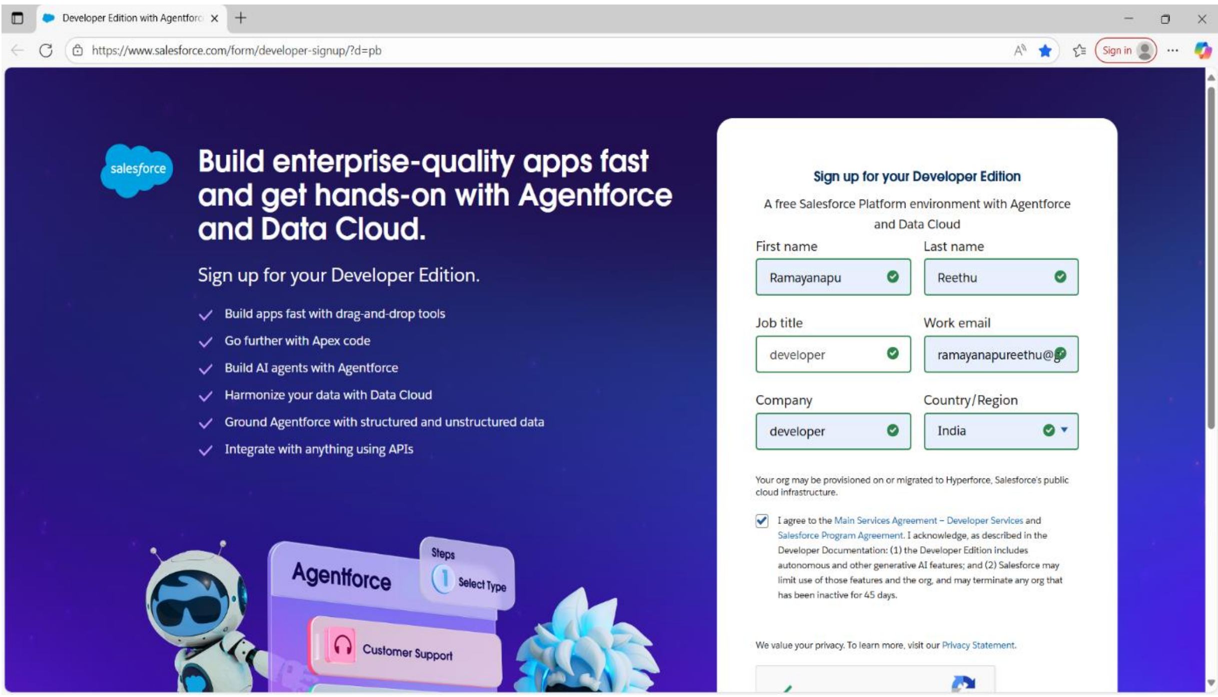
Phase 2 : Org Setup & Configuration for Leave Tracking App

1. Org Preparation

- Spin up a **Developer Edition / Sandbox / Trailhead Playground**.



2.Company Setup:

- Organization Name: Leave Tracker (example for your project).
- Default Time Zone: IST (India Standard Time) to match employee location.
- Default Currency: INR (₹) for leave-related reporting (if linked with payroll).
- Language Settings: English (default), with multilingual support possible if required.

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)

        - 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.

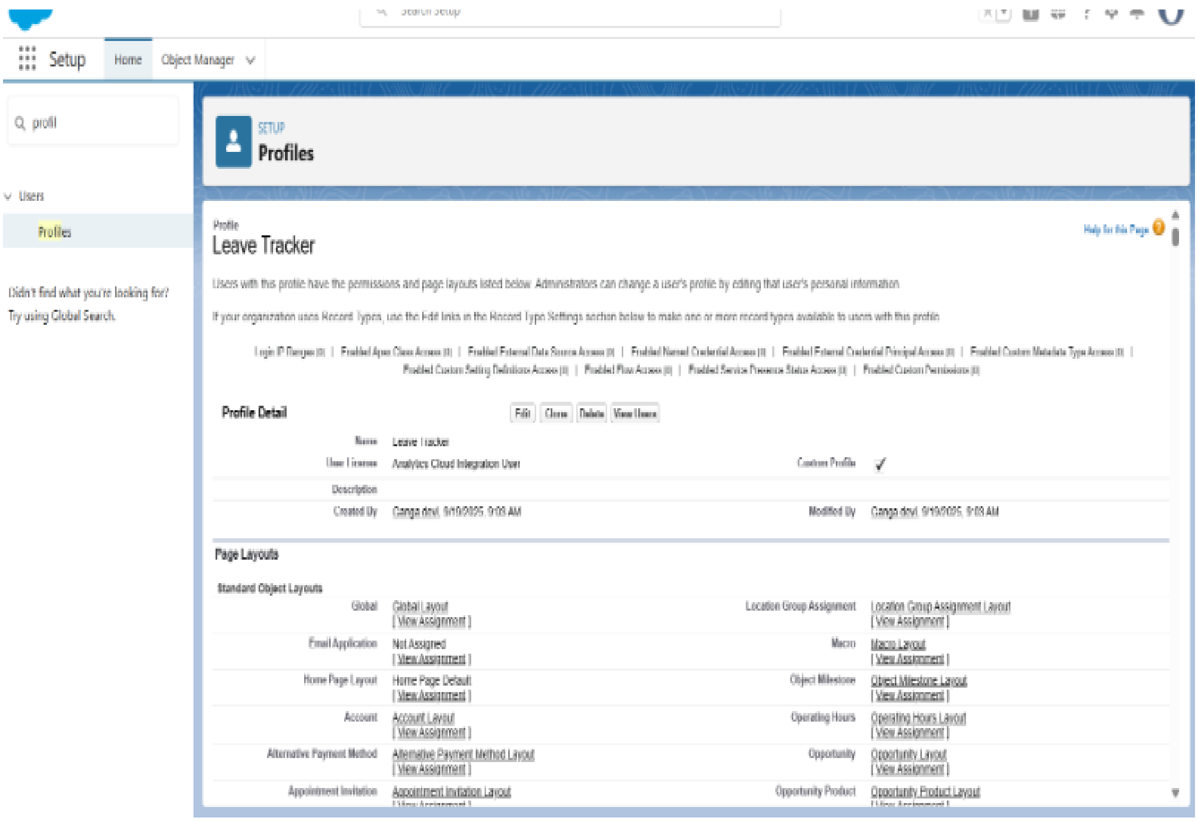
- **Approval Process**:
    - Manager approves/rejects.
    - Notification sent to employee.

