

Digital Banking CRM

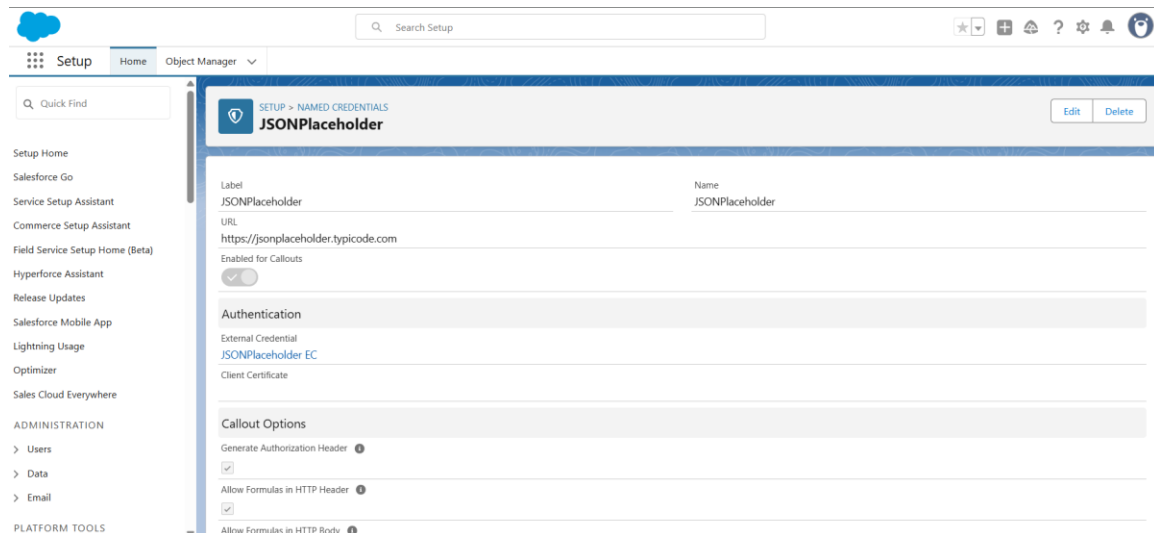
Overview

This document outlines the integration of external systems and secure access for a Digital Banking CRM platform. The CRM ensures customer financial data, transactions, and services are accessible seamlessly while maintaining high levels of security and performance.

Key Tasks and Enhancements

1. External API Integration

- Integrated CRM with external banking APIs to fetch customer account and transaction data dynamically.
- Apex controllers handle callouts and process API responses.
- Configured Remote Site Settings for secure API access.
- Example API: <https://jsonplaceholder.typicode.com>



The screenshot displays the Salesforce Setup interface for configuring a Named Credential. The breadcrumb trail indicates the path: **Setup > NAMED CREDENTIALS**. The main heading is **JSONPlaceholder**. The configuration details are as follows:

Field	Value
Label	JSONPlaceholder
Name	JSONPlaceholder
URL	https://jsonplaceholder.typicode.com
Enabled for Callouts	<input checked="" type="checkbox"/>

