

Phase 3: Data Modeling & Relationships

1. Introduction

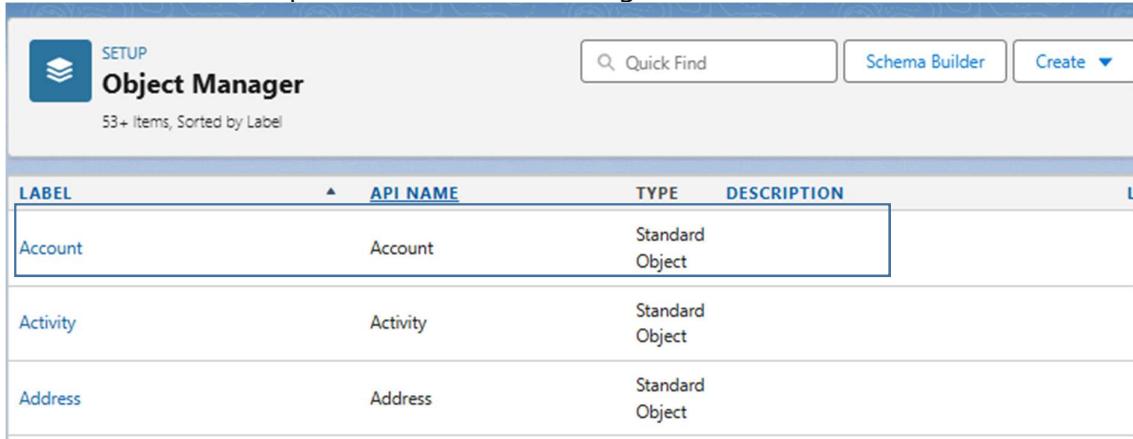
- In this phase, we focus on **designing the data model** of the Salesforce application to represent real-world business processes. A well-structured data model ensures **scalability, consistency, and efficient reporting**.
 - This phase involves working with **Standard Objects, Custom Objects, Fields, Record Types, Page Layouts, Compact Layouts, Schema Builder, Relationships, Junction Objects, and External Objects**.
-

2. Standard & Custom Objects

Standard Objects

- Predefined by Salesforce.
- Examples relevant to my project:

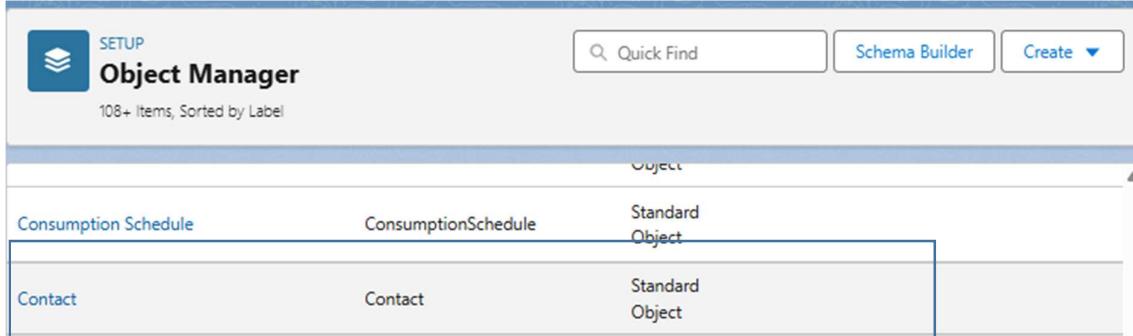
- **Account** → Represents customers or organizations.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a header with the 'SETUP' icon, 'Object Manager', a 'Quick Find' search bar, a 'Schema Builder' button, and a 'Create' button. Below the header, it says '53+ Items, Sorted by Label'. The main area is a table with columns: 'LABEL', 'API NAME', 'TYPE', and 'DESCRIPTION'. The table contains three rows for standard objects: Account, Activity, and Address. The 'Account' row is highlighted with a blue border.

| LABEL | API NAME | TYPE | DESCRIPTION |
|----------|----------|-----------------|-------------|
| Account | Account | Standard Object | |
| Activity | Activity | Standard Object | |
| Address | Address | Standard Object | |

- **Contact** → Represents individuals related to accounts.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a header with the 'SETUP' icon, 'Object Manager', a 'Quick Find' search bar, a 'Schema Builder' button, and a 'Create' button. Below the header, it says '108+ Items, Sorted by Label'. The main area is a table with columns: 'LABEL', 'API NAME', and 'TYPE'. The table contains two rows for standard objects: Consumption Schedule and Contact. The 'Contact' row is highlighted with a blue border.

| LABEL | API NAME | TYPE |
|----------------------|---------------------|-----------------|
| Consumption Schedule | ConsumptionSchedule | Standard Object |
| Contact | Contact | Standard Object |

- **Opportunity** → Tracks sales deals.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with the text 'oppo' and buttons for 'Schema Builder' and 'Create'. Below the header, it says '3 Items, Sorted by Label'. A table lists one item:

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOY |
|-------------|-------------|-----------------|-------------|---------------|--------|
| Opportunity | Opportunity | Standard Object | | | |

- **Case** → Manages customer issues.

The screenshot shows the Salesforce Object Manager interface with '108+ Items, Sorted by Label'. A table lists several objects, with 'Case' highlighted by a blue border:

| LABEL | API NAME | TYPE | DESCRIPTION |
|------------------------|----------------------|-----------------|-------------|
| Cart Tax | CartTax | Standard Object | |
| Cart Validation Output | CartValidationOutput | Standard Object | |
| Case | Case | Standard Object | |
| Case Related Issue | CaseRelatedIssue | Standard Object | |

Custom Objects

- Created by me to model my project-specific data (e.g., Job, Skill, Training, Student) to meet project-specific requirements.
- Examples for my project (Job-Skill system):
 - **Skill_c** → Stores different skills (e.g., Communication, Coding, Translation).
 - **Training_c** → Represents training sessions/workshops.
 - **Job_c** → Represents job roles requiring skills.

Procedure for my reference:

1. Log in to Salesforce → Click **Setup (⚙)** → Search **Objects** → Go to **Object Manager**.
2. Explore **Standard Objects** like Account, Contact, Opportunity.
3. Now, create your **first Custom Object**:
 - Click **Create** → **Custom Object**.
 - Example: Create **Skill** object.
 - Label: **Skill**

- Plural Label: **Skills**
- Record Name: Auto Number or Text (choose Text for simplicity).
- Optional: Allow Reports, Activities, Track Field History → check them.
- Save.

