

# Phase 3 : Data Modelling & Relationships

## Problem Statement:

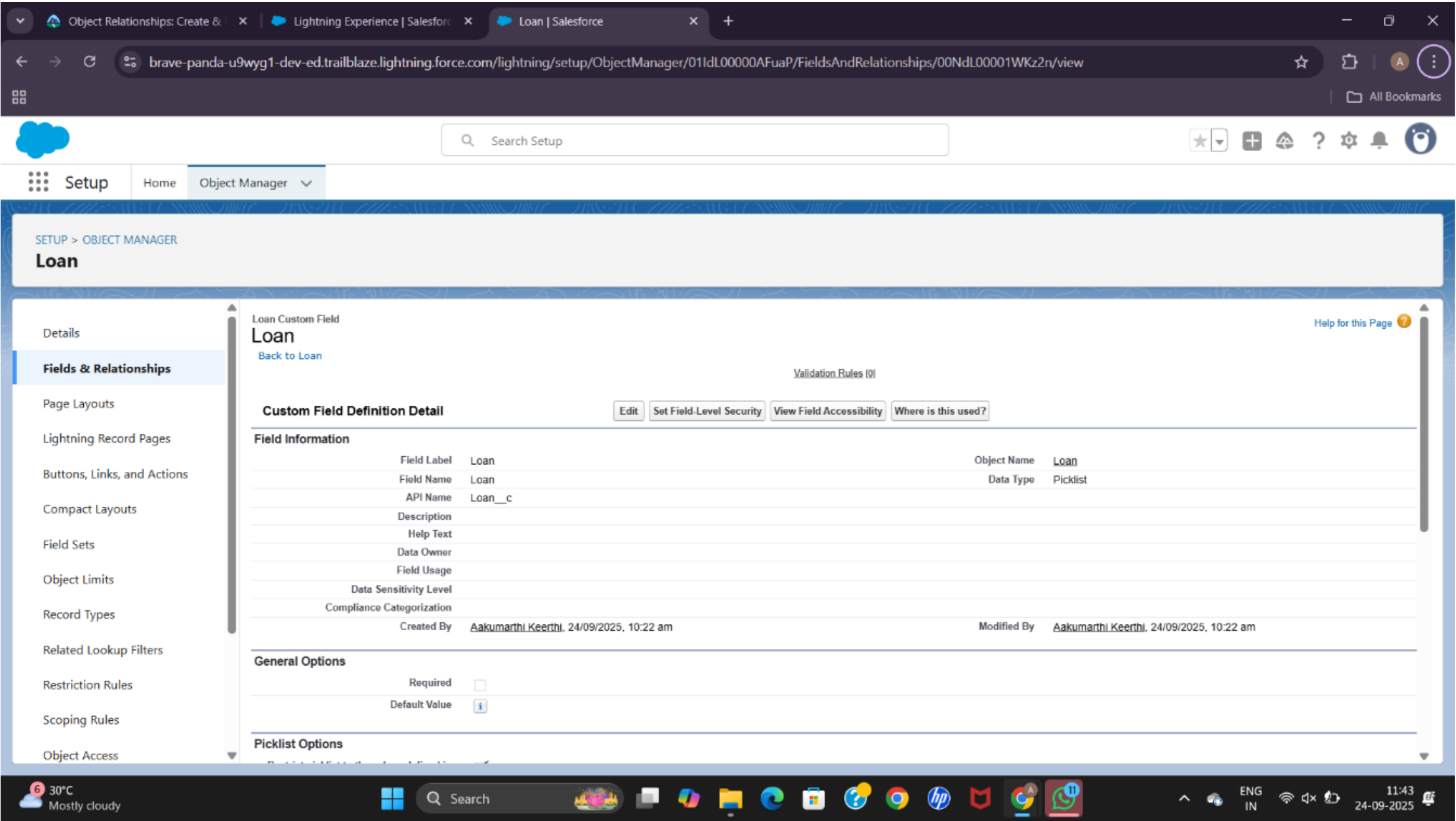
The bank currently lacks a structured system to manage customer, loan, and investment data in a centralized and secure way. Customer accounts, loans, investments, and service requests are stored in multiple disconnected systems, making it difficult to track relationships and maintain data accuracy.

## 1.Standard & Custom Objects:

- . For full control, most Banking CRMs create a custom object called Loan.
- . Loan Amount is a custom currency field on this Loan object.
- . This allows creating relationships with Account, Contact, Payment, or Service Request objects.

