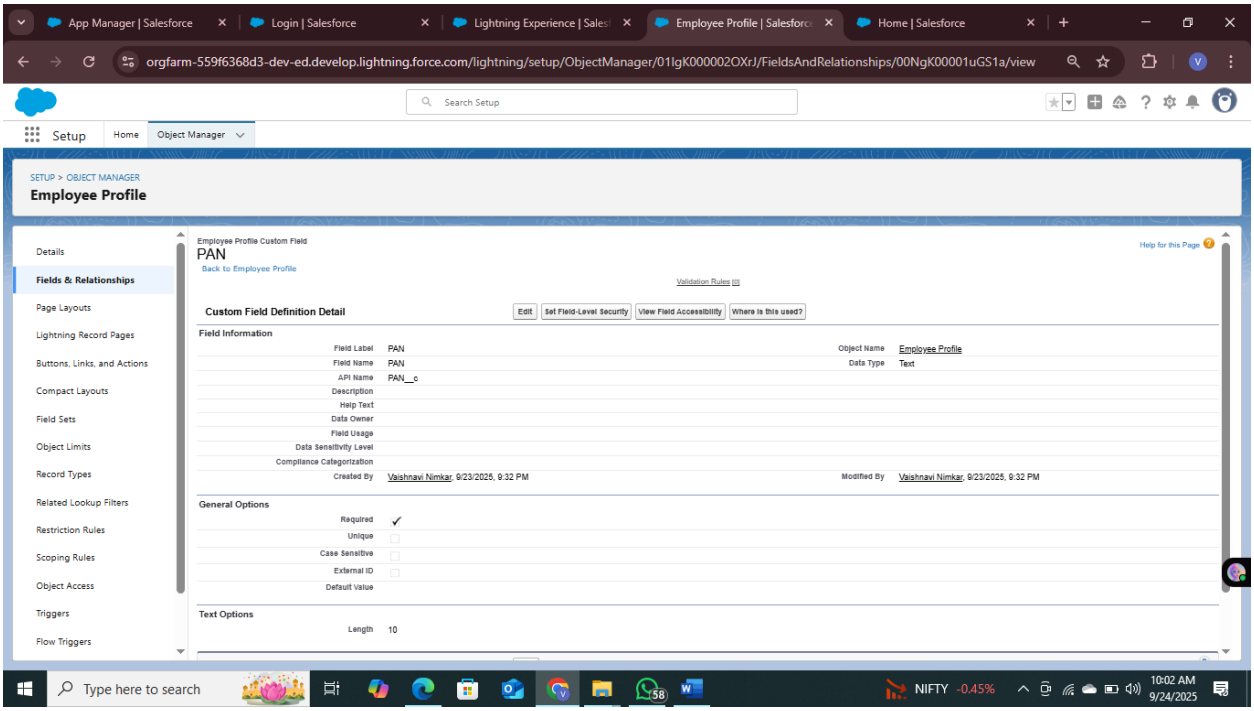
Employee Onboarding Application-Phase 3

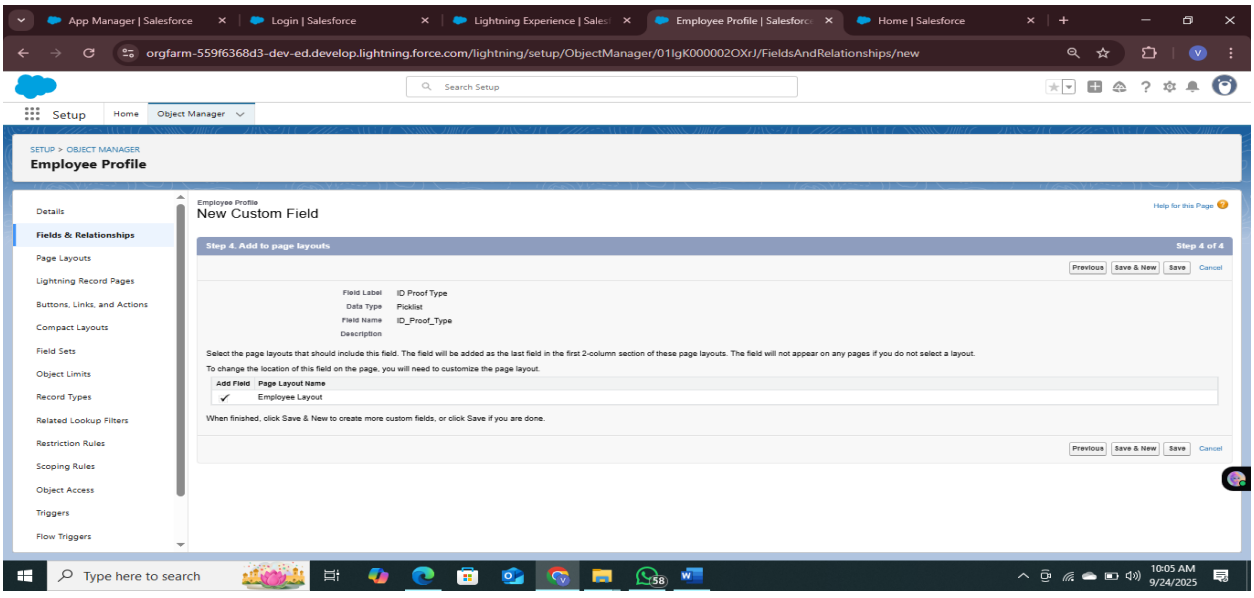
1) Add core fields on Employee Profile

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

Create PAN field

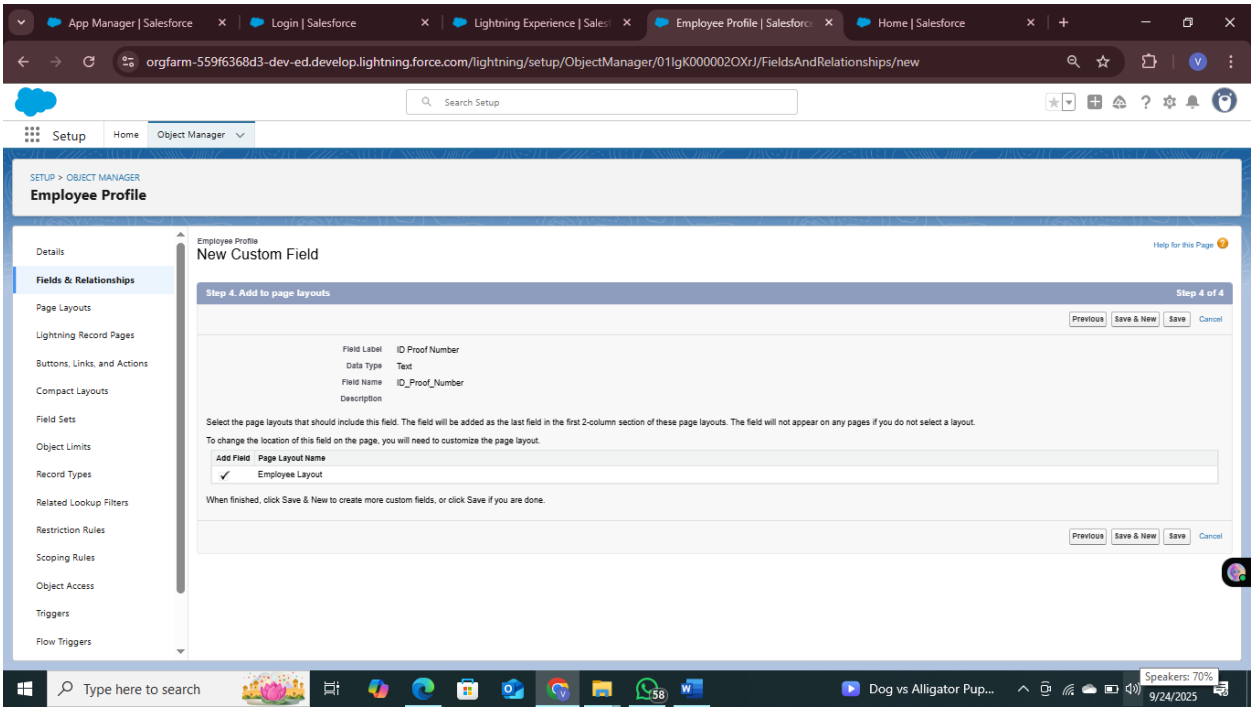


Create ID Proof Type (picklist)



Create ID Proof Number (text)

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

