Phase 3 — Data Modeling & Relationships

Project: Employee Onboarding System (Salesforce) Context: Define the data structure for the onboarding solution, including standard and custom objects, fields, relationships, and layouts. This ensures the org has a solid data foundation before building automation, flows, and dashboards.

1. **Standard & Custom Objects**

Standard Objects:

User → HR staff, managers, and system users.

Contact → Optional if employees are linked to external contacts.

Custom Objects:

Employee__c → Main record for each employee.

Onboarding_Task__c → Individual tasks for new hires.

Document__c → Required documents (e.g., NDA, ID Proof).

Training__c → Training sessions for employees.

Department__c → Department for each employee.

Employee_Training__c → Junction object for many-to-many between Employee and Training.

SETUP > OBJECT MANAGER
Employee

Details		
Details		Edit Delete

Details

Description

API Name	Enable Reports
Employee__c	
Custom	Track Activities
✓	
Singular Label	Track Field History
Employee	
Plural Label	Deployment Status
Employees	Deployed
	Help Settings
	Standard salesforce.com Help Window

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
- Restriction Rules
- Scoping Rules

2. **Fields**

Employee__c (Custom Object) example fields:

Name (Standard)

Email (Text)

Job Title (Picklist: Full-Time, Part-Time, Intern)

Department (Lookup → Department__c)

Start Date (Date)

Onboarding Status (Picklist: Not Started, In Progress, Completed)

Onboarding_Task__c example fields:

Task Name (Text)

Assigned To (Lookup → Employee__c)

Due Date (Date)

Status (Picklist: Pending, Completed)

Document__c example fields:

Document Name (Text)

Employee (Master-Detail → Employee__c)

Document Type (Picklist: ID, NDA, Certificate)

Submission Status (Picklist: Not Submitted, Submitted, Approved)

Training__c example fields:

Training Name (Text)

Training Date (Date)

Duration (Number)

Fields & Relationships
13 Items, Sorted by Field Label

Created By	CreatedById	Lookup(User)
Department	Department__c	Lookup(Department)
Email	Email__c	Email
Employee ID	Name	Text(80)
End Date	End_Date__c	Date
FirstName	FirstName__c	Text(40)
Job Title	Job_Title__c	Picklist
Last Modified By	LastModifiedById	Lookup(User)
Last Name	Last_Name__c	Text(40)
Onboarding Status	Onboarding_Status__c	Picklist

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

Owner	OwnerId	Lookup(User,Group)	✓	
Record Type	RecordTypeId	Record Type	✓	
Start Date	Start_Date__c	Date		

p.lightning.force.com/one/one.app#/setup/Object...

3. Record Types

Employee__c:

Record Types → Full-Time, Part-Time, Intern

Each type can have different picklist values and page layouts.

Onboarding_Task__c:

Optional record types: IT Setup Task, HR Paperwork, Training Task

Record Types
3 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
Full-Time	Employees working full-time	✓	New Hire, 9/13/2025, 7:25 AM	
Intern	Employees working as intern	✓	New Hire, 9/13/2025, 7:28 AM	
Part_Time	Employees working part-time		New Hire, 9/13/2025, 7:27 AM	

Record Types
3 Items, Sorted by Record Type Label

Quick Find

RECORD TYPE LABEL	▲	DESCRIPTION	ACTIVE	MODIFIED BY
HR_Paperwork				New Hire, 9/13/2025, 7:29 AM
IT_Setup_Task			✓	New Hire, 9/13/2025, 7:29 AM
Training_Task				New Hire, 9/13/2025, 7:30 AM

4. Page Layouts

Employee Page Layout: Sections for Personal Info, Department Info, Onboarding Status, Assigned Tasks, Documents

Onboarding Task Layout: Task Details, Employee Lookup, Status

Document Layout: Document Details, Employee Lookup, Submission Status

Page Layouts
1 Items, Sorted by Page Layout Name

Quick Find   New   Page Layout Assignment

PAGE LAYOUT NAME	▲	CREATED BY	MODIFIED BY	
Onboarding Task Layout		New Hire, 9/12/2025, 9:26 AM	New Hire, 9/13/2025, 7:14 AM	▼

