

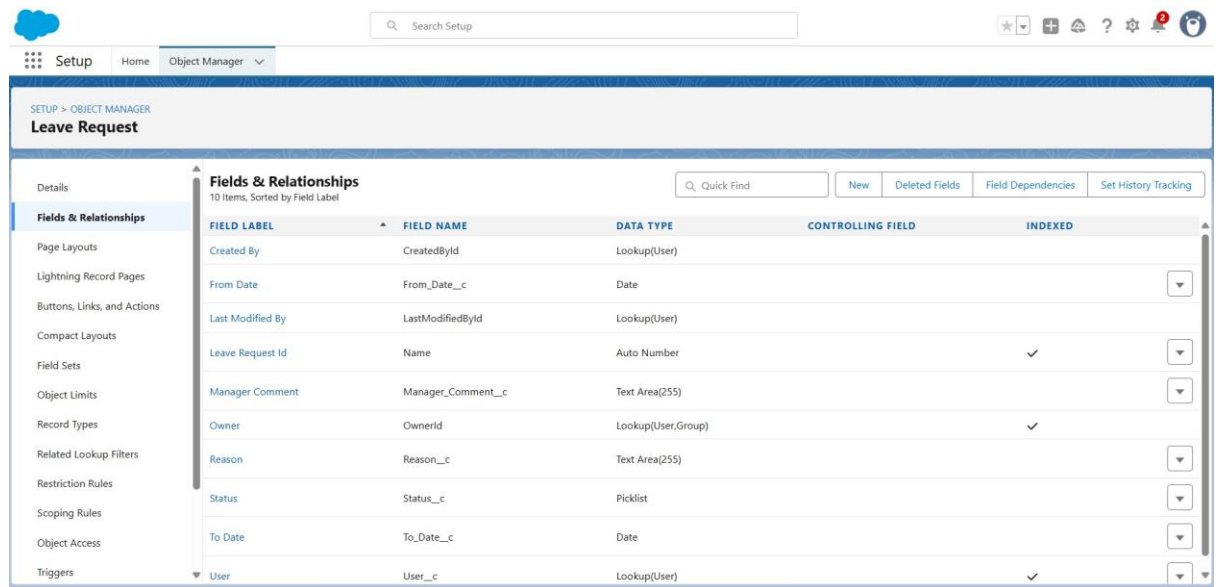
Phase 3: Data Modeling & Relationships – Leave Hub

1. Standard & Custom Objects

- **Standard Objects:**
 - **User** → Represents employees, managers, and HR/Admin.
- **Custom Objects:**
 - **Leave Request** → Stores employee leave applications.

2. Fields

- **Leave Request:** Employee (Lookup to User), Leave Type, Start Date, End Date, Total Days (Formula), Status, Reason.

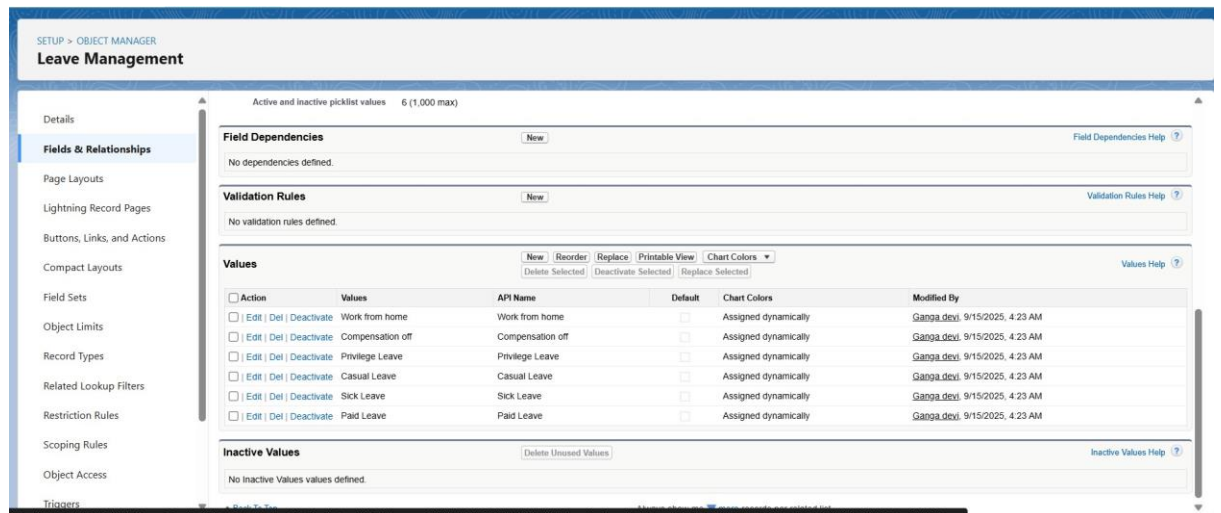


The screenshot shows the Salesforce Setup interface for the 'Leave Request' object. The 'Fields & Relationships' tab is selected, displaying a table of 10 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), From Date (From_Date__c, Date), Last Modified By (LastModifiedById, Lookup(User)), Leave Request Id (Name, Auto Number, indexed), Manager Comment (Manager_Comment__c, Text Area(255)), Owner (OwnerId, Lookup(User,Group), indexed), Reason (Reason__c, Text Area(255)), Status (Status__c, Picklist), To Date (To_Date__c, Date), and User (User__c, Lookup(User), indexed).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
From Date	From_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave Request Id	Name	Auto Number		✓
Manager Comment	Manager_Comment__c	Text Area(255)		
Owner	OwnerId	Lookup(User,Group)		✓
Reason	Reason__c	Text Area(255)		
Status	Status__c	Picklist		
To Date	To_Date__c	Date		
User	User__c	Lookup(User)		✓

3. Record Types

- **Leave Request Record Types:**
 - Sick Leave
 - Casual Leave
 - Earned Leave
 - Special Leave(ex:Maternity,Paternity)
 - Work from home



- Record Types allow different **picklist values**, **page layouts**, and **approval processes** for each leave type.

