

FinSmart CRM Project – Phase 3:

Data Modeling & Relationships

In this phase, I created custom objects, fields, record types, page layouts, and relationships to model the FinSmart Bank CRM system. Screenshots are attached for each major step.

1. Custom Objects Creation


What I did: I created the following custom objects:

- Bank_Customer__c (Label: Bank_Customer)
- Loan_Application__c (Label: Loan_Application)
- Repayment__c (Label: Repayment)
- Document__c (Label: Document)
- Offer__c (Label: Offer)








For Loan_Application__c and Repayment__c, I used Auto-Number record names to ensure unique identifiers (e.g., LA-{0000}, RP-{0000}). For Bank_Customer__c, I used a text record name to capture full customer names.

- I created custom **tabs** for Bank_Customer, Loan_Application, Repayment, Document, and Offer so that users can easily access these objects from the Salesforce app navigation bar.

Reason: These objects represent the core banking entities needed for loan processing, repayments, document tracking, and offers. Using separate objects ensures proper data organization and relationships.



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Bank_Customer

Details

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Buttons, Links, and Actions

Compact Layouts

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Details

Description

API Name

Bank_Customer__c

Custom

✓

Singular Label

Bank_Customer

Plural Label

Bank_Customers

Enable Reports

✓

Track Activities

✓

Track Field History


Deployment Status

Deployed








Help Settings

Standard salesforce.com Help Window

EditDelete



Search Setup



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Description

API Name

Loan_Application__c

Custom

✓

Singular Label

Loan_Application

Plural Label

Loan_Applications

Enable Reports

✓

Track Activities

✓

Track Field History

✓


Deployment Status

Deployed








Help Settings

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Repayment

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Details

EditDelete








Description

API NameRepayment__cCustom✓Singular LabelRepaymentPlural LabelRepayments

Enable Reports✓Track Activities✓Track Field HistoryDeployment StatusDeployedHelp SettingsStandard salesforce.com Help Window



