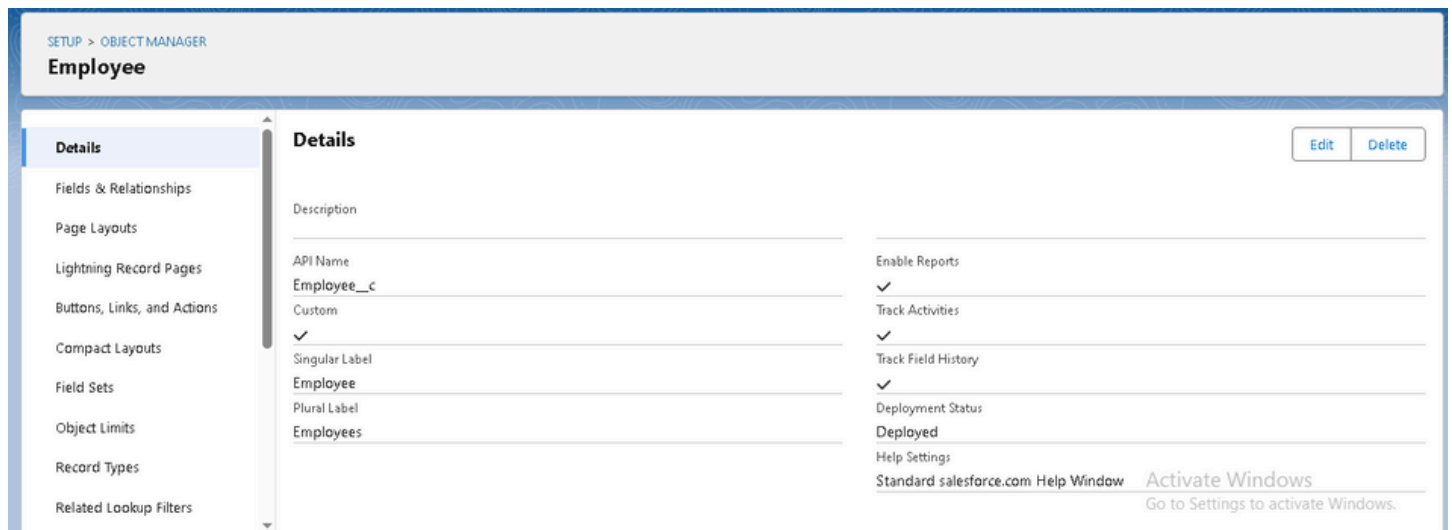


PHASE -3

Project: AI-Powered HR & Employee Management Bot

1. Standard & Custom Objects

1. Setup → **Object Manager** → **Create** → **Custom Object**.
2. Fill:
 - **Label:** Employee
 - **Plural Label:** Employees
 - **Object Name:** Employee (API Employee__c)
 - **Record Name:** Employee ID (Text)
 - Enable: Allow Reports, Allow Activities, Track Field History (optional)
3. Click **Save**.
4. Repeat for Attendance, Leave, Onboarding, Performance.



SETUP > OBJECT MANAGER

Employee

Edit Delete

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
Standard salesforce.com Help Window Activate Windows
Go to Settings to activate Windows.