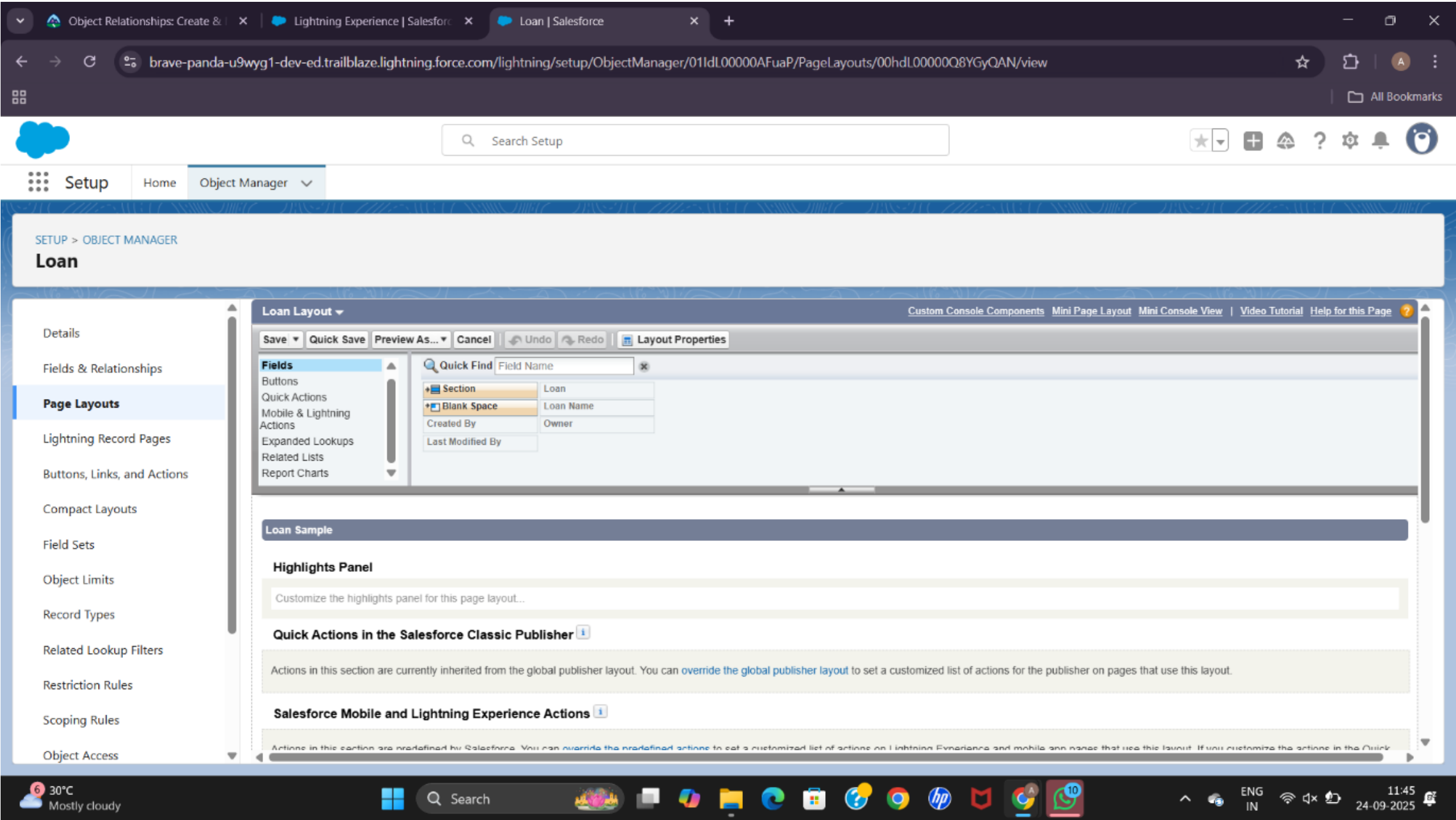
## 2.Fields & Relationships:

- . Loan Amount → Currency field on Loan object.
- . Loan Type → Picklist (Personal, Mortgage, Business).