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Document

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

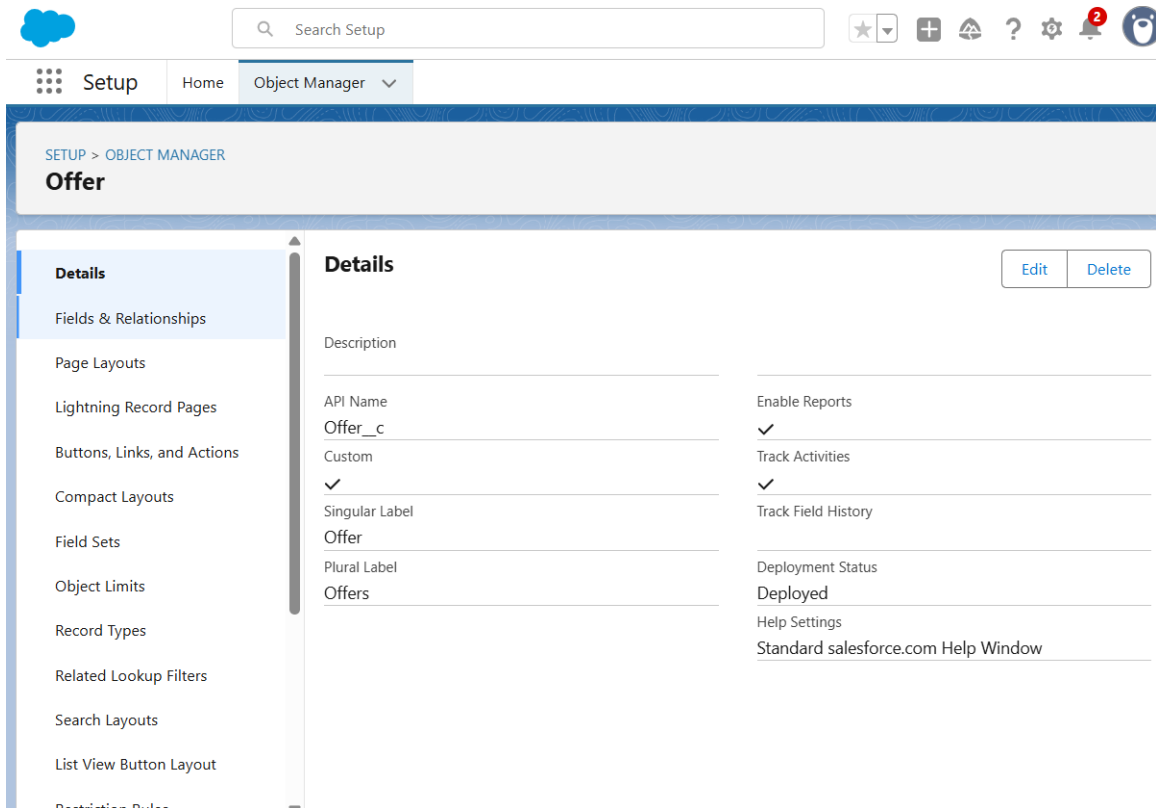
Details

EditDelete

Description

API NameDocument__cCustom✓Singular LabelDocumentPlural LabelDocuments

Enable Reports✓Track Activities✓Track Field HistoryDeployment StatusDeployedHelp SettingsStandard salesforce.com Help Window



2. Key Fields for Bank_Customer__c

What I did: I created key fields on Bank_Customer__c:

- Email__c (Email)
- Mobile__c (Phone)
- Customer_ID__c (Text, 20)
- DOB__c (Date)
- Address__c (Long Text Area)

Reason: These fields capture essential customer information required for KYC compliance and loan processing.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|------------------------------------|-------------------|---------|
| Address | Address__c | Long Text Area(32768) | | |
| Created By | CreatedById | Lookup(User) | | |
| Customer Name | Name | Text(80) | | ✓ |
| Customer_ID | Customer_ID__c | Text(20) (Unique Case Insensitive) | | ✓ |
| DOB | DOB__c | Date | | |
| Email | Email__c | Email (Unique) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Mobile | Mobile__c | Phone | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

3. Key Fields for Loan_Application__c

What I did: I added key fields on Loan_Application__c:

- Customer__c (Master-Detail to Bank_Customer__c)
- Loan_Type__c (Picklist: Home, Car, Personal, Education, Gold)
- Loan_Amount__c (Currency)
- Interest_Rate__c (Percent)
- Tenure_Months__c (Number)
- EMI__c (Currency, calculated later by Flow/Apex)
- Loan_Status__c (Picklist: Draft, Submitted, Under_Review, Approved, Rejected, Disbursed, Active, Closed, Defaulted)
- Credit_Score__c (Number)
- Assigned_To__c (Lookup to User)
- Application_Date__c, Disbursement_Date__c (Date fields)

Reason: These fields track all key attributes of a loan application, including type, status, amount, repayment terms, and ownership.

SETUP > OBJECT MANAGER
Loan_Application

Details

Fields & Relationships
27 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 |
|------------------|---------------------|------------------------------|-------------------|---------|
| Annual_Income | Annual_Income__c | Currency(18, 0) | | |
| Application_Date | Application_Date__c | Date | | |
| Assigned_To | Assigned_To__c | Lookup(User) | | ✓ |
| Bank_Customer | Bank_Customer__c | Master-Detail(Bank_Customer) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Credit_Score | Credit_Score__c | Number(18, 0) | | |
| Dealer_Name | Dealer_Name__c | Text(10) | | |
| Down_Payment | Down_Payment__c | Currency(18, 0) | | |

Page Layouts
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Buttons, Links, and Actions
Compact Layouts
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4. Key Fields for Repayment__c

What I did: I created the following fields on Repayment__c:

- Loan__c (Master-Detail to Loan_Application__c)
- Installment_Number__c (Number)
- Due_Date__c, Payment_Date__c (Date)
- Due_Amount__c, Paid_Amount__c (Currency)
- Payment_Status__c (Picklist: Due, Paid, Overdue, Partially_Paid)

Reason: This object allows tracking of repayment schedules, ensuring each installment is monitored accurately.

