

# Project Title: Employee Wellness & Productivity Tracker

## Phase 3 : Data Modeling & Relationships

### STANDARD OBJECTS

To track employee wellness efficiently, both standard and custom objects are used.

#### Standard Objects Used:

- **User** – stores employee and admin information
- **Account / Contact** – optional, for employee company data

#### Custom Objects Created:

OBJECT NAME	TYPE	DESCRIPTION
Employee_Wellness__c	Custom	Stores wellness metrics, scores, and status for employees
Wellnes_Report__c	Custom	Stores detailed reports per employee
Feedback__c	Custom	Collects feedback from employees on wellness programs
Wellness_Program__c	Custom	Tracks wellness programs available for employees
Employee_Wellness_Program__c	Custom (Junction)	Many-to-many relationship between Employees and Programs

## FIELDS

### Key Fields for Employee\_Wellness\_\_c:

FIELD NAME	TYPE	DESCRIPTION
Employee	Lookup(User)	Connects wellness record to employee
Date	Date	Date of wellness entry
Wellness Score	Number	Score representing wellness level (1–100)
Wellness Status	Picklist	Excellent, Good, Average, Poor
Notes	Text Area (Long)	Optional notes from HR or Coach

SETUP > OBJECT MANAGER

Employee Wellness

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

Fields & Relationships

12 Items, Sorted by Name

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Created By	CreatedById	Lookup(User)	
Date	Date__c	Date	
Employee	Employee__c	Lookup(User)	✓
Employee Wellness Record Name	Name	Text(80)	✓
Last Checkin Date	Last_Checkin_Date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
Notes	Notes__c	Long Text Area(32768)	
Owner	OwnerId	Lookup(User,Group)	✓
Record Type	RecordTypeId	Record Type	✓
Wellness Score	Wellness_Score__c	Number(18, 0)	
Wellness Status	Wellness_Status__c	Picklist	

Key Fields for Wellness\_Report\_\_c:

FIELD NAME	TYPE	DESCRIPTION
Employee	Lookup(User)	Employee associated with report
Report Date	Date	Date of the report
Score Summary	Number	Aggregated wellness score
Report Details	Long Text	Detailed report information

SETUP > OBJECT MANAGER

Wellness Report

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

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Employee	Employee__c	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Report Details	Report_Details__c	Long Text Area(32768)		
Score Summary	Score_Summary__c	Number(18, 0)		
Wellness_Report Name	Name	Text(80)		✓

# RECORD TYPES

OBJECT	RECORD TYPE NAME	DESCRIPTION
Employee_Wellness__c	Employee Entry	Used by employees to input wellness data
Employee_Wellness__c	Manager Report	Used by HR Manager/Coach to view detailed employee records

SETUP > OBJECT MANAGER

Employee Wellness

Details

Fields & Relationships

Page Layouts

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Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Record Types

2 Items, Sorted by Record Type Label

Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Employee Entry		✓	Ayushi Bhanotra, 9/23/2025, 5:01 AM
Manager Report		✓	Ayushi Bhanotra, 9/23/2025, 5:07 AM

PAGE LAYOUT

LAYOUT NAME	OBJECT	PROFILE ASSIGNED	FIELDS DISPLAYED
Employee Layout	Employee_Wellness__c	Employee Profile	Score, Status
Manager Layout	Employee_Wellness__c	HR Manager / Coach	Score , Status Notes,

SETUP > OBJECT MANAGER

Employee Wellness

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Page Layouts

3 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Employee Page Layout	Ayushi Bhanotra, 9/23/2025, 5:14 AM	Ayushi Bhanotra, 9/24/2025, 4:48 AM	▼
Employee Wellness Record Layout	Ayushi Bhanotra, 9/23/2025, 2:50 AM	Ayushi Bhanotra, 9/24/2025, 4:48 AM	▼
Manager Page Layout	Ayushi Bhanotra, 9/23/2025, 5:10 AM	Ayushi Bhanotra, 9/24/2025, 4:48 AM	▼

COMPACT LAYOUT

OBJECT	COMPACT LAYOUT NAME	FIELDS DISPALYED
Employee_Wellness__c	Wellness Summary	Employee , Score , Status
Wellness_Report__c	Report Summary	Employee , Score Summary , Date

## Employee Wellness

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

**Compact Layouts**

### Compact Layouts

2 Items, Sorted by Label

Quick Find

New

Compact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM	✓		
Wellness Summary	Wellness_Summary		Ayushi Bhanotra	9/23/2025, 5:32 AM

