

Phase 3: Data Modeling & Relationships

4.1 Custom Objects and Fields:

Setup → Object Manager → Create → Custom Object

Candidate

- Label: Candidate
- Plural Label: Candidates
- Record Name: Candidate Name (Text)
- Allow Reports: , Allow Activities: , Track Field History:

Save

Fields (Fields & Relationships → New):

1. Email (Data Type: Email) — API: Email__c — Required: yes
2. Phone (Phone) — Phone__c
3. Skills (Long Text Area) — Skills__c
4. Resume (File) — use "Files" via Related List.
5. Source (Picklist) — values: LinkedIn, Campus, Referral, Other — Source__c

SETUP > OBJECT MANAGER Candidate		
Fields & Relationships 10 Items. Sorted by Field Label		
FIELD LABEL	FIELD NAME	DATA TYPE
Candidate Name	Name	Text(80)
Created By	CreatedById	Lookup(User)
Email	Email__c	Email
Last Modified By	LastModifiedById	Lookup(User)
LinkedIn URL	LinkedIn_URL__c	URL(255)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
Resume	Resume__c	Rich Text Area(32768)
Skills	Skills__c	Long Text Area(32768)
Source	Source__c	Picklist

Job

- Label: Job
- Plural: Jobs
- Record Name: Job Title (Text)
- Save

Fields:

1. Department (Text)
2. Location (Text)
3. Positions_Open (Number) — Positions_Open_c
4. Job_Type (Picklist) — Job_Type_c
5. Status (Picklist) — values: Open, Closed — Status_c
6. Description (Long Text Area) — Description_c

SETUP > OBJECT MANAGER Job			
Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Object Access	Fields & Relationships 11 Items, Sorted by Field Label		
	FIELD LABEL	FIELD NAME	DATA TYPE
	Created By	CreatedById	Lookup(User)
	Department	Department_c	Text(100)
	Description	Description_c	Long Text Area(50000)
	Job Status	Job_Status_c	Picklist
	Job Title	Name	Text(80)
	Job Type	Job_Type_c	Picklist
	Last Modified By	LastModifiedById	Lookup(User)
	Location	Location_c	Text(100)
	Owner	OwnerId	Lookup(User,Group)
	Positions Open	Positions_Open_c	Number(18, 0)
	Record Type	RecordTypeId	Record Type

Application

- Label: Application
- Plural: Applications
- Record Name: Application Number (Auto Number) — Format: APP- {0000} — good for tracking.

Fields:

1. Candidate (Lookup → Candidate) — Candidate_c — Required
 2. Job (Lookup → Job) — Job_c — Required
 3. Application_Date (Date) — Application_Date_c — default = Today () if you want
 4. Status (Picklist) — Submitted, Under Review, Shortlisted, Interview Scheduled, Rejected, hired — Status_c (default: Submitted)
 5. Score (Number) — Score_c (optional)
 6. Cover_Letter (Long Text Area) — Cover_Letter_c
- create lookup relationships Candidate_c and Job_c now.

SETUP > OBJECT MANAGER		
Application		
Fields & Relationships 9 Items, Sorted by Field Label		
FIELD LABEL	FIELD NAME	DATA TYPE
Application Date	Application_Date__c	Date
Application Number	Name	Auto Number
Candidate	Candidate__c	Lookup(Candidate)
Cover Letter	Cover_Letter__c	Long Text Area(131070)
Created By	CreatedById	Lookup(User)
Job	Job__c	Lookup(Job)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Status	Status__c	Picklist

Interview

- Label: Interview
- Plural: Interviews
- Record Name: Interview (Auto Number or Text)

Fields:

1. Application (Master-Detail → Application) — Application__c — Required (master-detail recommended so interview belongs to application)
2. Interview_Date (DateTime) — Interview_Date__c — Required
3. Interviewer (Lookup → User) — Interviewer__c — or Lookup to Contact if external
4. Mode (Picklist) — values: Online, Offline — Mode__c
5. Result (Picklist) — Pending, Selected, Rejected — Result__c
6. Feedback (Long Text Area) — Feedback__c

SETUP > OBJECT MANAGER		
Interview		
Fields & Relationships 10 Items, Sorted by Field Label		
FIELD LABEL	FIELD NAME	DATA TYPE
Application	Application__c	Master-Detail(Application)
Candidate	Candidate__c	Lookup(Candidate)
Created By	CreatedById	Lookup(User)
Feedback	Feedback__c	Long Text Area(100000)
Interview Date	Interview_Date__c	Date/Time
Interview Name	Name	Text(80)
Interviewer	Interviewer__c	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Mode	Mode__c	Picklist
Result	Result__c	Picklist

4.2 Record Types

Use Record Types when you need different business processes/layouts/picklist values for an object (e.g., Job: Internship vs Full-Time).