SETUP > OBJECT MANAGER
Repayment

Details

Fields & Relationships
9 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

| | | | | |
|--------------------|-----------------------|---------------------------------|---|---|
| Created By | CreatedById | Lookup(User) | | |
| Due_Amount | Due_Amount__c | Currency(12, 2) | | |
| Due_Date | Due_Date__c | Date | | |
| Installment_Number | Installment_Number__c | Number(18, 0) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Loan | Loan__c | Master-Detail(Loan_Application) | ✓ | |
| Paid_Amount | Paid_Amount__c | Currency(12, 2) | | |
| Payment_Status | Payment_Status__c | Picklist | | |
| Repayment Name | Name | Auto Number | | ✓ |

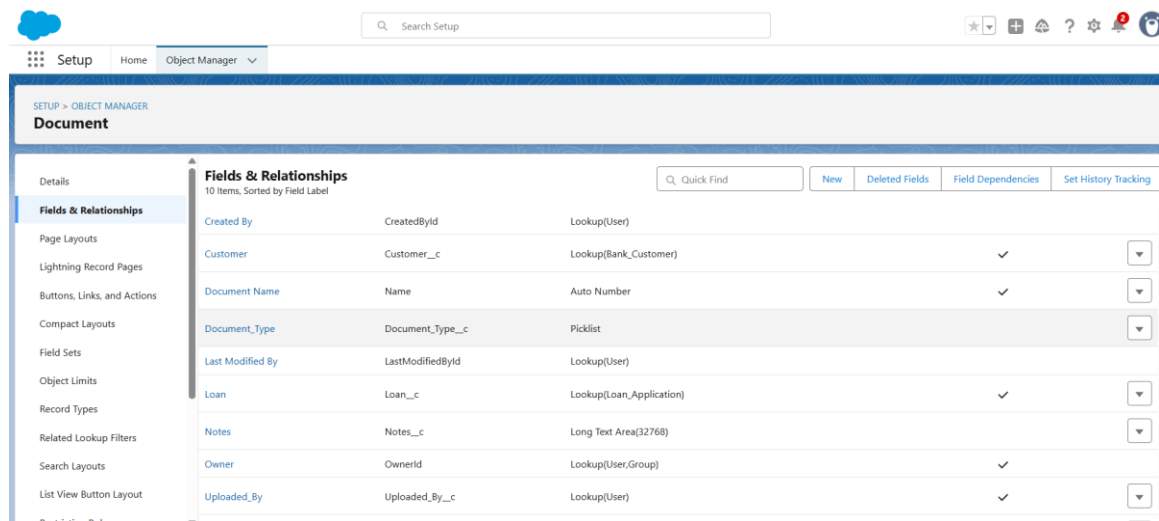
Page Layouts
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5. Key Fields for Document__c

What I did: I added the following fields:

- Related_Loan__c (Lookup to Loan_Application__c)
- Bank_Customer__c (Optional Lookup)
- Document_Type__c (Picklist: PAN, Aadhaar, Salary Slip, Bank Statement, Address Proof, Other)
- Document_Number__c (Text)
- Issue_Date__c, Expiry_Date__c (Date)
- Verification_Status__c (Picklist: Pending, Verified, Rejected)
- Uploaded_By__c (Lookup to User)
- Notes__c (Long Text Area)

Reason: Document__c stores metadata for KYC and proof documents, while the actual files are managed using Salesforce Files.



The screenshot shows the Salesforce Object Manager interface for the 'Document' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields sorted by label. The fields are:

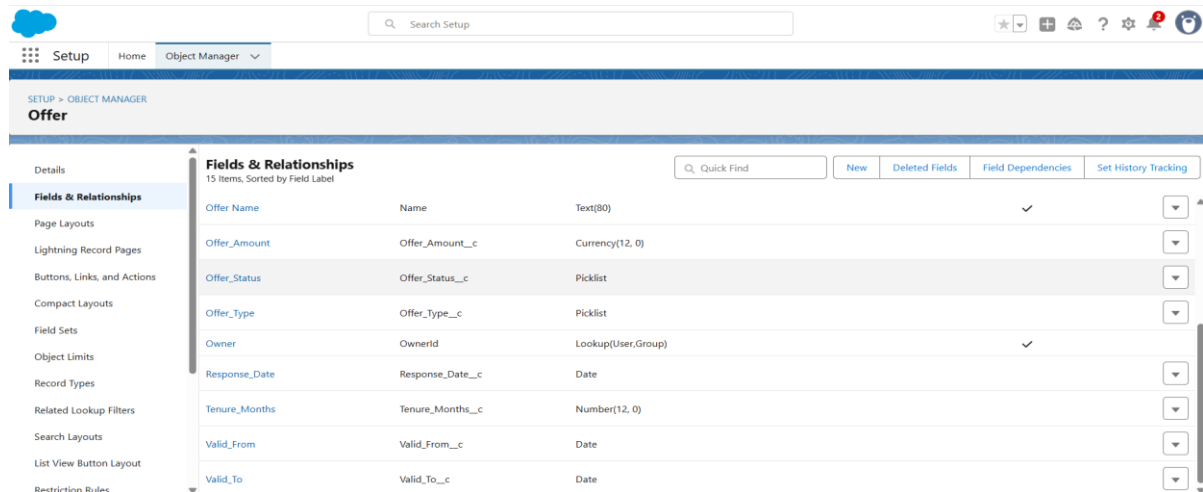
| Field Name | Field Label | Field Type | Required | Default Value |
|------------------|------------------|--------------------------|----------|---------------|
| Created By | CreatedById | Lookup(User) | | |
| Customer | Customer__c | Lookup(Bank_Customer) | ✓ | |
| Document Name | Name | Auto Number | ✓ | |
| Document_Type | Document_Type__c | Picklist | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Loan | Loan__c | Lookup(Loan_Application) | ✓ | |
| Notes | Notes__c | Long Text Area(32768) | | |
| Owner | OwnerId | Lookup(User,Group) | ✓ | |
| Uploaded_By | Uploaded_By__c | Lookup(User) | ✓ | |

