

Employee Onboarding & Asset Management CRM Project

Phase 3: Data Modeling & Relationships Implementation

1. Standard & Custom Objects

- **Standard Objects to Use:**
 - **User** → HR Manager, IT Admin, Employees (system users).
- **Custom Objects to Create:**

Employee__c

- Stores employee onboarding details.

Asset__c

- Tracks IT assets (Laptop, Mobile, ID card, etc.).

Onboarding_Task__c

- Represents each onboarding activity (Document Verification, Orientation, etc.).

The image displays three screenshots of the Salesforce Object Manager interface, each showing a different custom object. Each screenshot includes a search bar, 'Schema Builder' and 'Create' buttons, and a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-----------------|--------------------|---------------|-------------|---------------|----------|
| Onboarding Task | Onboarding_Task__c | Custom Object | | 9/19/2025 | ✓ |

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------|----------------|---------------|---|---------------|----------|
| Employee | Employee_ID__c | Custom Object | Stores employee records for HR, IT, and managers. | 9/19/2025 | ✓ |

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-------|----------|---------------|-------------|---------------|----------|
| Asset | Asset__c | Custom Object | | 9/19/2025 | ✓ |

2. Fields for Each Object

Employee__c

- Employee ID (Auto Number, EMP-{000})
- Name (Text)
- Department (Picklist → HR, IT, Finance, Sales, etc.)
- Designation (Text)

- Joining Date (Date)
- Status (Picklist → Onboarding, Active, Resigned)
- Manager (Lookup → User)

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships
14 Items, Sorted by Field Label

Quick Find: New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------|------------------------|----------------|-------------------|---------|
| Bank Account Number | Bank_Account_Number__c | Text(30) | | |
| Created By | CreatedById | Lookup(User) | | |
| Department | Department__c | Picklist | | |
| Designation | Designation__c | Text(35) | | |
| Email | Email__c | Email (Unique) | | ✓ |
| Employee ID | Employee_ID__c | Auto Number | | |
| Employee Name | Name | Text(80) | | ✓ |
| Full Name | Full_Name__c | Text(50) | | |
| Joining Date | Joining_Date__c | Date | | |

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Asset__c

- Asset ID (Auto Number, AST-{000})
- Asset Type (Picklist → Laptop, ID Card, Mobile, etc.)
- Serial Number (Text)
- Assigned To (Lookup → Employee__c)
- Allocation Date (Date)
- Return Date (Date)
- Value (Currency)

SETUP > OBJECT MANAGER

Asset

Details

Fields & Relationships
12 Items, Sorted by Field Label

Quick Find: New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|--------------------|--------------------|-------------------|---------|
| Allocation Date | Allocation_Date__c | Date | | |
| Asset ID | Asset_ID__c | Auto Number | | |
| Asset Name | Name | Text(80) | | ✓ |
| Asset Type | Asset_Type__c | Picklist | | |
| Created By | CreatedById | Lookup(User) | | |
| Employee | Employee__c | Lookup(Employee) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User/Group) | | ✓ |
| Purchase Date | Purchase_Date__c | Date | | |
| Return Date | Return_Date__c | Date | | |

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Onboarding_Task__c

- Task Name (Text)
- Assigned To (Lookup → User)
- Related Employee (Lookup → Employee__c)
- Due Date (Date)
- Status (Picklist → Pending, In Progress, Completed)

SETUP > OBJECT MANAGER
Onboarding Task

Details

Fields & Relationships
11 items. Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|----------------------|---------------------|--------------------|-------------------|---------|
| Assigned To | Assigned_To__c | Lookup(User) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Due Date | Due_Date__c | Date | | |
| Employee | Employee__c | Lookup(Employee) | | ✓ |
| Employees | Employees__c | Lookup(Employee) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Onboarding Task Name | Name | Auto Number | | ✓ |
| Owner | OwnerId | Lookup(User.Group) | | ✓ |
| Related Employee | Related_Employee__c | Lookup(Employee) | | ✓ |
| Status | Status__c | Picklist | | |

3. Record Types

- **Employee__c**: Fresher Onboarding, Lateral Hire, Intern.