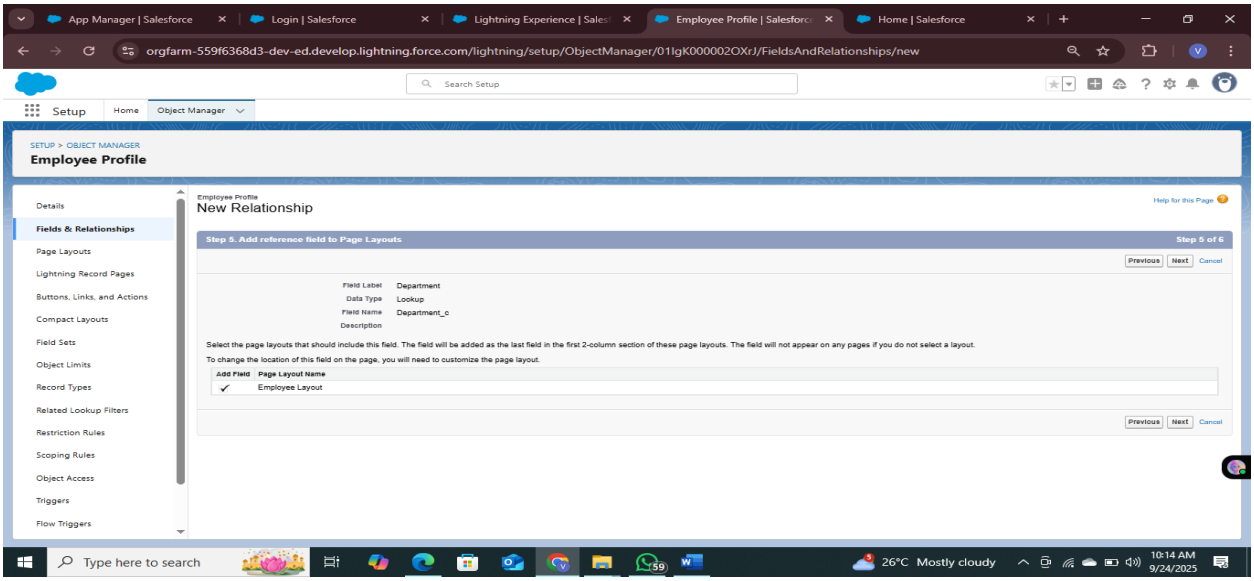


2) Create Department object and link to Employee

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

   Related To: Department → Next

   Field Label: Department (API Department__c) → Next



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

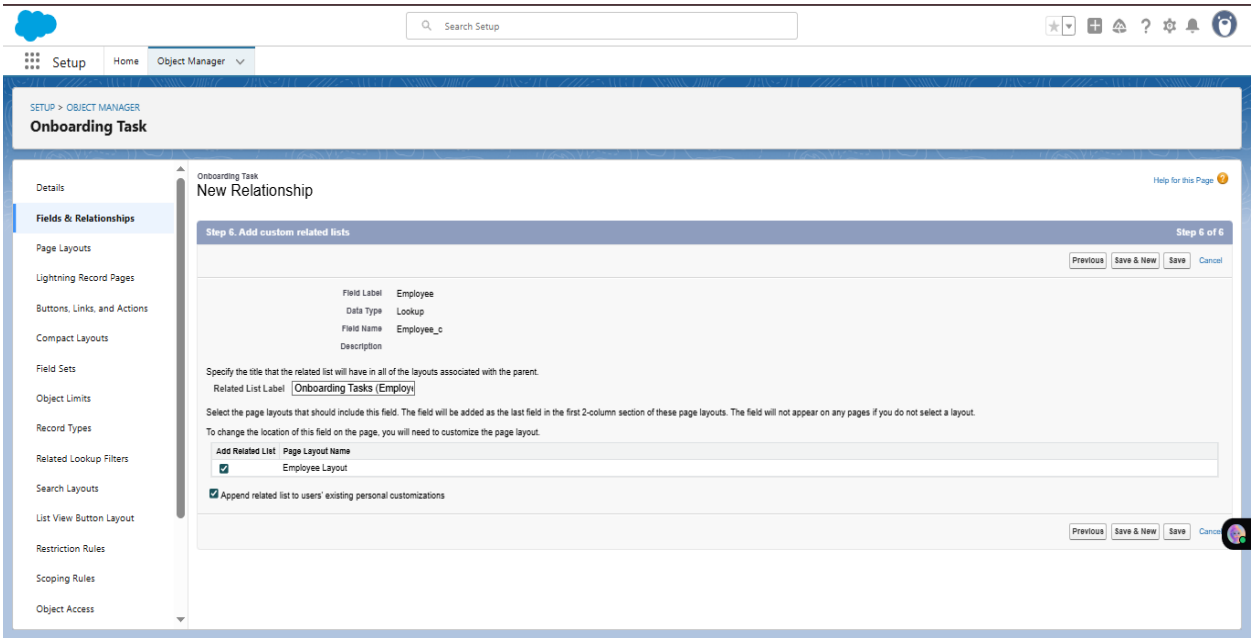
Onboarding Tasks should be children of Employee (one Employee → many Tasks).