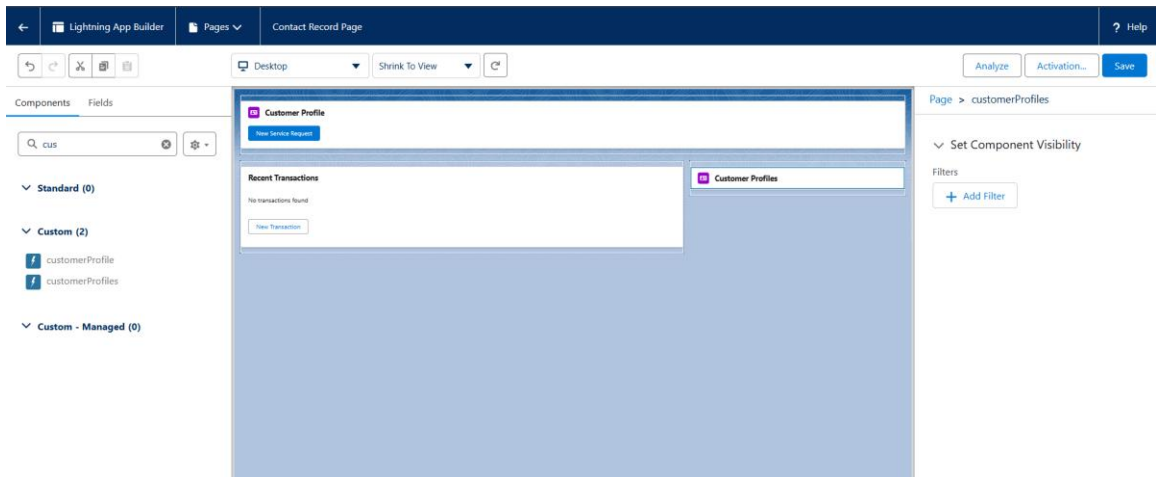
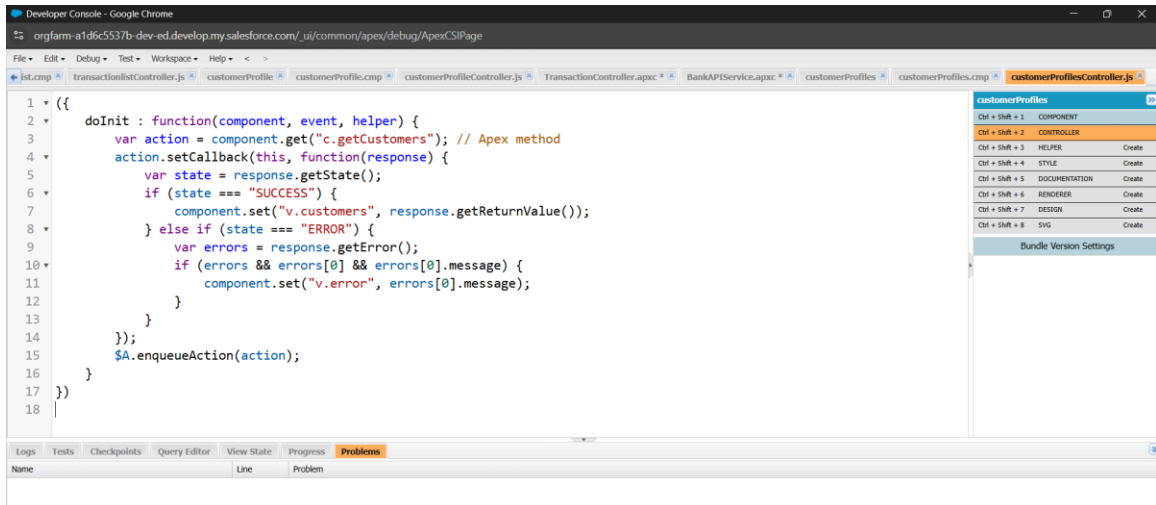
Authentication

Field	Value
External Credential	JSONPlaceholder EC
Client Certificate	

Callout Options

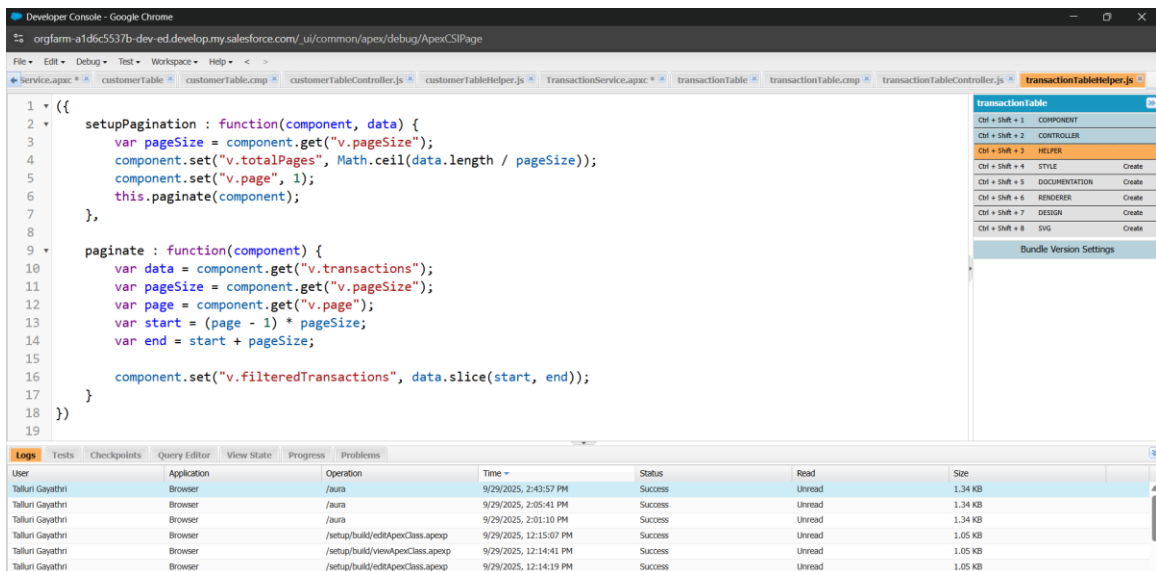
Option	Value
Generate Authorization Header	<input checked="" type="checkbox"/>
Allow Formulas in HTTP Header	<input checked="" type="checkbox"/>
Allow Formulas in HTTP Body	<input checked="" type="checkbox"/>

The interface includes a left-hand navigation menu with categories like Setup Home, Administration, and Platform Tools. The top navigation bar shows 'Setup', 'Home', and 'Object Manager' tabs, along with a search bar and utility icons.



