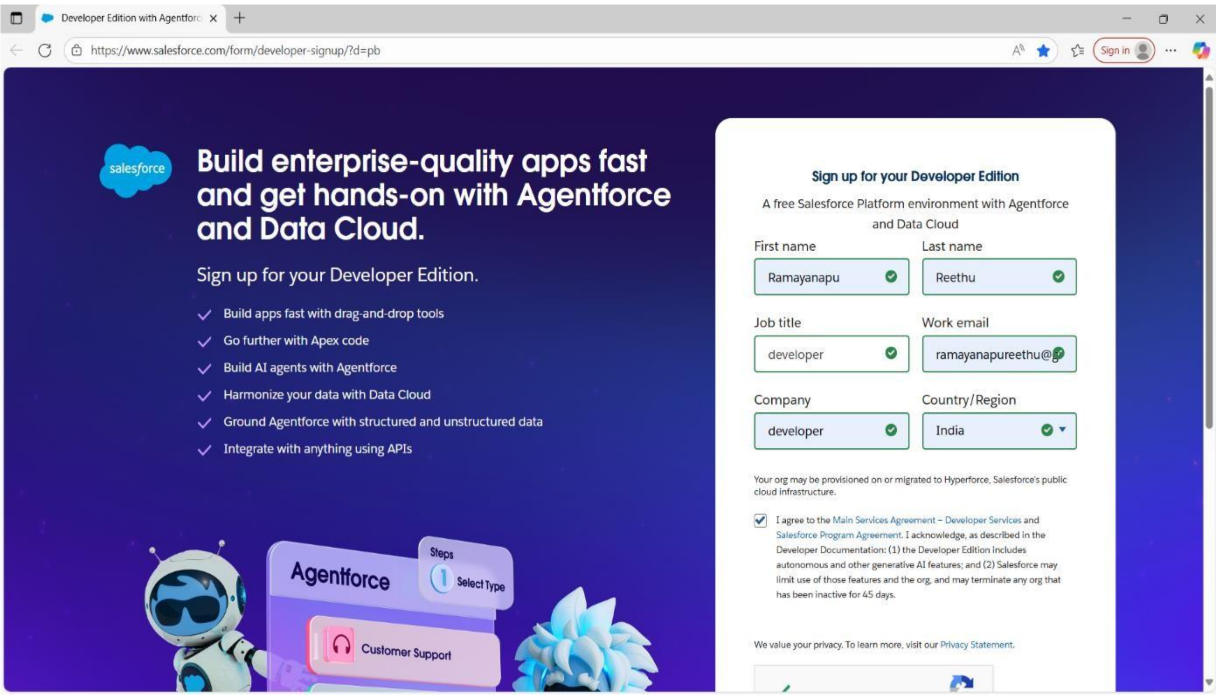
Phase 2 : Org Setup & Configuration for Leave Tracking App

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.

