

Phase 2: Org Setup & Configuration

1. Introduction

Once the problem is defined, the next step is to set up the Salesforce Org and configure the basic company-level settings. Proper setup ensures that the system reflects real organizational needs such as fiscal year tracking, time zones, business hours, users, and roles. These configurations provide a foundation for the Leave Management System and define how employees and managers will interact within Salesforce.

2. Org Creation

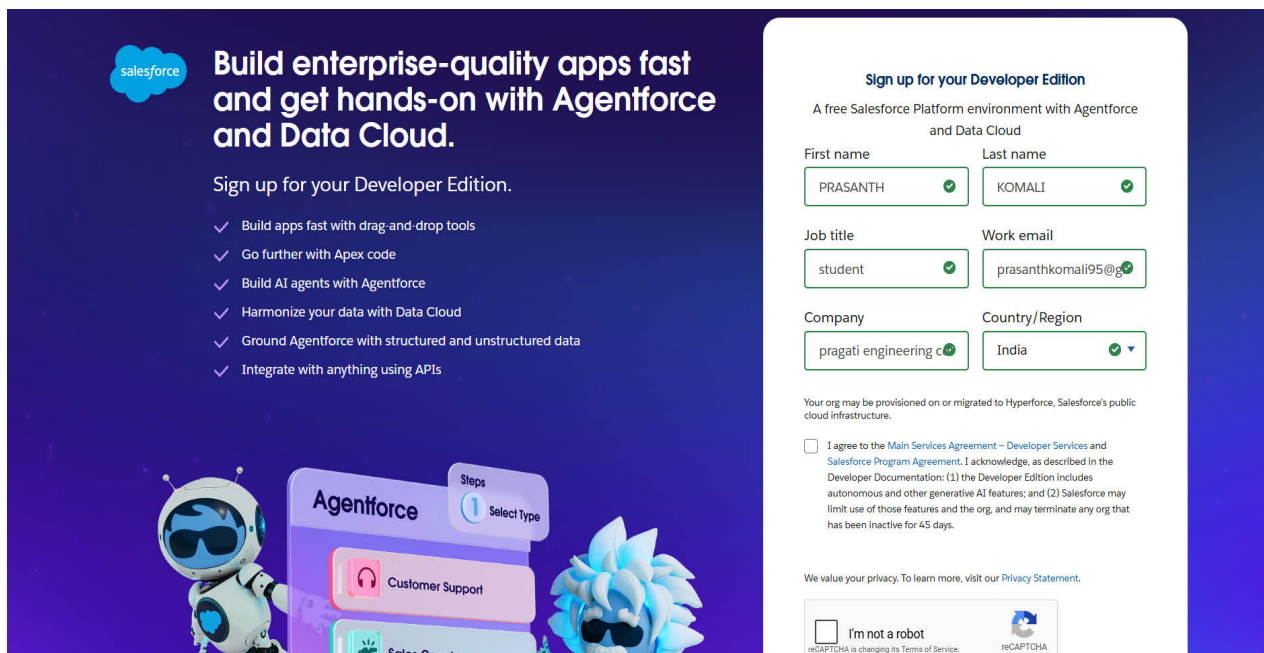
Step 1: Sign Up for a Salesforce Developer Org

1. Go to Salesforce Developer Sign Up Page:

<https://developer.salesforce.com/signup>

2. Fill in Your Details:

- FirstName/LastName: Your name
- Email: Your active email (you'll need to verify)



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First name: PRASANTH ✓ Last name: KOMALI ✓

Job title: student ✓ Work email: prasanthkomali95@gmail.com ✓

Company: pragati engineering c ✓ 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.

We value your privacy. To learn more, visit our Privacy Statement.

☐ I'm not a robot reCAPTCHA

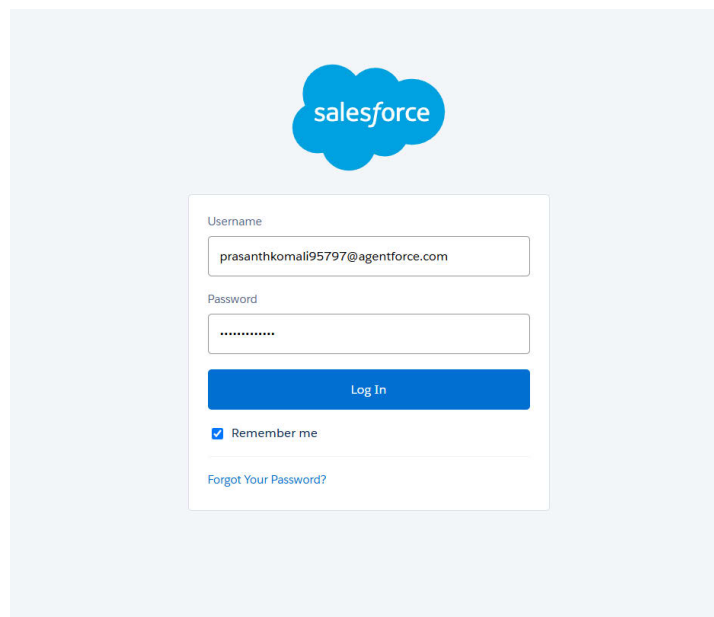
- Accept Terms → Click Sign me up

3. Check Your Email:

- Salesforce will send a verification email.
- Click the verification link to activate your org.

Step 2: Log in to Your Developer Org

1. Go to <https://login.salesforce.com>
2. Enter your username and password from sign-up.
3. You will land on Salesforce Lightning Home



3. Company Profile Setup

Steps Implemented:

1. Navigate to Setup → Company Settings → Company Information.
2. Configured the following:

Organization Name: Leave Management System

Default Locale: English (India).

Currency: Indian Rupees (INR).