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

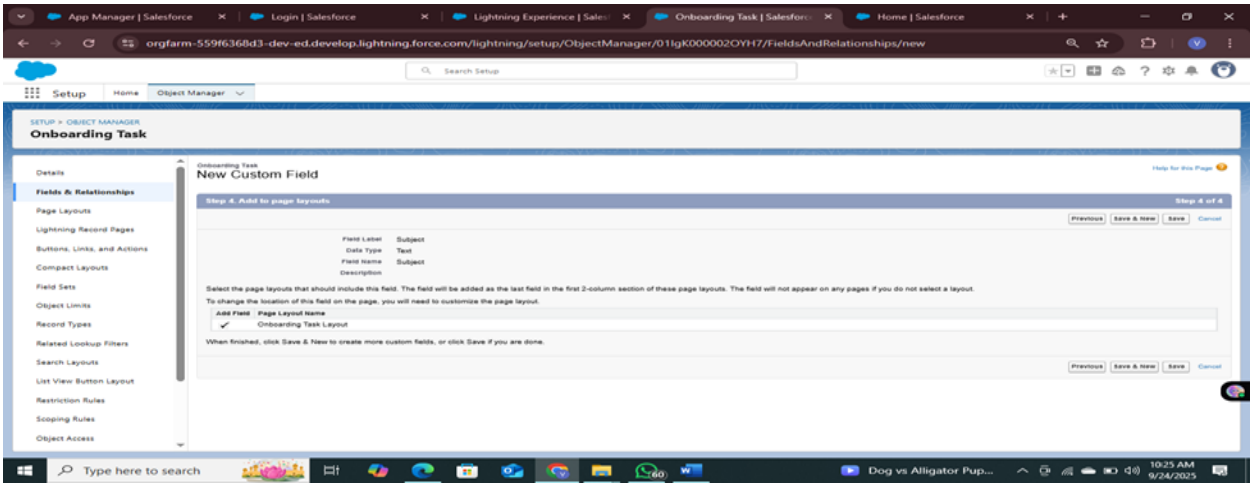
2. Choose Lookup Relationship (or Master-Detail if you want strict parent-child) → Next.

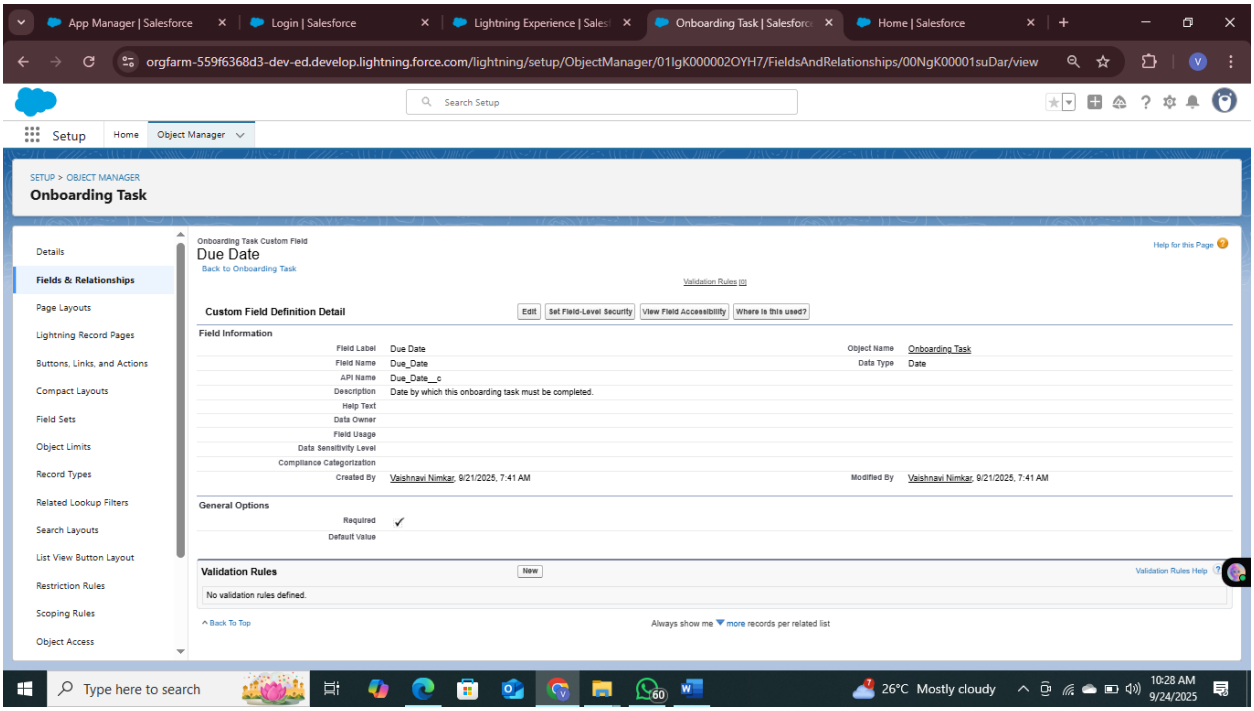
3. Related To: Employee Profile → Next.

