

# Employee Onboarding Application-Phase 3

## 1) Add core fields on Employee Profile

1. In Object Manager → Employee Profile → click Fields & Relationships → New.

Create PAN field

The screenshot shows the Salesforce Object Manager interface for the 'Employee Profile' object. The 'Fields & Relationships' tab is selected, and a new custom field named 'PAN' is being defined. The 'Field Information' section includes the following details:

Field Label	PAN	Object Name	Employee Profile
Field Name	PAN	Data Type	Text
API Name	PAN__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vishnaji Ninkar	Modified By	Vishnaji Ninkar
Created Date	9/23/2025, 9:32 PM	Modified Date	9/23/2025, 9:32 PM

The 'General Options' section shows the following settings:

Option	Value
Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

The 'Text Options' section shows the following settings:

Option	Value
Length	10

Create ID Proof Type (picklist)

The screenshot shows the Salesforce Object Manager interface for the 'Employee Profile' object. The 'Fields & Relationships' tab is selected, and a new custom field named 'ID Proof Type' is being defined. The 'Field Information' section includes the following details:

Field Label	ID Proof Type	Object Name	Employee Profile
Data Type <th>Picklist</th> <td></td> <td></td>	Picklist		
Field Name <th>ID_Proof_Type</th> <td></td> <td></td>	ID_Proof_Type		
Description <td></td> <td></td> <td></td>			

The 'Add to page layouts' section shows the following settings:

Page Layout Name	Value
Employee Layout	<input checked="" type="checkbox"/>

## Create ID Proof Number (text)

New → Text → Label ID Proof Number → Length 30 → Save.

The screenshot shows the Salesforce Setup interface for the Employee Profile. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area is titled 'New Custom Field' and is at 'Step 4 of 4: Add to page layouts'. A table displays the field configuration: Field Label 'ID Proof Number', Data Type 'Text', Field Name 'ID\_Proof\_Number', and Description. Below the table, instructions state: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.' An 'Add Field' section shows 'Employee Layout' selected with a checkmark. At the bottom, a message says: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' Navigation buttons 'Previous', 'Save & New', 'Save', and 'Cancel' are present.

## 2) Create Department object and link to Employee

1. In Employee Profile → Fields & Relationships → New: Select Lookup Relationship → Next

Related To: Department → Next

Field Label: Department (API Department\_\_c) → Next

The screenshot shows the Salesforce Setup interface for the Employee Profile, specifically the 'New Relationship' screen at 'Step 5 of 6: Add reference field to Page Layouts'. The left sidebar is identical to the previous screenshot, with 'Fields & Relationships' selected. The main content area shows a table for the relationship configuration: Field Label 'Department', Data Type 'Lookup', Field Name 'Department\_c', and Description. Instructions below the table state: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.' The 'Add Field' section shows 'Employee Layout' selected with a checkmark. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

### 3) Create Task ↔ Employee relationship (Employee → Task)

Onboarding Tasks should be children of Employee (one Employee → many Tasks).

1. Object Manager → Onboarding Task → Fields & Relationships → New.
2. Choose Lookup Relationship (or Master-Detail if you want strict parent-child) → Next.
3. Related To: Employee Profile → Next.
4. Field Label: Employee → Child Relationship Name: Onboarding\_Tasks (default) → Next.

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'Onboarding Task' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area is titled 'Onboarding Task New Relationship' and is at 'Step 6 of 6: Add custom related lists'. A table shows the relationship details: Field Label (Employee), Data Type (Lookup), Field Name (Employee\_c), and Description. Below the table, there are instructions to specify the title for the related list and to select page layouts. A section titled 'Add Related List' shows 'Employee Layout' selected with a checkbox. At the bottom, there is a checkbox for 'Append related list to users' existing personal customizations'.

Field Label	Employee
Data Type	Lookup
Field Name	Employee_c
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label Onboarding Tasks (Employ)

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.  
To change the location of this field on the page, you will need to customize the page layout.

Add Related List Page Layout Name  
☒ Employee Layout

☒ Append related list to users' existing personal customizations

Add other Task fields: Subject (Text), Due Date (Date), Status (Picklist).

