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, me 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

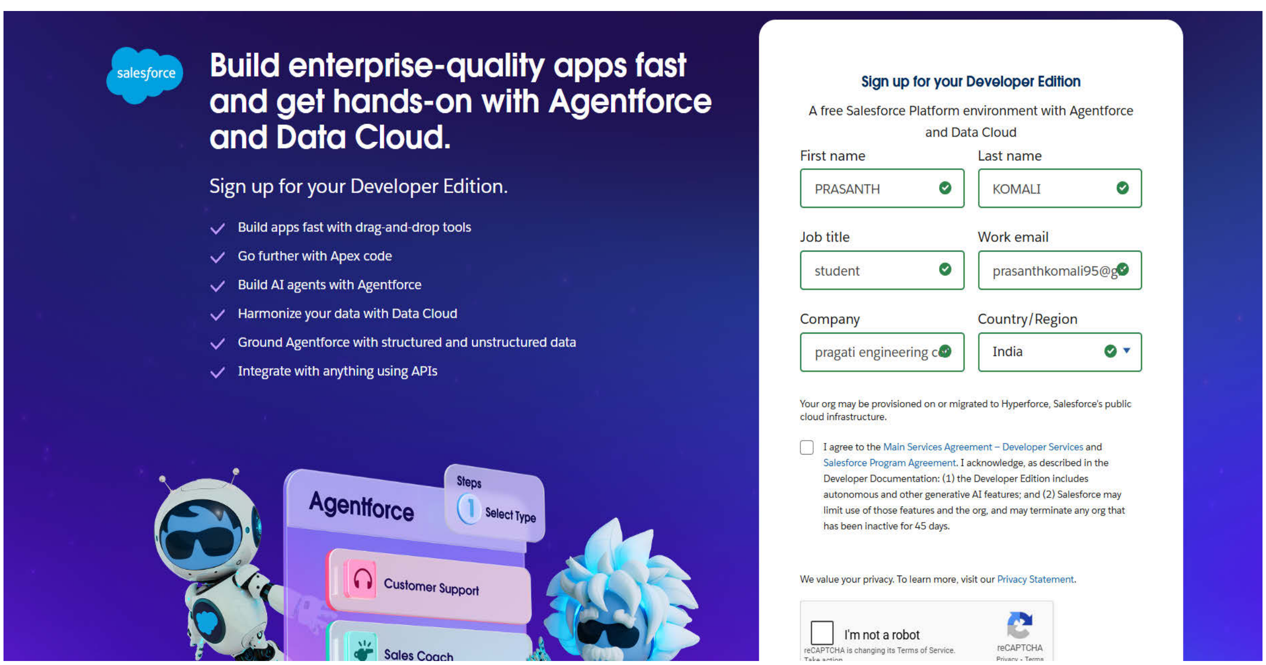
Step 1: Sign Up for a Salesforce Developer Org

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)