6. Key Fields for Offer__c

What I did: I created fields for Offer__c:

- Bank_Customer__c (Lookup)
- Offer_Type__c (Picklist: Personal Loan, Home Loan, Car Loan, Credit Card, Insurance)
- Offer_Amount__c (Currency)
- Interest_Rate__c (Percent)
- Tenure_Months__c (Number)
- Offer_Status__c (Picklist: Draft, Sent, Accepted, Rejected, Expired)
- Valid_From__c, Valid_To__c (Date)
- Generated_By__c (Lookup User)
- Response_Date__c (Date)
- Notes__c (Long Text Area)

Reason: Offer__c manages pre-approved or promotional loan offers, which can be accepted by customers to generate loan applications automatically.



The screenshot shows the Salesforce Setup interface for the 'Offer' object. The left sidebar contains a navigation menu with options like 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, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a list of 15 items, sorted by Field Label. The fields are:

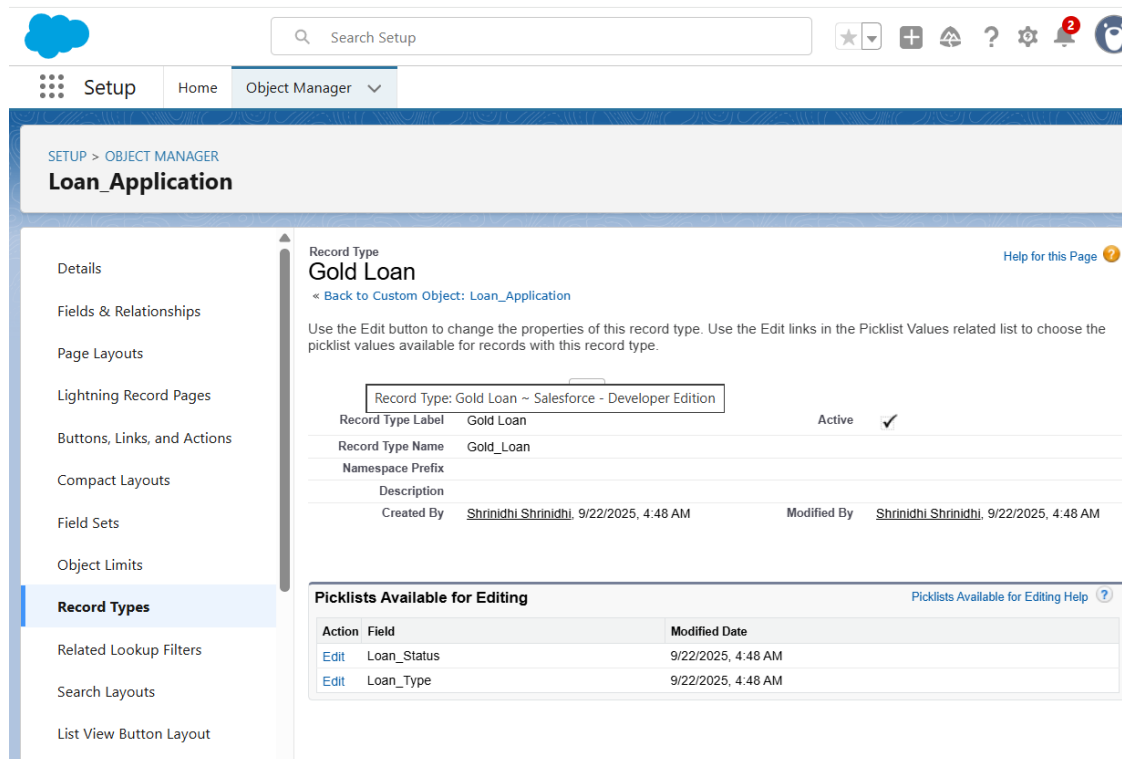
| Field Label | Field Name | Field Type | Required |
|---------------|------------------|---------------------|----------|
| Offer Name | Name | Text(80) | Yes |
| Offer_Amount | Offer_Amount__c | Currency(12, 0) | No |
| Offer_Status | Offer_Status__c | Picklist | No |
| Offer_Type | Offer_Type__c | Picklist | No |
| Owner | OwnerId | Lookup(User, Group) | Yes |
| Response_Date | Response_Date__c | Date | No |
| Tenure_Months | Tenure_Months__c | Number(12, 0) | No |
| Valid_From | Valid_From__c | Date | No |
| Valid_To | Valid_To__c | Date | No |