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Onboarding Task' object. The left sidebar is the same as the previous screenshot. The main content area is titled 'Onboarding Task New Custom Field' and is at 'Step 4 of 4: Add to page layouts'. A table shows the field details: Field Label (Subject), Data Type (Text), Field Name (Subject), and Description. Below the table, there are instructions to select page layouts that should include this field. A section titled 'Add Field' shows 'Onboarding Task Layout' selected with a checkbox. At the bottom, there is a note: 'When finished, click Save & New to create more custom fields, or click Save if you are done.'

Field Label	Subject
Data Type	Text
Field Name	Subject
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.  
To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name  
☒ Onboarding Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

App Manager | Salesforce x Login | Salesforce x Lightning Experience | Sales x Onboarding Task | Salesforce x Home | Salesforce x

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Setup Home Object Manager

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

Object Access

Onboarding Task Custom Field

Due Date

Back to Onboarding Task

Validation Rules

**Custom Field Definition Detail**

Edit Set Field-Level Security View Field Accessibility Where is this used?

**Field Information**

Field Label	Due Date	Object Name	Onboarding Task
Field Name	Due_Date	Data Type	Date
API Name	Due_Date__c		
Description	Date by which this onboarding task must be completed.		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavi Nimkar, 9/21/2025, 7:41 AM	Modified By	Vaishnavi Nimkar, 9/21/2025, 7:41 AM

**General Options**

Required ☒

Default Value

**Validation Rules**

New

No validation rules defined.

Validation Rules Help

Back To Top

Always show me more records per related list

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Setup Home Object Manager

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

Object Access

Onboarding Task Custom Field

Status

Back to Onboarding Task

Validation Rules

**Custom Field Definition Detail**

Edit Set Field-Level Security View Field Accessibility Where is this used?

**Field Information**

Field Label	Status	Object Name	Onboarding Task
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vaishnavi Nimkar, 9/21/2025, 7:47 AM	Modified By	Vaishnavi Nimkar, 9/21/2025, 7:47 AM

**General Options**

Required ☐

Default Value

**Picklist Options**

Restrict picklist to the values defined in the value set ☒

Controlling Field (New)

**Picklist Values Used**

Active and inactive picklist values 3 (1,000 max)

#### 4) Design Employee ↔ Training (many-to-many recommended)

Create Junction object: Training Enrollment

1. Object Manager → Create Custom Object → Label Training Enrollment → Save.

The screenshot shows the Salesforce Object Manager interface for the 'Training Enrollment' custom object. The left sidebar contains a navigation menu with options: 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, and Object Access. The 'Details' section is active, showing the following information:

- Description:** (Empty text area)
- API Name:** Training\_Enrollment\_\_c
- Custom:** ☒
- Singular Label:** Training Enrollment
- Plural Label:** Training Enrollments
- Enable Reports:** ☒
- Track Activities:** ☒
- Track Field History:** ☒
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2. Open Training Enrollment → Fields & Relationships → New → select Master–Detail Relationship.

Related To: Employee Profile → Next → Field Label Employee → Next → Save.

The screenshot shows the Salesforce Object Manager interface for the 'Training Enrollment' custom object, specifically the 'Fields & Relationships' section. The left sidebar is the same as in the previous screenshot. The 'Fields & Relationships' section is active, showing the following information:

- Training Enrollment Custom Field:** Employee
- Back to Training Enrollment:** (Link)
- Validation Rules:** (Link)
- Custom Field Definition Detail:** (Section header)
- Field Information:** (Table)
- Master-Detail Options:** (Section header)
- Lookup Filter:** No lookup filters defined.
- Validation Rules:** (Section header)

The 'Field Information' table has the following data:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Created Date	Modified By	Modified Date
Employee	Employee	Employee__c							Vishnave Nimbkar	9/23/2025, 10:06 PM	Vishnave Nimbkar	9/23/2025, 10:06 PM

The 'Master-Detail Options' section shows the following information:

- Related To:** Employee Profile
- Child Relationship Name:** Training\_Enrollments
- Sharing Setting:** Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
- Replicable Master Detail:** ☐

Buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?' are located above the 'Field Information' table.

### 3. Create second Master–Detail Relationship on Training Enrollment:

New → Master–Detail → Related To: Training Module → Next → Field Label Training Module → Next → Save.