- **Skill**

- Stores details of skills (e.g., Java, Salesforce Admin, Data Analysis).
- Fields: Skill Name, Skill Category, Proficiency Level, Description.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The top navigation bar includes 'SETUP' and the 'New Custom Object' title. A message banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' Below this is the 'Custom Object Definition Edit' form.

Custom Object Information (Required Information)

- Label:** Skill (Example: Account)
- Plural Label:** Skills (Example: Accounts)
- Starts with vowel sound:**

The Object Name is used when referencing the object via the API.

- Object Name:** Skill (Example: Account)

Description: (Large text area)

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

- Record Name:** Skill Name (Example: Account Name)
- Data Type:** Text (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Details

[Edit](#) [Delete](#)

Description

API Name

Skill_c

Custom



Singular Label

Skill

Plural Label

Skills

Enable Reports



Track Activities



Track Field History



Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|------------------------|----------------------|-----------------|-------------|---------------|----------|
| Service Resource Skill | ServiceResourceSkill | Standard Object | | | |
| Skill | Skill_c | Custom Object | | 9/17/2025 | ✓ |
| Skill Requirement | SkillRequirement | Standard Object | | | |

- **Job**

- Stores job opportunities or positions.
- Fields: Job Title, Job Description, Department, Location, Required Skills.

| Object Manager | | | | | |
|----------------|----------|---------------|-------------|---------------|----------|
| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| Job | Job_c | Custom Object | | 9/17/2025 | ✓ |

- **Training**

- Stores training programs conducted.
- Fields: Training Name, Trainer, Duration, Mode (Online/Offline), Related Skill.

| Object Manager | | | | | |
|----------------|------------|---------------|-------------|---------------|----------|
| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| Training | Training_c | Custom Object | | 9/17/2025 | ✓ |

- **Candidate / Student**

- Stores information about candidates or students applying for jobs/trainings.
- Fields: Name, Email, Phone, Education, Applied Job.

| Object Manager | | | | | |
|----------------|------------|---------------|-------------|---------------|----------|
| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| Student | Student__c | Custom Object | | 8/2/2025 | ✓ |

| Object Manager | | | | | |
|----------------|--------------|---------------|---|---------------|----------|
| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| Candidate | Candidate__c | Custom Object | Records for rural youth registrations and profiles (project: Skill Dev & Employment Portal) | 9/12/2025 | ✓ |

- **Application (Junction Object between Candidate & Job)**

- Tracks which candidate applied for which job.
- Fields: Application Status, Applied Date.

| Object Manager | | | | | |
|-------------------------|----------------------|-----------------|-------------|---------------|----------|
| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| API Anomaly Event Store | ApiAnomalyEventStore | Standard Object | | | |
| Application | Application__c | Custom Object | | 9/17/2025 | ✓ |
| Appointment | Appointment | Standard | | | |

- **Enrolment (Junction Object between Candidate & Training)**

- Tracks candidates enrolled in training programs.
- Fields: Enrolment Date, Completion Status, Score.

| Object Manager | | | | | |
|----------------|---------------|---------------|-------------|---------------|----------|
| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
| enrollment | enrollment__c | Custom Object | | 9/17/2025 | ✓ |

3. Fields

Each object requires **standard fields (auto-created)** and **custom fields**.

Procedure to Create Fields:

- Go to **Setup** → **Object Manager** → [Select Object] → **Fields & Relationships** → **New**.

The screenshot shows the 'Fields & Relationships' section of the Object Manager for the 'Skill' object. The top navigation bar includes 'SETUP > OBJECT MANAGER' and the object name 'Skill'. Below the navigation is a toolbar with buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A search bar labeled 'Quick Find' is present. The main table lists standard fields under 'Page Layouts', 'Lightning Record Pages', and 'Buttons, Links, and Actions'. A new field, 'Skill Name', has been added by the user, which is highlighted with a red circle around the 'New' button in the toolbar. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

| Details | Fields & Relationships | | | | |
|-----------------------------|------------------------|------------------|--------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Page Layouts | Created By | CreatedById | Lookup(User) | | |
| Lightning Record Pages | Last Modified By | LastModifiedById | Lookup(User) | | |
| Buttons, Links, and Actions | Owner | OwnerId | Lookup(User,Group) | ✓ | |
| Compact Layouts | Skill Name | Name | Text(80) | ✓ | ▼ |
| Field Sets | | | | | |
| Object Limits | | | | | |

- Choose **Field Type** (Text, Picklist, Lookup, Number, etc.).

Text

Allows users to enter any combination of letters and numbers.

- Enter **Field Label, Length, Values (if Picklist)**.

SKIII
New Custom Field

Help for this Page 

Step 2. Enter the details

Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)

Field Label 

Please enter the maximum length for a text field below.

Length

Field Name 

Description

Help Text



Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity 

Default Value [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today) + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__mdt.RecordAPIName.FieldName__c}

[Previous](#) [Next](#) [Cancel](#)

1. Set **Field-Level Security** → Visible for profiles.

Step 3. Establish field-level security

Step 3 of 4

[Previous](#) [Next](#) [Cancel](#)

| | |
|-------------|------------|
| Field Label | Skill Name |
| Data Type | Text |
| Field Name | Skill_Name |
| Description | |

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

| Field-Level Security for Profile | Visible | Read-Only |
|-------------------------------------|-------------------------------------|--------------------------|
| Analytics Cloud Integration User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Anypoint Integration | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Authenticated Website | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Authenticated Website | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| B2B Reordering Portal Buyer Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cross Org Data Proxy User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Marketing Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Sales Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community Login User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community Plus Login User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community Plus User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Community User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal Manager Custom | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

2. Add to Page Layout → Yes.

Step 4. Add to page layouts

Step 4 of 4

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

| | |
|-------------|------------|
| Field Label | Skill Name |
| Data Type | Text |
| Field Name | Skill_Name |
| Description | |

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

| | |
|-------------------------------------|------------------|
| Add Field | Page Layout Name |
| <input checked="" type="checkbox"/> | Skill Layout |

When finished, click Save & New to create more custom fields, or click Save if you are done.