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

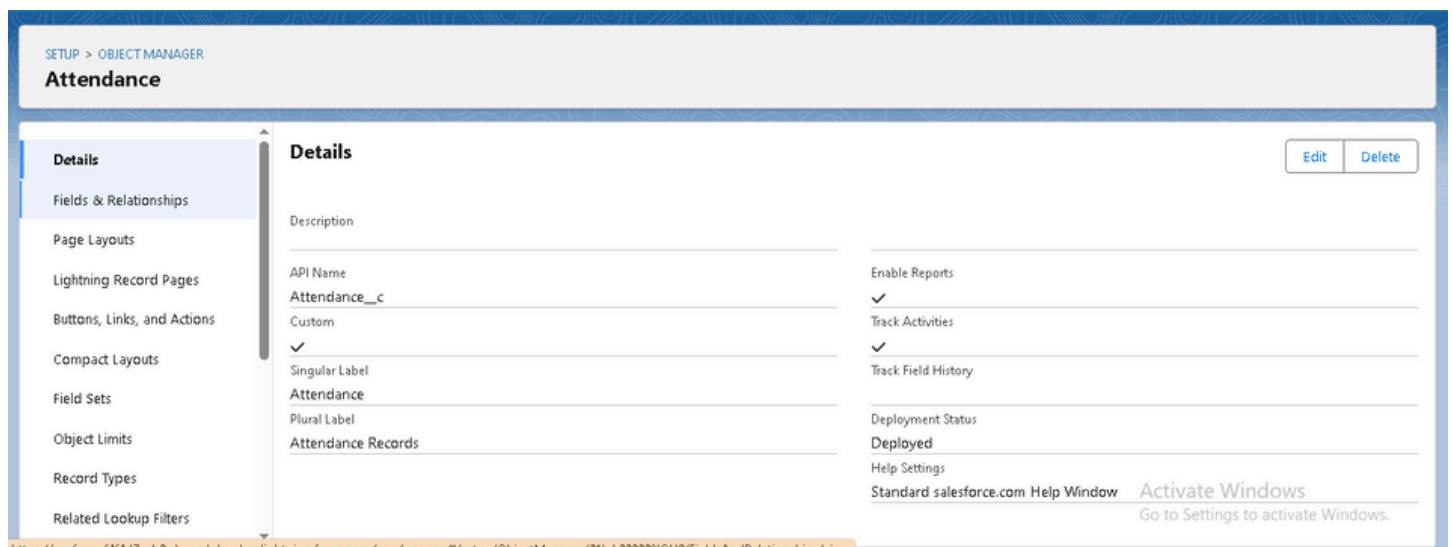
Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters



SETUP > OBJECT MANAGER

Attendance

Edit Delete

Details

Description

API Name
Attendance__c

Custom
✓

Singular Label
Attendance

Plural Label
Attendance Records

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window Activate Windows
Go to Settings to activate Windows.

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

SETUP > OBJECT MANAGER

Leave

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Details

Description

API Name
Leave__c

Custom
✓

Singular Label
Leave

Plural Label
Leaves

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

[Activate Windows](#)
Go to Settings to activate Windows.

Edit Delete

SETUP > OBJECT MANAGER

Onboarding

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Details

Description

API Name
Onboarding__c

Custom
✓

Singular Label
Onboarding

Plural Label
Onboarding Records

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

[Activate Windows](#)
Go to Settings to activate Windows.

Edit Delete

SETUP > OBJECT MANAGER

Performance

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Details

Description

API Name
Performance__c

Custom
✓

Singular Label
Performance

Plural Label
Performance Reviews

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

[Activate Windows](#)
Go to Settings to activate Windows.

Edit Delete

2. Fields

1. Setup → Object Manager → **[Your Object]** → **Fields & Relationships** → **New**.
2. Choose Data Type (Text, Date, Number, Email, Lookup, Master-Detail, Picklist, Long Text).
3. Enter Label → API Name auto-fills (ends with __c).
4. Set **Required** if necessary.
5. Set **Field-Level Security** (visible/editable for profiles).
6. Add to Page Layout(s) at the end of the wizard.

7. Click **Save**.

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

Fields & Relationships

5 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)		
Currency	CurrencyIsoCode	Picklist		
Employee ID	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Attendance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendance ID	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Leave

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

5 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)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Leave ID	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Onboarding

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Onboarding ID	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Performance

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Performance ID	Name	Text(80)		✓

Activate Windows
Go to Settings to activate Windows.

3. Record Types

Purpose

Different processes or layouts per “type” (e.g., Planned vs Unplanned leave).

Steps

1. Setup → Object Manager → **[Object]** → **Record Types** → **New**.
2. Fill **Record Type Label** (e.g., Planned Leave) and **Description**.
3. Select **Business Process** if shown (for some objects).
4. Assign to Profiles (who can use this record type).
5. Choose default Page Layout for this record type.
6. Click **Save**.

SETUP > OBJECT MANAGER

Leave

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Record Type

Planned Leave

Help for this Page

< Back to Custom Object: Leave

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label

Planned Leave

Active

✓

Record Type Name

Planned_Leave

Namespace Prefix

Description

Leave requested in advance for planned events (vacation, medical appointment).

Created By

Siddharth Singh, 9/24/2025, 9:53 AM

Modified By

Siddharth Singh, 9/24/2025, 9:53 AM

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Leave

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Record Type

Unplanned Leave

Help for this Page

< Back to Custom Object: Leave

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label

Unplanned Leave

Active

✓

Record Type Name

Unplanned_Leave

Namespace Prefix

Description

Leave requested on short notice due to emergencies.

