

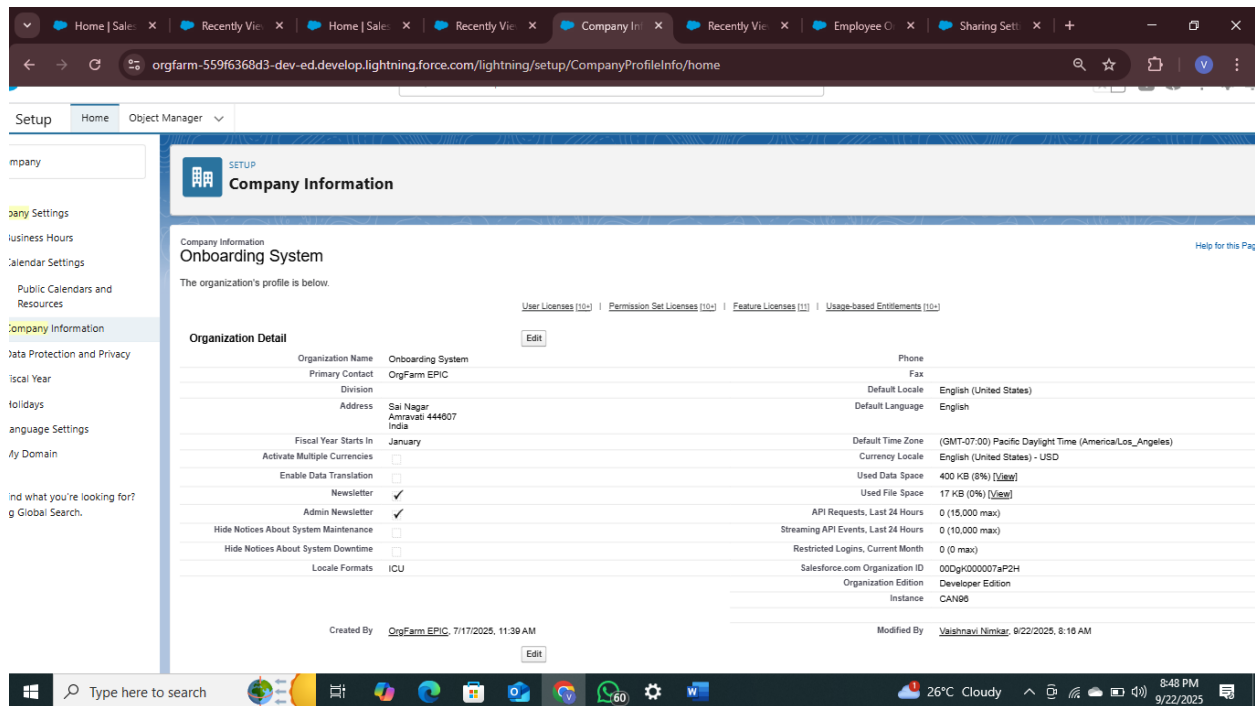
# Employee Onboarding Application

## Phase 2: System Design & Architecture

### Step 1: Define Org Structure

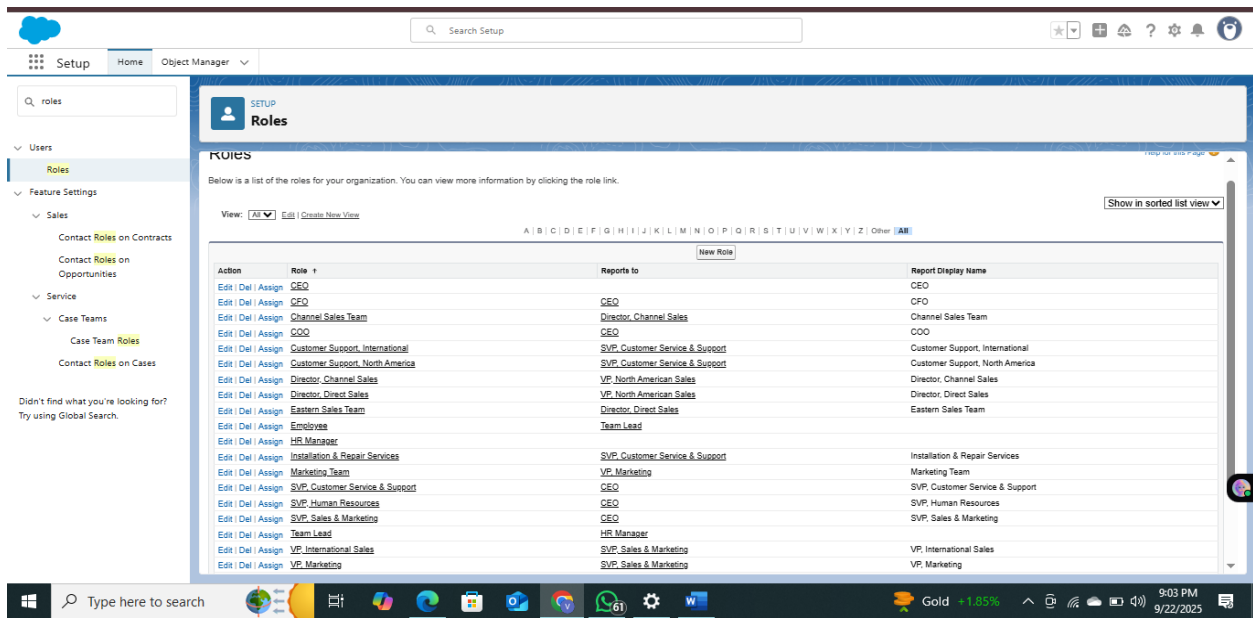
Go to Setup (gear icon → Setup).