Record-Triggered Flows

- On leave approval → Deduct from Leave Balance.
- On rejection → Leave Balance remains unchanged.

5.Security & Access

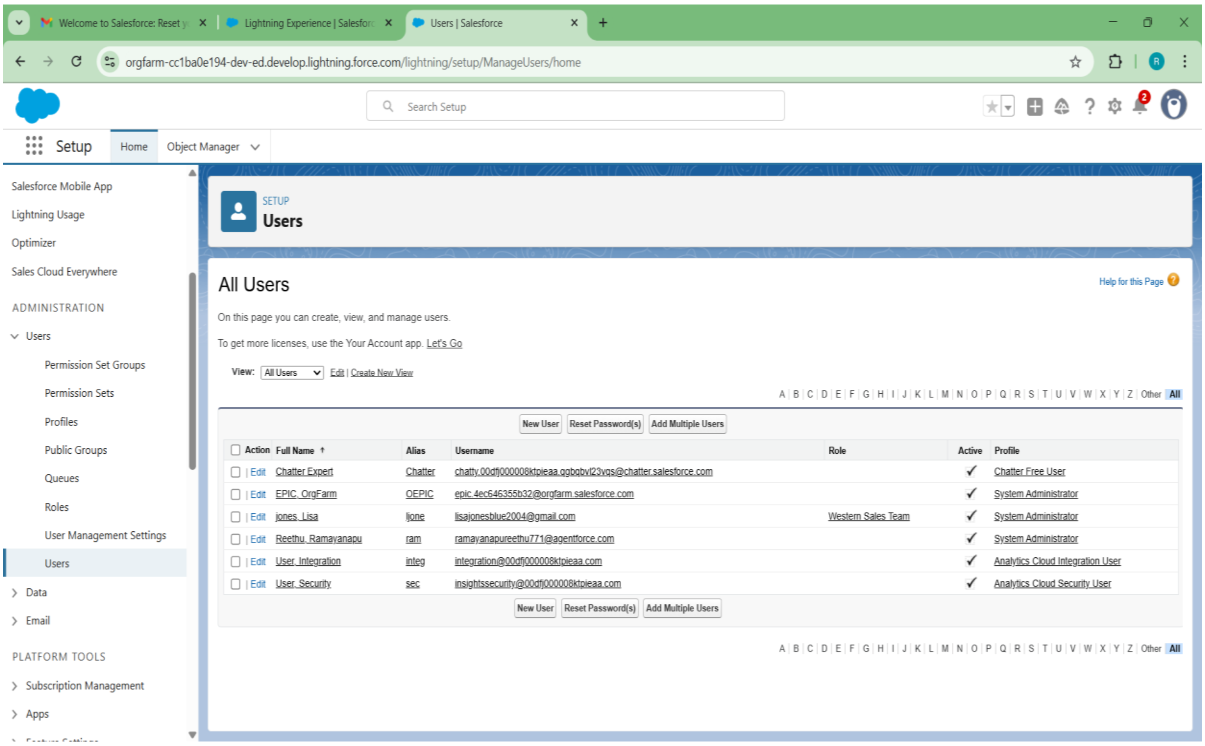
- **Profiles / Permission Sets**
    - Employee: Create/View own Leave Requests, View balances.
    - Manager: Approve/Reject team requests.
    - HR/Admin: Full access.



- **Users:**

    - Used to test the profiles, Roles, permission sets.

    - The user is used to edit the leave request to accepted , Rejected.



- **Sharing Rules**
    - Leave Requests visible only to employee, manager, and HR.
    - HR/Admin has access to all employee records.

5. 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.

6. Reports & Dashboards

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

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

7. Testing & Deployment

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