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'Training Enrollment' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'New Relationship' and shows 'Step 6: Add custom related lists'. The relationship is configured as follows:

Field Label	Training Module
Data Type	Master-Detail
Field Name	Training_Module
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List: ☒ Page Layout Name:

☒ Append related list to users' existing personal customizations

Buttons: Previous, Save & New, Save, Cancel

### 7) Create Document Checklist and attach to Employee

Object Manager → Document Checklist → Fields & Relationships → New → Lookup to Employee Profile (like tasks).

Add fields: Document Name, Required (Checkbox), Status (Picklist: Submitted, Missing, Rejected).

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'Document Checklist' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'New Relationship' and shows 'Step 6: Add custom related lists'. The relationship is configured as follows:

Field Label	Employee
Data Type <td>Lookup</td>	Lookup
Field Name <td>Employee</td>	Employee
Description <td></td>	

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List: ☒ Page Layout Name:

☒ Append related list to users' existing personal customizations

Buttons: Previous, Save & New, Save, Cancel

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Setup Home Object Manager

### Document Checklist

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Document Checklist

Field Name	Owner	Uploaded Date
Document Checklist	Owner	
Document Type	Required	
Created By	Employee	Status
Document Name	Last Modified By	Uploaded

Employee Sample Text

System Information (header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Files

This list is not customizable

Notes & Attachments

This list is not customizable

Type here to search

Humid 12:22 PM 9/24/2025

App Manager | Salesforce | Login | Salesforce | Lightning Experience | Sales | Employee Profile | Salesforce | Home | Salesforce

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Setup Home Object Manager

### Employee Profile

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Employee Profile

Field Name	Owner	Uploaded Date
Employee Profile	Owner	
Employee Name	Manager	
Department	Manager	
Created By	Enabled	Owner
Date of Joining	Employee	Joining Date

Asset Name

Sample Text

Onboarding Tasks (Employee)

Onboarding Task Name

Sample Text

Training Enrollments

Training Enrollment Training Module Name

Sample Text

Document Checklists

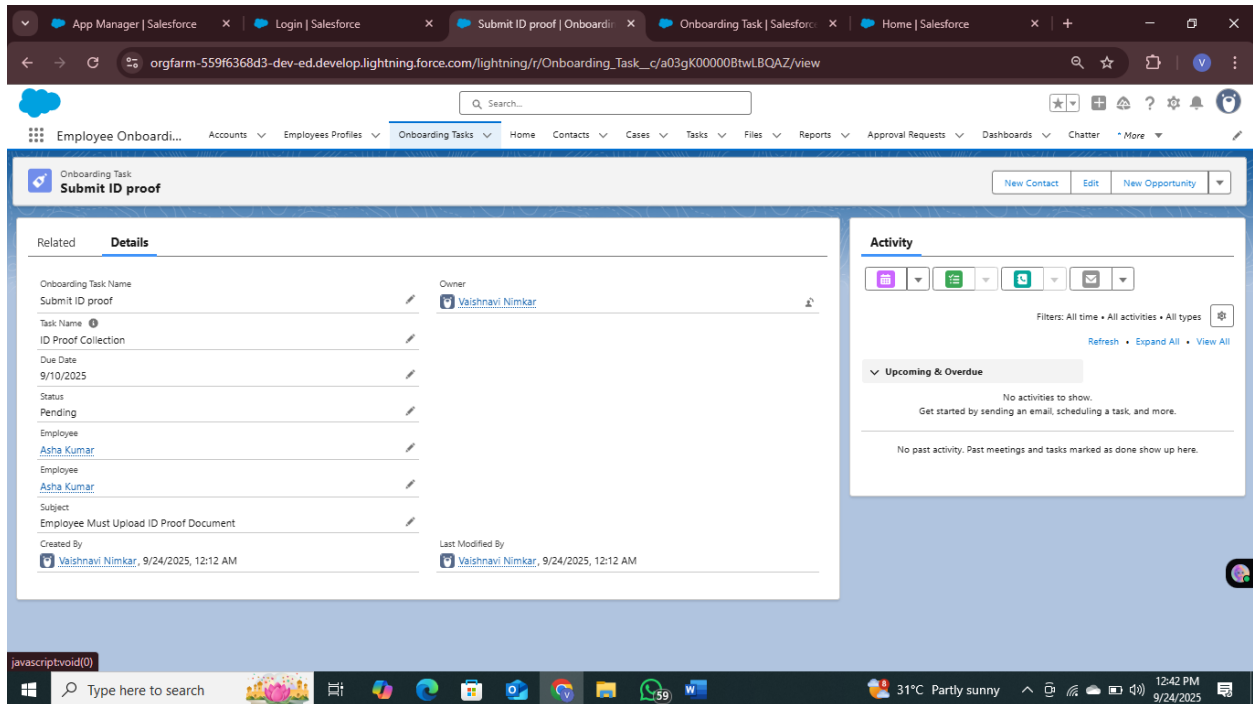
Document Checklist Name	Document Name	Document Type	Required	Status	Uploaded Date
Sample Text	Sample Text	Sample Text	✓	Sample Text	9/23/2025, 11:55 PM

