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.

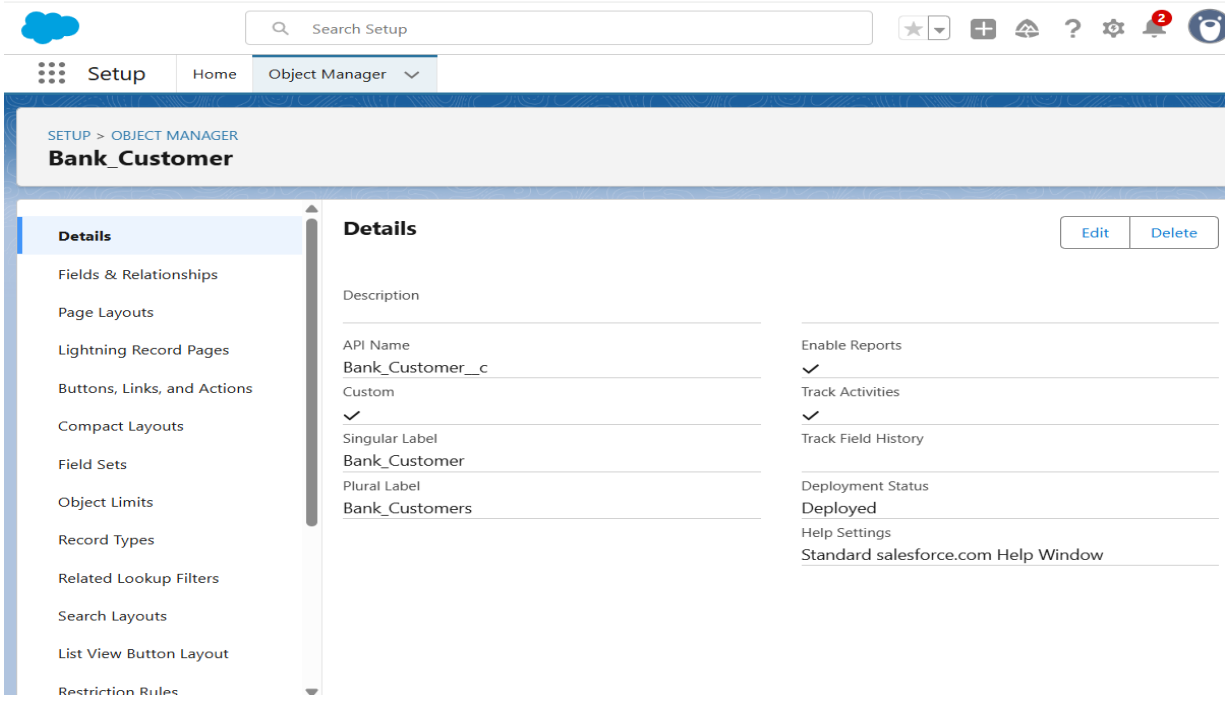
1. Custom Objects Creation

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.