4. Page Layouts

- Employee Layout:** Simple form for applying leave.
- Manager Layout:** Includes approval section and team view.

5. Compact Layouts

- For **Leave Request** (Mobile / Highlights Panel):
 - Employee, Leave Type, Start Date, End Date, Status.

Modal header

User

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×

* From Date

* To Date

Reason

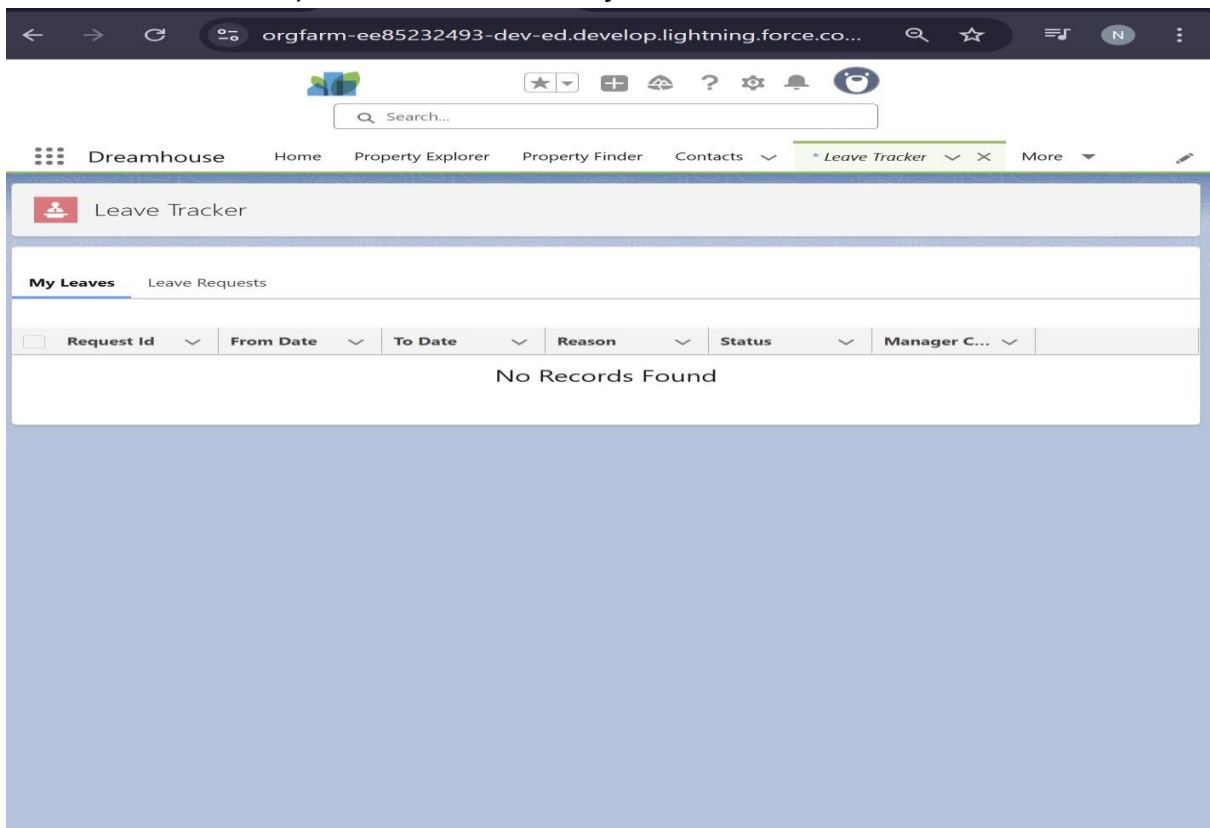
Save

Cancel

- For **Leave Balance**:
 - Employee, Leave Type, Remaining Balance.

6. Schema Builder

- Use **Schema Builder** to:
 - Visually design object relationships (User ↔ Leave Request ↔ Leave Balance).
 - Add fields & relationships quickly.
 - Check dependencies across objects.



7. Lookup vs Master-Detail vs Hierarchical

- **Lookup Relationship**:
 - Used between **Leave Request** ↔ **User** and **Leave Balance** ↔ **User** (loose coupling).
- **Master-Detail Relationship**:
 - Could be used between **Leave Balance** ↔ **Leave Request** if you want cascading delete and roll-up summaries.
- **Hierarchical Relationship** (only on User):
 - Can define Manager → Employee relationship for approvals.

8. Junction Objects

- Useful if you want **many-to-many relationships**, e.g.:
 - **Employee ↔ Project ↔ Leave Requests** (if leaves are project-specific).
- For basic Leave Management, junction objects are **not mandatory**.

9. External Objects (*Optional*)

- If company holidays or employee data is stored in an **external HR system (ERP/Payroll)**, use **External Objects** (via Salesforce Connect).
- Allows referencing external data in real-time without storing in Salesforce.

Phase 3 Outcome

- A **complete data structure** for Leave Management is defined.
- **Standard & Custom Objects** ensure flexibility and scalability.
- **Record Types & Page Layouts** provide tailored experiences for employees, managers, and HR.
- **Schema Builder** helps visualize and maintain relationships.
- Clear use of **Lookup vs Master-Detail** ensures proper data integrity.
- Future scalability supported with **Junction Objects & External Objects** if business expands.