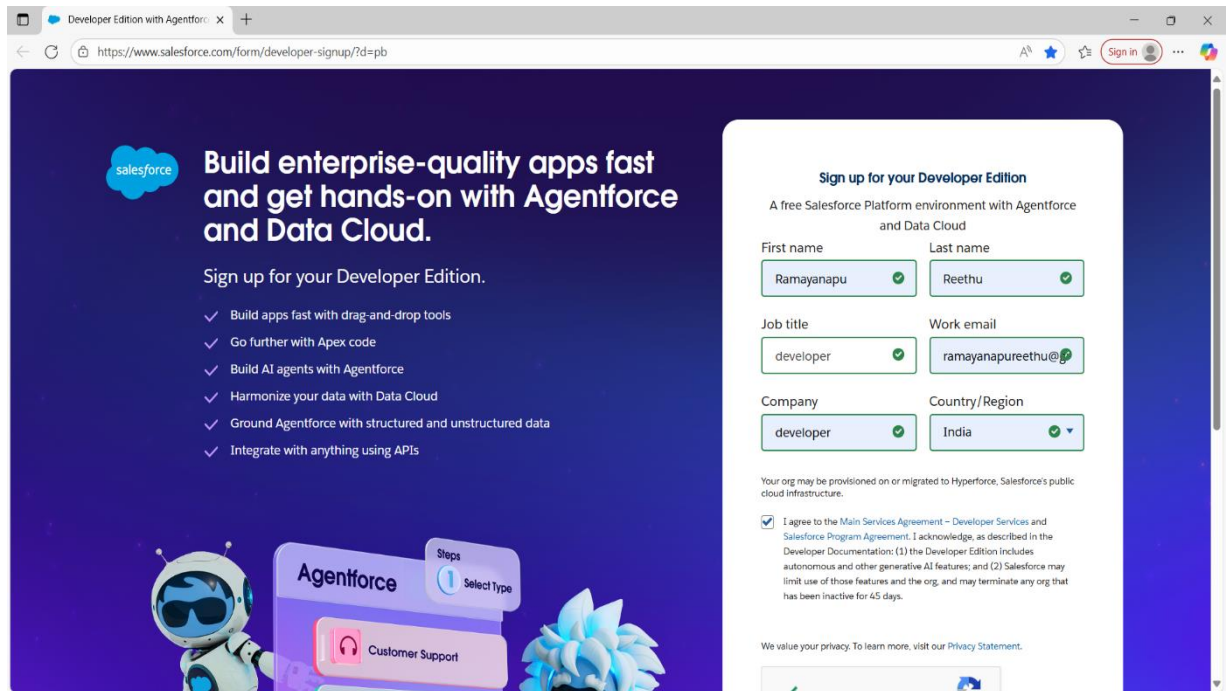


# Phase 2 : Org Setup & Configuration for Leave Tracking App

## 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  $\geq$  Start Date.
- Total Days  $\leq$  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**

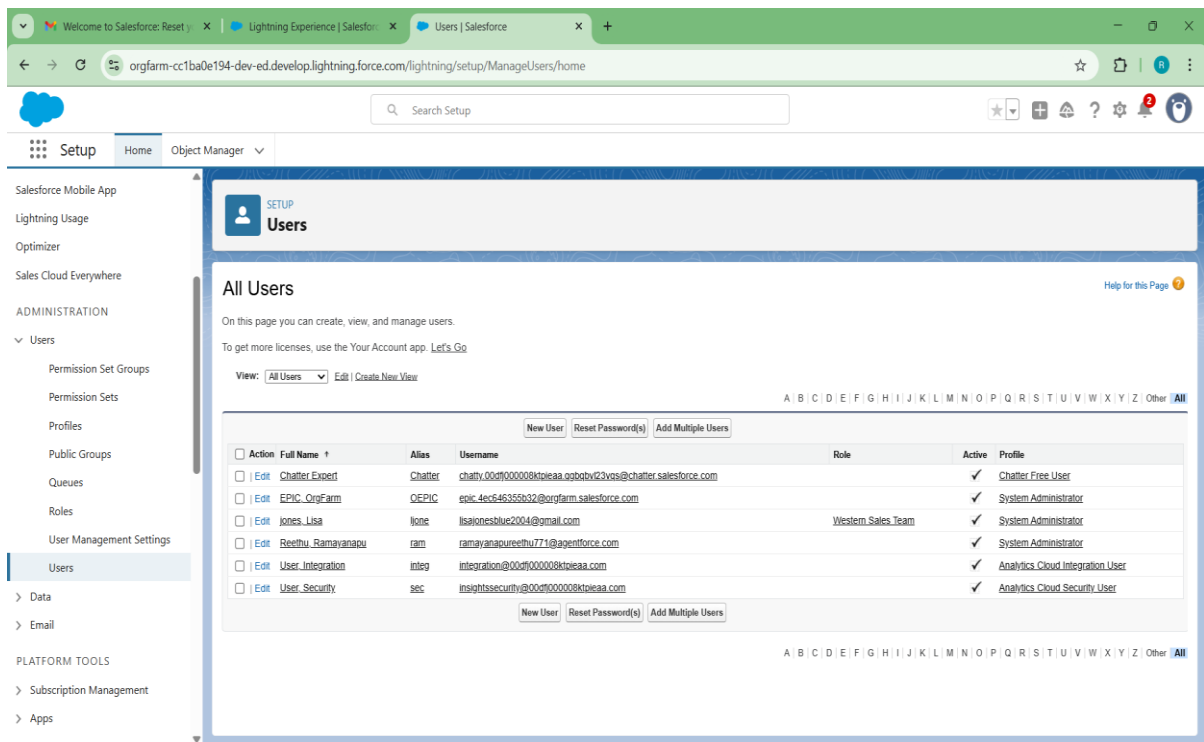
- Employee: Create/View own Leave Requests, View balances.
- Manager: Approve/Reject team requests.
- HR/Admin: Full access.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Profiles' and shows the 'Leave Tracker' profile. Below the profile name, there is a description and a list of permissions. The 'Profile Detail' section shows the profile's name, user license, description, and creation/modification dates. The 'Page Layouts' section displays a table of layouts assigned to the profile.

Page Layouts			
Standard Object Layouts	Global	Global Layout (View Assignment)	Location Group Assignment (View Assignment)
	Email Application	Not Assigned (View Assignment)	Macro (View Assignment)
	Home Page Layout	Home Page Default (View Assignment)	Object Milestone (View Assignment)
	Account	Account Layout (View Assignment)	Operating Hours (View Assignment)
	Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Opportunity (View Assignment)
	Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity Product (View Assignment)

- **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.