Created By

Siddharth Singh, 9/24/2025, 9:54 AM

Modified By

Siddharth Singh, 9/24/2025, 9:54 AM

Activate Windows
Go to Settings to activate Windows.

Record Type Edit

Leave Type

Help for this Page

General Properties

Field Label

Leave Type

Record Type

Planned Leave

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values

Sick

Emergency

Casual

Selected Values

Vacation

Medical

Personal

Add

Remove

Default

--None--

Activate Windows
Go to Settings to activate Windows.

General Properties

Record Label: **Leave Type**
Record Type: **Unplanned Leave**

Picklist Values

Select a item from the Available Values list and add it to the Selected Values list to include that a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values: Vacation, Medical, Personal
Selected Values: Sick, Emergency, Casual

Add
Remove

Default: --None--

Save Cancel

Activate Windows

Record Type Settings Edit

User Profile: **Manager_Profile**
Record Type: **Leave**

Selected Record Types

Select the record types for this user profile. You need to add the record type field to the page layout associated with this profile to display this record detail and edit pages.

Available Record Types: --Master--
Selected Record Types: Planned Leave, Unplanned Leave

Add
Remove

Default Record Type

Select the default record type for this user profile. The default record type is used when creating a new record.

Default: Unplanned Leave

Save Cancel

Activate Windows
Go to Settings to activate Windows.

Record Type Settings Edit

User Profile: **Employee_Profile**
Record Type: **Leave**

Selected Record Types

Select the record types for this user profile. You need to add the record type field to the page layout associated with this profile to display this record detail and edit pages.

Available Record Types: --Master--
Selected Record Types: Planned Leave, Unplanned Leave

Add
Remove

Default Record Type

Select the default record type for this user profile. The default record type is used when creating a new record.

Default: Planned Leave

Save Cancel

Activate Windows
Go to Settings to activate Windows.

4. Page Layouts

Purpose

Control which fields/sections/related lists users see.

Steps

1. Setup → Object Manager → **[Object]** → **Page Layouts** → **Edit** or **New**.
2. Drag fields into sections. Add related lists (e.g., Attendance on Employee page).
3. Save.
4. Assign page layout to Profiles (Setup → Object Manager → [Object] → Page Layout Assignment).

SETUP > OBJECT MANAGER
Leave

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: Leave Layout

Page Layout Name: Planned Leave Layout

Save Cancel

SETUP > OBJECT MANAGER
Leave

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

Page Layout To Use: -- Select Page Layout -- 4 Selected 0 Changed

Profiles	Record Types		
	Master	Planned Leave	Unplanned Leave
Customer Portal Manager Standard	Leave Layout	Leave Layout	Leave Layout
Einstein Agent User	Leave Layout	Leave Layout	Leave Layout
Employee_Profile	Leave Layout	Leave Layout	Leave Layout
Employee_Profiles	Leave Layout	Leave Layout	Leave Layout
External Apps Login User	Leave Layout	Leave Layout	Leave Layout
External Identity User	Leave Layout	Leave Layout	Leave Layout
Force.com - App Subscription User	Leave Layout	Leave Layout	Leave Layout
Force.com - Free User	Leave Layout	Leave Layout	Leave Layout
Gold Partner User	Leave Layout	Leave Layout	Leave Layout
High Volume Customer Portal	Leave Layout	Leave Layout	Leave Layout
High Volume Customer Portal User	Leave Layout	Leave Layout	Leave Layout
HR_Manager_Profile	Leave Layout	Leave Layout	Leave Layout
HR_Manager_Profiles	Leave Layout	Leave Layout	Leave Layout
Identity User	Leave Layout	Leave Layout	Leave Layout
Integration_Profile	Leave Layout	Leave Layout	Leave Layout
Manager_Profile	Leave Layout	Leave Layout	Leave Layout
Marketing User	Leave Layout	Leave Layout	Leave Layout
Minimum Access - API Only Integrations	Leave Layout	Leave Layout	Leave Layout

(1-3 of 3)

5. Compact Layouts

Purpose

Fields visible in the highlights panel at top of a record page.

Steps

1. Setup → Object Manager → **[Object]** → **Compact Layouts** → **New**.
2. Select 3–4 key fields (e.g., Employee Name, Employee_ID, Department, Status).
3. Save → Click **Compact Layout Assignment** → assign the layout.

Leave Compact Layouts Help for this Page ?