SETUP > OBJECT MANAGER
Employee

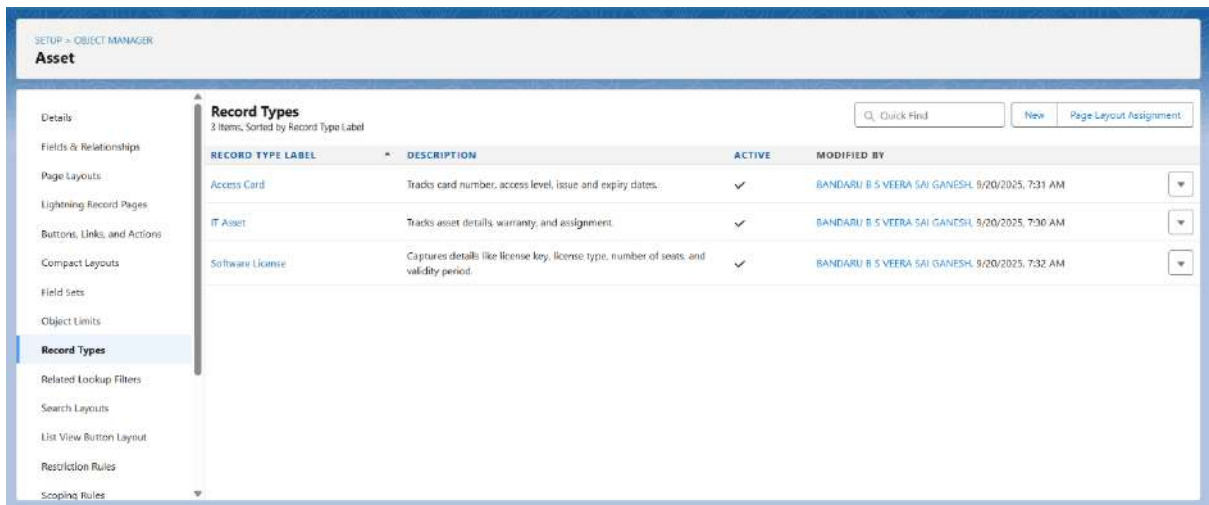
Details

Record Types
3 items. Sorted by Record Type Label

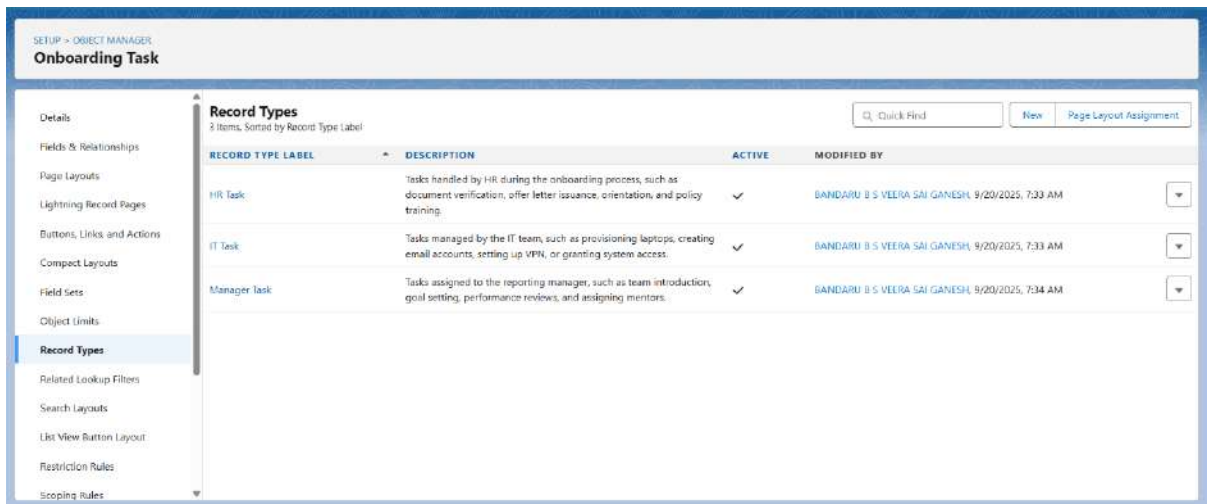
Q, Quick Find New Page Layout Assignment