7. Record Types & Page Layouts

What I did: For Loan_Application__c, I created Record Types for Home Loan, Vehicle Loan, Personal Loan, and Gold Loan.

Each record type has its own page layout customized with fields relevant to that loan type.

Reason: Record Types allow tailoring loan application forms to specific loan categories, making data entry simpler and more relevant for users.



The screenshot shows the Salesforce Setup interface for the 'Loan_Application' object. The left sidebar contains a navigation menu with options like 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, and Restriction Rules. The main content area is titled 'Loan_Application' and shows the 'Record Type' configuration for 'Gold Loan'.

Record Type: Gold Loan

Record Type Label: Gold Loan | Active: Yes

Record Type Name: Gold_Loan

Namespace Prefix:

Description:

Created By: Shrinidhi Shrinidhi, 9/22/2025, 4:48 AM | Modified By: Shrinidhi Shrinidhi, 9/22/2025, 4:48 AM

Picklists Available for Editing

| Action | Field | Modified Date |
|--------|-------------|--------------------|
| Edit | Loan_Status | 9/22/2025, 4:48 AM |
| Edit | Loan_Type | 9/22/2025, 4:48 AM |

Setup

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SETUP > OBJECT MANAGER

Loan_Application

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Compact Layouts

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List View Button Layout

Record Type

Personal Loan

[Back to Custom Object: Loan_Application](#)

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

Personal Loan

Active

✓

Record Type Name

Personal_Loan

Namespace Prefix

Description

Created By

Shrinidhi Shrinidhi

9/22/2025, 4:48 AM

Modified By

Shrinidhi Shrinidhi

9/22/2025, 4:48 AM

Picklists Available for Editing

[Picklists Available for Editing Help](#)

| Action | Field | Modified Date |
|----------------------|-------------|--------------------|
| Edit | Loan_Status | 9/22/2025, 4:48 AM |
| Edit | Loan_Type | 9/22/2025, 4:48 AM |

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Record Type

Home Loan

[Back to Custom Object: Loan_Application](#)

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

Home Loan

Active

✓

Record Type Name

Record Type: Home Loan ~ Salesforce - Developer Edition

Namespace Prefix

Description

Created By

Shrinidhi Shrinidhi

9/22/2025, 4:45 AM

Modified By

Shrinidhi Shrinidhi

9/22/2025, 4:45 AM

Picklists Available for Editing

[Picklists Available for Editing Help](#)

| Action | Field | Modified Date |
|----------------------|-------------|--------------------|
| Edit | Loan_Status | 9/22/2025, 4:45 AM |
| Edit | Loan_Type | 9/22/2025, 4:45 AM |

Setup

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Object Manager

SETUP > OBJECT MANAGER

Loan_Application

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Record Type

Vehicle Loan

« Back to Custom Object: Loan_Application

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 | Vehicle Loan | Active | <input checked="" type="checkbox"/> |
| Record Type Name | Vehicle_Loan | | |
| Namespace Prefix | | | |
| Description | | | |
| Created By | Shrinidhi Shrinidhi, 9/22/2025, 4:46 AM | Modified By | Shrinidhi Shrinidhi, 9/22/2025, 4:46 AM |