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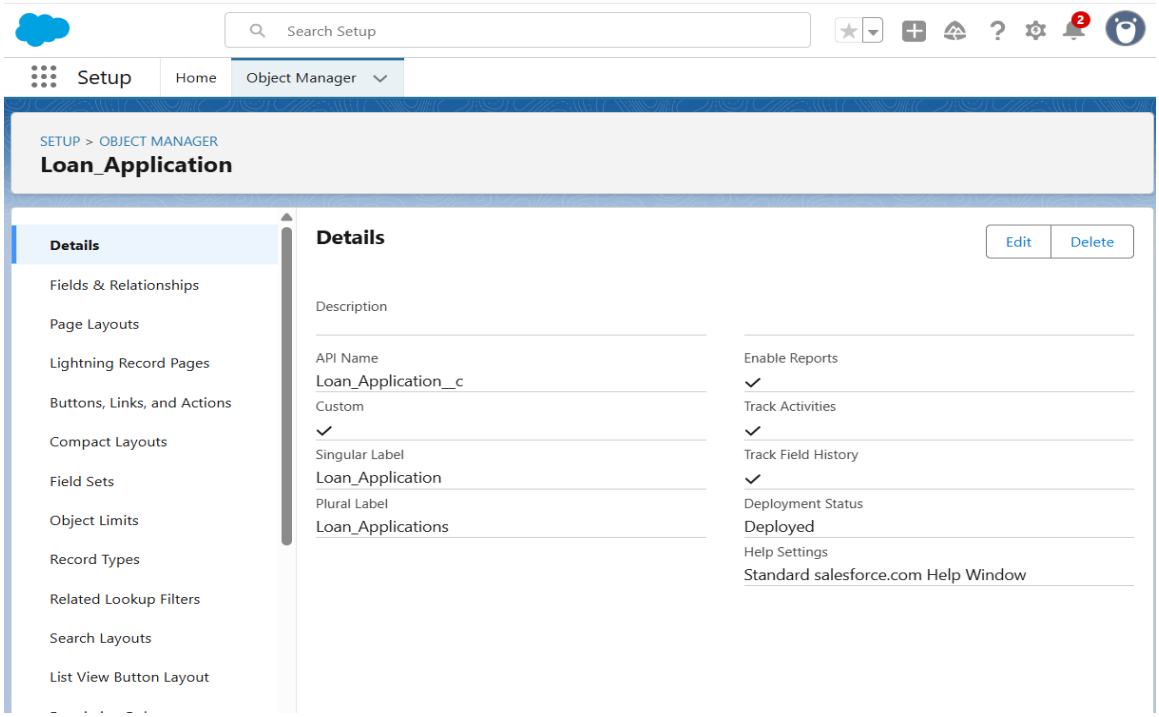
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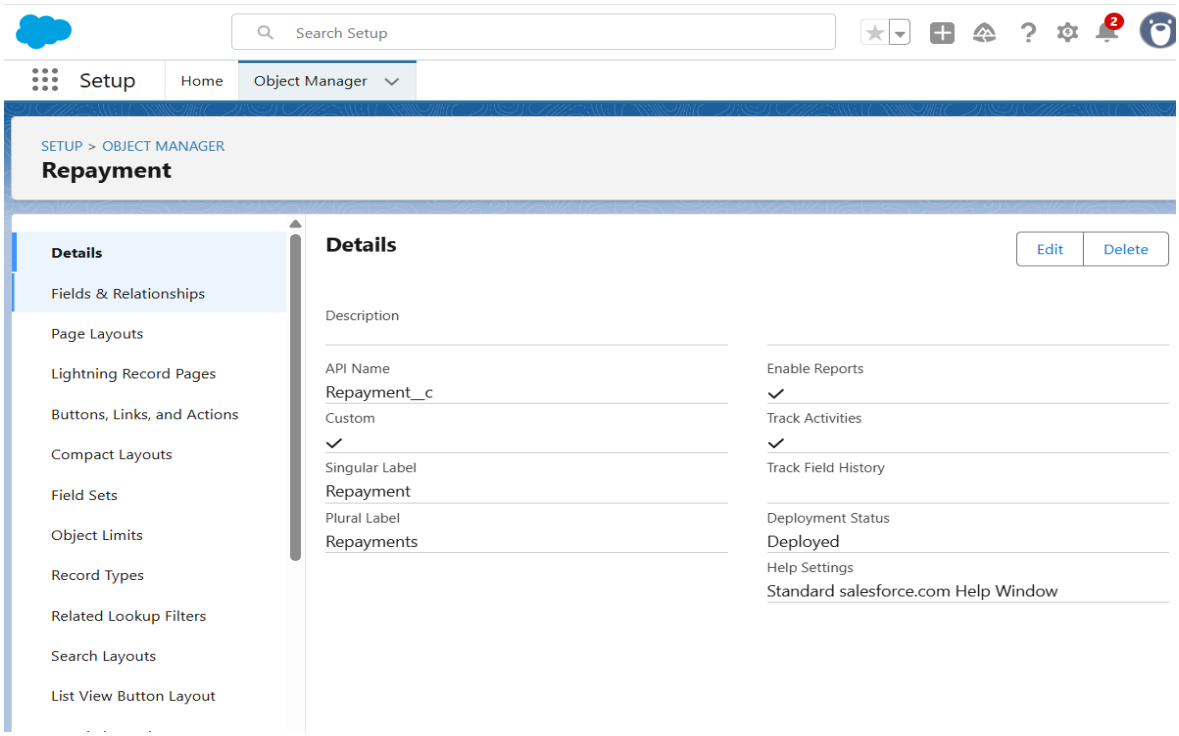
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