Fiscal Year: Standard fiscal year starting in April.

Time Zone: (GMT +05:30) Asia/Kolkata.

3. Saved the changes..

SETUP
Company Information

Company Information
Leave Management System

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

Organization Detail [Edit](#)

Organization Name	Leave Management System	Phone	
Primary Contact	prasanth komali	Fax	
Division		Default Locale	English (India)
Address	533293 Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	364 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	262 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Dg5000000DvsV
		Organization Edition	Developer Edition
		Instance	IND168

Created By [OrgFam EPIC](#), 10/9/2025, 8:58 PM

Modified By [PRASANTH KOMALI](#), 10/16/2025, 4:20 AM

4. Business Hours Setup

Steps Implemented:

1. Setup → Company Settings → Business Hours.

2. Edited the default business hours:

- Name: Standard Business Hours
 - Time Zone: Asia/Kolkata
 - Hours: 9:00 AM to 6:00 PM, Monday to Friday
1. Saved the configuration.

SETUP

Business Hours

Organization Business Hours

Help for this Page

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

Edit

Business Hours Name	Standard Business Hours	Time Zone
Business Hours	<div> <div>Sunday</div> <div>No Hours</div> </div> <div> <div>Monday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Tuesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Wednesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Thursday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Friday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Saturday</div> <div>No Hours</div> </div>	<div>(GMT+05:30) India Standard Time (Asia/Kolkata)</div>

Default Business Hours

Active

Created By

PRASANTH KOMALI

10/15/2025, 5:32 AM

Last Modified By

PRASANTH KOMALI

10/15/2025, 5:32 AM

Edit

Holidays

Add/Remove

No records to display

1. Role Hierarchy Configuration

Roles define who can see and manage records. For the Leave Management System, we require:

- Manager Role → Can view and approve/reject leave requests submitted by employees.
- Employee Role → Can submit leave requests but cannot approve/reject.

Steps Implemented:

1. Setup → Users → Roles → Set Up Roles.

2. Created a Role Hierarchy:

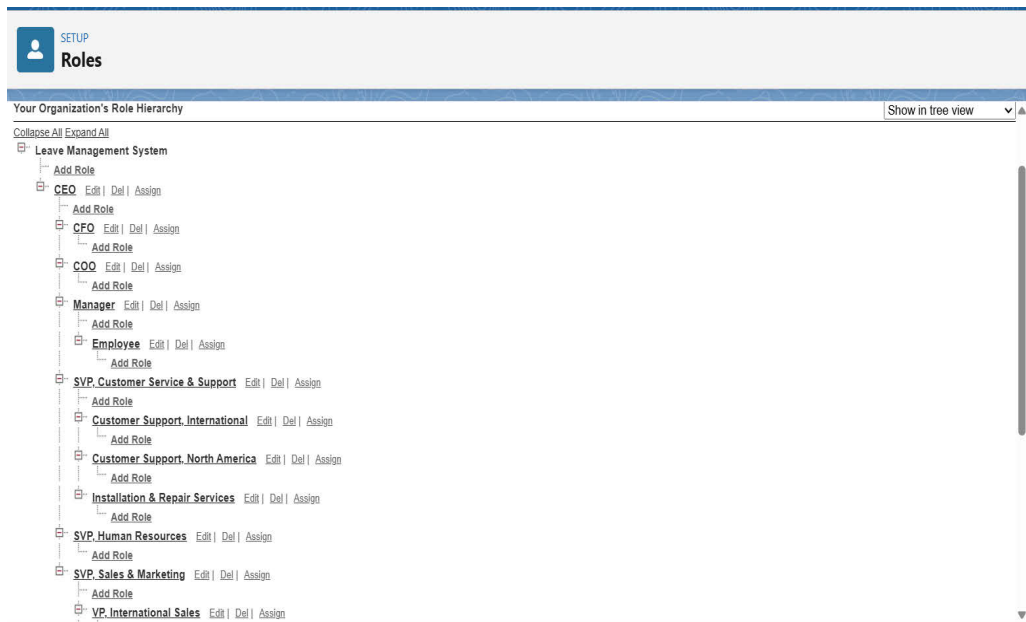
◦ Top Level: CEO

◦ Under CEO: Manager

◦ Under

Manager: Employee

3. Saved and activated the role hierarchy.



2. User Creation & Role Assignment

Steps Implemented:

1. Setup → Users → Users.
2. Created two test users for demonstration:
 - Manager User → Assigned Role = Manager, Profile = Standard User.
 - Employee User → Assigned Role = Employee, Profile = Standard User.
3. Verified that:
 - Employee User can create leave requests.
 - Manager User can view and act upon subordinates' leave requests.

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00dg5000000dsveas.6lhy@yvaurn@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	EPIC_OrgFarm	OEPIK	epic.082819116abc@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	KOMALI_PRASANTH	pra	prasanthkomali95797@agentforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	User_Employee	euser	employeeuser@org.com	Employee	✓	Standard User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00dg5000000dsveas.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Manager	muser	manageruser@org.com	Manager	✓	Standard User
<input type="checkbox"/>	Edit	User_Security	sec	insightsecurity@00dg5000000dsveas.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

3. Outcome of Phase 2

- The Salesforce Org has been successfully set up with company details, fiscal year, and business hours.
- Roles (Manager and Employee) were created and assigned to users, ensuring proper data visibility and hierarchy.
- This configuration lays the groundwork for the Leave Management System, where Employees can request leaves, and Managers can approve or reject them.

4. Conclusion

Phase 2 ensures that the Salesforce Org is properly aligned with the organizational structure. By configuring company settings, roles, and users, we have established a foundation for subsequent phases like data modeling, automation, and Apex development. These steps guarantee that our Leave Management System mimics a real-world IT company environment.