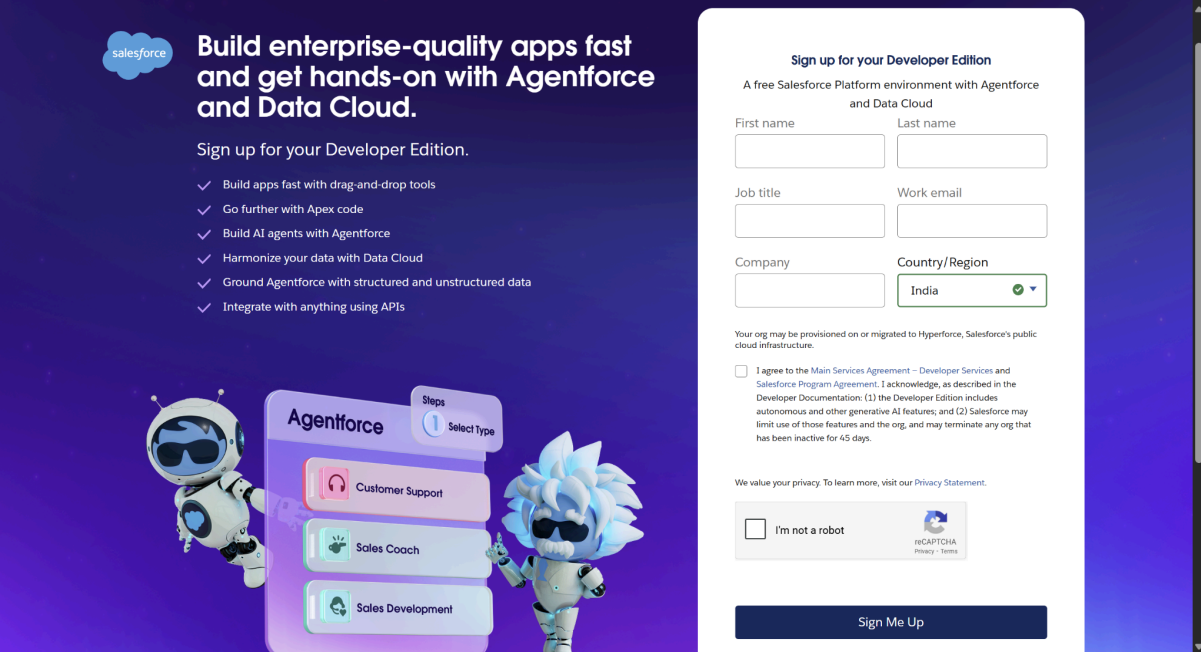


Phase 2 : Org Setup & Configuration for Leave Tracking App

1. Org Preparation

- Spin up a **Developer Edition / Sandbox / Trailhead Playground**.
- Enable necessary features:
 - **Approvals**
 - **Reports & Dashboards**
 - **Email-to-User Notifications**
 - **Chatter**



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Agentforce

Steps

- 1 Select Type
- Customer Support
- Sales Coach
- Sales Development

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First name Last name

Job title Work email

Company Country/Region

India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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2. Custom Objects & Fields

Create the objects needed to track leave requests and balances.

Objects

1. Leave Request

- Fields:
 - Employee (Lookup → User/Employee)
 - Leave Type (Picklist: Sick, Casual, Earned, etc.)
 - Start Date (Date)
 - End Date (Date)
 - Total Days (Formula)

- Status (Picklist: Draft, Submitted, Approved, Rejected, Cancelled)
- Reason (Long Text Area)

SETUP > OBJECT MANAGER
Leave Request

Details Fields & Relationships 10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
From Date	From_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave Request Id	Name	Auto Number		✓
Manager Comment	Manager_Comment__c	Text Area(255)		
Owner	OwnerId	Lookup(User,Group)		✓
Reason	Reason__c	Text Area(255)		
Status	Status__c	Picklist		
To Date	To_Date__c	Date		
User	User__c	Lookup(User)		✓

3. Relationships

- **User ↔ Leave Request:** Lookup (many leave requests per user).
- **User ↔ Leave Balance:** Lookup (one record per leave type).
- **Leave Request ↔ Leave Balance:** Lookup (optional, for validation).

4. Automation

Validation Rules

- End Date \geq Start Date.
- Total Days \leq Available Balance.

Flows

- **Submit Leave Flow:**
 - Auto-calculate total days.
 - Check leave balance.
 - Update balance on approval.
- **Approval Process:**
 - Manager approves/rejects.

- Notification sent to employee.

Record-Triggered Flows

- On leave approval → Send Approval Email.
- On rejection → Send Rejected Email.

5. Security & Access

- **Profiles / Permission Sets**
 - Employee: Create/View own Leave Requests, View balances.
 - Manager: Approve/Reject team requests.

The screenshot shows the Salesforce Setup interface for the 'System Administrator' profile. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays the profile details and a list of page layouts. The profile is named 'System Administrator' and has a 'Salesforce' user license. It was created by 'salesforce.com, Inc.' on 9/9/2025 at 1:13 AM and was last modified by 'Vargala NagaOjiva' on 9/23/2025 at 7:17 AM. The page layouts section shows a grid of layouts assigned to the profile, including 'Global Layout', 'Home Page Layout', 'Account Layout', and various object layouts like 'Opportunity Layout', 'Order Layout', and 'Payment Layout'.

● Sharing Rules

- Leave Requests visible only to employee, manager, and HR.

6. UI Configuration

● Lightning App Builder

- Custom **Leave Management App** with navigation tabs:
 - Leave Requests
 - Leave Balances
 - Reports & Dashboards

- Approvals

- **Record Pages**

- Employee-friendly leave request form.
- Manager view with team's availability panel.

7. Reports & Dashboards

- Reports:

- Leave Requests by Employee.
- Leave Balances Remaining.
- Approved vs Rejected Leaves.

- Dashboard:

- HR Overview (Total Leaves Taken, Team Availability).

8. Testing & Deployment

- Create sample users (Employee, Manager, HR).
- Test leave request submission, approval workflow, and balance deduction.
- Move to UAT → Production.