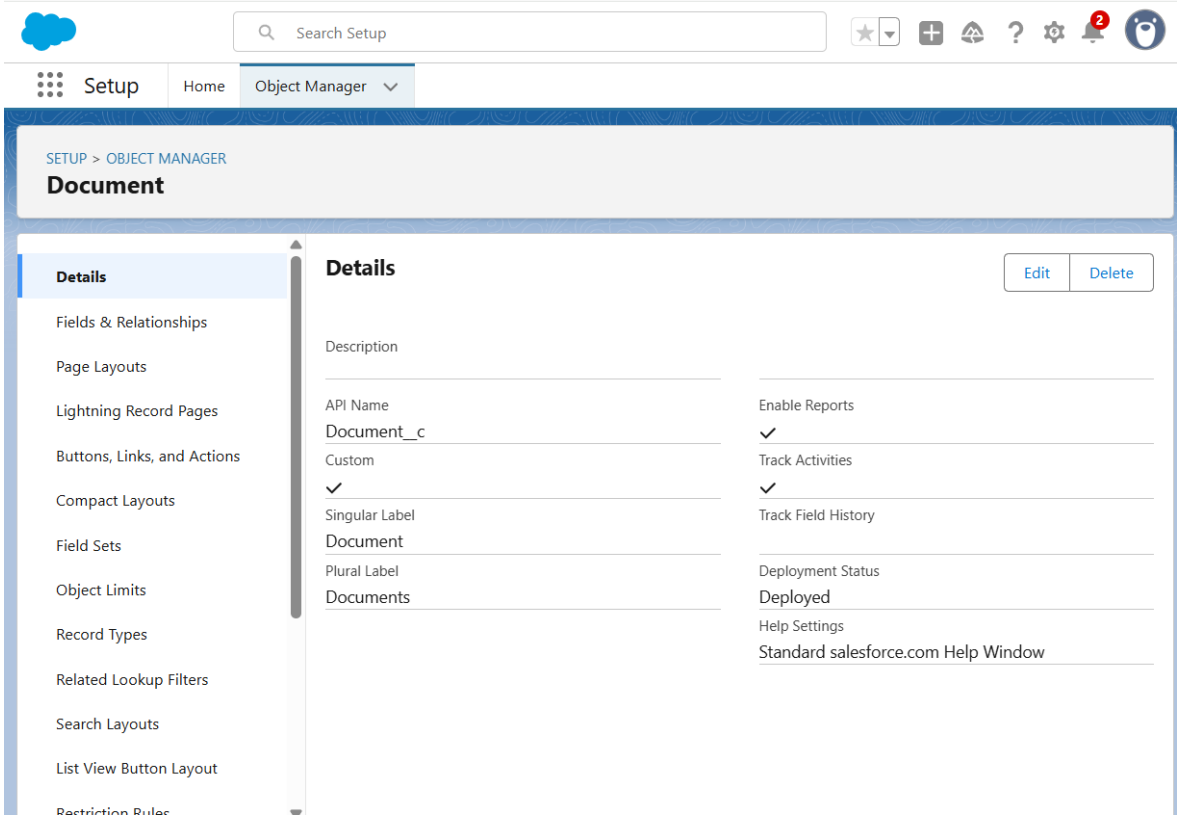
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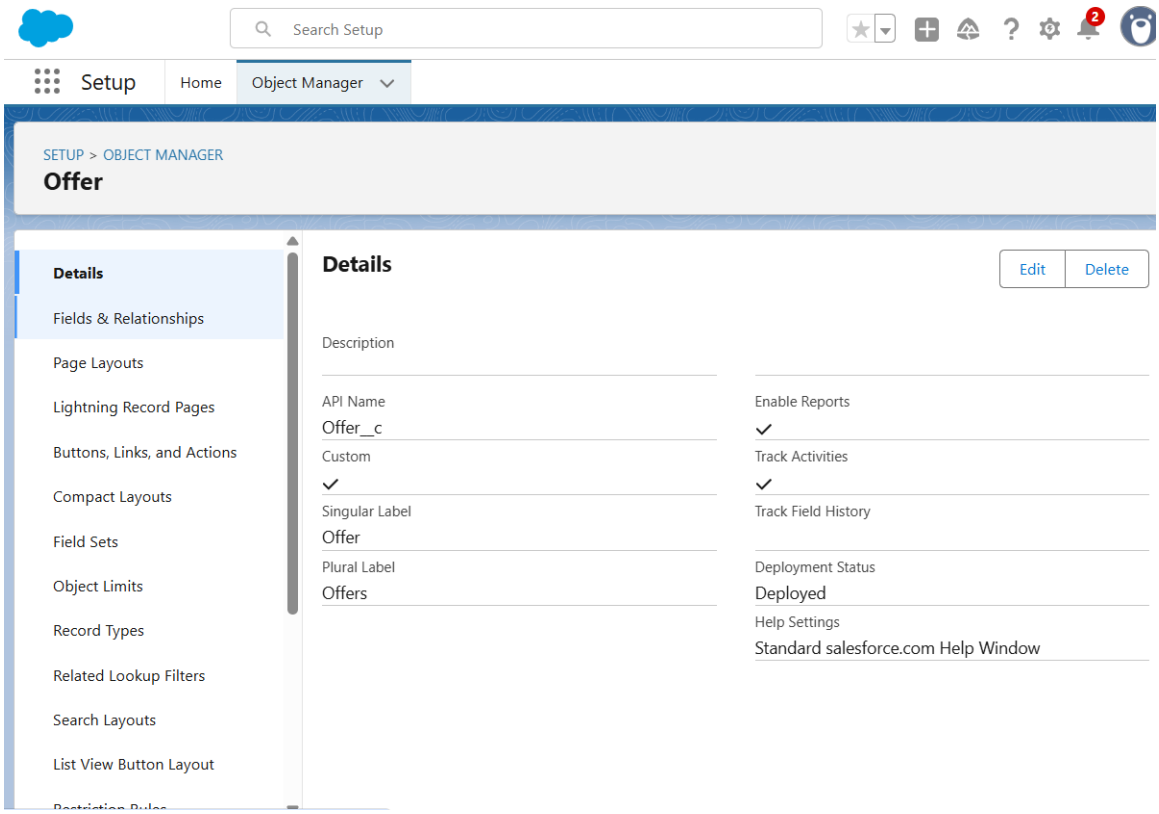
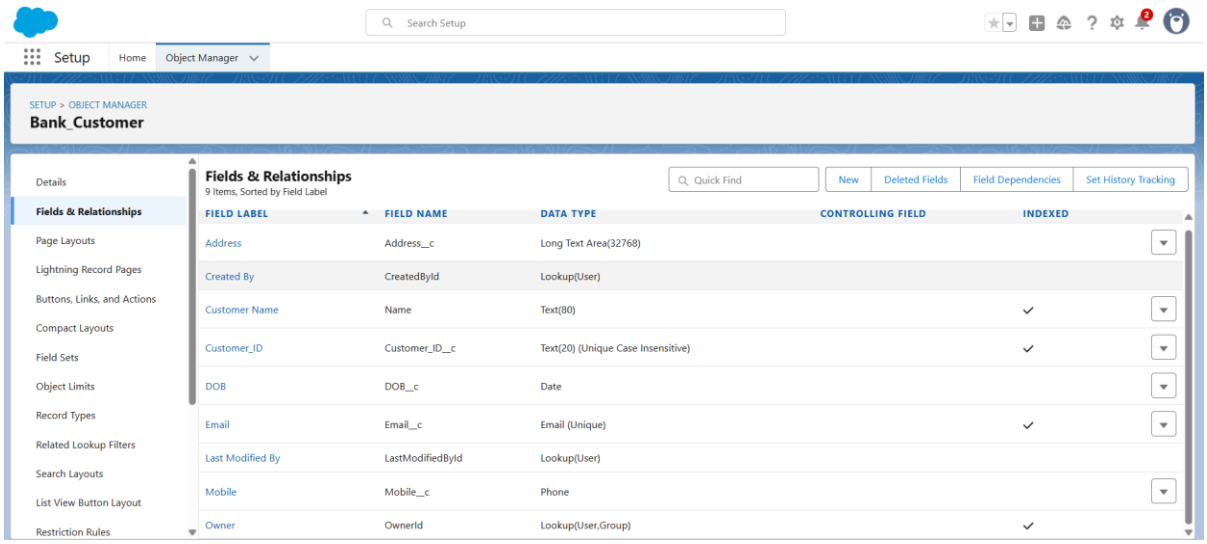