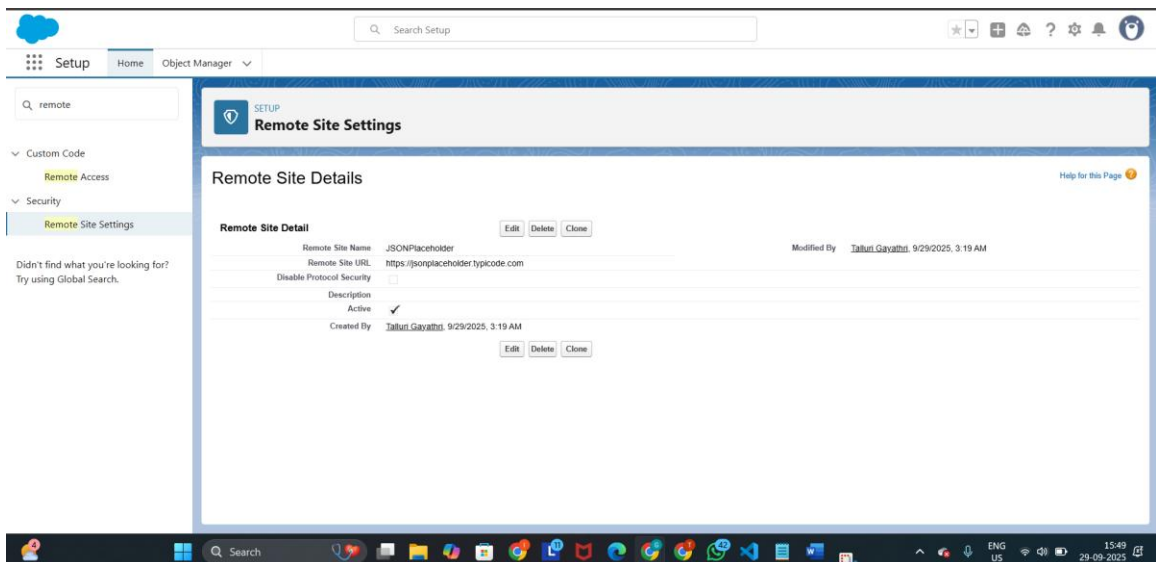
2. Customer Data Synchronization

- Retrieved customer and transaction records from APIs and displayed them in LWC tables.
- Added sorting, pagination, and search features for improved usability.



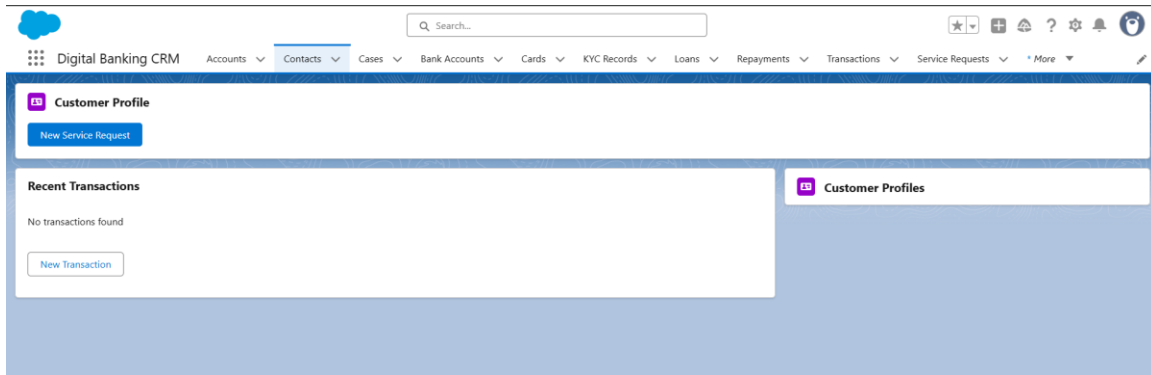
3. Secure External Access

- Configured Remote Site Settings for authorized API endpoints.
- Ensured HTTPS access for all external connections.
- Applied Salesforce security best practices to prevent unauthorized access.