New Compact Layout

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the compact layout, but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

Compact Layout Edit

Save Cancel

Enter Compact Layout Information ! Required Information

Label

Leave Compact Layout

Name

Leave_Compact_Layou

Select Compact Layout Fields

Available Fields

Created By
Currency
Last Modified By
Leave ID
Owner
Record Type

Add
Remove

Selected Fields

Leave Type
Status
Start Date
End Date

Top
Up
Down
Bottom

Activate Windows

Go to Settings to activate Windows.

Leave Compact Layouts Help for this Page ?

Compact Layout Assignment

Save Cancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Leave Compact Layout

Record Type Overrides

This table shows the compact layout assignments for different record types. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new compact layout from the dropdown.

Compact Layout to Use: -- Select Compact Layout -- 1 Selected 0 Changed

Record Types	Compact Layouts
Planned Leave	Inherit from Primary
Unplanned Leave	Inherit from Primary

Activate Windows

Go to Settings to activate Windows.

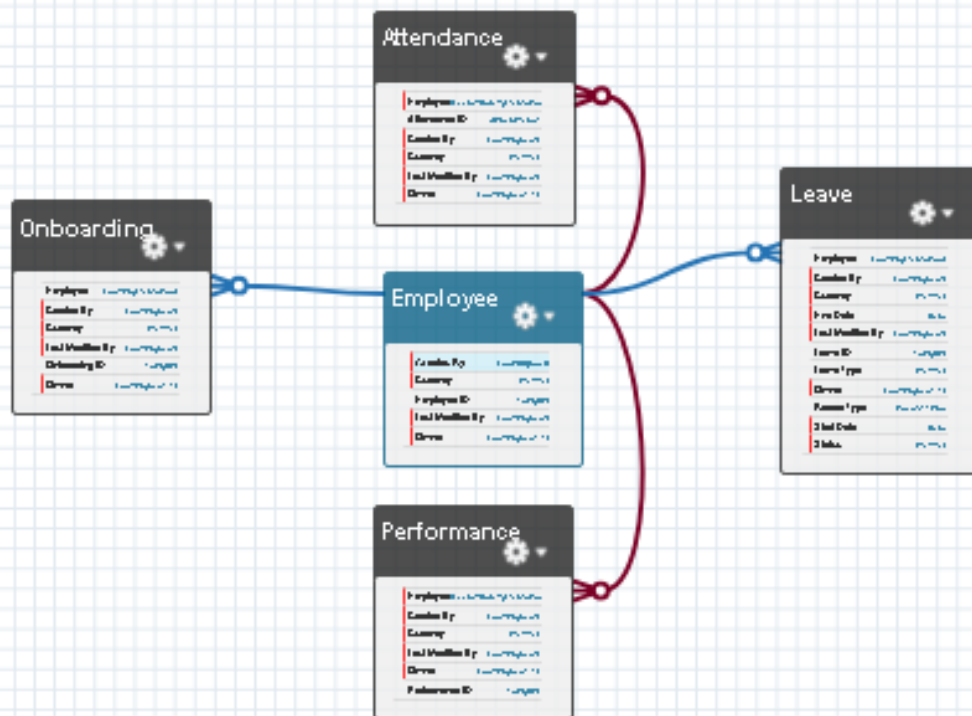
6. Schema Builder

Purpose

Visualize objects, fields and relationships; create fields/relationships quickly.

Steps

1. Setup → **Schema Builder**.
2. In left pane, check **Show All Objects** or pick specific ones.
3. Drag objects to canvas; view fields and relationships.
4. To add field: click object → + icon → add field. (Changes are live.)
5. Save/verify in Object Manager.



7. Relationships: Lookup vs Master-Detail vs Hierarchical

Summary

- **Lookup Relationship**
 - Loose coupling. Child record can exist without parent (optional if configured).
 - Sharing & visibility independent.
 - Deleting parent can either clear lookup or be prevented (depending on setup).
 - Use when child must survive parent or needs independent sharing (e.g., Attendance → Employee as Lookup if Attendance should remain independent).
- **Master-Detail Relationship**
 - Strong coupling. Child **inherits owner & sharing** from parent. Child is deleted when parent is deleted (cascade delete).
 - Allows **Roll-up Summary** fields on the master (e.g., count of Leaves per Employee).
 - Use when child must be owned by parent and you need rollups (e.g., Performance records as Master-Detail to Employee if you want aggregates).
- **Hierarchical Relationship**
 - Special relationship available only on **User** standard object to model manager hierarchy.
 - For a custom Employee object, use a **Lookup to same object** for manager chain.