2. Key Fields for Bank_Customer__c

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.

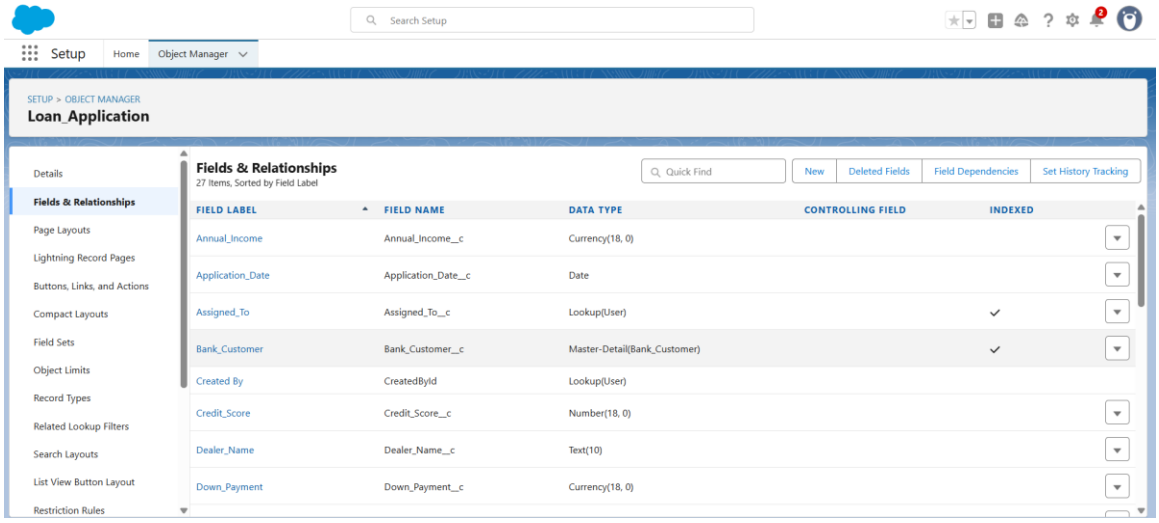


3. Key Fields for Loan_Application__c

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.

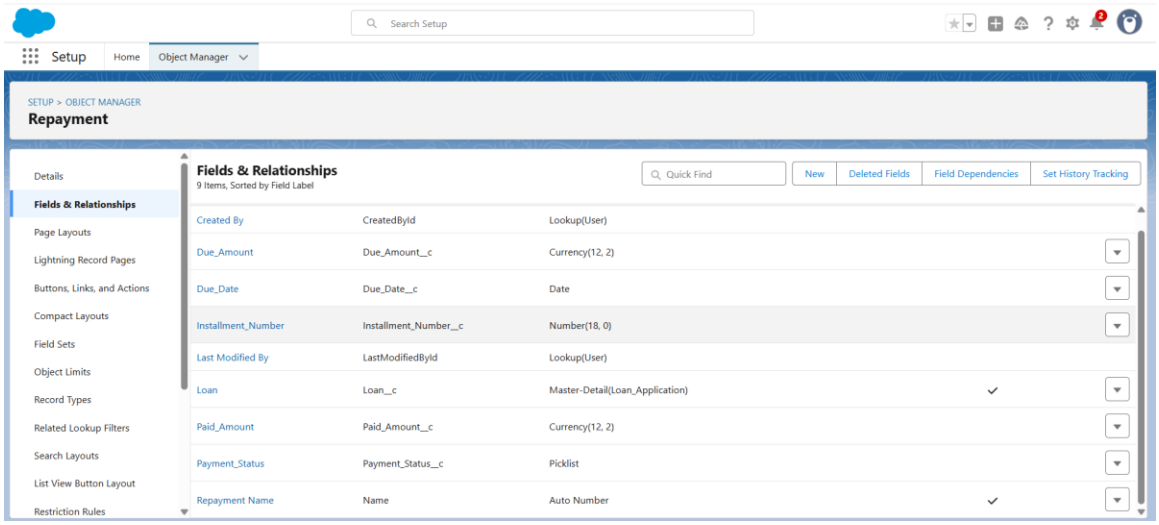


4. Key Fields for Repayment__c

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.

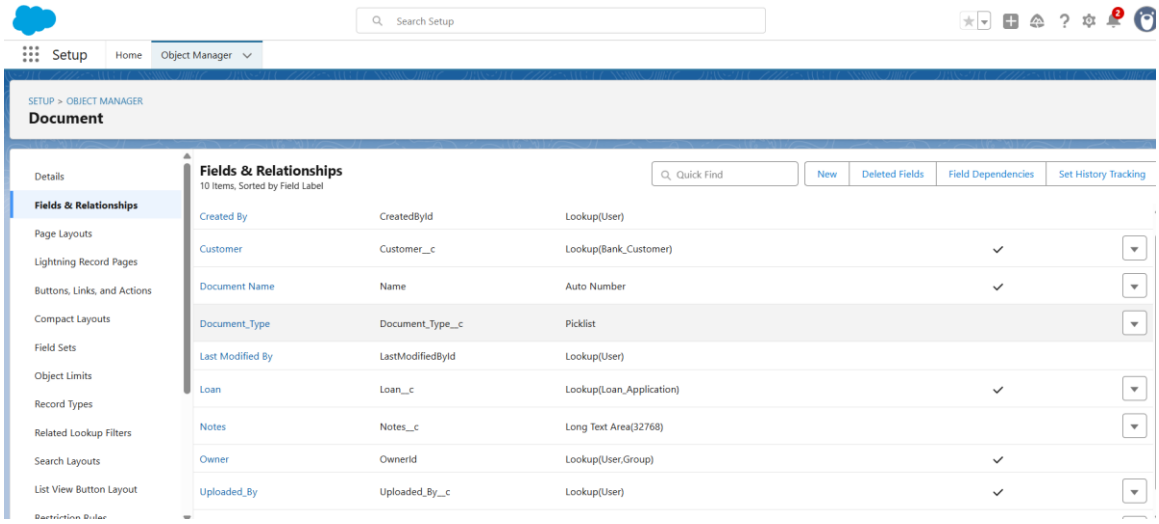


5. Key Fields for Document__c

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.

