

Phase 3: Data Modelling & Relationships

Title: - Employee Onboarding and Training Tracker using Salesforce CRM

1. The Core Objective

In Phase 2, we created the foundational custom fields for Employee, Training Module, and Onboarding Task. In Phase 3, the focus is on building the data model and relationships that connect these objects, ensuring that onboarding and training processes are not only tracked but also interconnected.

2. Why Data Modelling Matters

Without proper data relationships, employee onboarding and training remain siloed. Salesforce enables:

- Centralized View – All employee, training, and onboarding task data in one place.
- Traceability – HR can track which employees are linked to which training modules and onboarding tasks.
- Scalability – Junction objects allow handling many-to-many relationships, e.g., employees attending multiple trainings.
- Efficiency – Page layouts and compact layouts make it easier to view and manage critical details.


3. Objects and Fields Created

Standard Object Used:









- Contact → Used to represent employees.

Custom Objects Created:

- Employee – Stores employee details.
- Training Module – Defines training courses/modules.
- Onboarding Task – Tracks onboarding-related activities.
- Assignment (Junction Object) – Links Employees ↔ Training Modules (many-to-many).



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Employee

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

Details

Description

API Name

Employee__c

Custom

✓

Singular Label

Employee

Plural Label

Employees

Enable Reports

✓

Track Activities

✓

Track Field History

✓


Deployment Status

Deployed









Help Settings

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EditDelete



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Training Module

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Scoping Rules

Object Access

Triggers

Details

Description

API Name

Training_Module__c

Custom

✓

Singular Label

Training Module

Plural Label

Training Modules

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

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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

Details

Edit Delete

Description

API Name
Onboarding_Task__c

Custom

Singular Label
Onboarding Task

Plural Label
Onboarding Tasks

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
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Phase 2 Fields Recap:

- Employee: Name, Email, Department, Date of Joining

Setup Home Object Manager

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Employee

Details

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Fields & Relationships
 8 Items, Sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date of Joining	Date_of_Joining__c	Date		
Department	Department__c	Picklist		
Employee Email	Employee_Email__c	Email		
Employee Name	Employee_Name__c	Text(100)		
Employee Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

- Training Module: Training Type, Duration, Description

The screenshot shows the Salesforce Setup interface for the 'Training Module' object. The 'Fields & Relationships' tab is selected, displaying a table of 7 fields. The left sidebar contains navigation links for various setup areas. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(1000)		
Duration	Duration__c	Number(3, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Training Module Name	Name	Text(80)		✓
Training Type	Training_Type__c	Picklist		

- Onboarding Task: Task Status, Due Date, Related Employee (Lookup)

The screenshot shows the Salesforce Setup interface for the 'Onboarding Task' object. The 'Fields & Relationships' tab is selected, displaying a table of 7 fields. The left sidebar contains navigation links for various setup areas. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Due Date	Due_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Onboarding Task Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Related Employee	Related_Employee__c	Lookup(Employee)		✓
Task Status	Task_Status__c	Picklist		

4. Page Layouts Layouts

were designed for ease of use:

- Employee Layout: Employee details, related tasks, assigned trainings.
- Training Module Layout: Training details, related employees.
- Onboarding Task Layout: Task status, due date, and employee linkage.

5. Compact Layouts

Compact layouts help HR quickly see:

- Employee: Name, Department, Email, Date of Joining.
- Onboarding Task: Task Status, Due Date, Related Employee.

6. Relationships

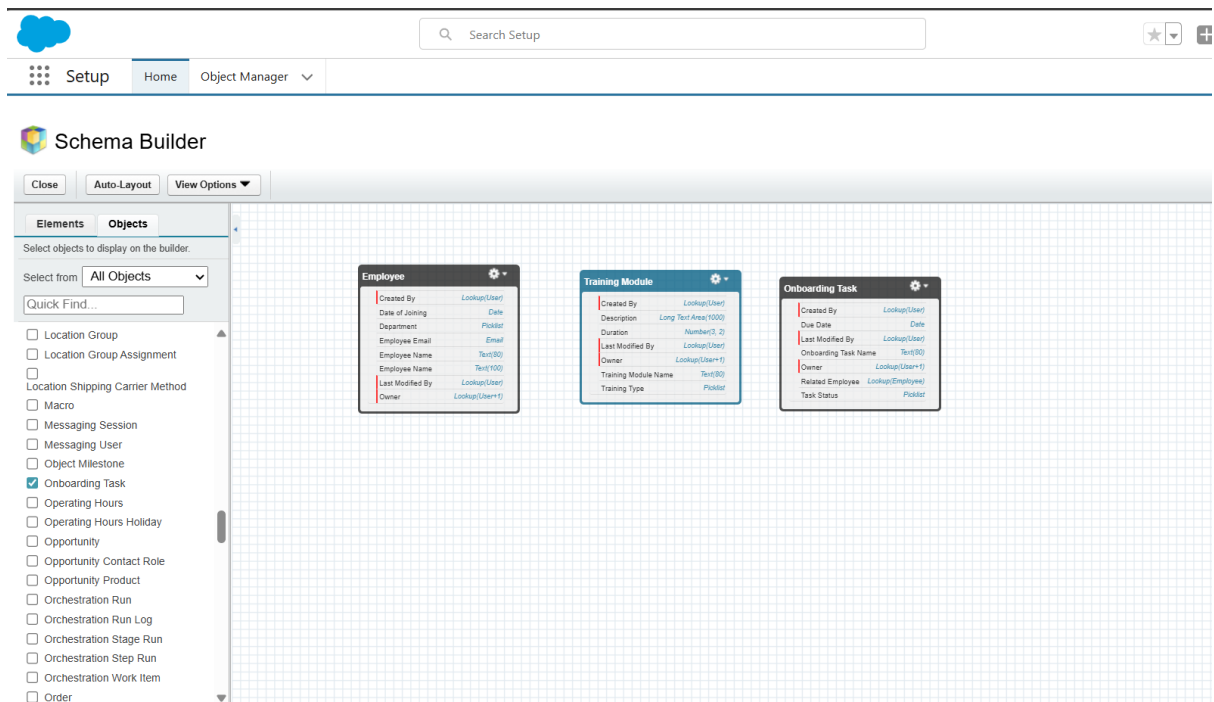
Defined key relationships in Salesforce:

- Onboarding Task → Employee (Lookup)
- Assignment → Employee & Training Module (Many-to-Many)
- Employee → Training Module (via Assignment)

7. Schema Builder View

Using Salesforce Schema Builder, the model now clearly shows:

- Employee ↔ Onboarding Task (One-to-Many)
- Employee ↔ Training Module (Many-to-Many via Assignment)



What We've Achieved in Phase 3

By the end of Phase 3, we have:

- A fully defined data model linking employees, onboarding tasks, and training modules.
- Junction object (Assignment) enabling many-to-many relationships.
- Page and compact layouts to improve usability.
- A schema view that provides visual clarity for stakeholders.