| RECORD TYPE LABEL | DESCRIPTION | ACTIVE | MODIFIED BY |
|--------------------|--|--------|--|
| Fresher Onboarding | Captures details like college, batch, buddy assignment, and training schedule. | ✓ | BANDARU B S VEERA SAI GANESH, 9/20/2025, 7:28 AM |
| Intern | Captures details like university, internship duration, stipend, and assigned mentor. | ✓ | BANDARU B S VEERA SAI GANESH, 9/20/2025, 7:27 AM |
| Lateral Hire | Captures fields such as previous employer, years of experience, notice period, and relieving letter. | ✓ | BANDARU B S VEERA SAI GANESH, 9/20/2025, 7:28 AM |

- **Asset__c:** IT Asset, Access Card, Software License.

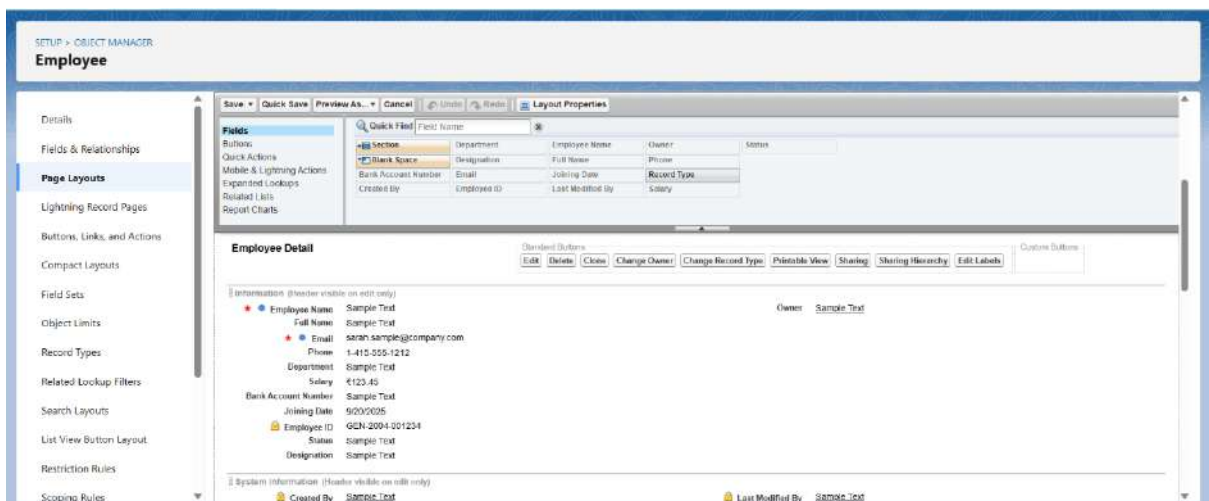


- **Onboarding_Task__c:** HR Task, IT Task, Manager Task.



4. Page Layouts

- **Employee Layout:** Show personal details, related onboarding tasks, and assigned assets.



- **Asset Layout:** Show asset details, linked employee, and allocation history.

The screenshot shows the 'Asset' layout configuration page in Salesforce. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Asset' and includes a 'Layout Properties' section with 'Quick Find' and 'Field Name' search. Below this is a table of fields with columns for 'Field Name', 'Asset Name', 'Last Modified By', 'Return Date', 'Asset Type', 'Owner', 'Serial Number', 'Allocation Date', 'Created By', 'Purchase Date', 'Status', 'Employee', and 'Record Type'. A 'Label' column shows 'Name: Status' and 'Type: Profile'. The 'Asset Detail' section shows 'Information (header visible on edit only)' with fields: Asset Name (Sample Text), Asset ID (GEN-2004-001234), Asset Type (Sample Text), Employee (Sample Text), Purchase Date (6/20/2025), Status (Sample Text), Serial Number (Sample Text), Allocation Date (6/20/2025), Return Date (6/20/2025), and Value (₹123.45). The 'System Information (header visible on edit only)' section shows 'Created By' (Sample Text) and 'Last Modified By' (Sample Text).

- **Onboarding Task Layout:** Show task details, linked employee, and status.