5. Compact Layouts

Employee Highlight Panel: Name, Job Title, Start Date, Onboarding Status

Task Highlight Panel: Task Name, Status, Due Date

Document Highlight Panel: Document Name, Submission Status

Compact Layouts
2 Items, Sorted by Label

Quick Find   New   Compact Layout Assignment

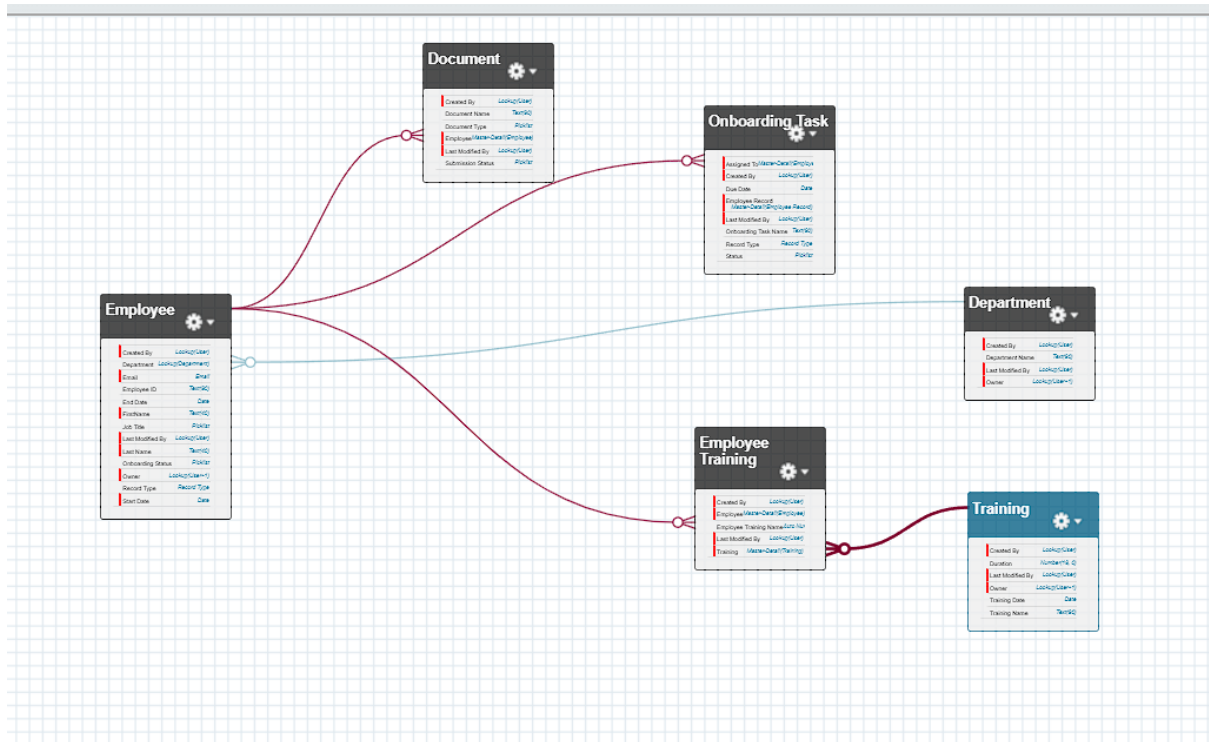| LABEL	▲	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED	
System Default		SYSTEM	✓			
Task Compact Layout		Task_Compact_Layout		New Hire	9/13/2025, 8:05 AM	▼

6. Schema Builder

Visualize all objects and relationships:

Employee__c → Master-Detail → Onboarding_Task__c

Employee__c → Master-Detail → Document__c

Employee__c ↔ Training__c → Junction Object Employee_Training__c

Employee__c → Lookup → Department__c

7. Lookup vs Master-Detail vs Hierarchical Relationships

Master-Detail:

Onboarding_Task__c → Employee__c (task cannot exist without employee)

Document__c → Employee__c (document belongs to employee)

Lookup:

Employee__c → Department__c (employee belongs to a department, but department can exist without employees)

Hierarchical:

User → User (Manager field to track reporting structure)