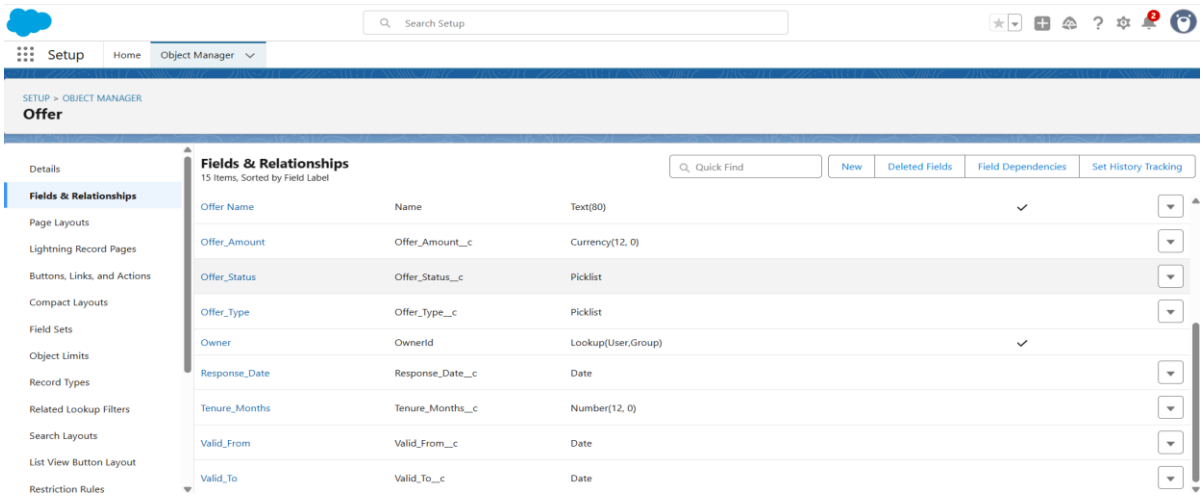


6. Key Fields for Offer__c

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)

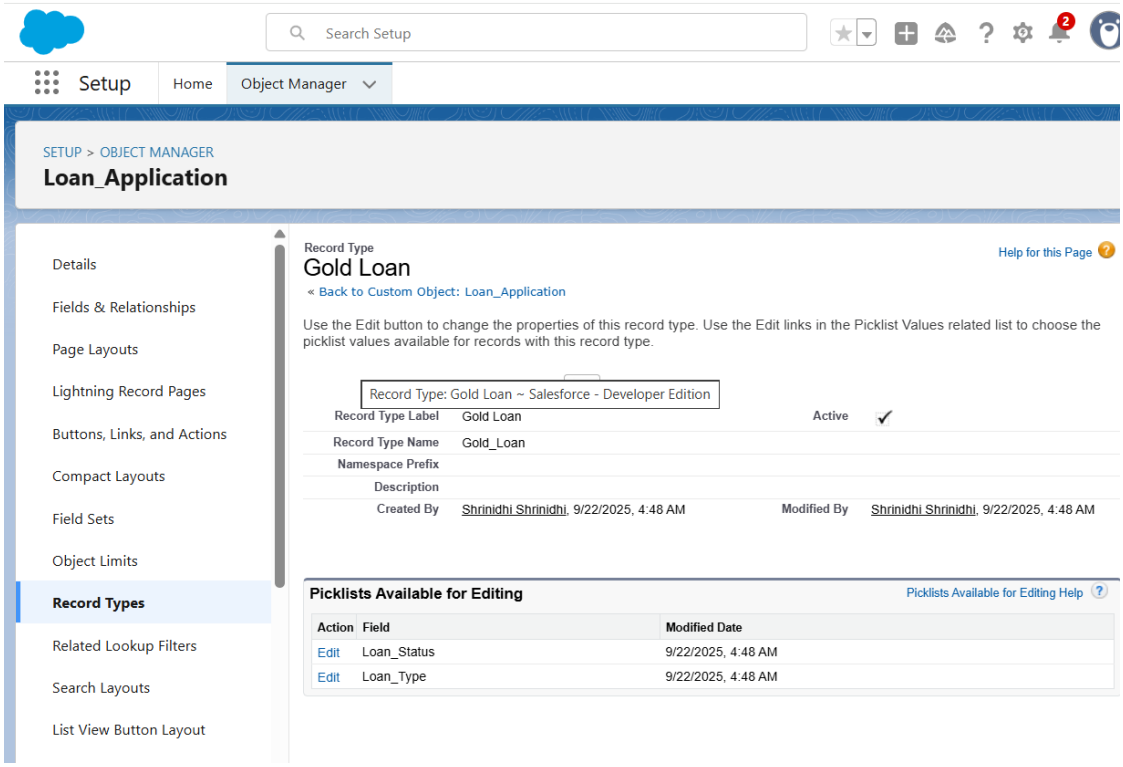
Reason: Offer__c manages pre-approved or promotional loan offers, which can be accepted by customers to generate loan applications automatically.