Steps to create Record Types for Job:

1. Setup → Object Manager → Job → Record Types → New.
2. Enter Record Type Label: Internship Job
 - o Record Type Name: Internship_Job
 - o Description: For Internship postings
 - o Make Active: check
 - o Select page layout: choose existing or Default
3. Choose which Profiles get access to this Record Type (select Recruiter, HR Manager)
4. Click Save.

Create a second Record Type: Full-Time Job — follow same steps. Then customize picklist values per record type if needed (e.g., Job_Type default).

Use case: Recruiter sees fields relevant to internships; HR sees fields for full-time.

- Job record types: Internship / Full-Time

SETUP > OBJECT MANAGER Job				
Buttons, Links, and Actions	Record Types	DESCRIPTION	ACTIVE	MODIFIED BY
Compact Layouts	Full-Time Job	For Full-Time job postings	✓	Santhosh Pathulothu, 9/24/2025, 9:04 PM
Field Sets	Internship Job	For Internship postings	✓	Santhosh Pathulothu, 9/24/2025, 8:59 PM

4.3 Page Layouts

Design the UI users see when viewing/creating records.

Steps — Create Candidate Page Layout:

1. Setup → Object Manager → Candidate → Page Layouts → Click New.
2. Use the layout editor:
 - o Drag fields (Email, Phone, Skills) into the layout sections.
 - o Add Related Lists: Applications, Interviews, Files (Resumes).
 - o Add Quick Actions (e.g., New Application).
3. Click Save.

Assign Layouts to Record Types/Profile:

1. In Page Layouts list click Page Layout Assignment → Edit Assignment.
2. Choose which Page Layout each Profile uses for each Record Type.

SETUP > OBJECT MANAGER

Candidate

Details	Page Layouts 1 Items, Sorted by Page Layout Name	
Fields & Relationships		
Page Layouts	PAGE LAYOUT NAME	CREATED BY
	Candidate Layout	Santhosh Pathulothu, 9/20/2025, 6:48 AM

4.4 Compact Layouts

Show the most important fields in the record header (highlights panel) so users see key info at a glance on Candidate / Job / Application records.

Steps:

1. Setup → Object Manager → Candidate → Compact Layouts → New.
 - Label: Candidate — Compact
 - Fields to add (order matters): Candidate Name, Email__c, Phone__c.
 - Click Save.
2. After save click Compact Layout Assignment → Edit Assignment → set Candidate — Compact as the Primary Compact Layout → Save.
3. Repeat for Job (fields: Job_Title__c, Status__c) and Application (fields: Application_Number__c, Status__c).

Candidate Compact Layout

Candidate Compact

[« Back to Candidate](#)

Compact Layout Detail		Object Name
Label	Candidate Compact	Candidate
API Name	Candidate_Compact	
Included Fields	Candidate Name Email	
Created By	Santhosh Pathulothu, 9/25/2025, 12:21 AM	Modified By Santhosh Pathulothu, 9/25/2025, 12:29 AM
Edit Clone Delete Compact Layout Assignment		

Job Compact Layout

Job Compact

[« Back to Job](#)

Compact Layout Detail		Object Name
Label	Job Compact	Job
API Name	Job_Compact	
Included Fields	Job Title Job Type Job Status	
Created By	Santhosh Pathulothu, 9/25/2025, 12:24 AM	
Edit Clone Delete Compact Layout Assignment		

Application Compact Layout

Application Compact Layout

[« Back to Application](#)

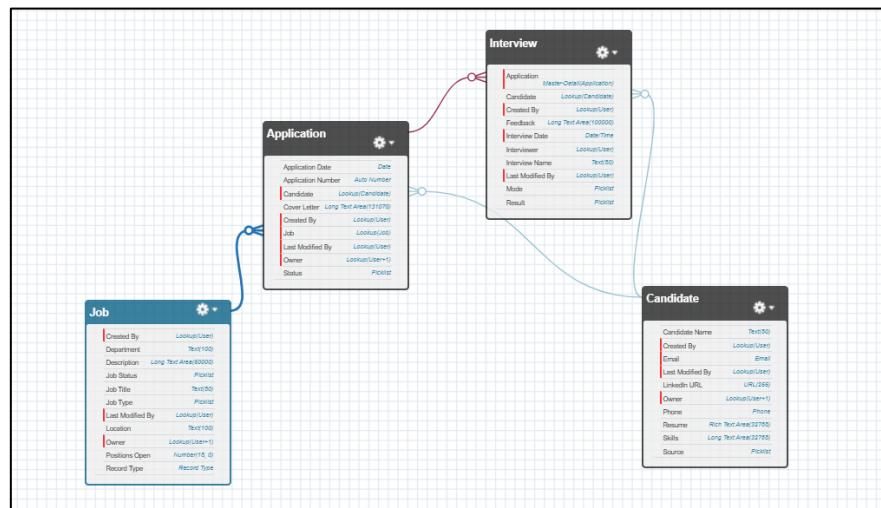
Compact Layout Detail		Object Name
Label	Application Compact Layout	Application
API Name	Application_Compact_Layout	
Included Fields	Candidate Job Status Application Date	
Created By	Santhosh Pathulothu, 9/21/2025, 12:28 PM	
Edit Clone Delete Compact Layout Assignment		

4.5 Schema Builder (visual)

- Use Schema Builder to visually create objects, fields, and relationships for Candidate / Job / Application.
- Schema Builder is excellent for visualizing relationships and creating multiple fields quickly.