Type here to search

30°C Cloudy 12:25 PM 9/24/2025

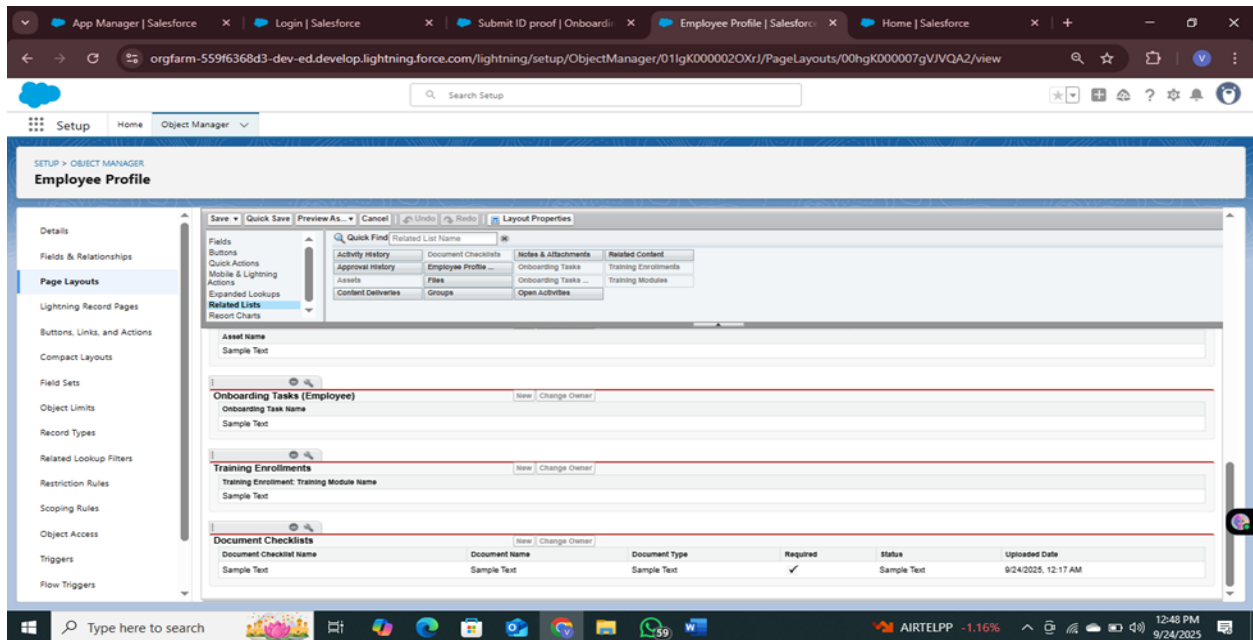
## 5) Create the Task Status picklist

1. Object Manager → Onboarding Task → Fields & Relationships → New.



## 9) Add Related Lists to Employee page layout

1. Click Related Lists (palette) → drag Onboarding Tasks, Training Enrollments, Document Checklists onto layout.





## 6) Validation Rules (example: PAN & ID proof)

### A. PAN validation

1. Object Manager → Employee Profile → Validation Rules → New.

2. Rule Label: PAN\_Format\_and\_Required.

The screenshot displays the Salesforce Object Manager interface for configuring a validation rule on the Employee Profile. The rule is named 'PAN\_Format\_and\_Required' and is currently active. The error condition formula is: `OR( ISBLANK(PAN__c), NOT(REGEX(UPPER(TRIM(PAN__c)), "[A-Z]{5}[0-9]{4}[A-Z]{1}$")) )`. The error message is 'PAN is Required and must be in the format AAAAA9999A', and the error location is set to 'PAN'. The rule was created by Vaishnavi Nimkar on 9/24/2025 at 12:32 AM.