4. Field Label: Employee → Child Relationship Name: Onboarding_Tasks (default) → Next.



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

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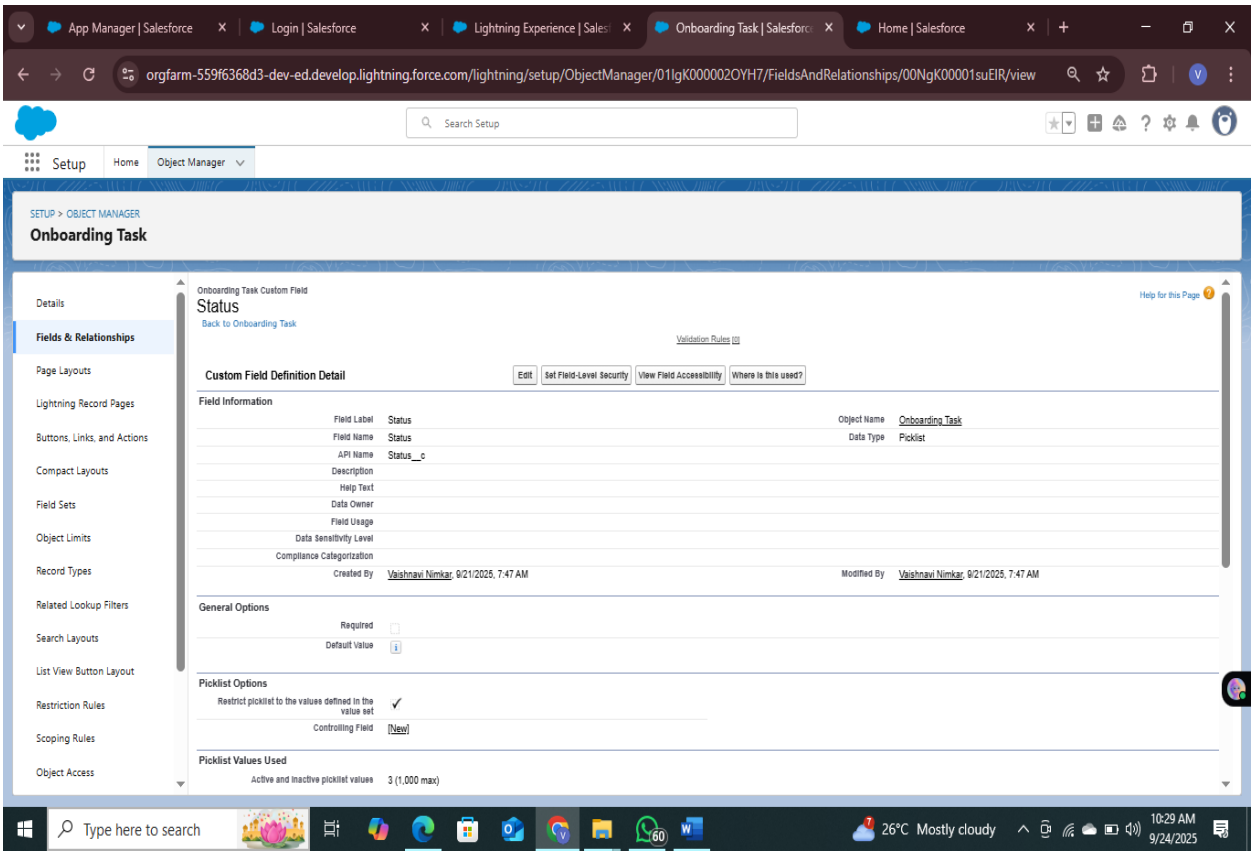
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Onboarding Task Custom Field
Due Date
Back to Onboarding Task
Help for this Page
Validation Rules (0)
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Due Date
Field Name Due_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
Object Name Onboarding Task
Data Type Date
Modified By Vaishnavi Nimkar, 9/21/2025, 7:41 AM
General Options
Required
Default Value
Validation Rules
New
Validation Rules Help
No validation rules defined.
Back To Top
Always show me more records per related list
Type here to search
26°C Mostly cloudy
10:28 AM
9/24/2025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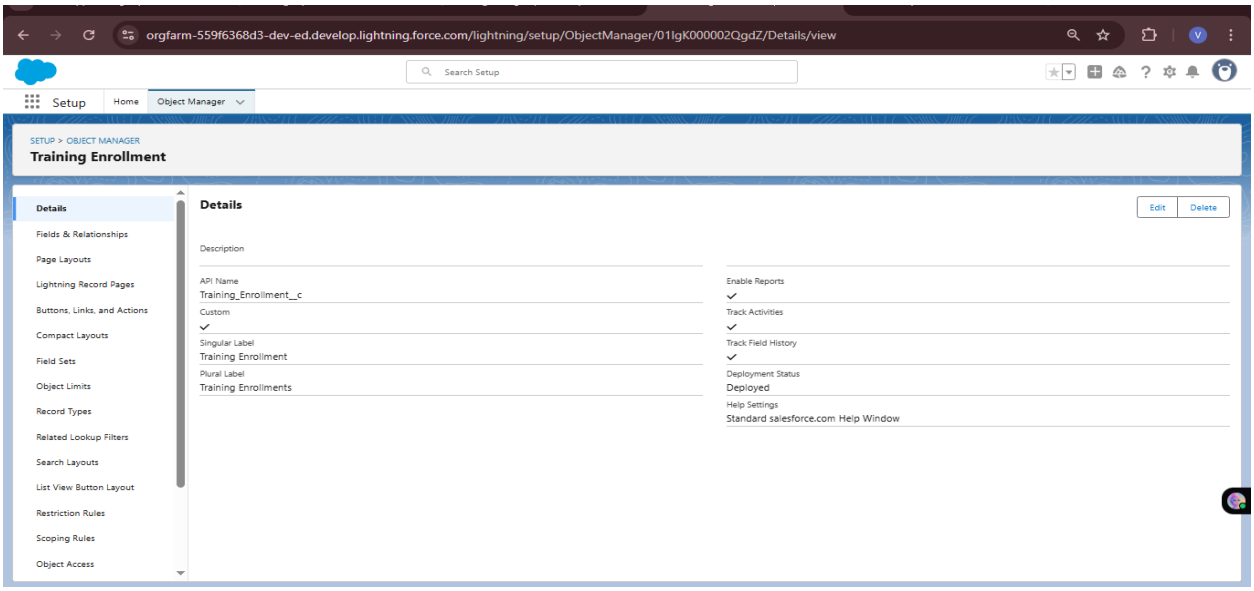
Restriction Rules
Scoping Rules
Object Access
Onboarding Task Custom Field
Status
Back to Onboarding Task
Help for this Page
Validation Rules (0)
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Status
Field Name Status
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
Object Name Onboarding Task
Data Type Picklist
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)
Type here to search
26°C Mostly cloudy
10:29 AM
9/24/2025

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

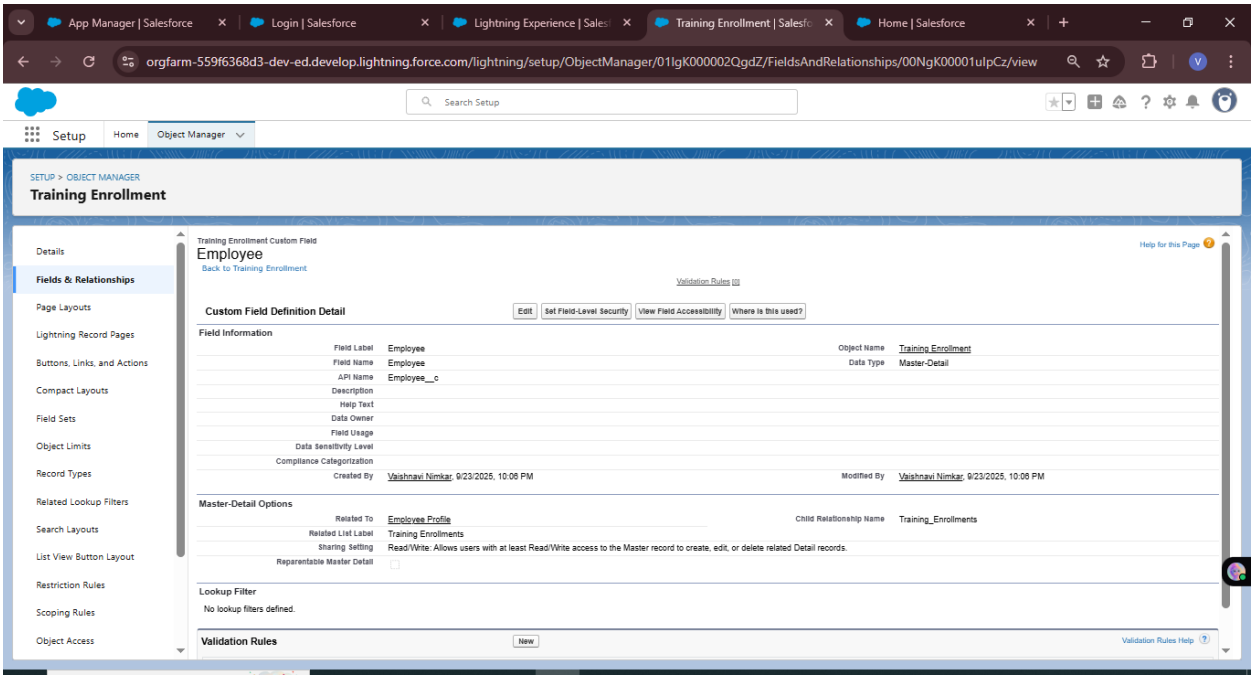
Create Junction object: Training Enrollment

