

Phase 3 — Data Modeling & Relationships

Documentation

Header / Intro

Objective:



Design custom objects, fields, and relationships to manage employee onboarding tasks and documents.




Goals:

- Create Employee__c, OnboardingTask__c, and Document__c objects
- Define fields for each object
- Establish Master-Detail and Lookup relationships
- Visualize the data model using Schema Builder





Objects & Fields


2a — Employee__c

Field Label	Field Name	Data Type	Required	Description
Employee Name	Employee_Name__c	Text (255)	 Yes	Full name of employee
Email	Email__c	Email	 Yes	Employee email address






Department	Department__c	Picklist	 No	Department name (HR, IT, etc.)
Manager	Manager__c	Lookup (User)	 No	Manager assigned to employee
Joining Date	Joining_Date__c	Date	 No	Employee joining date

2b — OnboardingTask__c

Field Label	Field Name	Data Type	Required	Description
Task Name	Task_Name__c	Text (255)	 Yes	Name of the onboarding task
Assigned Employee	Assigned_Employee__c	Master-Detail (Employee__c)	 Yes	Task linked to an employee
Assigned Manager	Assigned_Manager__c	Lookup (User)	 No	Manager responsible for the task
Status	Status__c	Picklist (Not Started, In Progress, Completed)	 Yes	Task progress status

Due Date	Due_Date__c	Date	 No	Task deadline
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2c — Document__c

Field Label	Field Name	Data Type	Required	Description
Document Name	Document_Name__c	Text (255)	 Yes	Name of the uploaded document
Uploaded By	Uploaded_By__c	Lookup (User)	 No	User who uploaded the document
Related Employee	Employee__c	Master-Detail (Employee__c)	 Yes	Document linked to employee
Related Task	Task__c	Lookup (OnboardingTask__c)	 No	Document linked to a task (optional)
Status	Status__c	Picklist (Pending, Approved, Rejected)	 Yes	Document approval status

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

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assigned Employee	Assigned_Employee__c	Lookup(Employee)		✓
Assigned Manager	Assigned_Manager__c	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Due Date	Due_Date__c	Date		
Employee	Employee__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Task Name	Name	Text(80)		✓

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Created By	CreatedById	Lookup(User)		
Department	Department__c	Picklist		
Email	Email__c	Email		
Employee Name	Name	Text(80)		✓
Has Manager	Has_Manager__c	Checkbox		
Joining Date	Joining_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Manager	Manager__c	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓

<div> <div>SETUP > OBJECT MANAGER</div> <div>Document</div> </div>																																																						
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Relationships Overview

Relationship	Type	Related List Label
Employee → Manager	Lookup (User)	Employees
OnboardingTask → Employee	Master-Detail (Employee__c)	Tasks
Document → Employee	Master-Detail (Employee__c)	Documents
Document → OnboardingTask	Lookup (OnboardingTask__c)	Documents