Under Company Settings → Company Information, review org limits (users, storage).

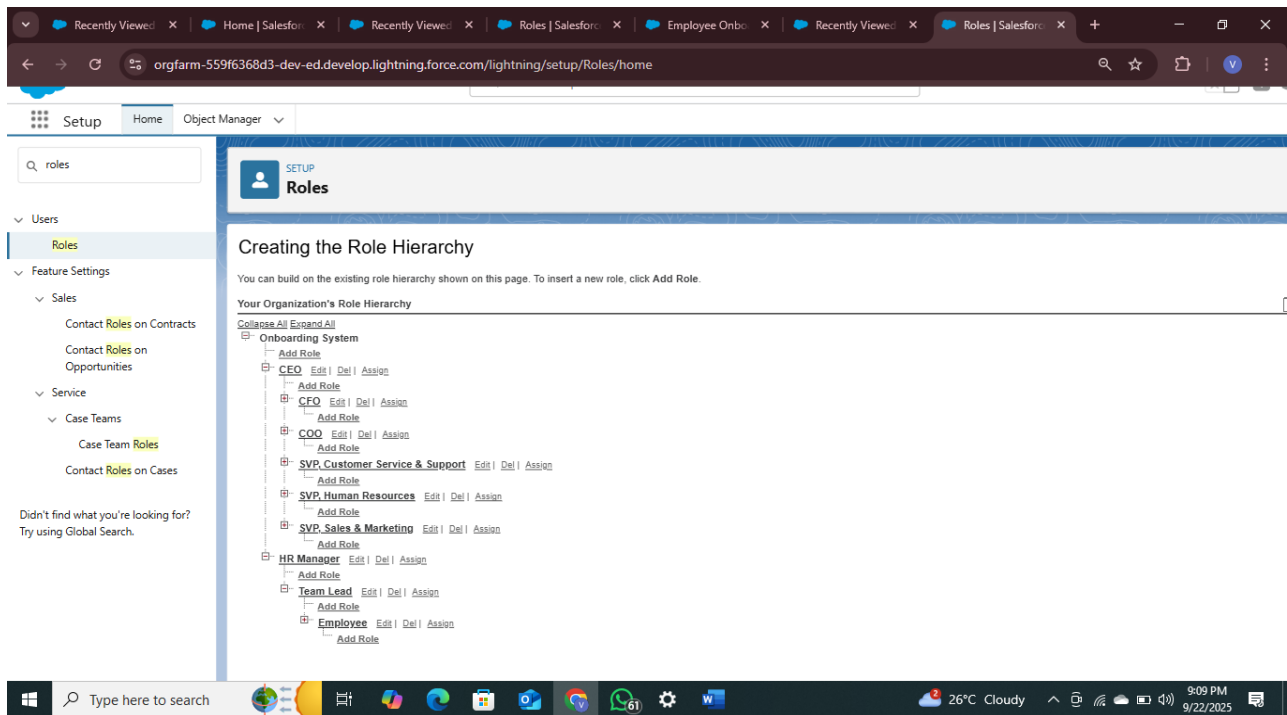


The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a navigation menu with options like 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', 'Company Information' (selected), 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', 'My Domain', and 'Find what you're looking for?'. The main content area is titled 'Company Information' and 'Onboarding System'. It displays the organization's profile details, including 'Organization Name' (Onboarding System), 'Primary Contact' (OrgFarm EPIC), 'Division' (Sai Nagar), 'Address' (Amravati 444607, India), 'Fiscal Year Starts In' (January), 'Default Time Zone' ((GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)), 'Currency Locale' (English (United States) - USD), 'Used Data Space' (400 KB (8%)), 'Used File Space' (17 KB (0%)), 'API Requests, Last 24 Hours' (0 (15,000 max)), 'Streaming API Events, Last 24 Hours' (0 (10,000 max)), 'Restricted Logins, Current Month' (0 (0 max)), 'Salesforce.com Organization ID' (000gk000007aP2H), 'Organization Edition' (Developer Edition), and 'Instance' (CAN96). The page also shows 'User Licenses (10/10)', 'Permission Set Licenses (10/10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10/10)'. The 'Created By' field shows 'OrgFarm EPIC' on 7/17/2025 at 