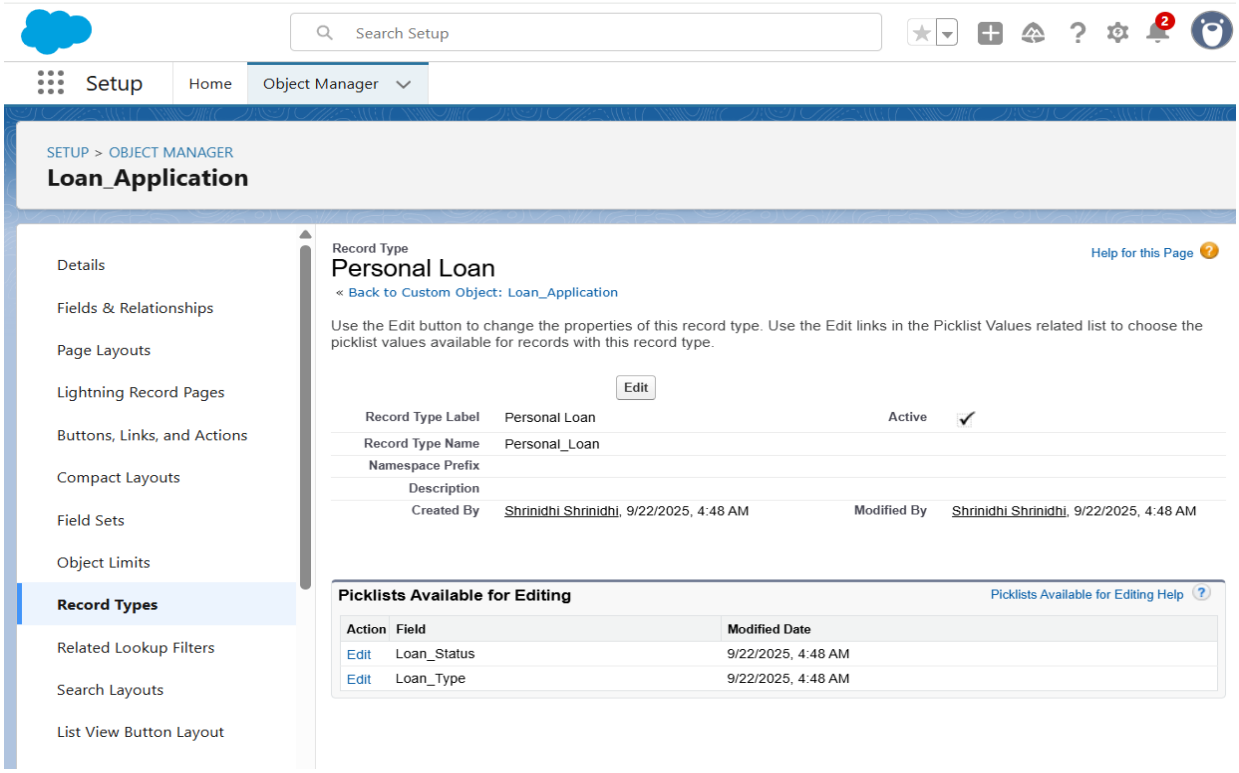


7. Record Types & Page Layouts

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.