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

3. Save.

1. Skill Object Fields

- **Skill Name** (default Record Name field – Text)
- **Skill Category** (Picklist → Example: Technical, Soft Skill, Management)
- **Proficiency Level** (Picklist → Beginner, Intermediate, Expert)
- **Description** (Long Text Area, 255 characters)

| Fields & Relationships | | | | | |
|-----------------------------|-------------------|----------------------|-----------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Page Layouts | Created By | CreatedById | Lookup(User) | | |
| Lightning Record Pages | Description | Description__c | Long Text Area(32768) | | ▼ |
| Buttons, Links, and Actions | Last Modified By | LastModifiedById | Lookup(User) | | |
| Compact Layouts | Owner | OwnerId | Lookup(User,Group) | ✓ | |
| Field Sets | Proficiency Level | Proficiency_Level__c | Picklist | | ▼ |
| Object Limits | Skill Category | Department__c | Picklist | | ▼ |
| Record Types | Skill Name | Skill_Name__c | Text(200) | | ▼ |
| Related Lookup Filters | Skill Name | Name | Text(80) | ✓ | ▼ |
| Search Layouts | | | | | |
| List View Button Layout | | | | | |

2. Job Object Fields

- **Job Title** (default Record Name field – Text)
- **Department** (Picklist → IT, HR, Finance, Marketing)
- **Location** (Text or Picklist → e.g., Chennai, Hyderabad, Bangalore)
- **Required Experience** (Number → Years)
- **Job Description** (Long Text Area, 255 characters)

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------|------------------------|-----------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Job Department | Job_Department__c | Picklist | | |
| Job Description | Job_Description__c | Long Text Area(32768) | | |
| Job Name | Name | Text(80) | ✓ | |
| Job Title | Job_Title__c | Text(100) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Location | Location__c | Geolocation | | |
| Locationn | Locationn__c | Picklist | | |
| Owner | OwnerId | Lookup(User,Group) | ✓ | |
| Required Experience | Required_Experience__c | Number(18, 0) | | |

4. Training Object Fields

- **Training Name** (default Record Name field – Text)
- **Trainer Name** (Lookup → Contact OR Text)
- **Duration (Days)** (Number)
- **Mode** (Picklist → Online, Offline, Hybrid)
- **Start Date** (Date)
- **End Date** (Date)

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Contact | Contact__c | Lookup(Contact) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Duration | Duration__c | Number(18, 0) | | |
| End Date | End_Date__c | Date | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Mode | Mode__c | Picklist | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Start Date | Start_Date__c | Date | | |
| Training Name | Training_Name__c | Text(200) | | |
| Training Name | Name | Text(80) | | ✓ |

5. Candidate Object Fields

- **Candidate Name** (default Record Name field – Text)
- **Email** (Email)
- **Phone Number** (Phone)
- **Education** (Text or Picklist → B.Tech, M.Tech, MBA, etc.)
- **Experience Level** (Picklist → Fresher, 1–3 years, 3–5 years, 5+ years)

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|---------------------------|-------------------|------------------------------------|
| Candidate Name | Name | Auto Number | | ✓ <input type="button" value="▼"/> |
| CandidateID | CandidateID_c | Auto Number (External ID) | | ✓ <input type="button" value="▼"/> |
| ContactNumber | ContactNumber_c | Phone | | <input type="button" value="▼"/> |
| Created By | CreatedById | Lookup(User) | | |
| Education | Education_c | Picklist | | <input type="button" value="▼"/> |
| Email | Email_c | Email (Unique) | | ✓ <input type="button" value="▼"/> |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Place | Place_c | Text(200) | | <input type="button" value="▼"/> |
| Skills | Skills_c | Text Area(255) | | <input type="button" value="▼"/> |

Types of Fields Used

- **Text** – Names, Titles, Descriptions.
- **Picklist** – Skill level (Beginner, Intermediate, Advanced).
- **Lookup Relationship** – Linking related records.
- **Master-Detail Relationship** – For dependent data.
- **Checkbox** – Status (Active/Inactive).
- **Date/DateTime** – Event or Training schedules.

Sample: ➔

| Object | Field Label | Type | Example Values |
|-----------|----------------|----------|-----------------------|
| Skill | Skill Category | Picklist | Technical, Soft Skill |
| Job | Department | Picklist | IT, HR, Finance |
| Training | Mode | Picklist | Online, Offline |
| Candidate | Education | Picklist | B.Tech, MBA |

Example (Skill_c)

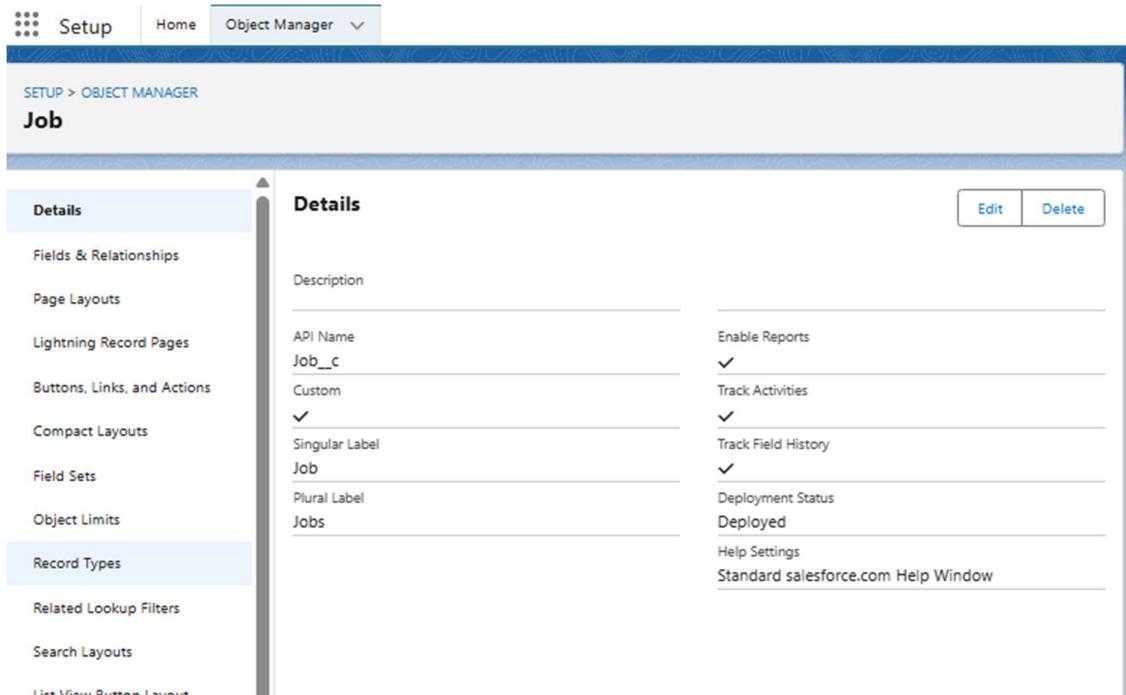
| Field Name | Data Type | Description |
|------------------|-----------|----------------------------------|
| Skill_Name__c | Text (80) | Name of the skill |
| Skill_Level__c | Picklist | Beginner, Intermediate, Advanced |
| Certification__c | Checkbox | Whether certification exists |

4. Record Types

- ❖ Record types allow **different business processes** within the same object.

