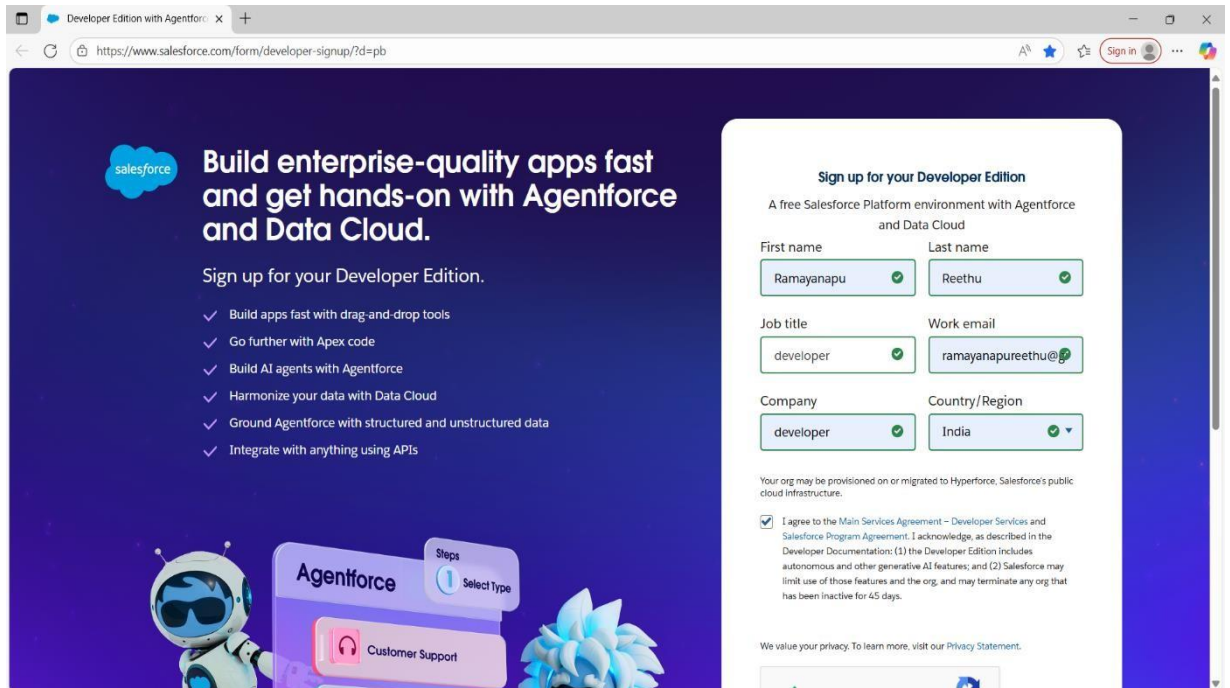


# Phase 2 : Org Setup & Configuration for Leave Tracking App

## 1. Org Preparation • Spin up a Developer Edition / Sandbox /

Trailhead Playground.



Developer Edition with Agentforce

https://www.salesforce.com/form/developer-signup?d=pb

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name Last name

Ramayanapu Reethu

Job title Work email

developer ramayanapureethu@

Company Country/Region

developer 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.

## 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**

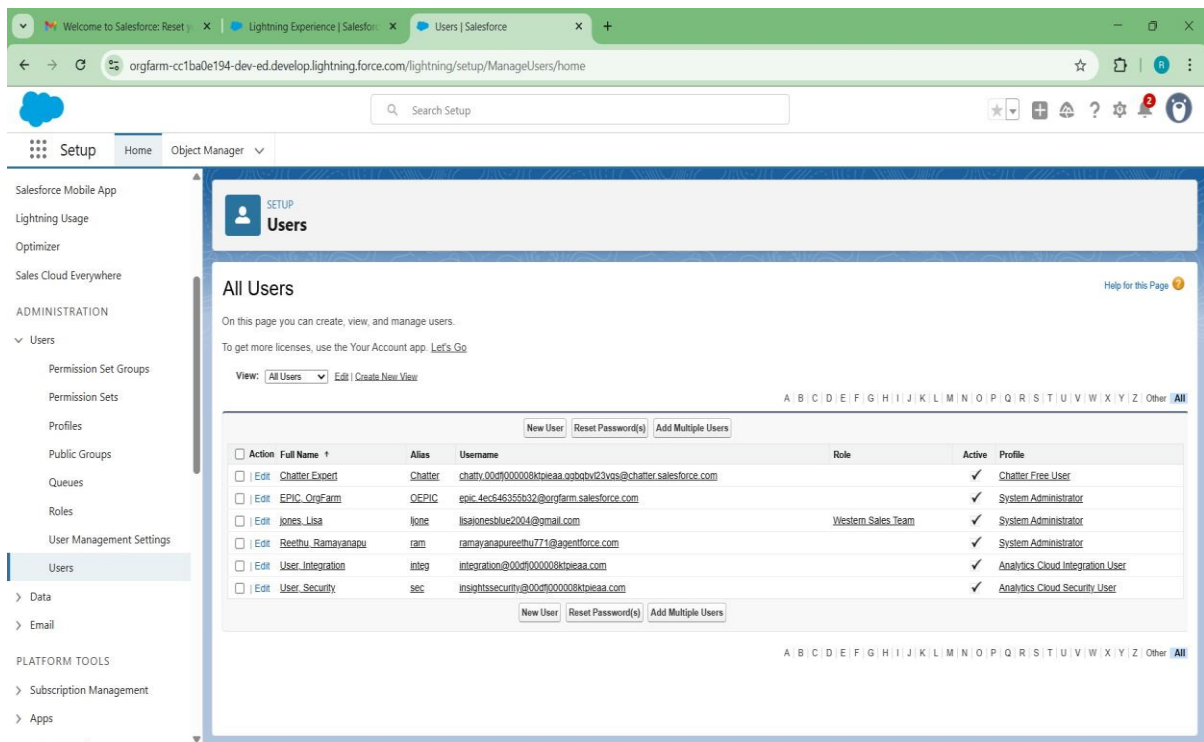
- Employee: Create/View own Leave Requests, View balances.
- Manager: Approve/Reject team requests.
- HR/Admin: Full access.

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. The profile details include the Name 'Leave Tracker', License 'Analytics Cloud Integration User', and Description 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' The 'Page Layouts' section shows a table of layouts assigned to the profile.

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

- **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.