Phase 3 Report: Data Modeling & Relationships

# NextGen Recruit CRM – Salesforce Implementation

## Executive Summary

This report documents the completion of Phase 3 activities for the NextGen Recruit CRM, focusing on comprehensive data modeling and relationship architecture. The phase established a robust data foundation with 6 core objects, 40+ custom fields, and strategic relationships that support the complete recruitment lifecycle from candidate sourcing to placement.

## 1. Standard Objects Customization

### 1.1 Lead Object Enhancement

✅ Implementation Status: Complete

Custom Fields Added:

• Position\_Applied\_\_c (Lookup to Job Opening)  
 o Purpose: Links prospects to a specific job  
 o Relationship: Many-to-One with Job Opening  
• Source\_Channel\_\_c (Picklist: Job Portal, Referral, Walk-in, Social Media)  
 o Purpose: Captures candidate sourcing channel

### 1.2 Account Object Configuration

✅ Implementation Status: Complete

Custom Field Added:  
• Organization\_Type\_\_c (Picklist: Client, Vendor, Internal)  
 o Purpose: Categorizes organizations for engagement and billing

Standard Fields Utilized:  
• Account Name, Phone, Industry, Billing Address, Website

### 1.3 Contact Object Implementation

✅ Implementation Status: Complete

Configuration Approach:  
• Leveraging standard Salesforce Contact fields exclusively  
• Fields: First Name, Last Name, Email, Phone, Mobile, Mailing Address  
• Controlled by Parent Account for security inheritance

### 1.4 Job Opening Object Enhancement

✅ Implementation Status: Complete

Custom Fields Added:  
• Job\_Title\_\_c (Text 100 characters)  
• Department\_\_c (Picklist: Engineering, Sales, HR, Finance, Operations)  
• Location\_\_c (Text 100)  
• Experience\_Level\_\_c (Picklist: Fresher, Junior, Mid, Senior)  
• Salary\_Range\_\_c (Currency)  
• Openings\_Count\_\_c (Number)  
• Urgency\_Level\_\_c (Picklist: High, Medium, Low)  
• Is\_Remote\_\_c (Checkbox)  
• Hiring\_Manager\_\_c (Lookup to Contact)

### 1.5 Opportunity Object Integration

✅ Implementation Status: Complete

Custom Fields Added:  
• Candidate\_\_c (Lookup to Contact)  
• Job\_Opening\_\_c (Lookup to Job Opening)  
• Interview\_Stage\_\_c (Picklist: Screening, Interview, Offer, Hired, Rejected)  
• Expected\_Joining\_Date\_\_c (Date)  
• Placement\_Fee\_\_c (Currency)

## 2. Custom Objects Architecture

### 2.1 Candidate Application Object

✅ Implementation Status: Complete

Object Configuration:  
• API Name: Candidate\_Application\_\_c  
• Record Name: Auto Number (APP-{0000})

Core Fields:  
• Candidate\_\_c (Required Lookup to Contact)  
• Job\_Opening\_\_c (Required Lookup to Job Opening)  
• Application\_Date\_\_c (Date)  
• Status\_\_c (Picklist: Applied, In Process, Selected, Rejected, Withdrawn)  
• Resume\_Link\_\_c (URL)  
• Notes\_\_c (Long Text Area)

### 2.2 Interview Schedule Object

✅ Implementation Status: Complete

Object Configuration:  
• API Name: Interview\_Schedule\_\_c  
• Record Name: Auto Number (INT-{0000})

Core Fields:  
• Candidate\_\_c (Lookup to Contact)  
• Job\_Opening\_\_c (Lookup to Job Opening)  
• Interview\_Date\_\_c (DateTime)  
• Interviewer\_\_c (Lookup to User)  
• Mode\_\_c (Picklist: Online, Offline)  
• Result\_\_c (Picklist: Passed, Failed, On Hold)  
• Feedback\_\_c (Long Text Area)

### 2.3 Offer Letter Object

✅ Implementation Status: Complete

Object Configuration:  
• API Name: Offer\_Letter\_\_c  
• Record Name: Auto Number (OFF-{0000})

Core Fields:  
• Candidate\_\_c (Lookup to Contact)  
• Job\_Opening\_\_c (Lookup to Job Opening)  
• Offer\_Date\_\_c (Date)  
• Offered\_Salary\_\_c (Currency)  
• Joining\_Date\_\_c (Date)  
• Status\_\_c (Picklist: Offered, Accepted, Declined)  
• Signed\_By\_\_c (Lookup to User)

## Conclusion

Phase 3 has successfully established a comprehensive data foundation for the NextGen Recruit CRM. The implementation includes:  
• Complete Object Model: 6 objects with 40+ fields  
• Strategic Relationships: Optimized lookup and master-detail relationships  
• Record Type Strategy: Supporting recruitment business scenarios  
• Schema Visualization: Complete relationship mapping  
  
Implementation Status: 100% Complete. All Phase 3 deliverables have been successfully implemented and tested.