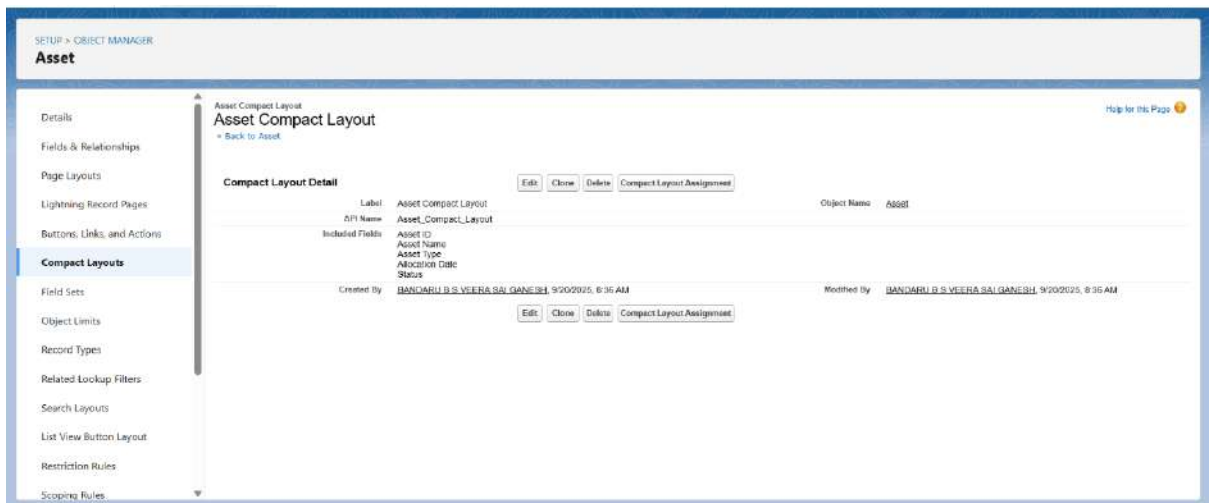
The screenshot shows the 'Onboarding Task' layout configuration page in Salesforce. The left sidebar is the same as the previous screenshot. The main content area is titled 'Onboarding Task' and includes a 'Layout Properties' section with 'Quick Find' and 'Field Name' search. Below this is a table of fields with columns for 'Field Name', 'Due Date', 'Onboarding Task Name', 'Status', 'Employee', 'Owner', 'Task Name', 'Assigned To', 'Employees', 'Record Type', 'Created By', and 'Last Modified By'. The 'Onboarding Task Detail' section shows 'Information (header visible on edit only)' with fields: Onboarding Task Name (GEN-2004-001234), Task Name (Sample Text), Employee (Sample Text), Due Date (6/20/2025), Status (Sample Text), Assigned To (Sample Text), and Related Employee (Sample Text). The 'System Information (header visible on edit only)' section shows 'Created By' (Sample Text) and 'Last Modified By' (Sample Text). The 'Custom Links (header visible on edit only)' section is empty.

5. Compact Layouts

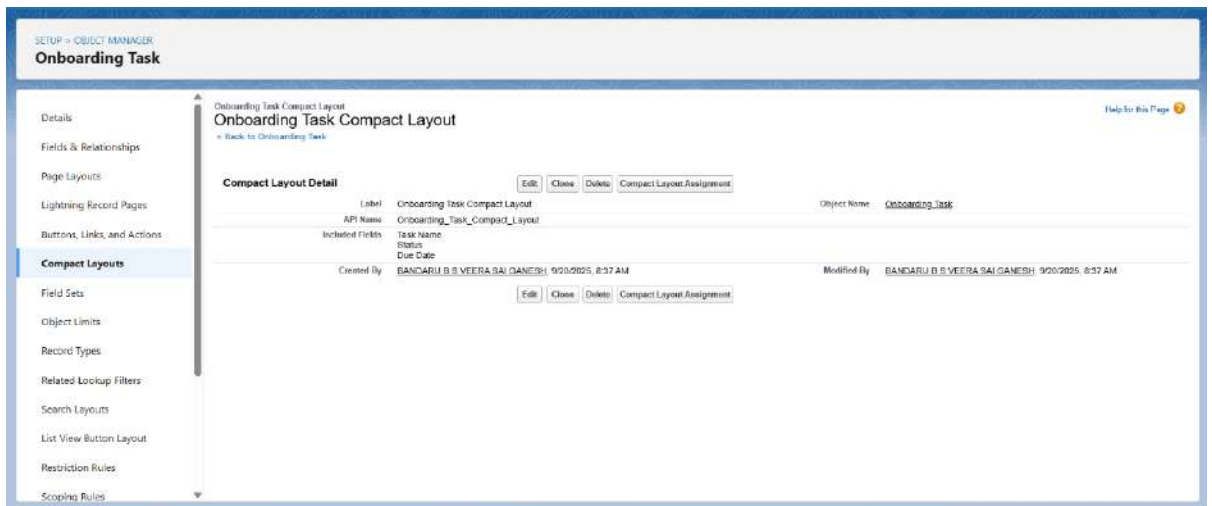
- **Employee__c:** Employee ID, Name, Department, Status.