Validation Rule Detail	
Rule Name	PAN_Format_and_Required
Error Condition Formula	<code>OR( ISBLANK(PAN__c), NOT(REGEX(UPPER(TRIM(PAN__c)), "[A-Z]{5}[0-9]{4}[A-Z]{1}\$")) )</code>
Error Message	PAN is Required and must be in the format AAAAA9999A
Description	
Created By	Vaishnavi Nimkar, 9/24/2025, 12:32 AM

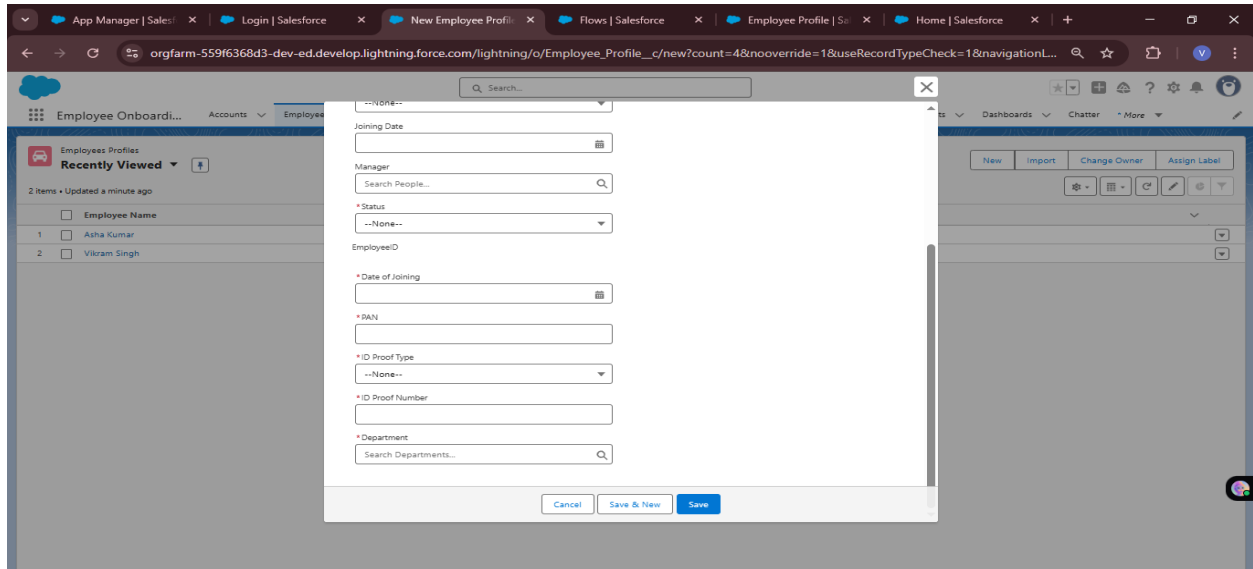
### B. Require ID Proof Type + Number

The screenshot displays the Salesforce Object Manager interface for configuring a validation rule on the Employee Profile. The rule is named 'Require\_ID\_Proof\_Type\_and\_Number' and is currently active. The error condition formula is: `OR( ISPICKVAL(ID_Proof_Type__c, ''), ISBLANK(ID_Proof_Number__c) )`. The error message is 'Please select ID Proof Type and Provide its number.', and the error location is set to 'ID Proof Type'. The rule was created by Vaishnavi Nimkar on 9/24/2025 at 12:40 AM.

Validation Rule Detail	
Rule Name	Require_ID_Proof_Type_and_Number
Error Condition Formula	<code>OR( ISPICKVAL(ID_Proof_Type__c, ''), ISBLANK(ID_Proof_Number__c) )</code>
Error Message	Please select ID Proof Type and Provide its number.
Description	
Created By	Vaishnavi Nimkar, 9/24/2025, 12:40 AM

## 7) Field-Level Security & Page Layouts

1. After creating fields, click the field → Set Field-Level Security → make visible/editable to the profiles that need it.
2. Edit the Page Layout to place important fields on top: PAN, Department, ID Proof.