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Record Type
Personal Loan
Help for this Page
« 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
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Description
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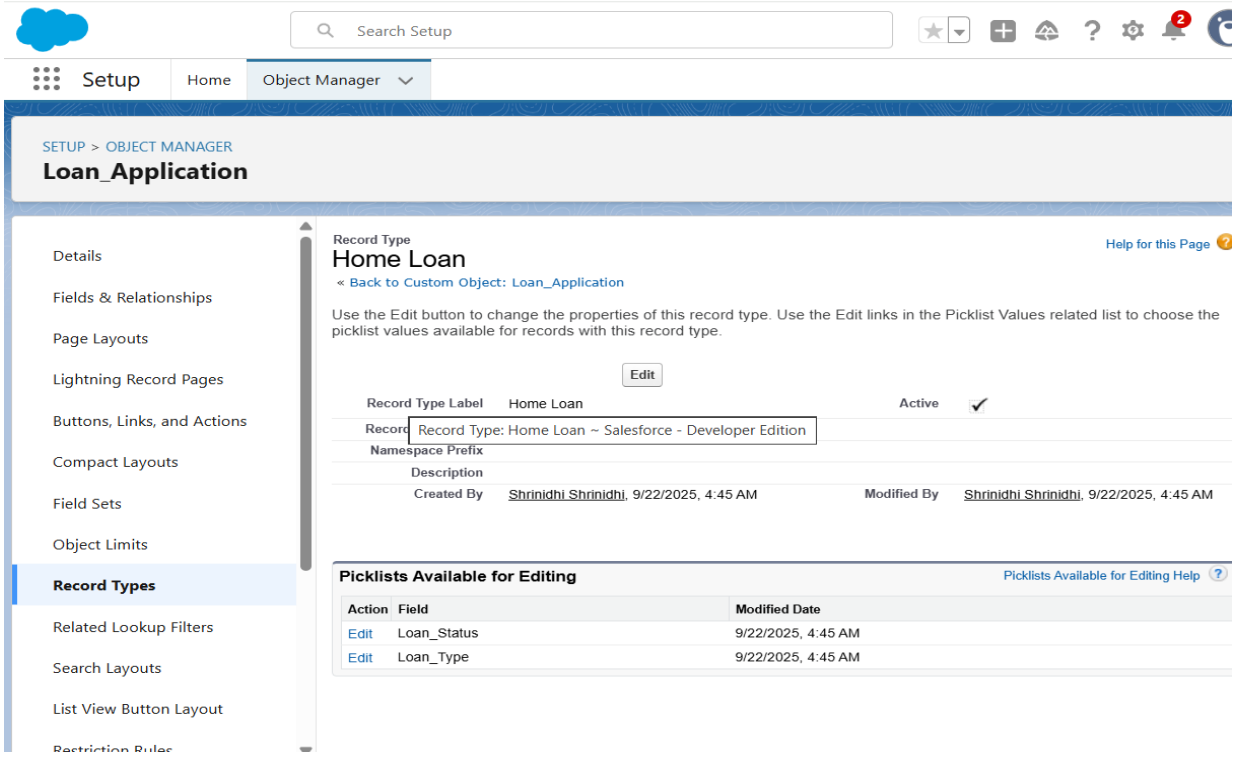
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Restriction Rules
Record Type
Home Loan
Help for this Page
« Back to Custom Object: Loan_Application
Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.
Edit