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



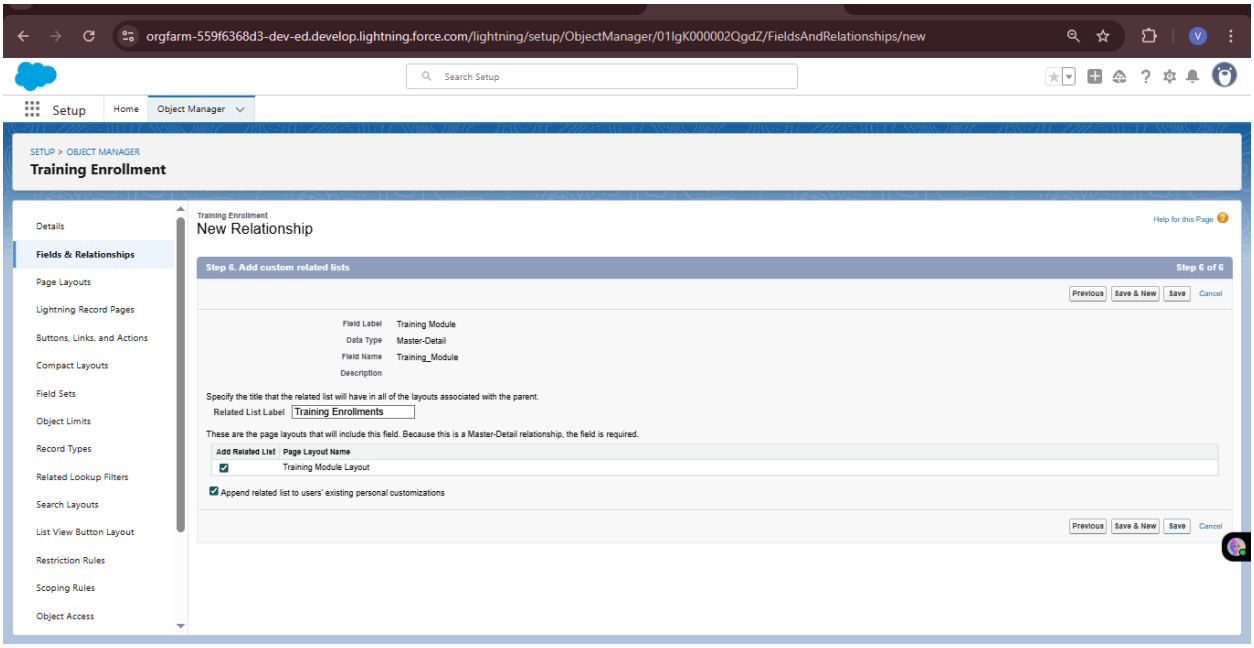
2. Open Training Enrollment → Fields & Relationships → New → select Master–Detail Relationship.

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



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

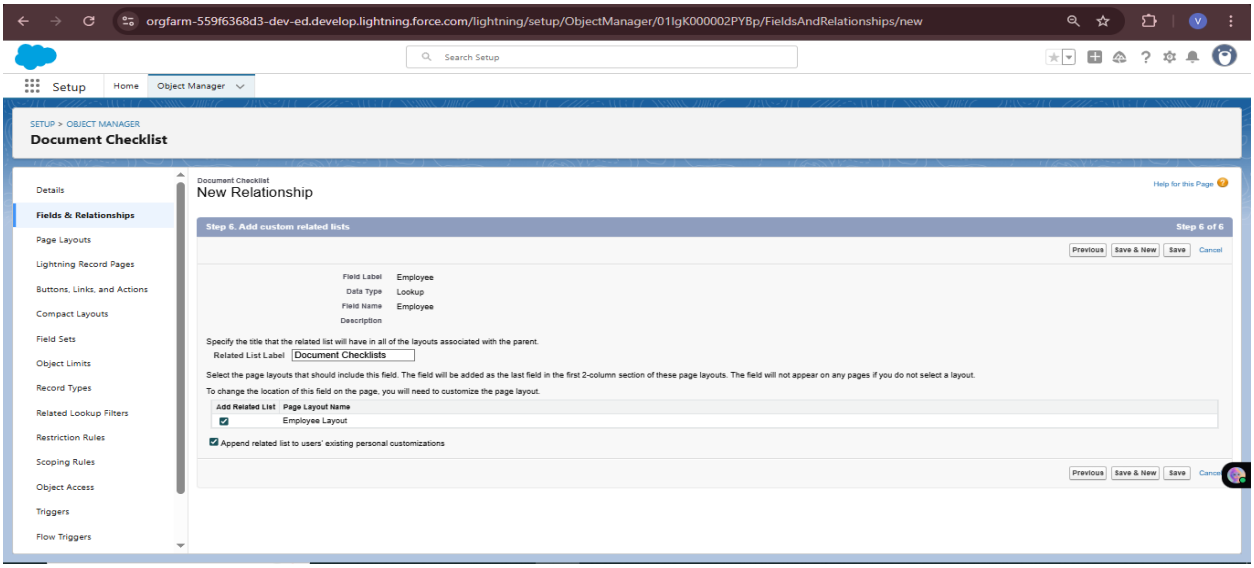
New → Master–Detail → Related To: Training Module → Next → Field Label Training Module → Next → Save.