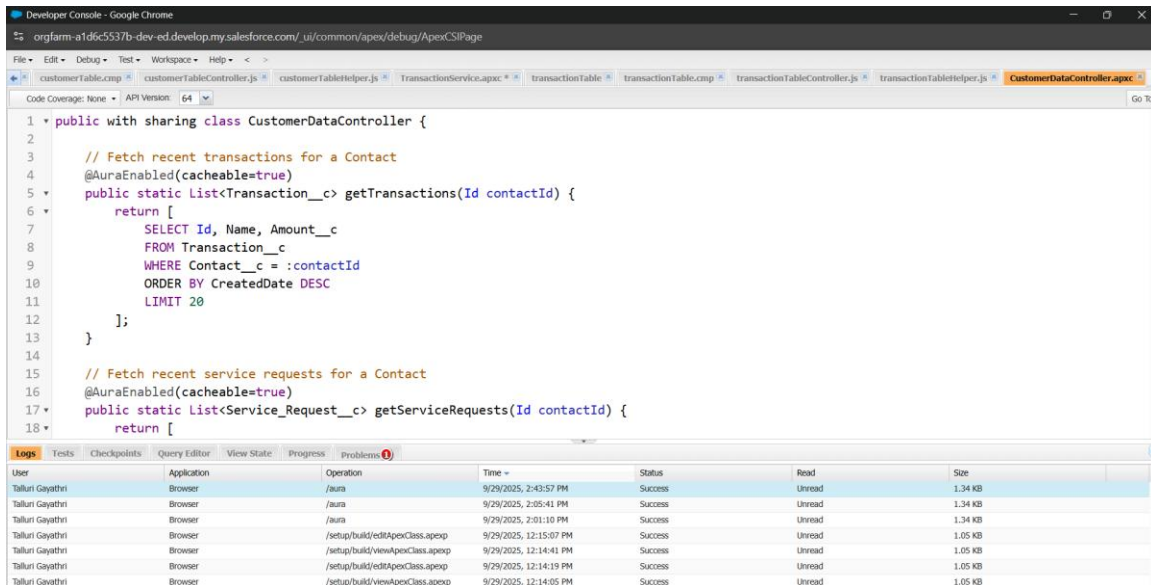
4. Service Request & Transaction Integration

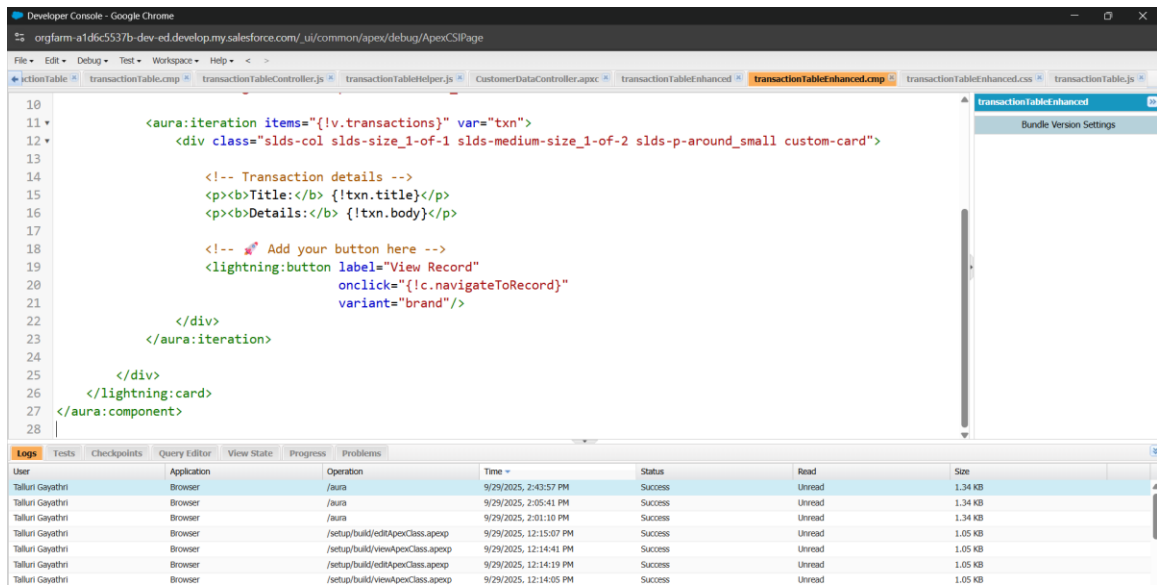
- Connected LWCs for service requests and transactions with Salesforce objects and external APIs.
- Bank staff can view customer profiles and transactions fetched from external systems.
- Dynamic service booking and transaction initiation integrated with backend logic.



5. Enhanced UI/UX

- Added responsive layouts for financial data display.
- Applied custom CSS for better visual integration with the CRM theme.
- Ensured consistent branding and smooth navigation across CRM modules.





Tools & Technologies Used

- Lightning Web Components (LWC) – Display dynamic banking data
- Apex Controllers – API integration and business logic
- Salesforce Remote Site Settings – Secure external connections
- External Banking APIs – Customer and transaction data sources
- Custom CSS & SLDS – Responsive, branded UI