Procedure to Create Record Types:

1. Go to **Setup** → **Object Manager** → **Select Object (e.g., Job)** → **Record Types** → **New**.



2. Enter:

- Label: *Full-Time Job*
- Record Type Name: *Full_Time_Job*
- Assign Profiles → System Administrator (for now).

- o Select **Page Layout** (we'll customize later).
1. Save.
 2. Repeat for *Internship*.
 3. Repeat for **Training** (Technical, Soft Skills).

The screenshot shows the 'Record Type' configuration page for a custom object named 'Job'. The record type is 'Full-Time Job' with the internal name 'Full_Time_Job'. The 'Active' status is checked. The page includes fields for Record Type Label, Record Type Name, Namespace Prefix, Description, Created By, and Modified By. Below this, a section titled 'Picklists Available for Editing' lists two picklist entries: 'Job Department' and 'Location'. Both were modified by 'Eric Executive' on 9/17/2025, 6:22 AM.

| Action | Field | Modified Date |
|--------|----------------|--------------------|
| Edit | Job Department | 9/17/2025, 6:22 AM |
| Edit | Location | 9/17/2025, 6:22 AM |

Example

For **Training_c**:

- **Record Type 1: Online Training**
- **Record Type 2: Offline Workshop**
- **Job Object**
 - o Record Types:
 - **Full-Time Job**
 - **Internship**

Record Type
Internship

[Help for this Page](#)

[« Back to Custom Object: Job](#)

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 | Internship | Active |
| Record Type Name | Internship | |
| Namespace Prefix | | |
| Description | | |
| Created By | Eric Executive , 9/17/2025, 6:24 AM | Modified By Eric Executive , 9/17/2025, 6:24 AM |

| Picklists Available for Editing | | Picklists Available for Editing Help |
|---------------------------------|----------------|--------------------------------------|
| Action | Field | Modified Date |
| Edit | Job Department | 9/17/2025, 6:24 AM |
| Edit | Locationn | 9/17/2025, 6:24 AM |

- Difference: Full-Time requires “Experience” field; Internship does not.

- **Training Object**

- Record Types:
 - **Technical Training**
 - **Soft Skill Training**

SETUP > OBJECT MANAGER

Training

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

| Record Types | | | |
|--------------------------------------|-------------|--------|---|
| 2 Items, Sorted by Record Type Label | | | |
| RECORD TYPE LABEL | DESCRIPTION | ACTIVE | MODIFIED BY |
| Soft Skill Training | | | Eric Executive , 9/17/2025, 6:29 AM |
| Technical Training | | | Eric Executive , 9/17/2025, 6:27 AM |

- Difference: Technical Training links with technical skills; Soft Skills training does not require “Trainer Certification” field.

- **Candidate Object (Optional)**

- Record Types:
 - **Fresher Candidate**
 - **Experienced Candidate**

| Record Types | | Quick Find | New | Page Layout Assignment | |
|--------------------------------------|-------------|------------|------------------------------------|------------------------|--|
| 2 Items, Sorted by Record Type Label | | | | | |
| Record Type Label | Description | Active | Modified By | | |
| Fresher Candidate | | ✓ | Eric Executive, 9/17/2025, 6:33 AM | ▼ | |
| Experienced Candidate | | ✓ | Eric Executive, 9/17/2025, 6:35 AM | ▼ | |

- Difference: Experienced Candidate has "Experience Level" mandatory.

Each record type can have its own **Page Layout** and **Picklist values**.

| Object | Record Types | Purpose |
|-----------|------------------------|-----------------------------|
| Job | Full-Time, Internship | Separate hiring processes |
| Training | Technical, Soft Skills | Different course categories |
| Candidate | Fresher, Experience | Different Job Roles |

5. Page Layouts

- They control **which fields, sections, buttons, and related lists** appear on a record detail/edit page.
- Combined with **Record Types**, they allow different users to see different layouts for the same object.
 - Controls **fields, related lists, buttons** visibility for users.
 - Example: For **Job_c**, HR users see "Salary" field, while external partners only see "Role Description".

Procedure to Create Page Layouts

- Go to **Setup** → **Object Manager** → **Select Object (e.g., Job)** → **Page Layouts**.

- Click **New** → clone the default layout.
- Rename it (e.g., *Full-Time Job Layout*).

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page I include the standard sections whose names are translated for your internation

Existing Page Layout **Job Layout**

Page Layout Name **Full-Time Job Layout**

Save **Cancel**

- Drag & drop fields to rearrange sections:
 - Create sections like **Job Details**, **Requirements**, etc.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Section Properties

Section Name **Job Details.**

Display Section Header On Detail Page Edit Page

Layout

1-Column 2-Column

Tab-key Order

Left-Right Top-Down

OK Cancel

Job Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Layout

Custom Buttons:

Information (Header visible on edit only)

* Job Name Sample Text
Job Title Sample Text
Job Department Sample Text

Owner Sample Text

- Add relevant fields to each.
- Assign the **Page Layout** to the correct **Record Type**.
- Example: Full-Time Job → Full-Time Layout.
- Internship → Internship Layout.

1. Job Object Layouts

- **Full-Time Job Layout**
- Fields: Job Title, Department, Location, Required Experience, Job Description.
- **Internship Layout**
- Fields: Job Title, Department, Location, Duration (instead of Required Experience), Job Description.

| Page Layouts | | |
|-------------------------------------|------------------------------------|------------------------------------|
| 3 Items, Sorted by Page Layout Name | | |
| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
| Full-Time Job Layout | Eric Executive, 9/17/2025, 6:45 AM | Eric Executive, 9/17/2025, 7:47 AM |
| Internship Layout | Eric Executive, 9/17/2025, 7:48 AM | Eric Executive, 9/17/2025, 7:52 AM |
| Job Layout | Eric Executive, 9/17/2025, 5:05 AM | Eric Executive, 9/17/2025, 6:02 AM |

2. Training Object Layouts

- **Technical Training Layout**
- Fields: Training Name, Trainer Name, Duration, Mode, Start Date, End Date, Related Skill.
- **Soft Skill Training Layout**
- Fields: Training Name, Trainer Name, Duration, Mode, Start Date, End Date (no Skill mapping needed).