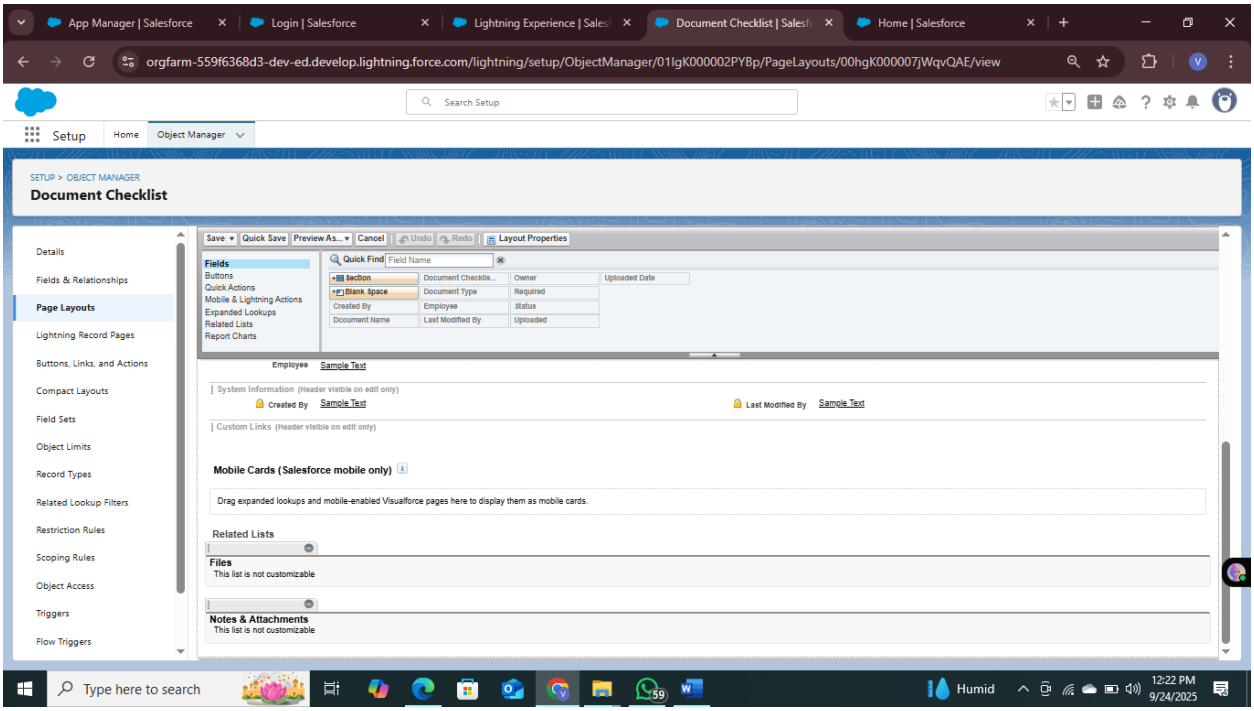


7) Create Document Checklist and attach to Employee

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

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

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Scoping Rules
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Triggers
Flow Triggers
Save
Quick Save
Preview As...
Cancel
Undo
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Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Blank Space
Document Checklis...
Owner
Uploaded Date
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
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Type here to search
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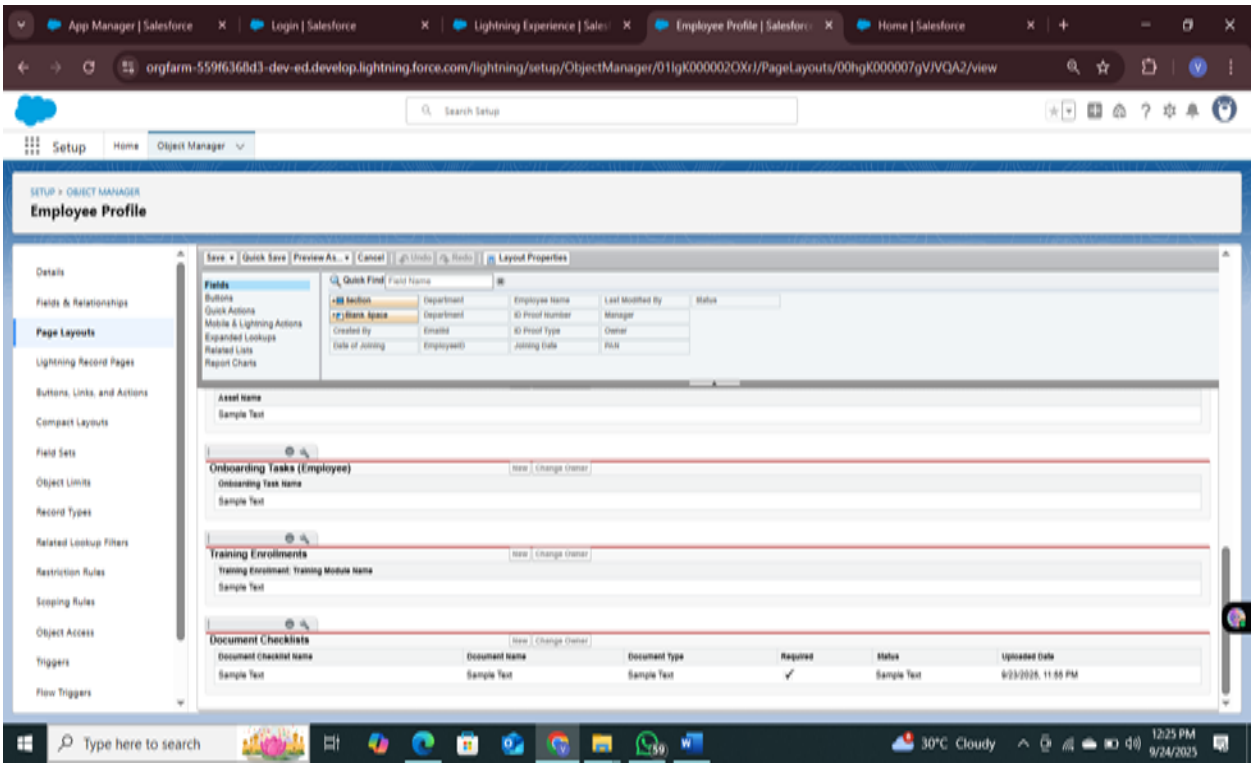
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Related Lists
Report Charts
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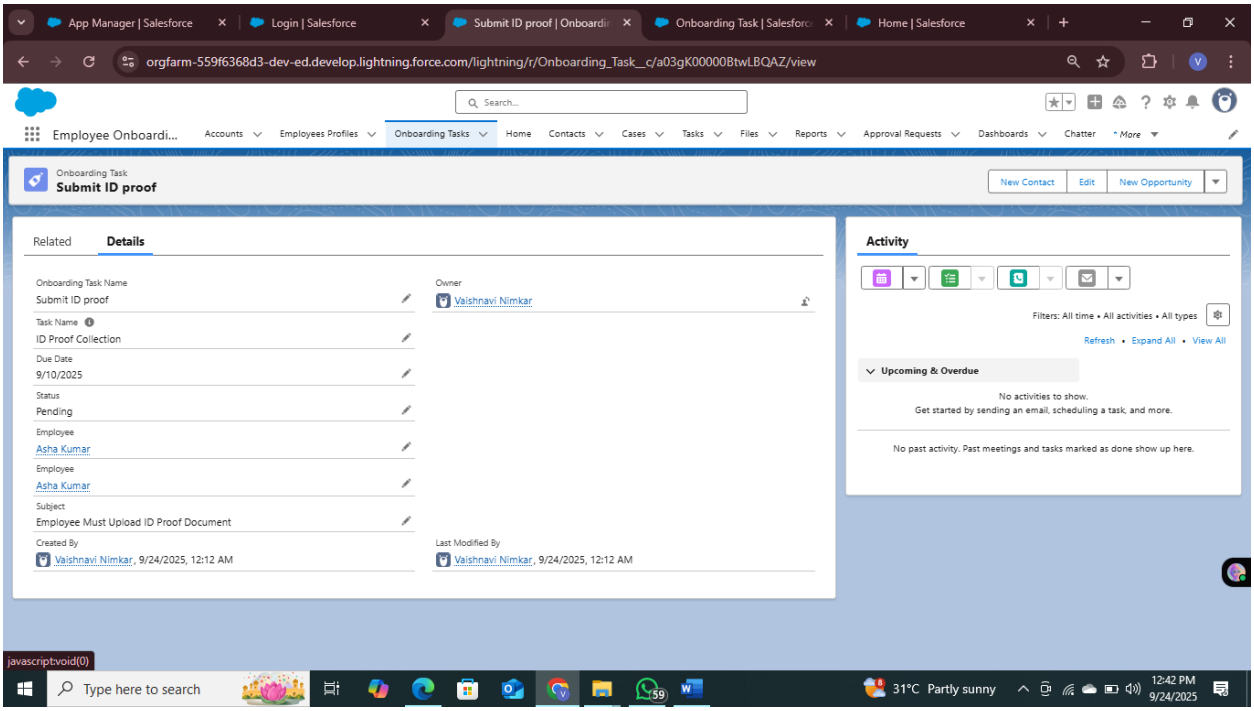
Sample Text
Onboarding Tasks (Employee)
Onboarding Task Name
Sample Text
Training Enrollments
Training Enrollment: Training Module Name
Sample Text
Document Checklists
Document Checklist Name
Document Name
Document Type
Required
Status
Uploaded Date
Sample Text
Sample Text
Sample Text
Sample Text
9/23/2025, 11:55 PM
Type here to search
30°C Cloudy
12:25 PM
9/24/2025