The screenshot shows the 'Employee Compact Layout' configuration page in Salesforce. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Employee Compact Layout' and includes a 'Compact Layout Detail' section with 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment' buttons. Below this is a table with columns for 'Label', 'API Name', 'Included Fields', 'Object Name', 'Employee ID', 'Full Name', 'Department', 'Status', 'Created By', and 'Modified By'. The 'Created By' field shows 'BANDARU D S VEERA SAI GANESH, 9/20/2025, 8:34 AM' and the 'Modified By' field shows 'BANDARU D S VEERA SAI GANESH, 9/20/2025, 8:34 AM'. The 'Compact Layout Assignment' button is visible at the bottom.

- **Asset__c**: Asset ID, Asset Type, Assigned To.



- **Onboarding_Task__c**: Task Name, Status, Due Date.



6. Relationships

- **Employee ↔ Asset**
 - One Employee can have many Assets → **Lookup Relationship**.
- **Employee ↔ Onboarding_Task**
 - One Employee has multiple onboarding tasks → **Lookup Relationship**.
- **Manager ↔ Employee**
 - Employee object has a **Lookup(User)** for Manager.

SETUP > OBJECT MANAGER

Asset

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Asset Custom Field

Assigned To

Back to Asset

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

| | | | |
|---------------------------|--|-------------|--|
| Field Label | Assigned To | Object Name | Asset |
| Field Name | Assigned_To | Data Type | Lookup |
| API Name | Assigned_To__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | BANDARU B S VEERA SAI GANESH, 9/19/2025, 1:22 AM | Modified By | BANDARU B S VEERA SAI GANESH, 9/20/2025, 8:42 AM |

Lookup Options

| | | | |
|---|--------------------------------|-------------------------|--------|
| Related To | Employee | Child Relationship Name | Assets |
| Related List Label | Assets | | |
| Required | <input type="checkbox"/> | | |
| What to do if the lookup record is deleted? | Clear the value of this field. | | |

Lookup Filter

SETUP > OBJECT MANAGER

Onboarding Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Onboarding Task Custom Field

Employee

Back to Onboarding Task

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

| | | | |
|---------------------------|--|-------------|--|
| Field Label | Employee | Object Name | Onboarding Task |
| Field Name | Employee | Data Type | Lookup |
| API Name | Employee__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | BANDARU B S VEERA SAI GANESH, 9/19/2025, 4:20 AM | Modified By | BANDARU B S VEERA SAI GANESH, 9/19/2025, 4:20 AM |

Lookup Options

| | | | |
|---|--------------------------------|-------------------------|------------------|
| Related To | Employee | Child Relationship Name | Onboarding_Tasks |
| Related List Label | Onboarding_Tasks | | |
| Required | <input type="checkbox"/> | | |
| What to do if the lookup record is deleted? | Clear the value of this field. | | |

Lookup Filter

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Employee Custom Field

Assigned Manager

Back to Employee

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

| | | | |
|---------------------------|--|-------------|--|
| Field Label | Assigned Manager | Object Name | Employee |
| Field Name | Assigned_Manager | Data Type | Lookup |
| API Name | Assigned_Manager__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | BANDARU B S VEERA SAI GANESH, 9/20/2025, 8:46 AM | Modified By | BANDARU B S VEERA SAI GANESH, 9/20/2025, 8:46 AM |