| Page Layouts | | |
|-------------------------------------|------------------------------------|------------------------------------|
| 3 Items, Sorted by Page Layout Name | | |
| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
| Soft Skill Training Layout | Eric Executive, 9/17/2025, 8:05 AM | Eric Executive, 9/17/2025, 8:05 AM |
| Technical Training Layout | Eric Executive, 9/17/2025, 8:01 AM | Eric Executive, 9/17/2025, 8:01 AM |
| Training Layout | Eric Executive, 9/17/2025, 5:05 AM | Eric Executive, 9/17/2025, 6:11 AM |

3. Candidate Object Layouts (Optional)

- **Fresher Layout** → Candidate Name, Email, Phone, Education.
- **Experienced Layout** → Candidate Name, Email, Phone, Education, Experience Level, Previous Job Details.

| Page Layouts | | |
|-------------------------------------|------------------------------------|------------------------------------|
| 4 Items, Sorted by Page Layout Name | | |
| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
| Candidate Layout | Eric Executive, 9/12/2025, 4:47 AM | Eric Executive, 9/17/2025, 6:14 AM |
| Copy of Experienced Layout | Eric Executive, 9/17/2025, 8:10 AM | Eric Executive, 9/17/2025, 8:10 AM |
| Experienced Layout | Eric Executive, 9/17/2025, 8:09 AM | Eric Executive, 9/17/2025, 8:09 AM |
| Fresher Layout | Eric Executive, 9/17/2025, 8:07 AM | Eric Executive, 9/17/2025, 8:08 AM |

| Object | Record Type | Page Layout Assigned |
|-----------|-------------|---------------------------|
| Job | Full-Time | Full-Time Job Layout |
| Job | Internship | Internship Job Layout |
| Training | Technical | Technical Training Layout |
| Training | Soft Skills | Soft Skills Layout |
| Candidate | Fresher | Fresher Layout |
| Candidate | Experience | Experienced Layout |

6. Compact Layouts

- Compact Layouts decide **which key fields are visible at the top of a record page** (the **Highlights Panel**) and in the Salesforce Mobile App.
- They show the **most important information** without opening the record fully.

Example: For a **Job** record, instead of opening the whole page, you can quickly see: *Job Title, Department, Location, Required Experience*.

- Define which fields are visible in **highlights panel** (mobile & Lightning).
- Example: For **Skill_c**, show → *Skill Name, Level, Certification Status*.

Procedure to Create a Compact Layout

1. Go to **Setup** → **Object Manager** → **Select Object (e.g., Job)**.
2. In left menu → click **Compact Layouts**.

SETUP > OBJECT MANAGER
Job

Details

Description

API Name: Job__c

Custom: ✓

Singular Label: Job

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Edit

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

3. Click **New**.
4. Enter:
 - Label: *Full-Time Job Compact Layout*
 - Fields to Display → Choose from available fields (use the 4 listed above).

Job 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: **Full-Time Job Compact Lay**
Name: **Full_Time_Job_Compact_L** i

Select Compact Layout Fields

| Available Fields | Selected Fields |
|---|---|
| Created By Job Name Last Modified By Locationn Owner Record Type | Job Title Job Department Location Required Experience |
| <input type="button" value="Add"/> <input type="button" value="Remove"/> | Top Up ▲ Down ▼ Bottom |

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Save Cancel

- Click **Save**.
- 5. After saving → Click **Compact Layout Assignment** (button at top).
- 6. Select your newly created Compact Layout → Click **Save**.

| Compact Layout Detail | | Edit | Clone | Delete | Compact Layout Assignment |
|---|---|---------------------------------|---|------------------------|---|
| Label | Internship | Object Name Job | | | |
| API Name | Internship | | | | |
| Included Fields | Job Title Job Department Location Job Name | | | | |
| Created By | Eric Executive , 9/17/2025, 8:20 AM | Modified By | Eric Executive , 9/17/2025, 8:20 AM | | |
| Edit Clone Delete Compact Layout Assignment | | | | | |

Job Object – Full-Time Job

Compact Layout:

- Job Title
- Department
- Location
- Required Experience

Job Object – Internship

Compact Layout:

- Job Title
- Department
- Location
- Duration

| SETUP > OBJECT MANAGER | | | | | |
|-----------------------------|--|--|------------------------------|----------------|--------------------|
| Job | | | | | |
| Details | | Compact Layouts | | | |
| Fields & Relationships | | LABEL | API NAME | PRIMARY | MODIFIED BY |
| Page Layouts | | Full-Time Job Compact Layout | Full_Time_Job_Compact_Layout | Eric Executive | 9/17/2025, 8:17 AM |
| Lightning Record Pages | | Internship | Internship | Eric Executive | 9/17/2025, 8:20 AM |
| Buttons, Links, and Actions | | System Default | SYSTEM | ✓ | |
| Compact Layouts | | | | | |
| | | <input type="text" value="Q, Quick Find"/> New Compact Layout Assignment | | | |

Training Object – Technical Training

Compact Layout:

- Training Name
- Trainer Name
- Duration
- Related Skill

Training Object – Soft Skills Training

Compact Layout:

- Training Name
- Trainer Name
- Duration
- Mode

| LABEL | API NAME | PRIMARY | MODIFIED BY | LAST MODIFIED |
|----------------------|----------------------|---------|----------------|--------------------|
| Soft Skills Training | Soft_Skills_Training | | Eric Executive | 9/17/2025, 8:23 AM |
| System Default | SYSTEM | ✓ | | |
| Technical Training | Technical_Training | | Eric Executive | 9/17/2025, 8:22 AM |

Candidate Object

- Candidate Name
- Email
- Phone
- Experience Level (for experienced candidates)

| LABEL | API NAME | PRIMARY | MODIFIED BY | LAST MODIFIED |
|-------------------|-------------------|---------|----------------|--------------------|
| Experienced Level | Experienced_Level | | Eric Executive | 9/17/2025, 8:26 AM |
| System Default | SYSTEM | ✓ | | |

| Object | Compact Layout Name | Fields Shown |
|----------|------------------------------|--|
| Job | Full-Time Job Compact Layout | Job Title, Department, Location, Required Experience |
| Job | Internship Compact Layout | Job Title, Department, Location, Duration |
| Training | Technical Training Compact | Training Name, Trainer, Duration, Related Skill |
| Training | Soft Skills Training Compact | Training Name, Trainer, Duration, Mode |

7. Schema Builder

Schema Builder allows you to **see your objects, fields, and relationships graphically**, and also **create/edit objects/fields directly** using drag-and-drop.

- Visual tool to create/view objects and relationships.
- Helps in validating **ERD (Entity-Relationship Diagram)**.