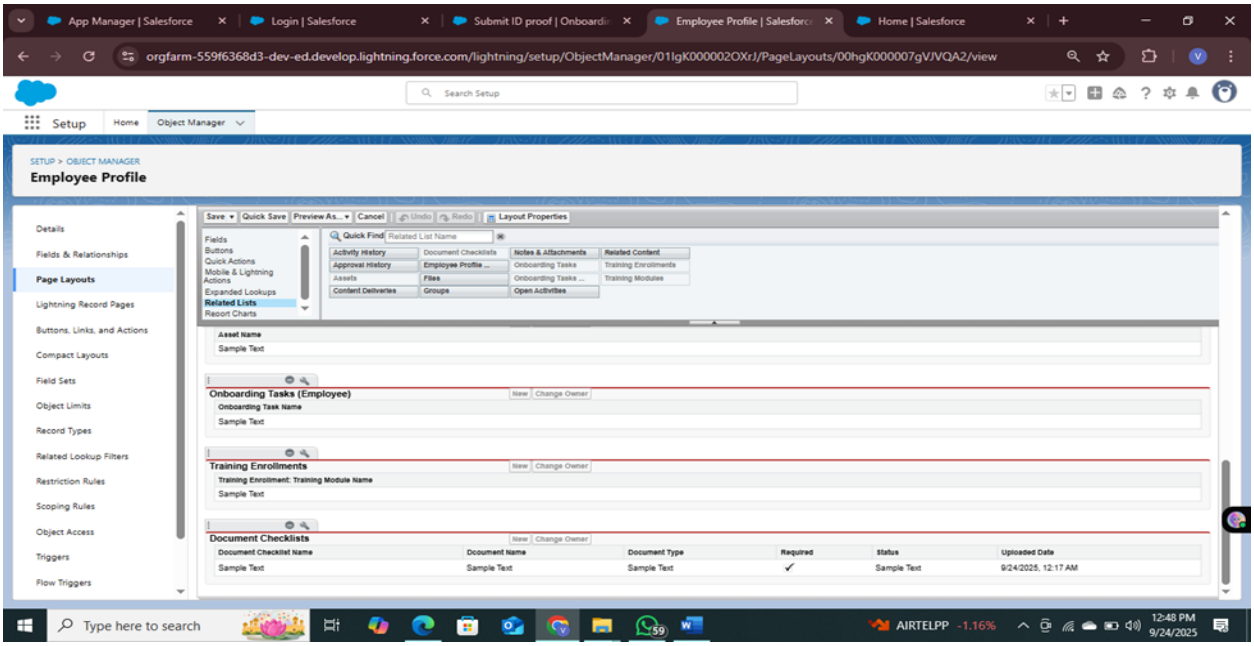
5) Create the Task Status picklist

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.

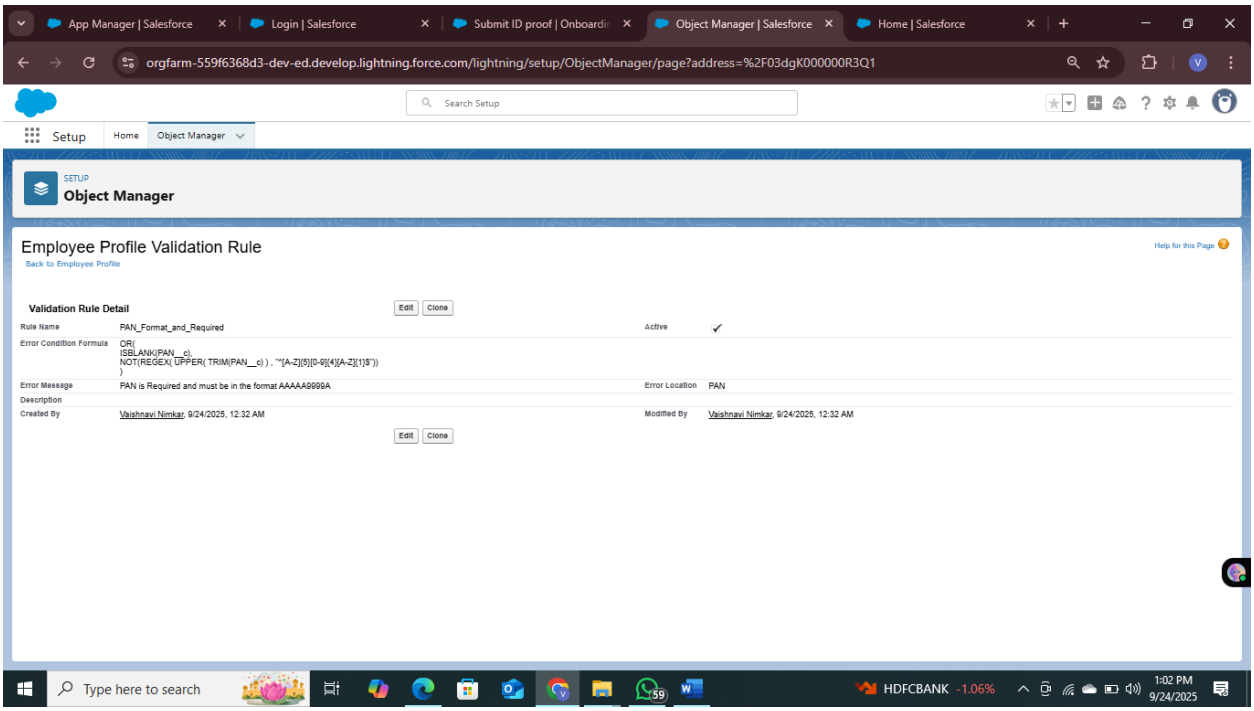


6) Validation Rules (example: PAN & ID proof)