## Wellness Report

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

**Compact Layouts**

### Compact Layouts

2 Items, Sorted by Label

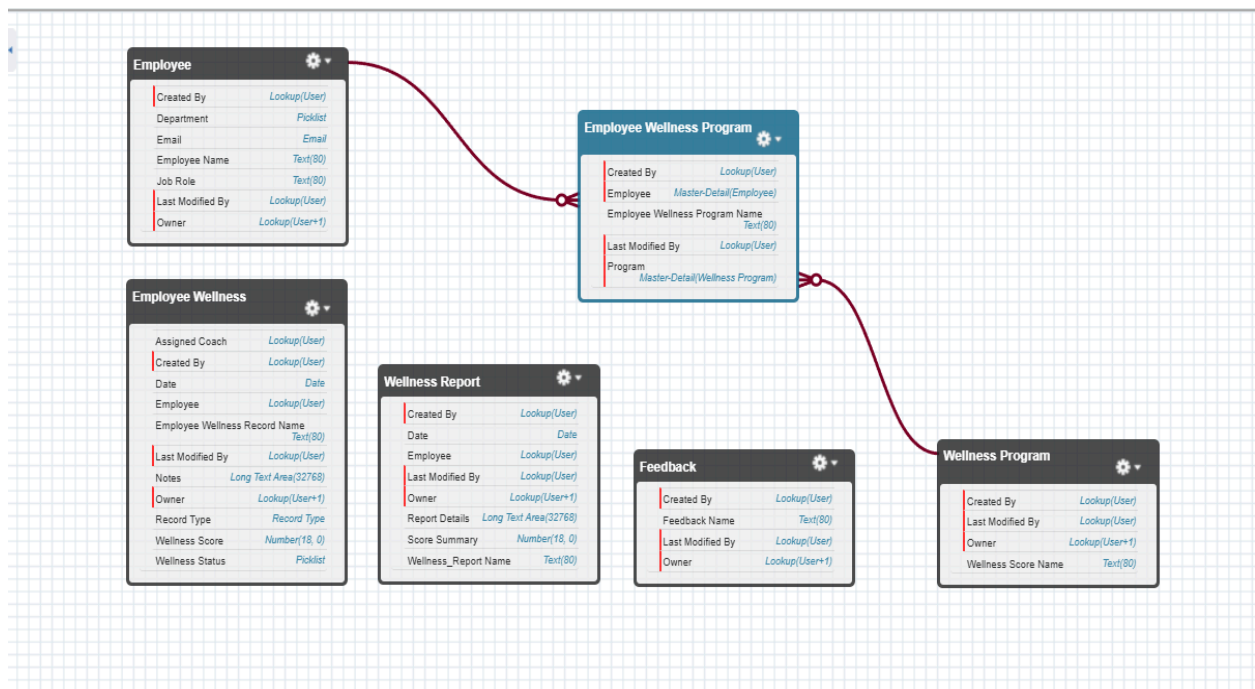
Quick Find

New

Compact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Report Summary	Report_Summary		Ayushi Bhanotra	9/23/2025, 5:33 AM
System Default	SYSTEM	✓		

## SCHEMA BUILDER



## LOOKUP VS MASTER DETAIL RELATIONSHIP

- Lookup Relationship (used in project):
  - Example: **Employee\_Wellness\_\_c** has a Lookup to **Employee\_\_c**.
  - Purpose: To identify *which employee* submitted wellness data

SETUP > OBJECT MANAGER

### Employee Wellness

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

**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 FIE...	INDEXED
Assigned Coach	Assigned_Coach__c	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Employee	Employee__c	Lookup(User)		✓

- Master-Detail Relationship (used in project):
  - Example: **Employee\_Wellness\_Program\_\_c** (junction object) has Master-Detail to both **Employee\_\_c** and **Wellness\_Program\_\_c**.

SETUP > OBJECT MANAGER

### Employee Wellness Program

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

**Fields & Relationships** 5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Master-Detail(Employee)		✓
Employee Wellness Program Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Program	Program__c	Master-Detail(Wellness Program)		✓

## JUNCTION OBJECTS

Object Created: **Employee\_Wellness\_Program\_\_c**

Relationships

- Master-Detail to **Employee\_\_c**
- Master-Detail to **Wellness\_Program\_\_c**

Purpose: To link employees and wellness programs (many-to-many).

The screenshot shows the Salesforce Setup interface for the 'Employee Wellness Program' object. The left sidebar contains a navigation menu with options like 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, and Object Access. The main content area is titled 'Fields & Relationships' and shows a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Employee (Employee\_\_c, Master-Detail(Employee)), Employee Wellness Program Name (Name, Text(80)), Last Modified By (LastModifiedById, Lookup(User)), and Program (Program\_\_c, Master-Detail(Wellness Program)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Master-Detail(Employee)		✓
Employee Wellness Program Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Program	Program__c	Master-Detail(Wellness Program)		✓

## EXTERNAL OBJECTS

- Implementation Status: Not implemented in this phase.
- Reason: External Objects require integration with external databases or APIs (like OData or HR systems), which is outside the scope of this Developer Org setup.
- Planned Use Case:

In future phases, External Objects can be connected to:

- HR Management Systems to fetch employee data directly.



- Fitness tracker APIs (Fitbit, Apple Health, Google Fit) to pull real-time health metrics such as steps, calories, and heart rate.
- Benefit: This would eliminate manual data entry by employees and provide real-time wellness tracking inside Salesforce.