Step-by-Step: Schema Builder

1. Open Schema Builder

- Go to **Setup** → **Quick Find** → type **Schema Builder** → Click it.
- You'll see:
 - **Canvas (middle)**: where objects will appear.
 - **Elements Panel (left)**: drag-and-drop tools.
 - **Filters Panel (right)**: choose which objects to display.

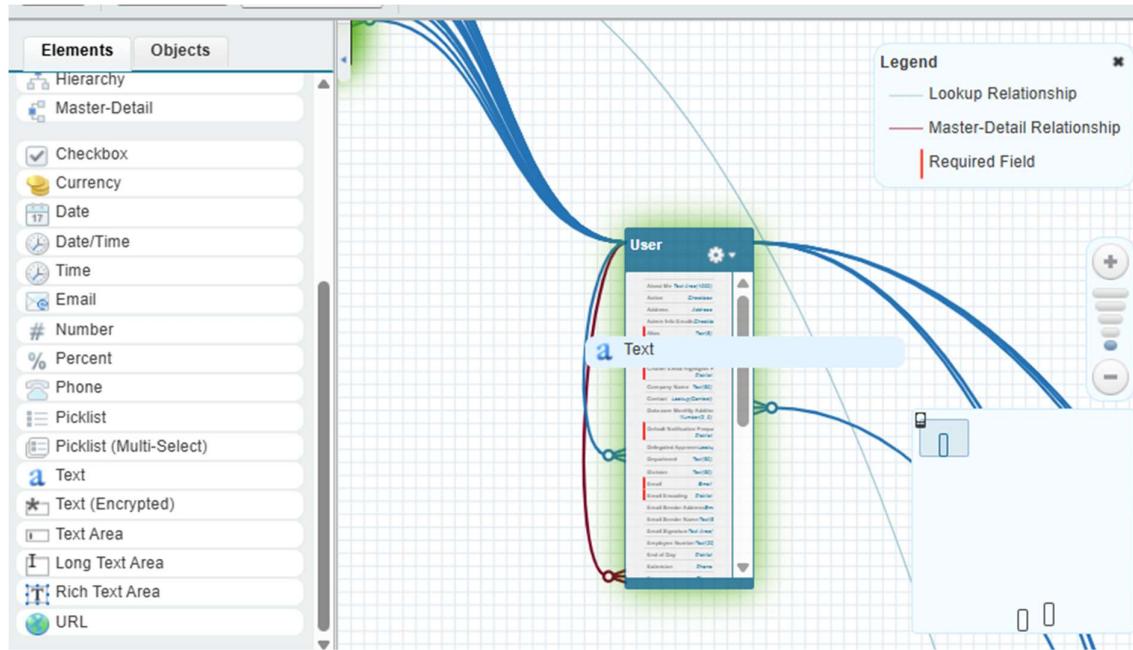
2. Show Your Objects

- In the **Filter Panel**, tick:
- Your **Custom Objects**: Student, Trainer, Skill, Training, Enrollment.
- Standard objects you may use (Account, Contact, User).
- Objects appear as **boxes** on the canvas, with their fields inside.



3. Drag & Drop (Inside Objects)

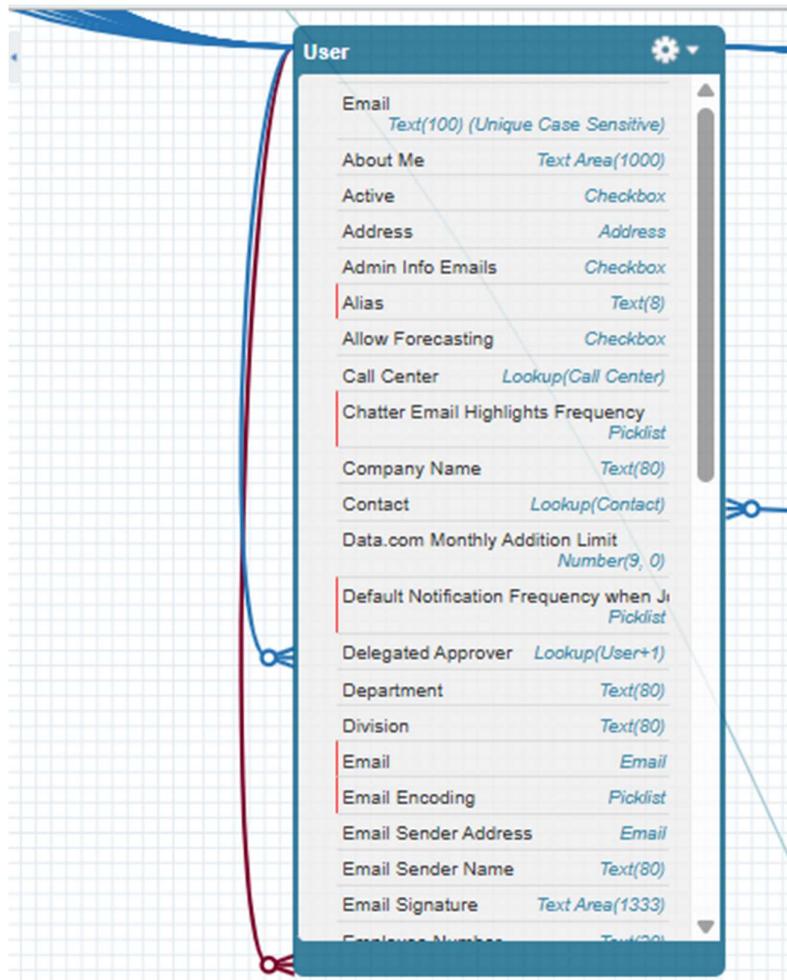
- From the **Elements Panel (left)**, drag a **Field Type** (e.g., Text, Number, Date, Checkbox).
- Drop it **into the desired object box** (like Student).



- A popup will open → Configure field details:
- Field Label (e.g., "Student Email").
- Field Name (auto-fills).
- Type & Properties (length, required, default value).
- Click **Save** → The field now shows inside the object box.

4. Adjust Canvas

- You can **move object boxes** around (drag the whole object box).
- Resize canvas using zoom controls (bottom left).
- This helps you **arrange objects neatly** for documentation.