11:36 AM, and the 'Modified By' field shows 'Vaishnavi Nimkar' on 6/22/2025 at 8:16 AM. The bottom of the screen shows a Windows taskbar with various application icons and system status information (26°C Cloudy, 8:48 PM, 9/22/2025).

Under Users → Roles, define roles: HR Manager, Team Lead, Employee.



Set hierarchy → HR Manager (top), Team Lead (mid), Employee (bottom).



## Step 2: Design Data Model (Objects & Fields)

From Setup, search Object Manager.

Click Create → Custom Object.

Name: Employee

The screenshot shows the Salesforce Object Manager interface for the 'Employee' 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, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The 'Details' section is currently selected. The main content area displays the following details:

- Description: (empty)
- API Name: Employee\_\_c
- Custom: ☒
- Singular Label: Employee
- Plural Label: Employees
- Enable Reports: ☒
- Track Activities: ☒
- Track Field History: ☐
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Add fields:

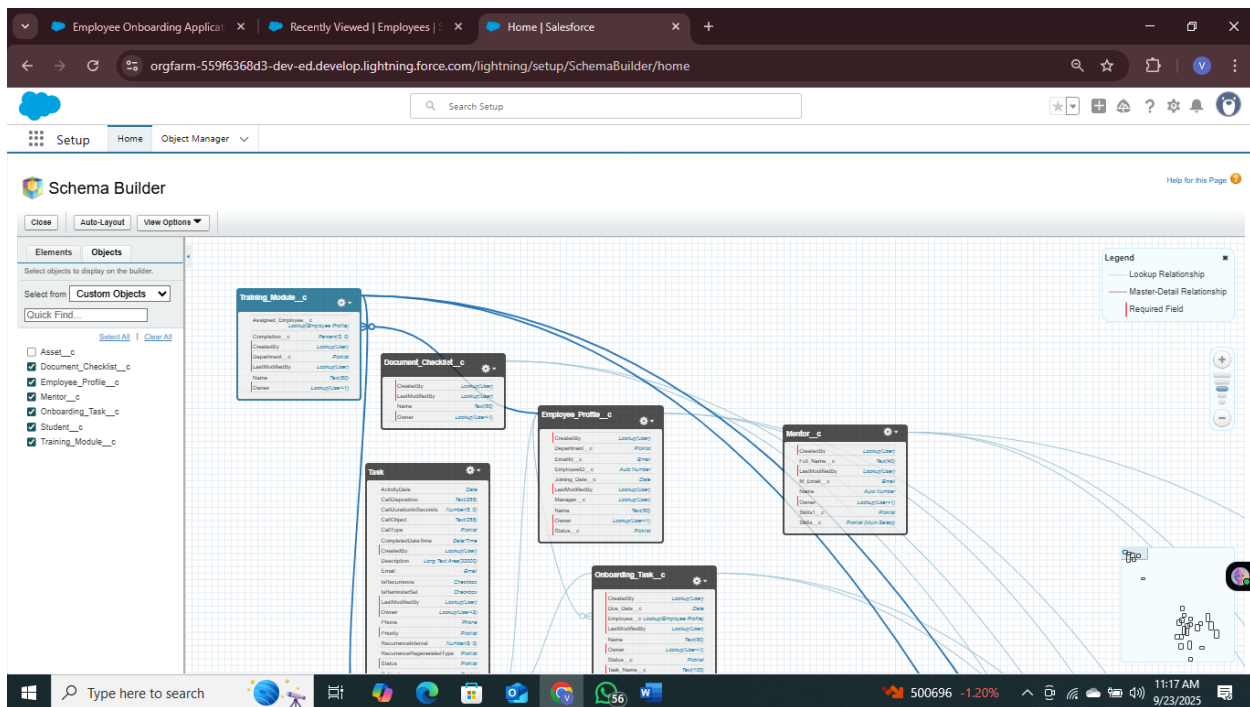
The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'Employee' object. The left sidebar is the same as in the previous screenshot. The main content area displays a table of fields with the following columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains 10 items, sorted by Field Label.