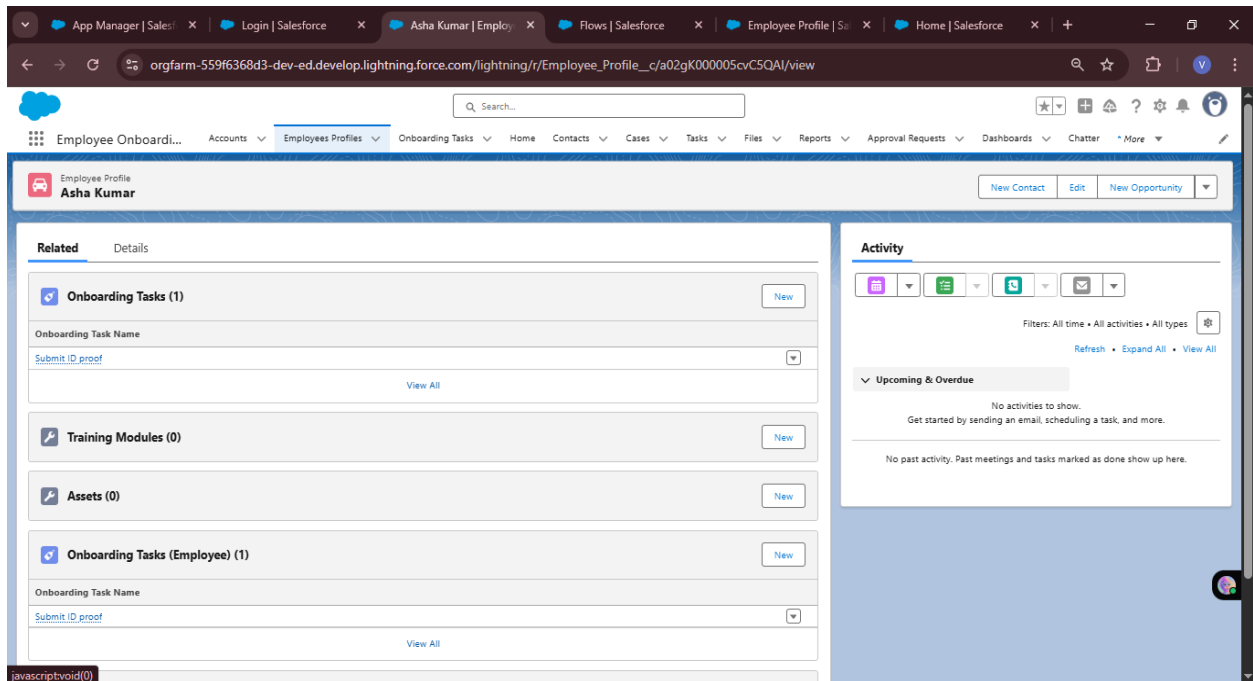
The screenshot shows the Salesforce interface for an Employee Profile record. A modal form is open for editing the profile. The form contains the following fields:

- Joining Date (calendar icon)
- Manager (lookup field with "Search People..." text)
- Status (dropdown menu, currently set to "--None--")
- EmployeeID (text field)
- \*Date of Joining (calendar icon)
- \*PAN (text field)
- \*ID Proof Type (dropdown menu, currently set to "--None--")
- \*ID Proof Number (text field)
- \*Department (lookup field with "Search Departments..." text)

At the bottom of the modal, there are three buttons: "Cancel", "Save & New", and "Save".

## 8) Test your model (create records)

1. App Launcher → open the App that includes your new objects (or use the object's tab).



The screenshot shows the Salesforce interface for an Employee Profile record for Asha Kumar. The page is divided into two main sections: "Related" and "Activity".

**Related Section:**

- Onboarding Tasks (1):** Includes a table with columns "Onboarding Task Name" and "Submit ID proof". A "View All" link is present.
- Training Modules (0):** Includes a "New" button.
- Assets (0):** Includes a "New" button.
- Onboarding Tasks (Employee) (1):** Includes a table with columns "Onboarding Task Name" and "Submit ID proof". A "View All" link is present.

**Activity Section:**

- Filters: All time • All activities • All types
- Buttons: Refresh • Expand All • View All
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.
- No past activity. Past meetings and tasks marked as done show up here.