Digital Banking CRM

Overview

This final presentation summarizes the Digital Banking CRM project and its completed phases. It captures all the work done so far, including backend development, UI, integration, data management, security, and reporting.

Backend Development

• Created Apex classes for managing Customers, Bank Accounts, and Transactions.
• Implemented API callouts to fetch external financial data from JSONPlaceholder API.

User Interface (UI) Development

• Developed Aura Components and Lightning Web Components for Customer, Bank Account, and Transaction modules.
• Designed responsive layouts and applied custom CSS for better user experience.

Integration & External Access

• Connected Salesforce with external APIs for real-time banking data.
• Configured Remote Site Settings and External Credentials for secure API callouts.

Data Management & Deployment

• Managed Customer, Bank Account, and Transaction data using Salesforce custom objects.
• Used Data Import Wizard and Data Loader for bulk data insertion and updates.
• Deployed Aura components, LWCs, Apex classes, and metadata to org using VS Code and SFDX.

Reports & Dashboards

• Created custom reports for Customers, Accounts, and Transactions.
• Enabled dashboards for Relationship Managers to track balances, revenues, and top customers.
• Configured Dynamic Dashboards so each Agent sees only their own customers.

Security Review

• Set Sharing Settings – Bank Accounts and Transactions private; Customers public.
• Applied Field-Level Security to hide sensitive fields like National ID and SSN.
• Configured Session Settings for auto logout after 30 minutes of inactivity.
• Restricted Login IP Ranges for Agents to office IPs.
• Enabled Audit Trail and Field History Tracking for Customer and Transaction objects.

Project Completion

• Finalized all components and ensured full functionality.
• Prepared the CRM for stakeholder review and demonstration.

Conclusion

The Digital Banking CRM project is now fully developed and functional. It provides a complete solution for managing customers, accounts, and transactions, with secure data handling, interactive dashboards, and external system integration. The project is ready for demonstration and further enhancements if needed.