Record Type Label
Home Loan
Active
Record
Record Type: Home Loan ~ Salesforce - Developer Edition
Namespace Prefix
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Created By
Shrinidhi Shrinidhi, 9/22/2025, 4:45 AM
Modified By
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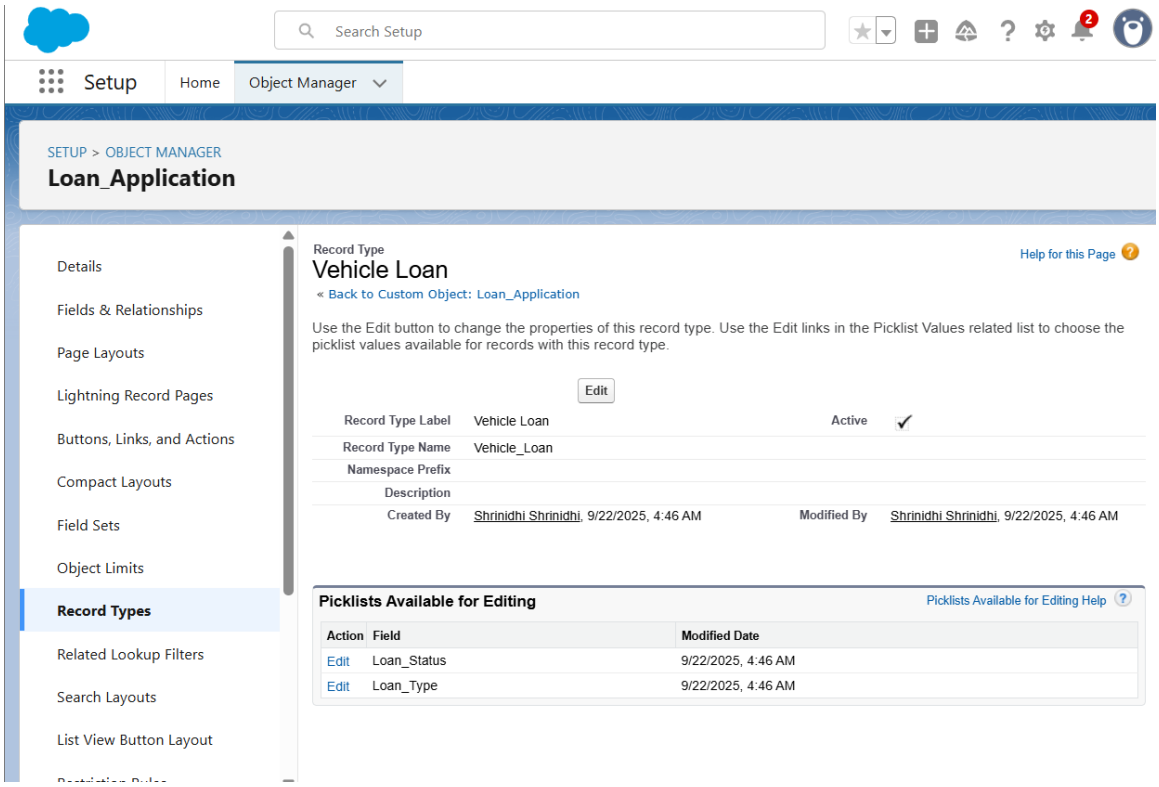
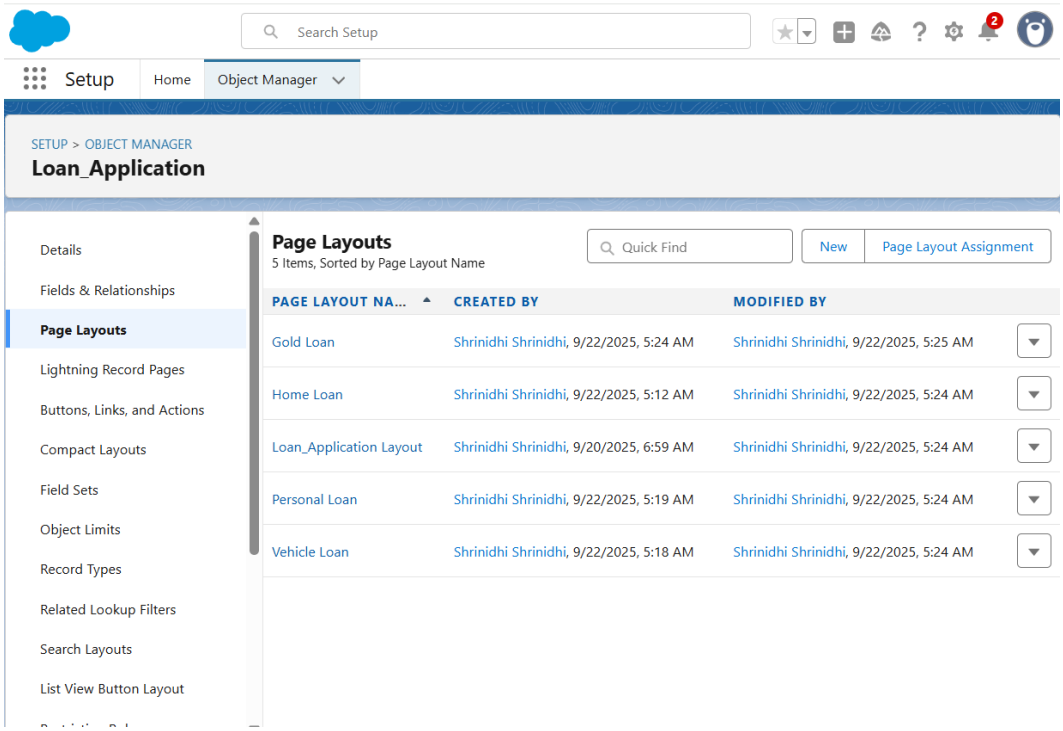
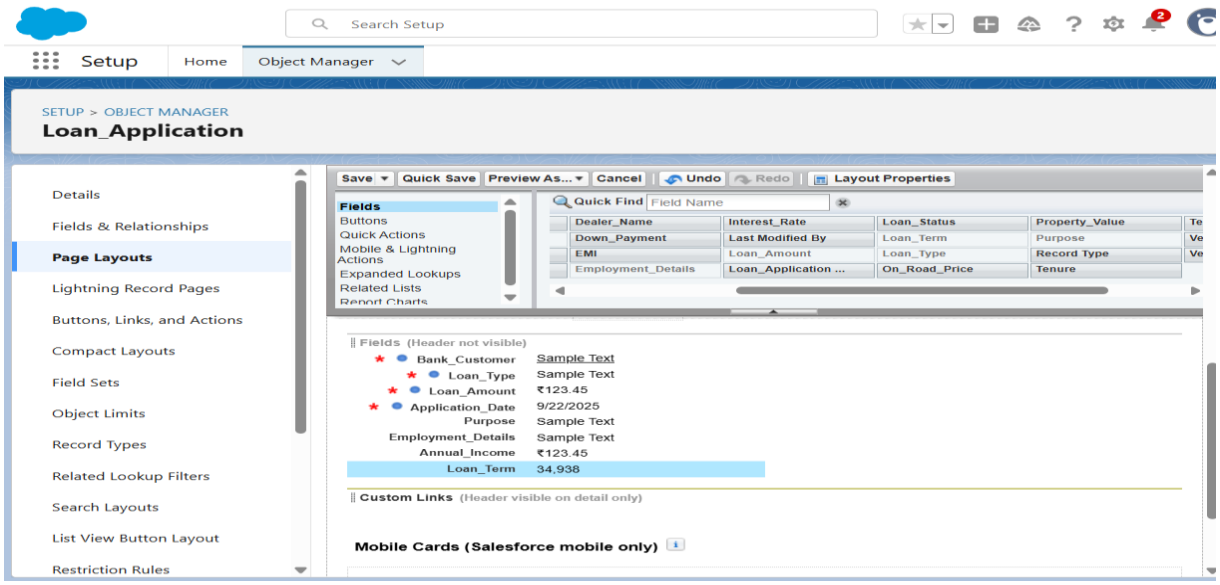
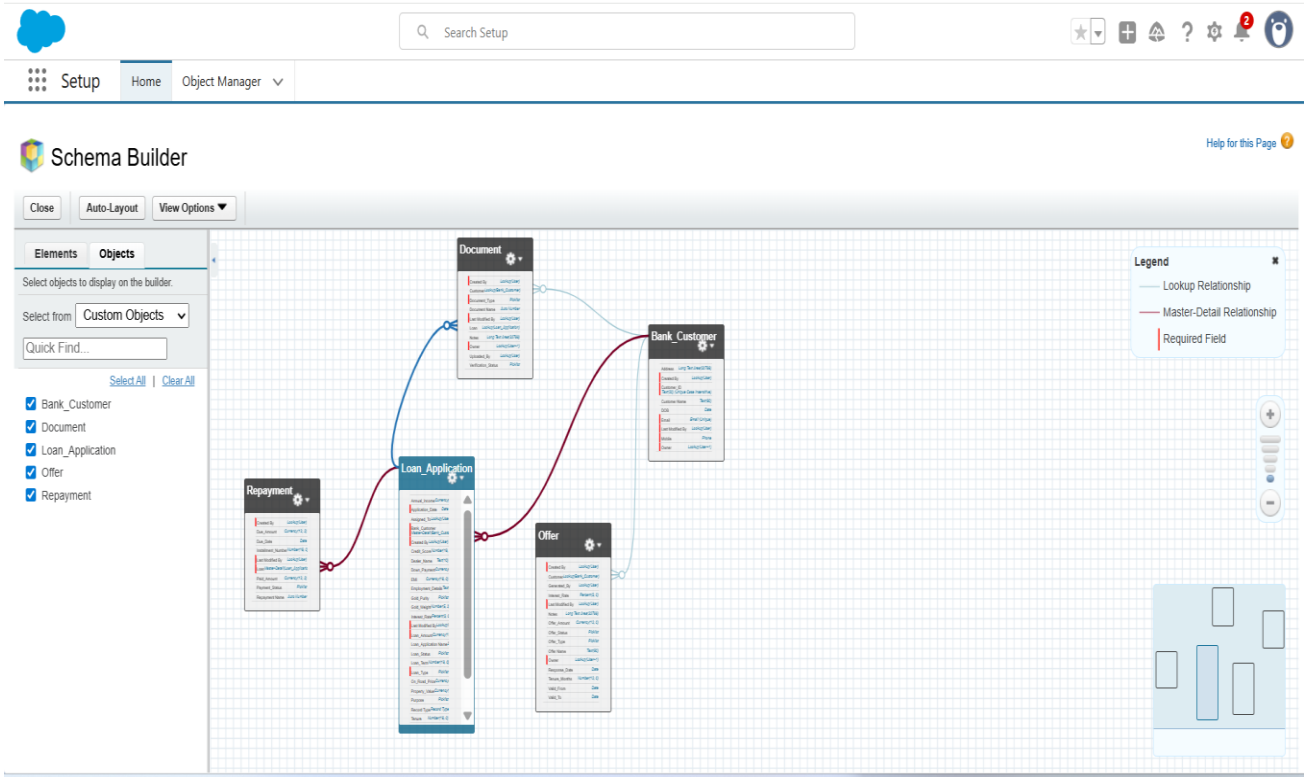


Page Layouts:





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.