Picklists Available for Editing

Picklists Available for Editing Help

| Action | Field | Modified Date |
|--------|-------------|--------------------|
| Edit | Loan_Status | 9/22/2025, 4:46 AM |
| Edit | Loan_Type | 9/22/2025, 4:46 AM |

Page Layouts:

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SETUP > OBJECT MANAGER

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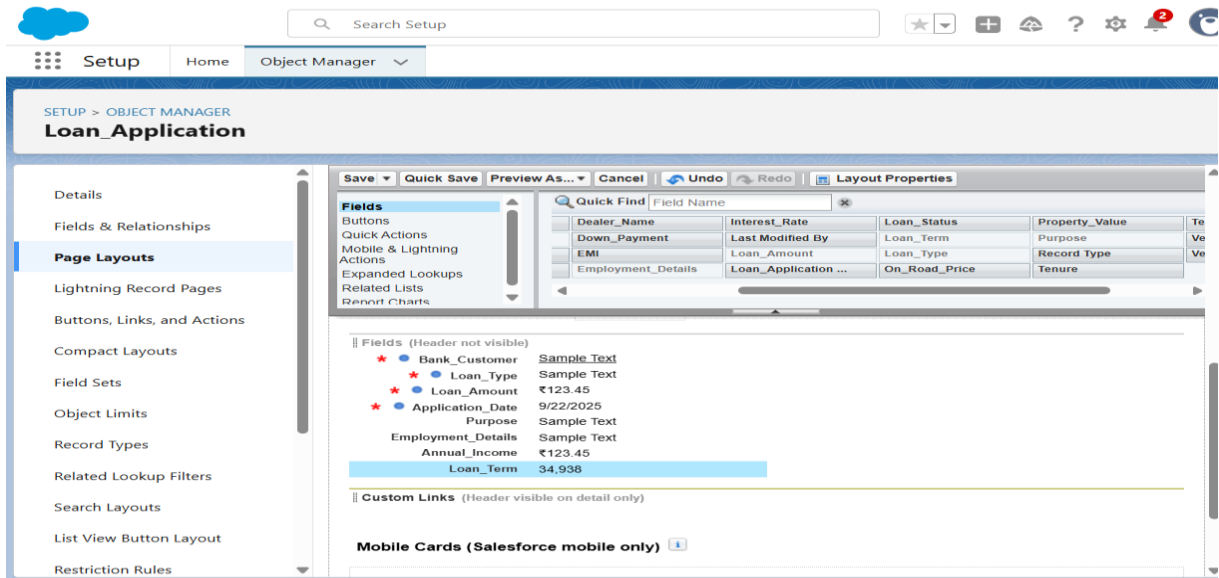
5 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

| PAGE LAYOUT NA... | CREATED BY | MODIFIED BY | |
|-------------------------|---|---|---|
| Gold Loan | Shrinidhi Shrinidhi, 9/22/2025, 5:24 AM | Shrinidhi Shrinidhi, 9/22/2025, 5:25 AM | ▼ |
| Home Loan | Shrinidhi Shrinidhi, 9/22/2025, 5:12 AM | Shrinidhi Shrinidhi, 9/22/2025, 5:24 AM | ▼ |
| Loan_Application Layout | Shrinidhi Shrinidhi, 9/20/2025, 6:59 AM | Shrinidhi Shrinidhi, 9/22/2025, 5:24 AM | ▼ |
| Personal Loan | Shrinidhi Shrinidhi, 9/22/2025, 5:19 AM | Shrinidhi Shrinidhi, 9/22/2025, 5:24 AM | ▼ |
| Vehicle Loan | Shrinidhi Shrinidhi, 9/22/2025, 5:18 AM | Shrinidhi Shrinidhi, 9/22/2025, 5:24 AM | ▼ |



9. Schema Builder

What I did: I used Schema Builder to visualize relationships:

Bank_Customer__c (1) → Loan_Application__c (N) → Repayment__c (N)

Additionally, Loan_Application__c is related to Document__c and Offer__c.

Reason: Schema Builder provides a clear picture of how objects are connected, ensuring proper data relationships are maintained.

