Phase 2 : Org Setup & Configuration for Leave Management App

1. Org Preparation

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

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)
2. **Leave Balance**
   - Fields:
     - Employee (Lookup → User/Employee)
     - Leave Type (Picklist)
     - Available Balance (Number)
     - Taken (Number)
     - Remaining Balance (Formula)

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 ≥ Start Date.
- Total Days ≤ 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 → Deduct from Leave Balance.
- On rejection → Leave Balance remains unchanged.

5. Security & Access

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

- **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.