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED                             |
|------------------|------------------|--------------------|-------------------|-------------------------------------|
| Created By       | CreatedById      | Lookup(User)       |                   |                                     |
| Department       | Department__c    | Picklist           |                   |                                     |
| EmailId          | EmailId__c       | Email              |                   |                                     |
| Employee Name    | Name             | Text(80)           |                   | <input checked="" type="checkbox"/> |
| EmployeeId       | EmployeeId__c    | Auto Number        |                   |                                     |
| Joining Date     | Joining_Date__c  | Date               |                   |                                     |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |                                     |
| Manager          | Manager__c       | Lookup(User)       |                   | <input checked="" type="checkbox"/> |
| Owner            | OwnerId          | Lookup(User,Group) |                   | <input checked="" type="checkbox"/> |
| Status           | Status__c        | Picklist           |                   |                                     |

### Step 3: Establish Relationships

Validate relationships in Schema Builder:

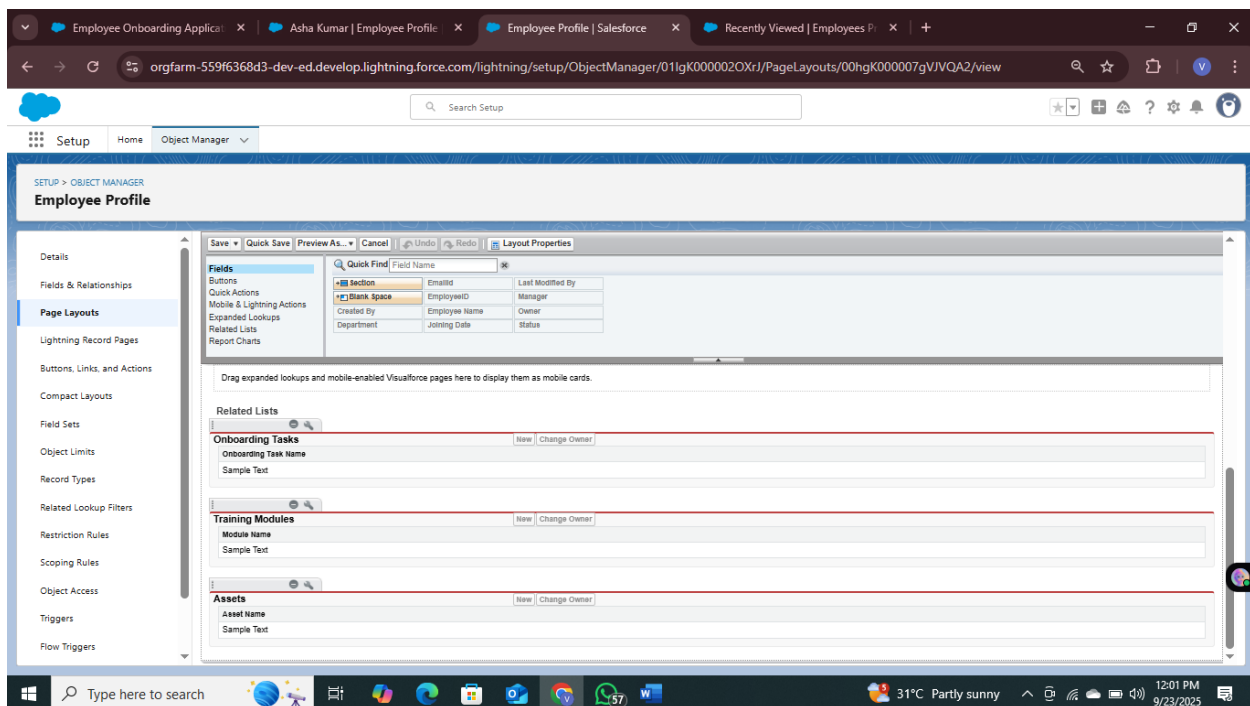
Setup → Schema Builder → drag objects and check connections.