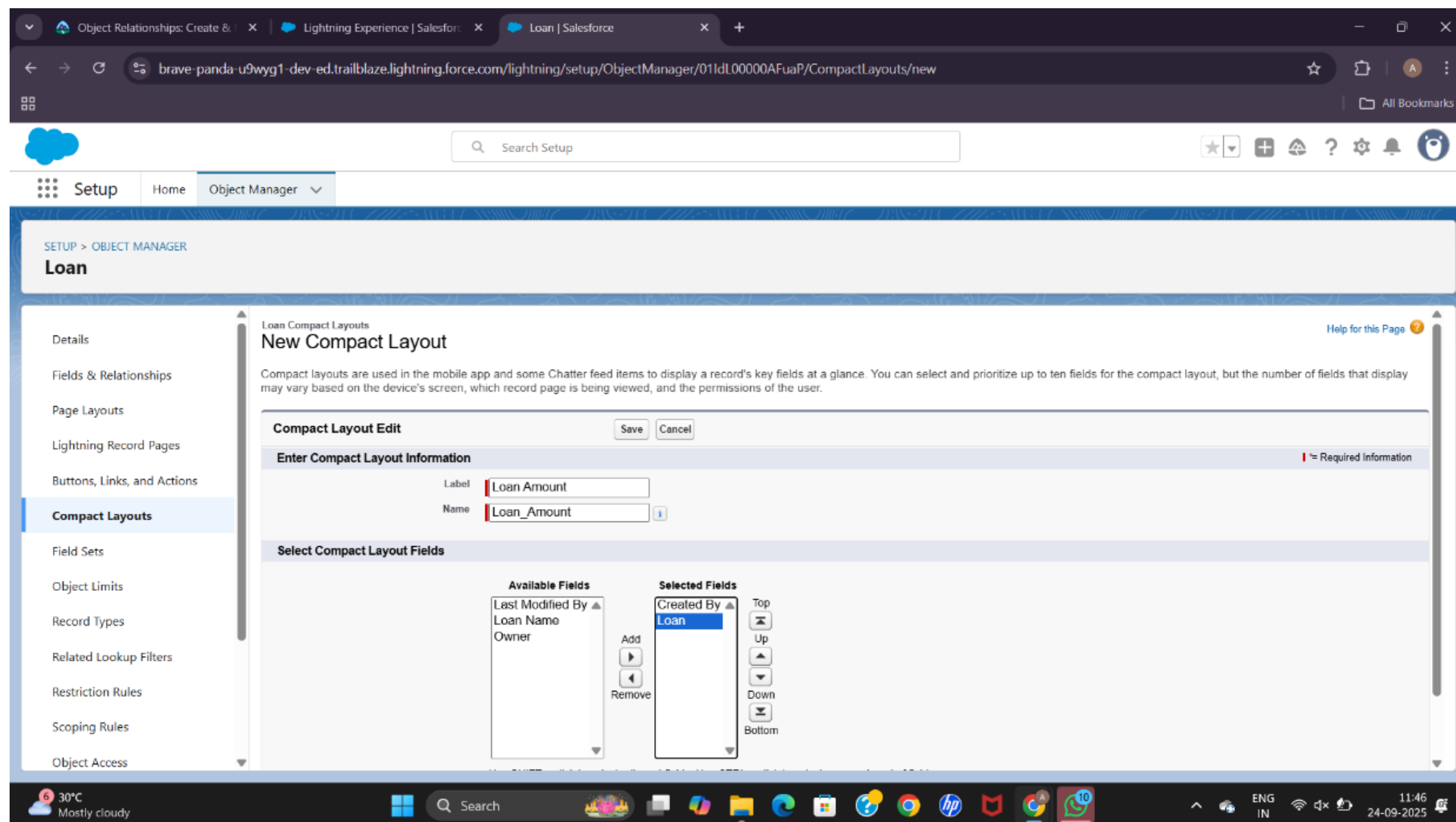
### 3. Page Layouts:

- . Show relevant information for each role (Relationship Manager, Loan Officer, Compliance Officer).
- . Hide sensitive fields from users who shouldn't see them (e.g., Credit Score, Compliance Notes).
- . Page layouts control **how fields, sections, buttons, and related lists appear** to users when they view or edit a record.



### 4. Compact Layouts:

- . Compact layouts determine which key fields appear in the record highlights section at the top of a record page.