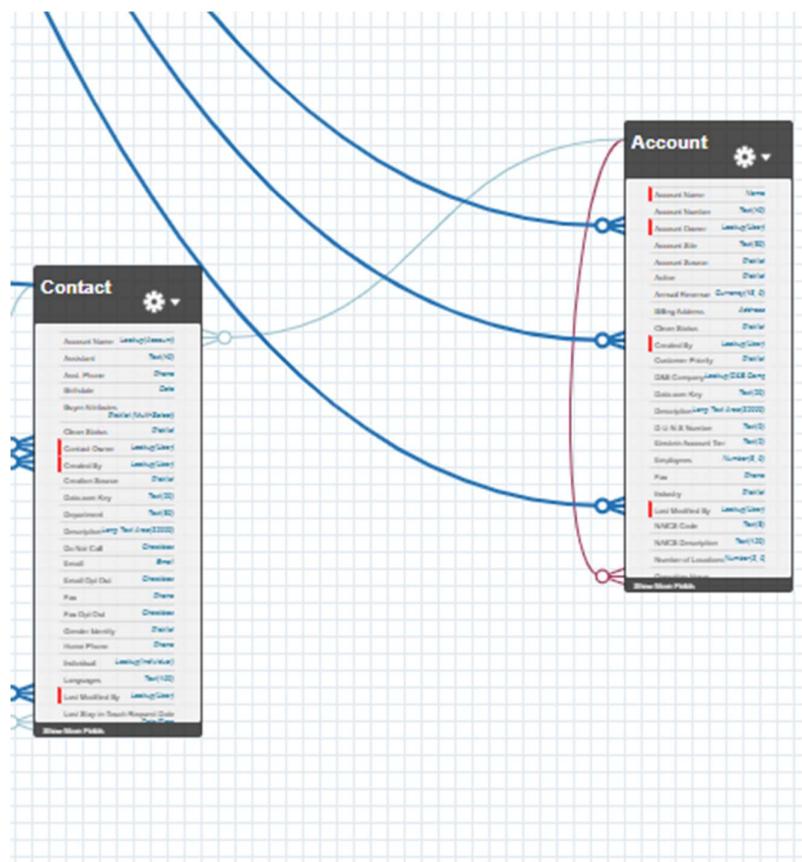
5. Customize Display

On the **Schema Builder toolbar** (top right):

- **Show Required Fields** → highlights required ones.
- **Show Relationship Fields** → we will use this later in next step.
- **Hide Standard Fields** → keeps canvas cleaner.

Job

| | |
|---------------------|---------------------------------------|
| Created By | Lookup(User) |
| Job Department | Long Text |
| Job Description | Lookup(User) Long Text Area(32768) |
| Owner | Lookup(User+1) |
| Job Name | Text(80) |
| Priority Level | Text(100) |
| Job Title | Picklist |
| Skill Category | Text(100) |
| Last Modified By | Lookup(User) |
| Skill Name | Text(80) |
| Location | Geolocation |
| Skill Name | Text(200) |
| Location | Picklist |
| Start Date | Date |
| Owner | Lookup(User+1) |
| Training Name | Text(80) |
| Record Type | Record Type |
| Training Name | Text(80) |
| Required Experience | Number(18, 0) |



8. Relationships

This is one of the most important parts of data modeling because it defines **how objects connect with each other** in Salesforce.

Types of Relationships

1. Lookup Relationship

- Loose connection between objects.
- Child record **can exist without parent**.
- Example: A `Skill` record linked to a `Student` (but can exist even if no student is assigned).

2. Master-Detail Relationship

- Strong connection (parent-child).
- Child record **cannot exist without parent**.
- Parent controls child record's lifecycle, ownership, and sharing.
- Example: `Enrollment` (child) must belong to a `Student` (parent).

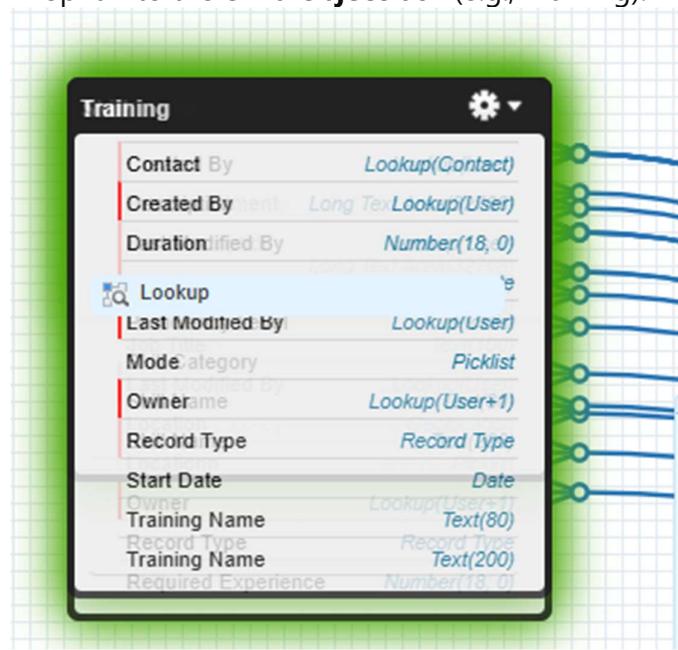
3. Hierarchical Relationship

- Only available on **User** object.
- Used to link users to managers (self-relationship).
- Example: User → Manager reporting.
- (Only possible on **User** object → usually for reporting lines, e.g., Manager field).
- Hierarchical is Not required for my current model,

Steps in Schema Builder

1. Create a Lookup Relationship

- In Schema Builder → drag **Lookup Relationship** from left panel.
- Drop it into the **child object** box (e.g., Training).



- Popup appears:
- Related To: **Trainer**.

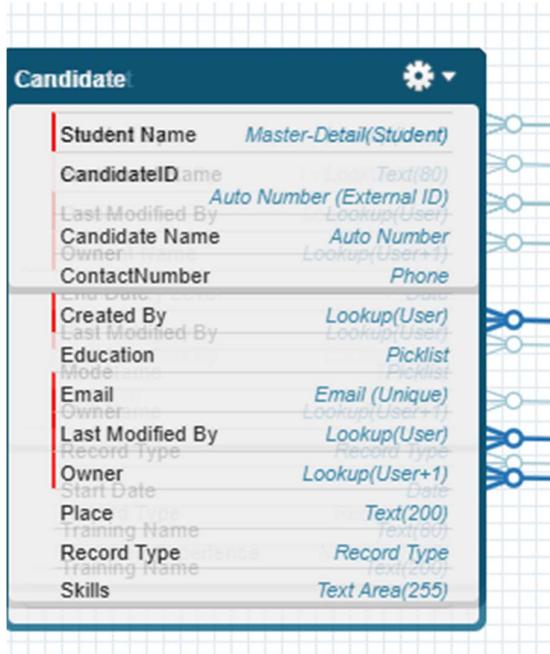
- Field Label: "Trainer Name".
- Save → A line appears between Training and Trainer.