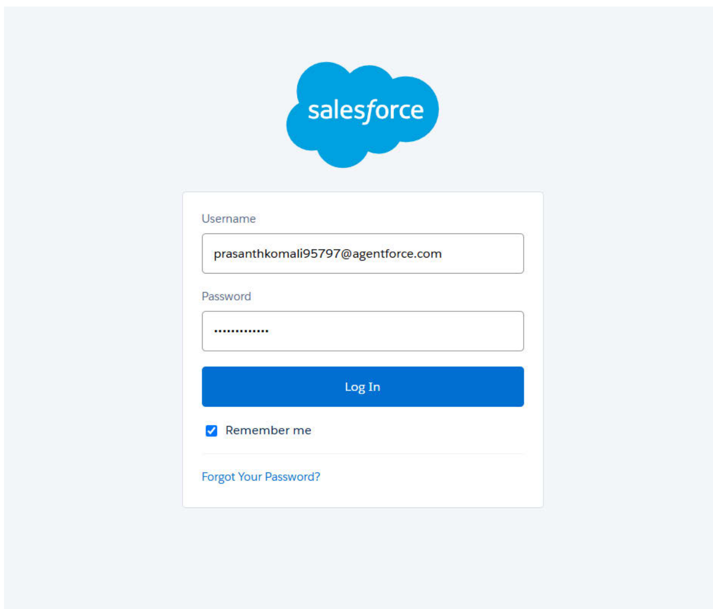


- Accept Terms→ Click Sign me up

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

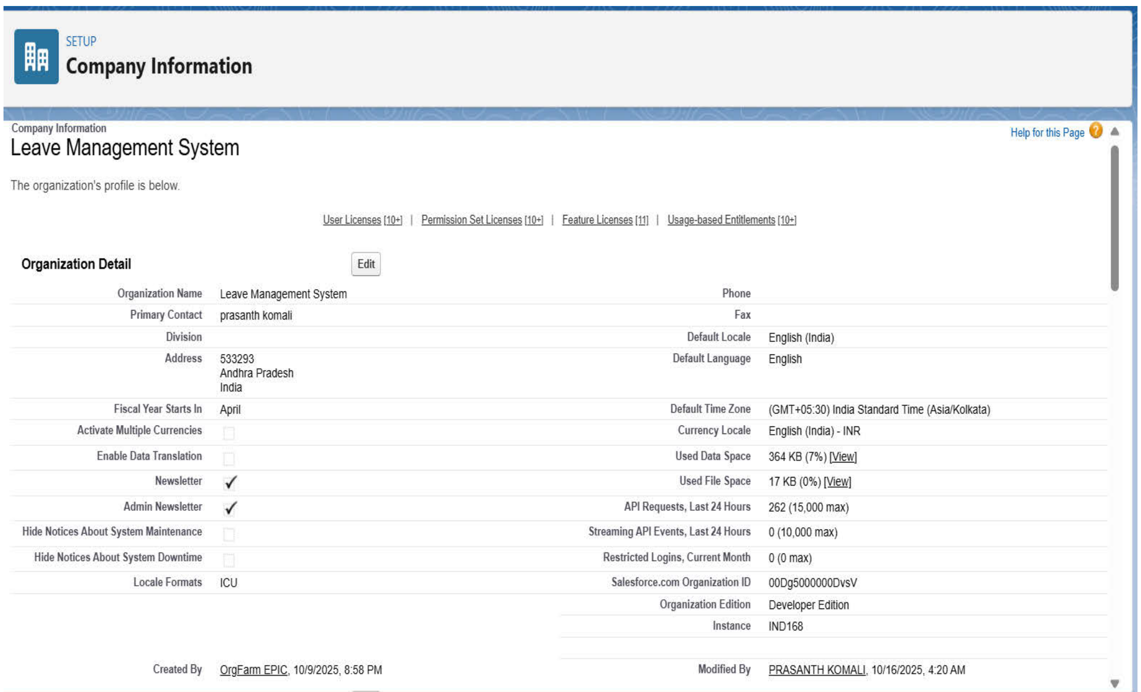
Default Locale: English (India).

Currency: Indian Rupees (INR).

Fiscal Year: Standard fiscal year star ng in April.

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

3. Saved the changes..

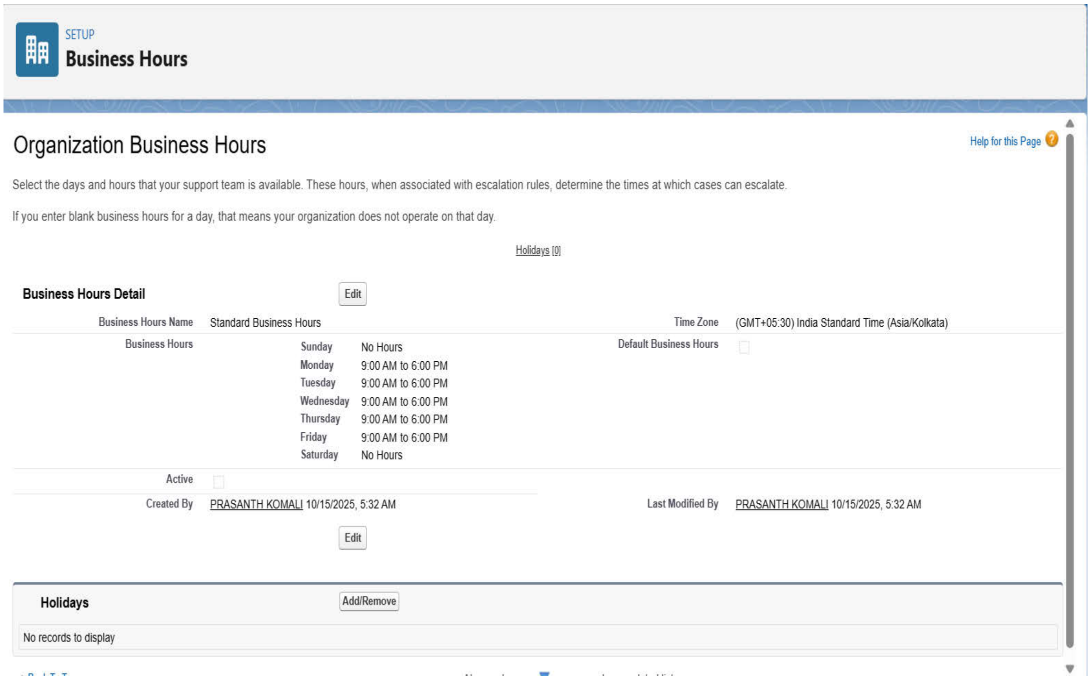


4.Business Hours Setup

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.