How to create relationship field

1. Setup → Object Manager → [Child Object] → **Fields & Relationships** → **New**.
2. Choose **Lookup Relationship** or **Master-Detail Relationship** → Next.
3. Choose Related To: select parent object (e.g., Employee).
4. Configure field label, behavior on delete, and FLS.
5. Add to page layouts & save.

Recommendation for HR objects

- **Attendance__c → Employee__c**: Lookup (if you want Attendance independent). If you need rollups (total days attended), consider Master-Detail.
- **Leave__c → Employee__c**: Master-Detail if you want rollups like total leave days; Lookup if you need independent sharing.
- **Performance__c → Employee__c**: Master-Detail if you need rollups/ownership.

SETUP > OBJECT MANAGER
Leave

Details

Fields & Relationships
11 Items, Sorted by Field Label

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Employee	Employee__c	Lookup(Employee)		✓
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Leave ID	Name	Text(80)		✓
Leave Type	Leave_Type__c	Picklist		
Owner	OwnerId	Lookup(User/Group)		✓
Record Type	RecordTypeId	Record Type		✓
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER
Attendance

Details

Fields & Relationships
5 Items, Sorted by Field Label

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendance ID	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Employee	Employee__c	Master-Detail(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Performance

Details

Fields & Relationships
5 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Employee	Employee_c	Master-Detail(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Performance ID	Name	Text(80)		✓

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Onboarding

Details

Fields & Relationships
6 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Employee	Employee_c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Onboarding ID	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		

Activate Windows
Go to Settings to activate Windows.

8. Junction Objects (many-to-many)

Use case

When you need many-to-many (e.g., Employees ↔ Projects).

Steps to create a junction object

1. Setup → Object Manager → **Create → Custom Object** → EmployeeProject__c.
2. Create first Master-Detail field:
 - Object: **Project__c** → Field Type → Master-Detail (Project).
3. Create second Master-Detail field:
 - Object: **Employee__c** → Field Type → Master-Detail (Employee).
4. Save. Add fields & layout.
5. On Project__c and Employee__c, related lists for assignments appear automatically.

Note

- Junction objects require two Master-Detail fields. The junction record's ownership rolls up to masters.

SETUP > OBJECT MANAGER

EmployeeProject

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Employee	Employee__c	Master-Detail(Employee)		✓
EmployeeProject Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Project	Project__c	Master-Detail(Project)		

Activate Windows
Go to Settings to activate Windows.

9. External Objects (Salesforce Connect)

Use case

Use when HR data lives externally (Workday, SQL DB, external attendance store) and you want live access.

Prerequisites

- Salesforce Connect license or permission in your edition.
- External system with OData (or other supported adapter).

Steps (high level)

1. Setup → **External Data Sources** → **New**.
 - Choose **Type** (OData 2.0/4.0, Salesforce Connect: OData, etc.).
 - Fill connection URL, authentication (OAuth/Named Principal).
2. Click **Validate and Sync**.
3. Select tables/entities to sync → Click **Sync**.



SETUP

External Data Sources

Sync

Sync in background ☐

Select	Table Name	External Object Name	Label	Rural Label	Name Field	Synced
<input type="checkbox"/>	Alphabetical_list_of_product	Alphabetical_list_of_product	Alphabetical_list_of_product	Alphabetical_list_of_products	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Category	Category	Category	Categories	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Category_Sales_for_1997	Category_Sales_for_1997	Category_Sales_for_1997	Category_Sales_for_1997	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Current_Product_List	Current_Product_List	Current_Product_List	Current_Product_Lists	--None--	<input type="checkbox"/>
<input type="checkbox"/>	CustomerDemographic	CustomerDemographic	CustomerDemographic	CustomerDemographics	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Customer_and_Suppliers_by_City	Customer_and_Suppliers_by_	Customer_and_Suppliers_by_	Customer_and_Suppliers_by_	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Customer	Customer	Customer	Customers	--None--	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Employee	Employee	Employee	Employees	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Invoice	Invoice	Invoice	Invoices	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Order_Detail	Order_Detail	Order_Detail	Order_Details	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Order_Details_Extended	Order_Details_Extended	Order_Details_Extended	Order_Details_Extendeds	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Order_Subtotal	Order_Subtotal	Order_Subtotal	Order_Subtotals	--None--	<input type="checkbox"/>
<input type="checkbox"/>	Order	Order	Order	Orders	--None--	<input type="checkbox"/>