## Step 4: Define Page Layouts & Record Types

Go to Object Manager → Employee Profile → Page Layouts.

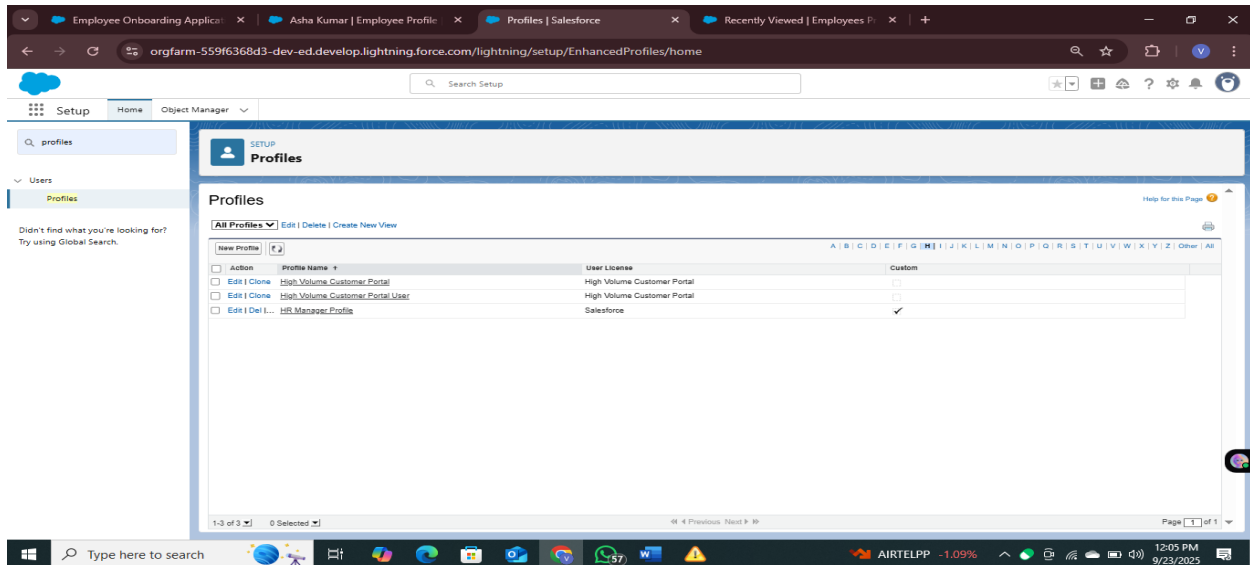
Add related lists: Onboarding Tasks, Training Modules.



## Step 5: Role-Based Access & Profiles

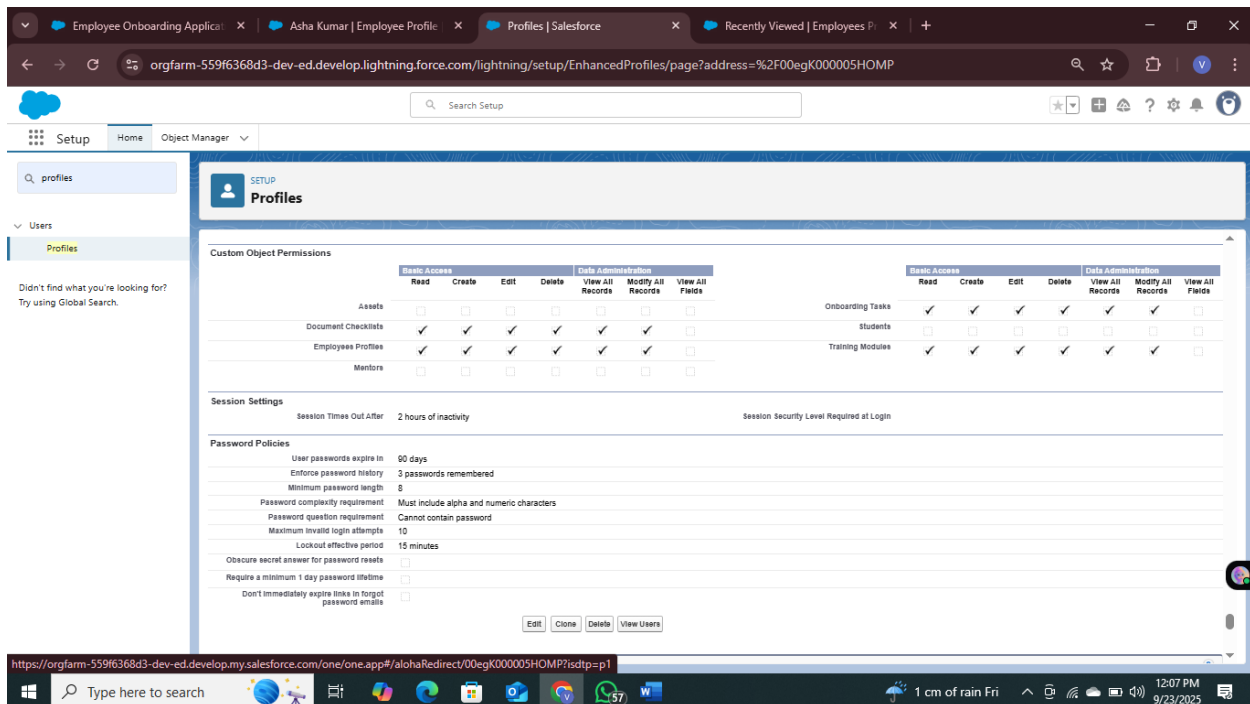
Go to Setup → Profiles.