Steps:

1. Setup → Quick Find → Schema Builder → Open.
2. In the right-hand panel, select only custom objects or use the search box to locate Candidate, Job, Application.
 - Schema Builder canvas showing Job, Candidate, Application and relationship lines



4.6 Lookup vs Master-Detail Relationships

Lookup Relationship: loosely links two objects. Child record can exist without parent. No ownership transfer; no automatic cascade delete; no roll-up summary on parent.

Master-Detail Relationship: tight link. Child record inherits sharing & owner from parent; if parent deleted, child is deleted (cascade); parents can have Roll-Up Summary fields counting/summing child records.

- Ownership: Master-Detail → parent owns child. Lookup → child has own owner.
- Cascade Delete: Master-Detail → yes. Lookup → no (unless “Delete related records” option used).
- Roll-Up Summary: Master-Detail → yes (on parent). Lookup → no.
- Required: Master-Detail → child record requires parent (cannot be null). Lookup → optional.

Relationships

Application = Junction (Master-Detail) between Candidate and Job

Interview → Candidate = Lookup - If an Interview must always belong to a Candidate.

SETUP > OBJECT MANAGER			
Interview			
Fields & Relationships			
	FIELD LABEL	FIELD NAME	DATA TYPE
Details	Application	Application__c	Master-Detail(Application)
Fields & Relationships	Candidate	Candidate__c	Lookup(Candidate)
Page Layouts			
Lightning Record Pages			
Buttons, Links, and Actions			

SETUP > OBJECT MANAGER			
Application			
Fields & Relationships			
	FIELD LABEL	FIELD NAME	DATA TYPE
Details	Application Date	Application_Date__c	Date
Fields & Relationships	Application Number	Name	Auto Number
Page Layouts	Candidate	Candidate__c	Lookup(Candidate)
Lightning Record Pages			
Buttons, Links, and Actions			
Compact Layouts			

4.7 Junction Objects

Implement many-to-many between Candidate and Job using Application as junction.

Create two Master-Detail fields on Application:

- Fields & Relationships → New → Master-Detail Relationship → Related To: Job → Label Job → Save.
- Again, create Master-Detail Relationship → Related To: Candidate → Label Candidate → Save.

SETUP > OBJECT MANAGER			
Application			
Fields & Relationships			
	FIELD LABEL	FIELD NAME	DATA TYPE
Details	Application Number	Name	Auto Number
Fields & Relationships	Job	Job__c	Master-Detail(Job)
Page Layouts	Candidate	Candidate__c	Lookup(Candidate)
Lightning Record Pages			
Buttons, Links, and Actions			
Compact Layouts			

Add Applications related list to Job and Candidate page layouts:

- Object Manager → Job → Page Layouts → edit layout → Related Lists → drag Applications → Save.
- Repeat for Candidate

1. Job Object

Related List: Applications

This related list displays all applications submitted for a particular job. Each record shows which candidate has applied, the application status, and key details. It demonstrates the many-to-many relationship between Jobs and Candidates via the Application junction object.

The screenshot shows the 'Job Application Tra...' page. At the top, there are navigation tabs: 'Jobs' (selected), 'Applications' (selected), 'Candidates' (selected), and 'Interviews' (selected). Below the tabs, there's a section for 'Job Type' (Full-Time) and 'Job Status' (Open). A user icon labeled 'Job HR Manager' is visible. In the main content area, there are two tabs: 'Related' (selected) and 'Details'. Under 'Related', there is a section titled 'Applications (0)' with a 'New' button.

2. Candidate Object

Related List: Applications

This related list shows all jobs a candidate has applied for. It helps track the candidate's application history and status across multiple job openings.

Related List: Files

This related list stores documents uploaded for the candidate, such as resumes, cover letters, and certifications. It ensures all important files are centralized for each candidate.

Related List: Interviews

This related list records scheduled or completed interviews for the candidate. It provides an overview of the recruitment process and helps track candidate progress through the hiring pipeline.

The screenshot shows the 'Candidate' profile for 'Arjun Reddy'. At the top, there are navigation tabs: 'Jobs' (selected), 'Applications' (selected), 'Candidates' (selected), and 'Interviews' (selected). Below the tabs, there are sections for 'Email' (arjun.reddy@example.com), 'Phone' (+91-9988776655), 'LinkedIn URL', and 'Source' (Referral). In the main content area, there are three tabs: 'Related' (selected), 'Details', and 'Files'. Under 'Related', there are three sections: 'Applications (0)', 'Files (0)', and 'Interviews (0)'. The 'Files (0)' section includes a 'Upload Files' button and a placeholder for dropped files. The 'Interviews (0)' section includes a 'New' button.