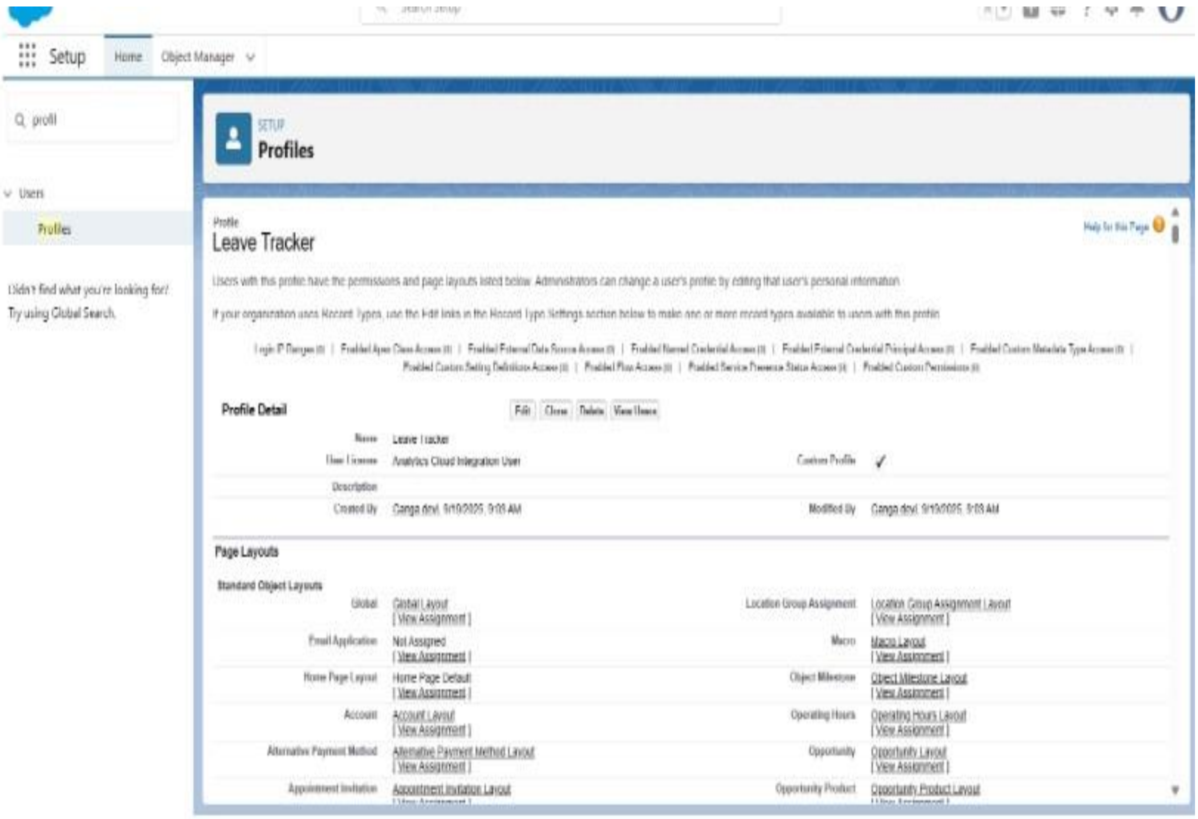
Record-Triggered Flows

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

5.Security & Access

- **Profiles / Permission Sets**

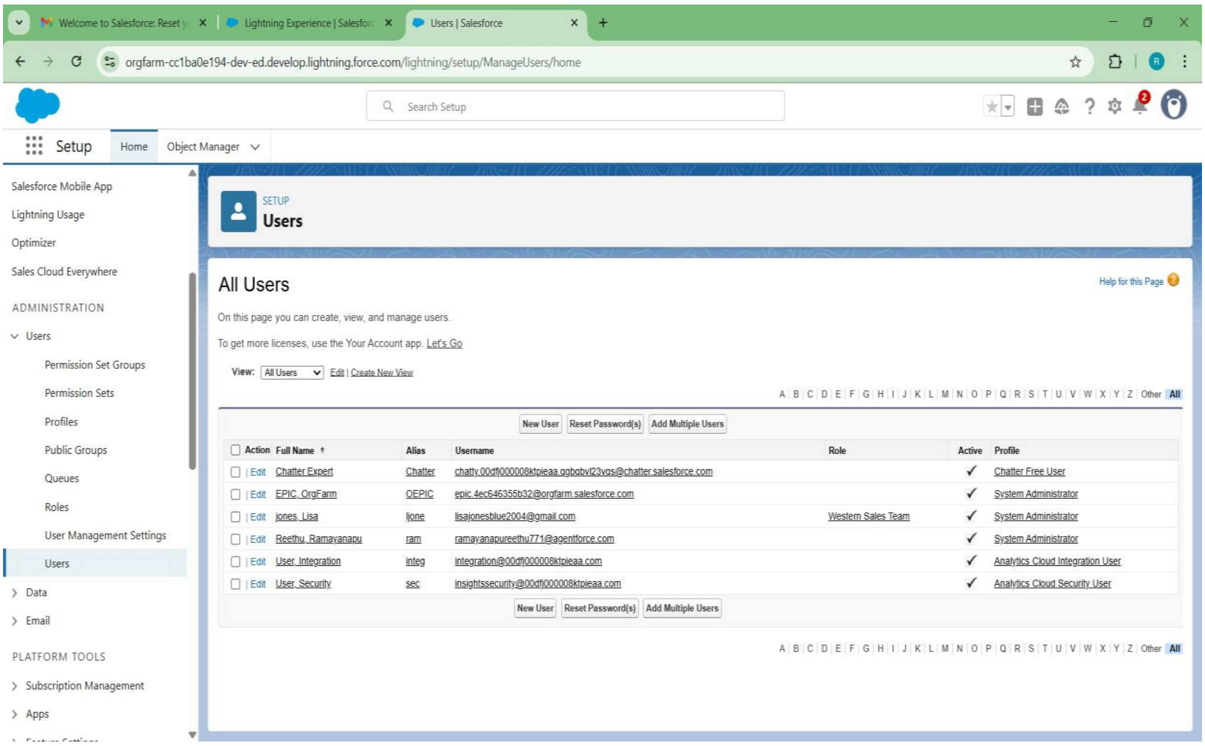
  ○ Employee: Create/View own Leave Requests, View balances.
  ○ Manager: Approve/Reject team requests.
  ○ HR/Admin: Full access.



- **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.