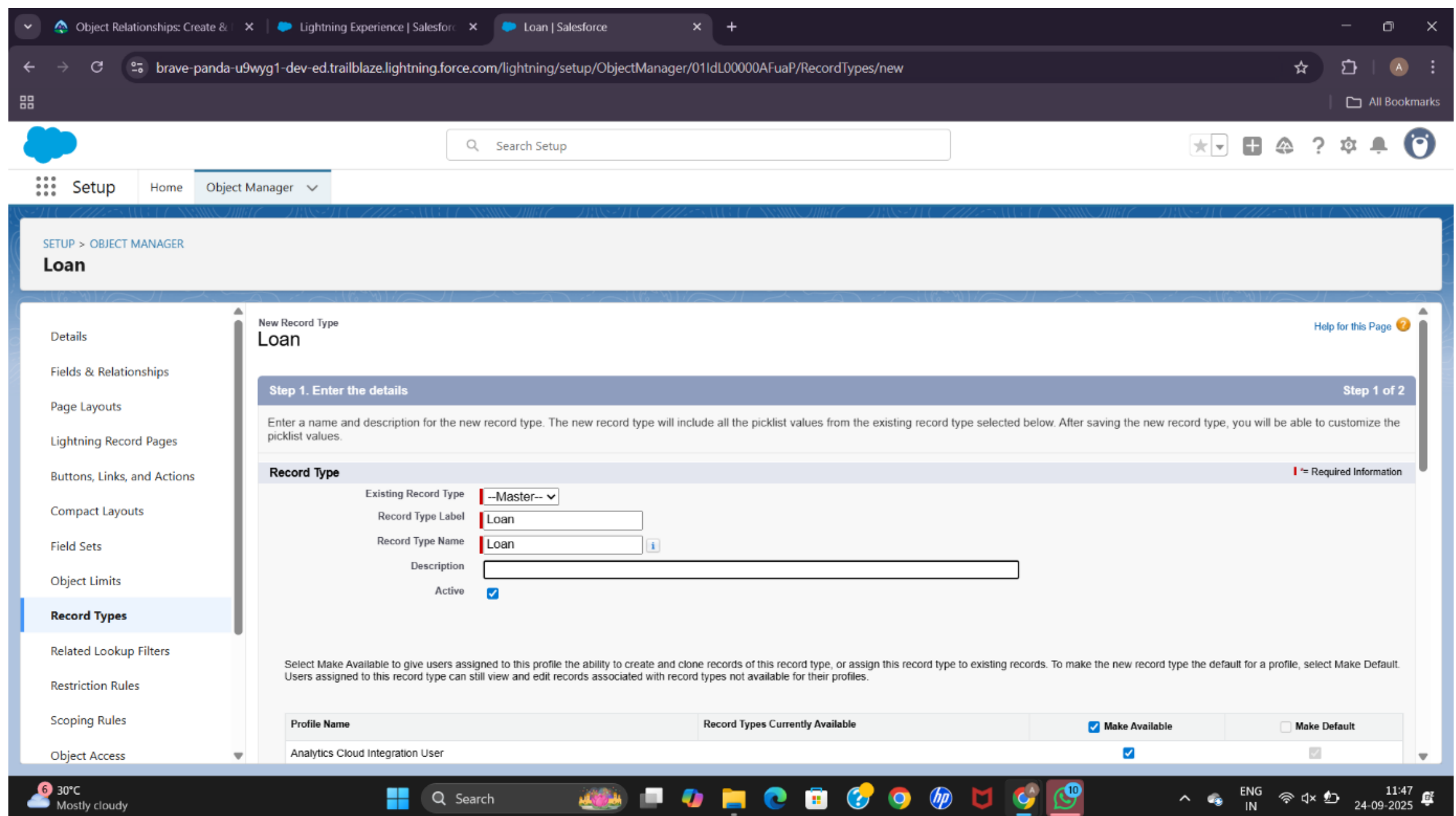
- . They are designed for quick access to important information, especially on Lightning pages and mobile devices.

### Loan Compact Layout:

Fields shown: Loan Amount, Loan Type, Loan Status, Customer Name.

## 5.Record Types:

- . Record Types allow you to offer different business processes, picklist values, and page layouts for the same object.
- . Manage different loan types, account types, or service requests in the same object.
- . Personal Loan → Page layout with fields like Loan Amount, Status, Customer Details.



## 6.Junction Objects:

- . Allows the bank to track complex relationships between objects.
- . Ensures proper linking of customers to multiple products or accounts without duplicating data.
- . Supports reporting, automation, and workflows for combined records.