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**

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.