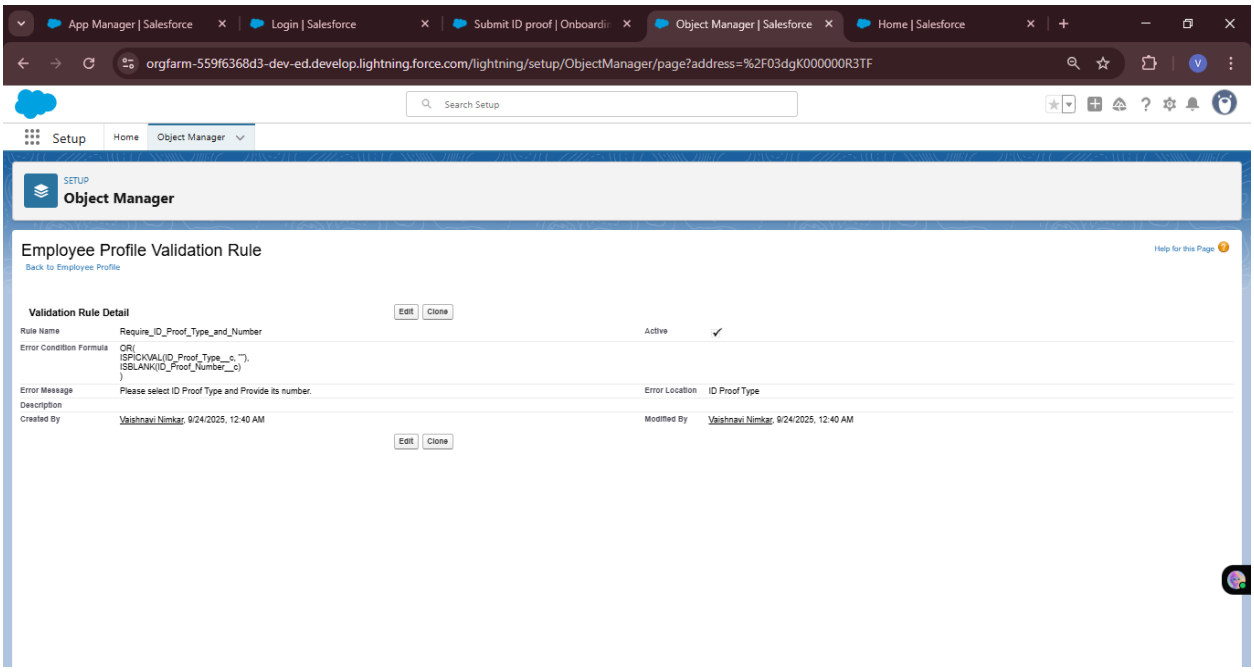
A. PAN validation

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

2. Rule Label: PAN_Format_and_Required.



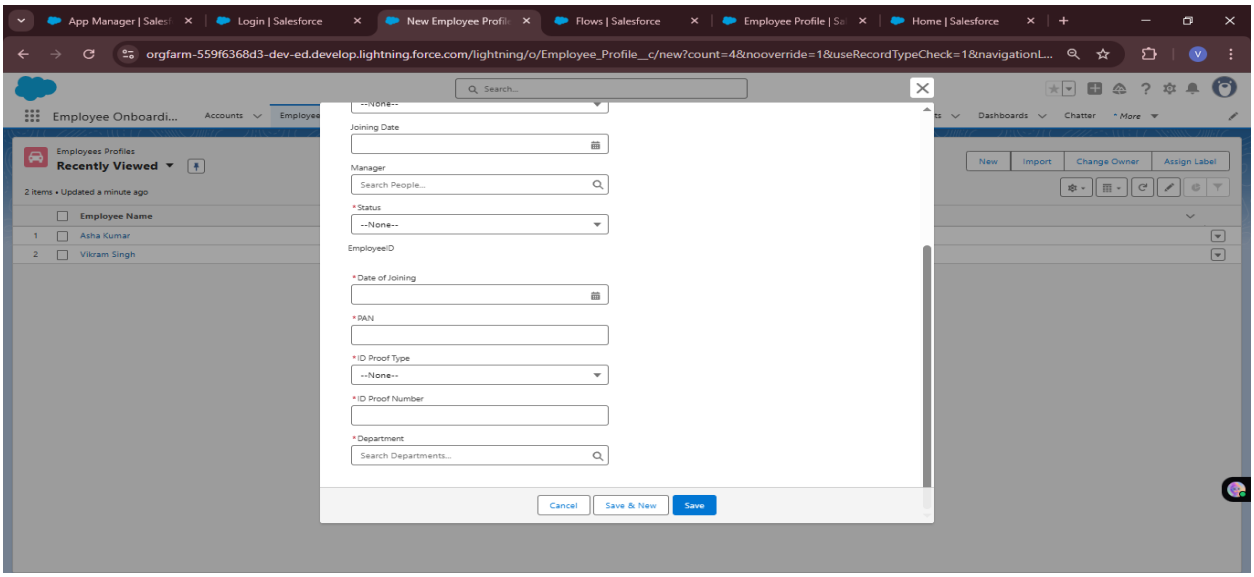
B. Require ID Proof Type + Number

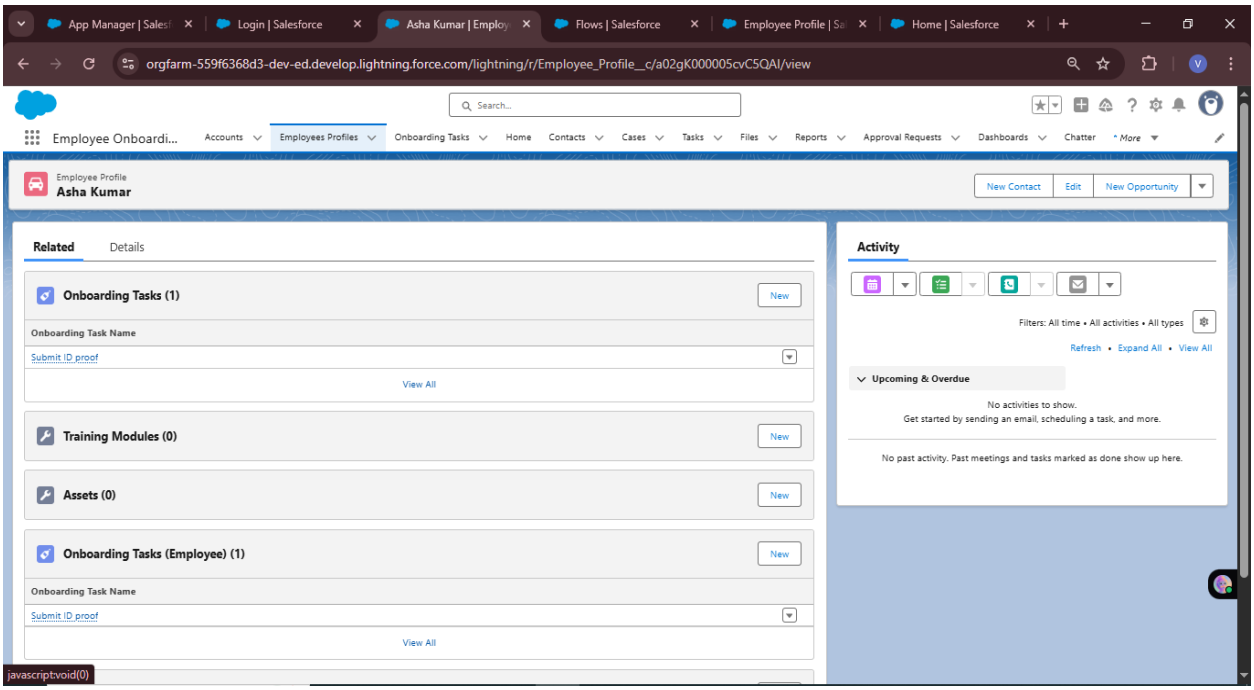


7) Field-Level Security & Page Layouts

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.



8) Test your model (create records)

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