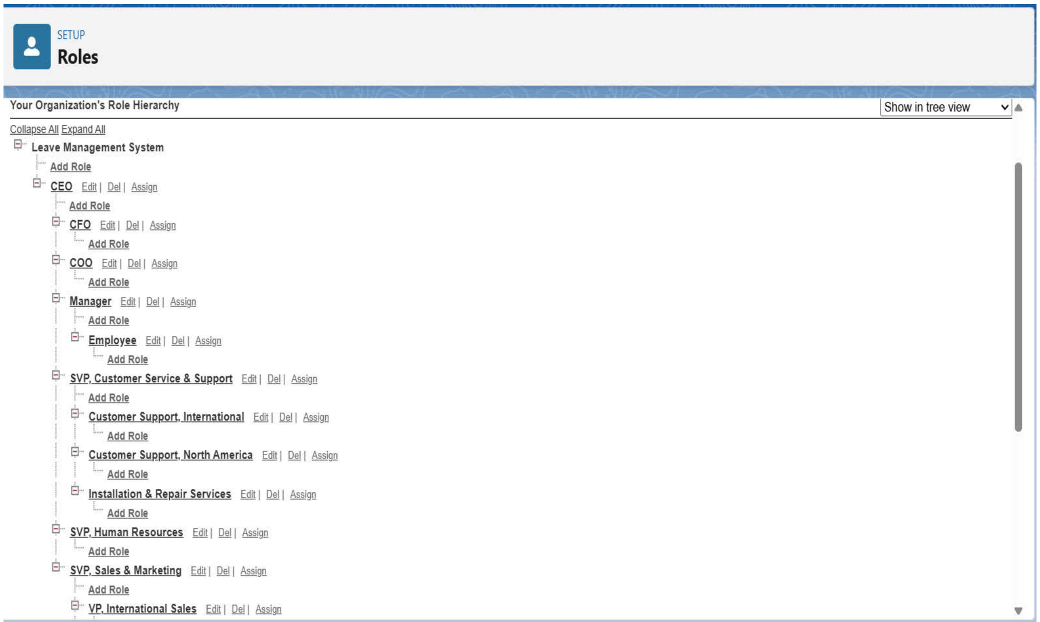
1. Role Hierarchy Configuration

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

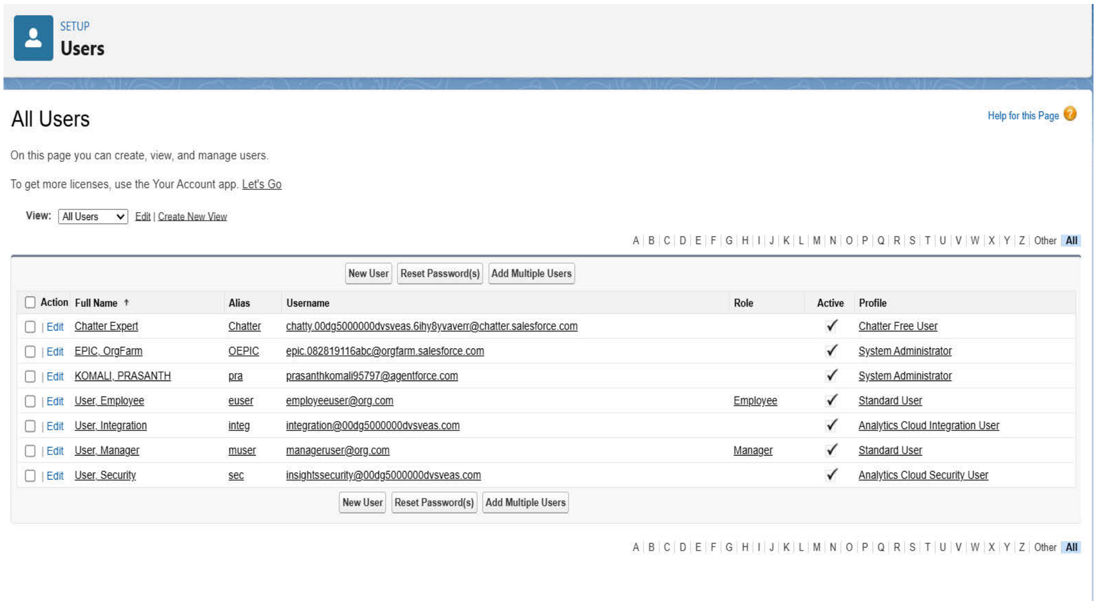
Steps Implemented:

1. Setup → Users → Users.
2. Created two test users for demonstration:

   o Manager User → Assigned Role = Manager, Profile = Standard User. o 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.



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.