HR Manager → Full access to all objects.



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'profiles' entered and a list of users. The main content area is titled 'Profiles' and shows a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'HR Manager: Profile' is highlighted.

| Action  | Profile Name                     | User License                | Custom                              |
|---|----------------------------------|-----------------------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Clone</a>                                | High Volume Customer Portal      | High Volume Customer Portal | <input type="checkbox"/>            |
| <a href="#">Edit</a>   <a href="#">Clone</a>                                | High Volume Customer Portal User | High Volume Customer Portal | <input type="checkbox"/>            |
| <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">New Profile</a> | HR Manager: Profile              | Salesforce                  | <input checked="" type="checkbox"/> |



The screenshot shows the 'Custom Object Permissions' section of the Salesforce Setup interface for Profiles. The left sidebar is the same as the previous screenshot. The main content area is titled 'Custom Object Permissions' and shows a table of permissions for the 'HR Manager: Profile'.

|                     | Basic Access                        |                                     |                                     |                                     | Only Administrators                 |                                     |                                     | Basic Access |        |      |        | Only Administrators |                    |                 |
|---------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------|--------|------|--------|---------------------|--------------------|-----------------|
|                     | Read                                | Create                              | Edit                                | Delete                              | View All Records                    | Modify All Records                  | View All Fields                     | Read         | Create | Edit | Delete | View All Records    | Modify All Records | View All Fields |
| Assets              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |              |        |      |        |                     |                    |                 |
| Document Checklists | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |              |        |      |        |                     |                    |                 |
| Employees Profiles  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |              |        |      |        |                     |                    |                 |
| Mentors             | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |              |        |      |        |                     |                    |                 |
| Onboarding Tasks    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |              |        |      |        |                     |                    |                 |
| Students            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |              |        |      |        |                     |                    |                 |
| Training Modules    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |              |        |      |        |                     |                    |                 |

Session Settings: Session Times Out After 2 hours of inactivity. Session Security Level Required at Login.

Password Policies: User passwords expire in 90 days. Enforce password history 3 passwords remembered. Minimum password length 8. Password complexity requirement: Must include alpha and numeric characters. Password question requirement: Cannot contain password. Maximum invalid login attempts 10. Lockout effective period 15 minutes. Obscure secret answer for password resets ☐. Require a minimum 1 day password lifetime ☐. Don't immediately expire links in forgot password emails ☐.

Team Lead :

Employee Onboarding Application | Asha Kumar | Employee Profile | Profiles | Salesforce | Recently Viewed | Employees |

orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000005HOPd

Setup Home Object Manager

profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

### SETUP Profiles

| Data Share Targets           |  |  |  |  |  | Work Types                          |  |  |  |  |  |
|------------------------------|--|--|--|--|--|-------------------------------------|--|--|--|--|--|
| Data Share Target Connection |  |  |  |  |  | Work Type Groups                    |  |  |  |  |  |
| <input type="checkbox"/>     |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>     |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |

#### Custom Object Permissions

|                     | Basic Access                        |                          |                                     |                          | Data Administration      |                          |                          |                  | Basic Access                        |                          |                                     |                          | Data Administration      |                          |                 |
|---------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-----------------|
|                     | Read                                | Create                   | Edit                                | Delete                   | View All Records         | Modify All Records       | View All Fields          |                  | Read                                | Create                   | Edit                                | Delete                   | View All Records         | Modify All Records       | View All Fields |
| Assets              | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Onboarding Tasks | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                 |
| Document Checklists | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Students         | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                 |
| Employees Profiles  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Training Modules | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                 |
| Mentors             | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |                                     |                          |                                     |                          |                          |                          |                 |

#### Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

#### Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Locked effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

https://orgfarm-559f6368d3-dev-ed.develop.my.salesforce.com/one/one.app/#/alohaRedirect/00egK000005HOPd?isdt=p1

Type here to search

NIFTY -0.38%

12:09 PM 9/23/2025

Employee → Read/Edit their own profile.

Employee Onboarding Application | Asha Kumar | Employee Profile | Profiles | Salesforce | Recently Viewed | Employees |

orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000005HOUT

Setup Home Object Manager

profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

### SETUP Profiles

| Data Object Tag Suggestions      |  |  |  |  |  | Transaction Metadata                |  |  |  |  |  |
|----------------------------------|--|--|--|--|--|-------------------------------------|--|--|--|--|--|
| Data Org Feature Allow Lists     |  |  |  |  |  | User External Credentials           |  |  |  |  |  |
| Data Package Kit Definitions     |  |  |  |  |  | Waitlists                           |  |  |  |  |  |
| Data Kit Objects                 |  |  |  |  |  | Web Cart Documents                  |  |  |  |  |  |
| Data Platforms                   |  |  |  |  |  | Web Store Inventory Sources         |  |  |  |  |  |
| Data Semantic Search Definitions |  |  |  |  |  | Work Orders                         |  |  |  |  |  |
| Data Share Definitions           |  |  |  |  |  | Work Plans                          |  |  |  |  |  |
| Data Share Sagemaker Connections |  |  |  |  |  | Work Plan Templates                 |  |  |  |  |  |
| Data Share Snowflake Connections |  |  |  |  |  | Work Step Templates                 |  |  |  |  |  |
| Data Share Targets               |  |  |  |  |  | Work Types                          |  |  |  |  |  |
| Data Share Target Connection     |  |  |  |  |  | Work Type Groups                    |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input type="checkbox"/>            |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input type="checkbox"/>            |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input type="checkbox"/>            |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |
| <input type="checkbox"/>         |  |  |  |  |  | <input checked="" type="checkbox"/> |  |  |  |  |  |

#### Custom Object Permissions

|                     | Basic Access                        |                                     |                                     |                          | Data Administration      |                          |                          |                  | Basic Access                        |                          |                                     |                          | Data Administration      |                          |                 |
|---------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-----------------|
|                     | Read                                | Create                              | Edit                                | Delete                   | View All Records         | Modify All Records       | View All Fields          |                  | Read                                | Create                   | Edit                                | Delete                   | View All Records         | Modify All Records       | View All Fields |
| Assets              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Onboarding Tasks | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                 |
| Document Checklists | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Students         | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                 |
| Employees Profiles  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Training Modules | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                 |
| Mentors             | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |                                     |                          |                                     |                          |                          |                          |                 |

#### Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

#### Password Policies

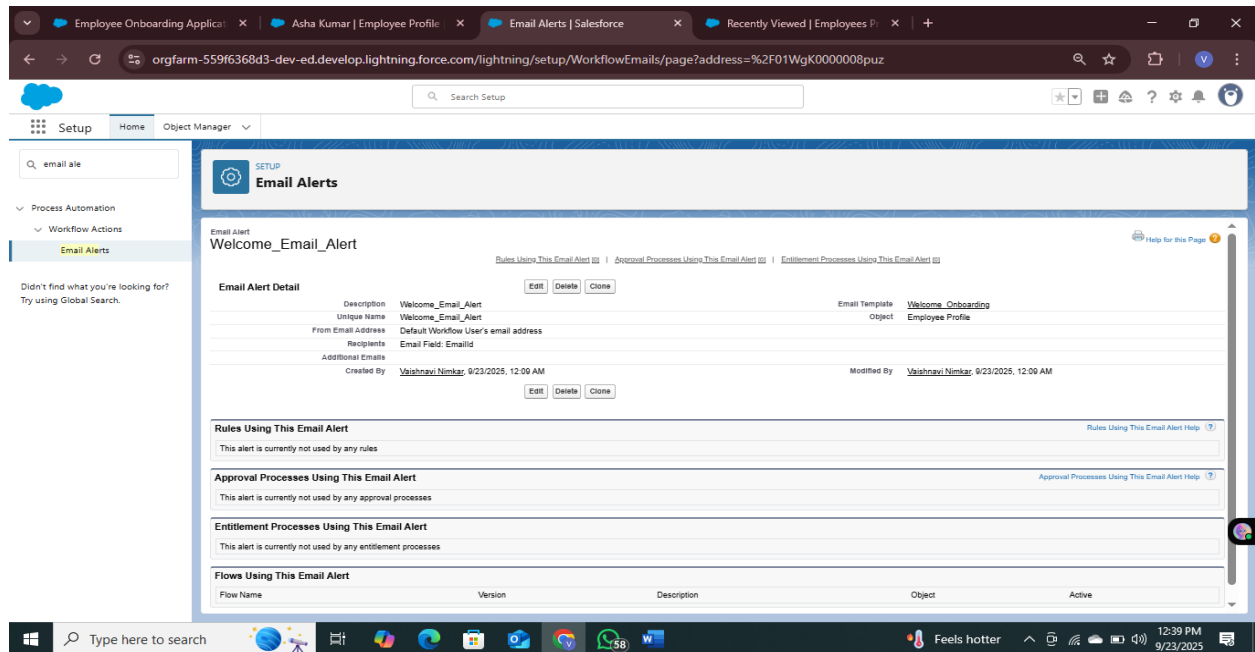
Hot weather

12:11 PM 9/23/2025

## Step 6: Plan Automation Architecture

Go to Setup → Flows.

Plan email notifications via Email Alerts + Flows.



The screenshot shows the Salesforce Setup interface for Email Alerts. The browser tabs include 'Employee Onboarding Application', 'Asha Kumar | Employee Profile', 'Email Alerts | Salesforce', and 'Recently Viewed | Employees'. The URL is 'orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01WgK0000008puz'. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Email Alerts' and displays details for the 'Welcome\_Email\_Alert'. The details include: Description: Welcome\_Email\_Alert; Unique Name: Welcome\_Email\_Alert; From Email Address: Default Workflow User's email address; Recipients: Email Field: EmailId; Additional Emails: (empty); Created By: Vajrnavi Nimbkar; 9/23/2025, 12:09 AM; Modified By: Vajrnavi Nimbkar; 9/23/2025, 12:09 AM. Below the details are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. The 'Flows Using This Email Alert' section is currently empty.

Create a Flow (Record-Triggered): When Employee Profile is created → Auto-generate onboarding tasks .

Employee Onboardin x Asha Kumar | Emplo x Employee Onboardin x Recently Viewed | Em x Home | Salesforce x ach private limited pu x +

orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=301gK00000LNRjSQAX

Flow Builder Employee Onboarding Application - V3 Debug Run: Employee Onboarding Application 9/23/2025, 2:37 PM Completed

Edit Flow Convert to Test Debug Again Save As New Version Save Deactivate

Record-Triggered Flow Start

Run Immediately

Create Onboarding Task Create Records

Send Welcome Email Email Alert

End

Debug Details

Expand All Basic Debug Log

Search this list...

Create Records: Create Onboarding Task

One or more Onboarding\_Task\_\_c records are ready to be created.

Details

Employee\_Profile\_\_c>Welcome\_Email\_Alert (Email Alerts): Send Welcome Email

Action Employee\_Profile\_\_c>Welcome\_Email\_Alert was run.

Details

Rollback

Details

How the Interview Finished

Details

The flow interview ran for 1.27 seconds and finished on September 23, 2025 at 2:37 PM.

Type here to search

33°C Mostly cloudy 2:37 PM 9/23/2025

Employee Onboardin Appli x Asha Kumar | Employee Profi x Recently Viewed | Employee x Home | Salesforce x ach private limited pune ka: x +

orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/lightning/o/Employee\_Profile\_\_c/list?filterName=\_\_Recent

Search...

Employee Onboardi... Accounts Employees Profiles Home Contacts Cases Tasks Files Reports Approval Requests Dashboards Employee Onboarding Ap...

Employees Profiles

Recently Viewed +

2 items • Updated 7 minutes ago

Employee Name

|   |                                       |  |
|---|---------------------------------------|--|
| 1 | <input type="checkbox"/> Asha Kumar   |  |
| 2 | <input type="checkbox"/> Vikram Singh |  |

NIFTY +0.03% 3:02 PM 9/23/2025