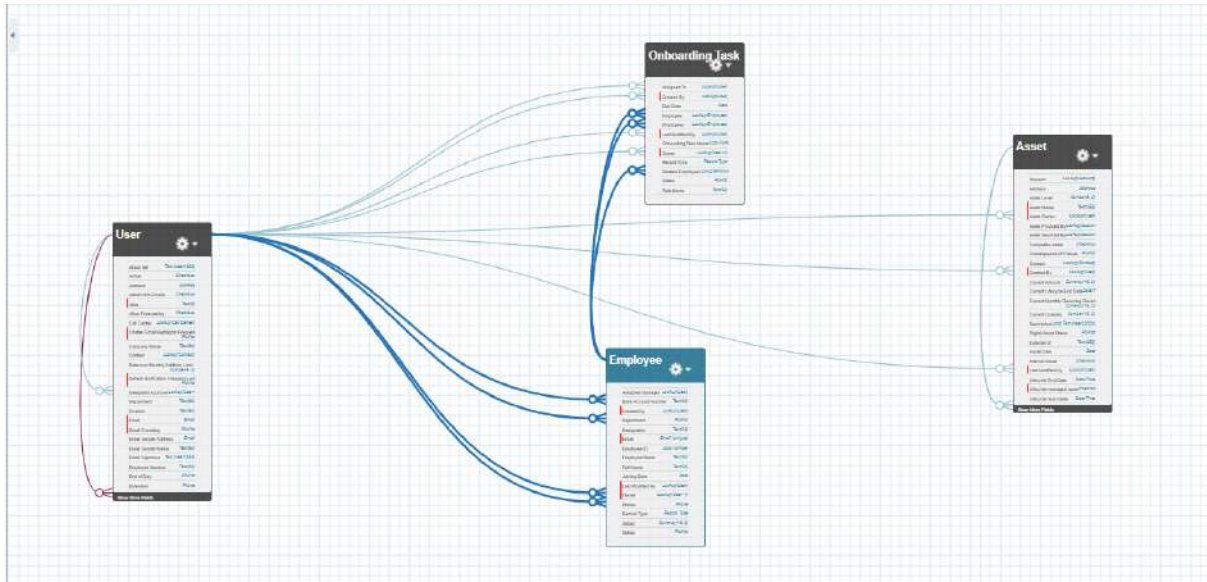
Lookup Options

| | | | |
|---|--------------------------------|-------------------------|-----------|
| Related To | User | Child Relationship Name | Employees |
| Related List Label | Employees | | |
| Required | <input type="checkbox"/> | | |
| What to do if the lookup record is deleted? | Clear the value of this field. | | |

Lookup Filter

7. Schema Builder

- Use **Schema Builder** in Salesforce to visually confirm:
 - Employee__c → Asset__c (1:M)
 - Employee__c → Onboarding_Task__c (1:M)
 - User → Employee__c (1:M for Manager reporting).



8. Junction Objects

- If multiple employees can share assets (like shared software licenses), create a **junction object**: Employee_Asset_Assignment__c.

SETUP > OBJECT MANAGER

Employee Asset Assignment

Details

Fields & Relationships
5 Items, Sorted by Field Label

Q, Quick Find Now Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|--------------------------------|------------------|-------------------------|-------------------|---------|
| Asset | Asset__c | Master-Detail(Asset) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Employee | Employee__c | Master-Detail(Employee) | | ✓ |
| Employee Asset Assignment Name | Name | Text(80) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |

Left sidebar menu:

- Details
- Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

9. External Objects (Future Scope)

- If assets are managed in an external system connect via **Salesforce Connect**.
- All objects (**Employee__c**, **Asset__c**, **Onboarding_Task__c**, **User**) are stored **within Salesforce**.
- There is **no requirement to integrate external data**.

Outcome of Phase 3:

- A complete **data model** for Employee Onboarding & Asset Management.
- HR, IT, and Managers will now have structured records to work with in later phases (automation, approvals, reporting).