Create Lookup Field (Object: Training)

| | |
|--|--------------|
| Field Label | Trainer Name |
| Field Name | Trainer_Name |
| Description | |
| Help Text | |
| Related To | Training |
| Select the other object to which this object is related. You must enter a value | |
| Child Relationship Name | Trainings |
| You must enter a value | |
| Related List Label | Trainings |
| Specify the title that the related list will have in all of the layouts associated with the parent. You must enter a value | |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> | |

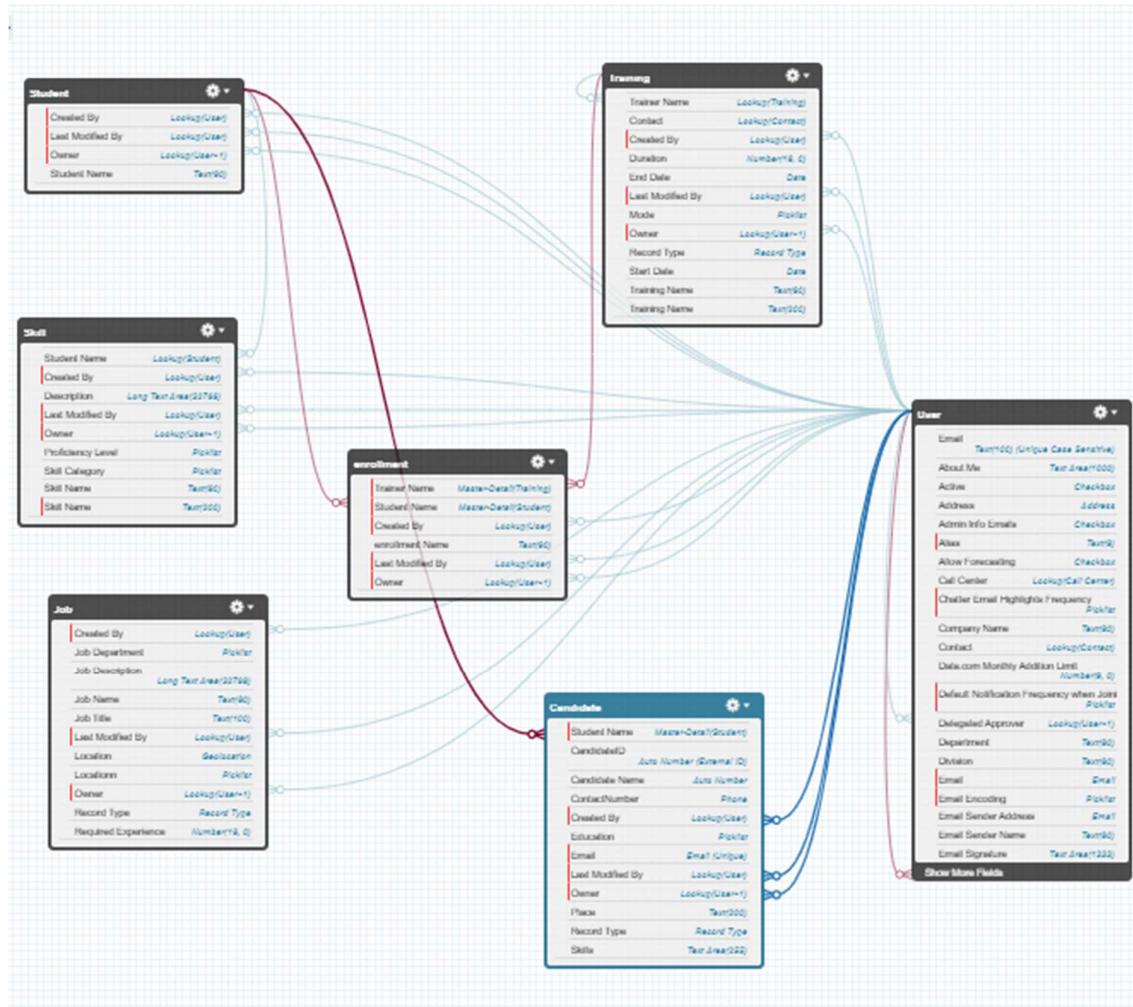
2. Create a Master-Detail Relationship

- Drag **Master-Detail Relationship** → Drop into Enrollment.
- Popup appears:
- Related To: **Student**.
- Field Label: "Student Name".
- Save → Line shows Enrollment → Student.
- Repeat for Enrollment → Training.



3. Arrange Schema

- Drag object boxes on canvas so relationships are clearly visible:
- Put **Student** and **Training** at top.
- Place **Enrollment** in middle as junction.
- Keep **Trainer** near Training.
- Place **Skill** near Student.



9. Junction Objects

- Used for **many-to-many relationships**.
- Example:
- JobSkill_c** → Junction between **Job_c** and **Skill_c**.
- Allows a job to require multiple skills and one skill to belong to multiple jobs.

```
Job__c ↔ JobSkill__c ↔ Skill__c
```

- A **junction object** is a custom object used to create a **many-to-many relationship** between two objects.
- It achieves this by having **two Master-Detail relationships**, one for each parent.

Enrollment is the junction object.

- **Why?**
- A **Student** can enroll in many **Trainings**.
- A **Training** can have many **Students**.
- To handle this many-to-many relationship → **Enrollment** is required.



Here Enrollment acts as a Junction Object

10. External Objects

Used to integrate **data outside Salesforce** (via OData).

Example:

- **External_Training_x** → Connects Salesforce to an external LMS (Learning Management System).
 - **External_Translation_x** → Connects Salesforce to AI Translation API logs.
-
- External Objects let Salesforce **connect to data stored outside Salesforce** (in external systems).
 - They are similar to custom objects but their records live **in another system** (not in Salesforce DB).
 - Accessed in Salesforce using **Salesforce Connect**.
 - Currently I'm not using it might use in upcoming phase if required
-

11. Documentation Deliverables

For Phase 3, include:

- **Entity-Relationship Diagram (ERD)** → Show Standard & Custom Objects + relationships.
 - **Custom Object & Field Tables** → Name, API Name, Type, Description.
 - **Record Type & Layout Mapping** → Which record types use which layouts.
 - **Junction Object Mapping** → Many-to-many relationships.
 - **Screenshots**: Schema Builder, Page Layout, Compact Layout.
-

12. Benefits of This Phase

- ❖ Ensures **clear business data structure**.
- ❖ Enables **automation (Flows, Triggers, Validation Rules)** later.
- ❖ Supports **reporting and dashboards**.
- ❖ Prepares data model for **scalability & integrations**.