

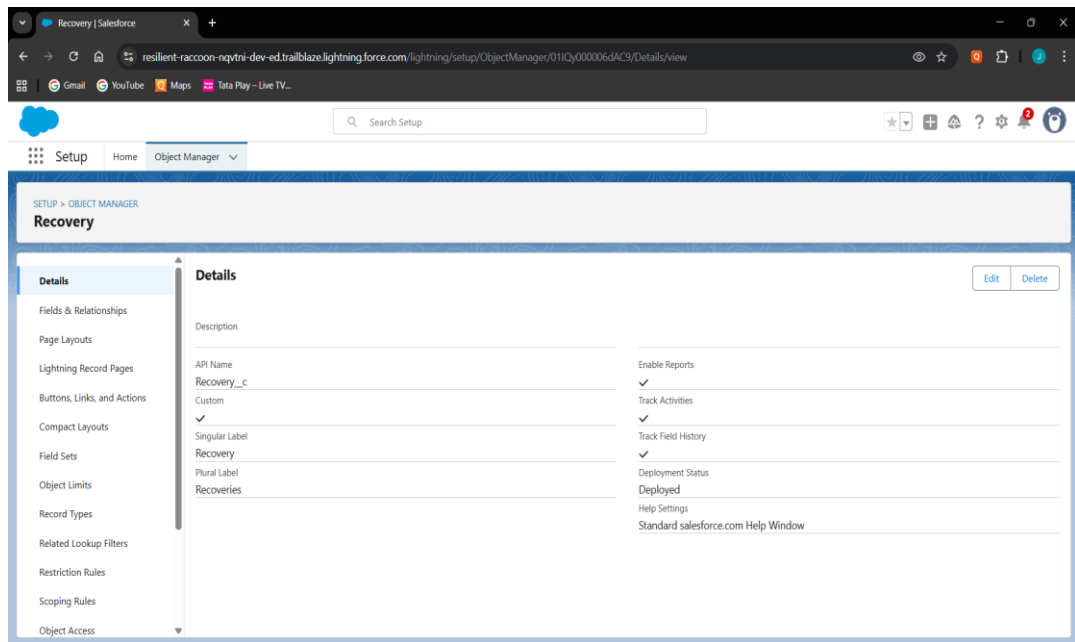
Phase 3: Data Modeling & Relationships

Standard & Custom Objects

- Use Account/Contact for Customers.
- Create custom objects: Loan, Payment, Recovery, Loan Agent Assignment (junction).

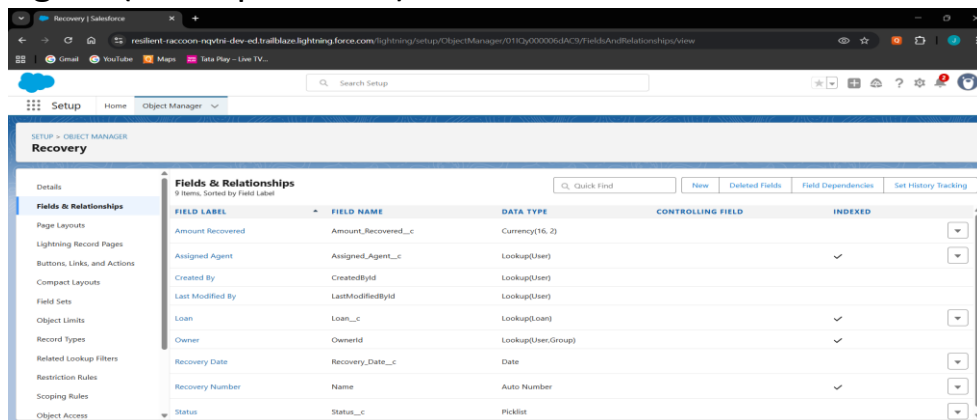
This screenshot shows the Salesforce Object Manager interface for a custom object named 'Loan'. The browser address bar indicates the URL is `resilient-raccoon-nqvtn-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01IQy000006dABv/Details/view`. The page title is 'Loan' under the 'Object Manager' section. A left-hand navigation menu lists various configuration options: 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 'Details' section is active, showing fields for Description, API Name (Loan_c), Custom (checked), Singular Label (Loan), and Plural Label (Loans). On the right, there are checkboxes for Enable Reports (checked), Track Activities (checked), Track Field History (checked), and Deployment Status (Deployed). A 'Help Settings' link points to the standard Salesforce.com Help Window. 'Edit' and 'Delete' buttons are visible in the top right corner.

This screenshot shows the Salesforce Object Manager interface for a custom object named 'Payment'. The browser address bar indicates the URL is `resilient-raccoon-nqvtn-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01IQy000006d9HW/Details/view`. The page title is 'Payment' under the 'Object Manager' section. The left-hand navigation menu is identical to the previous screenshot. The 'Details' section is active, showing fields for Description, API Name (Payment_c), Custom (checked), Singular Label (Payment), and Plural Label (Payments). On the right, there are checkboxes for Enable Reports (checked), Track Activities (checked), Track Field History (checked), and Deployment Status (Deployed). A 'Help Settings' link points to the standard Salesforce.com Help Window. 'Edit' and 'Delete' buttons are visible in the top right corner.



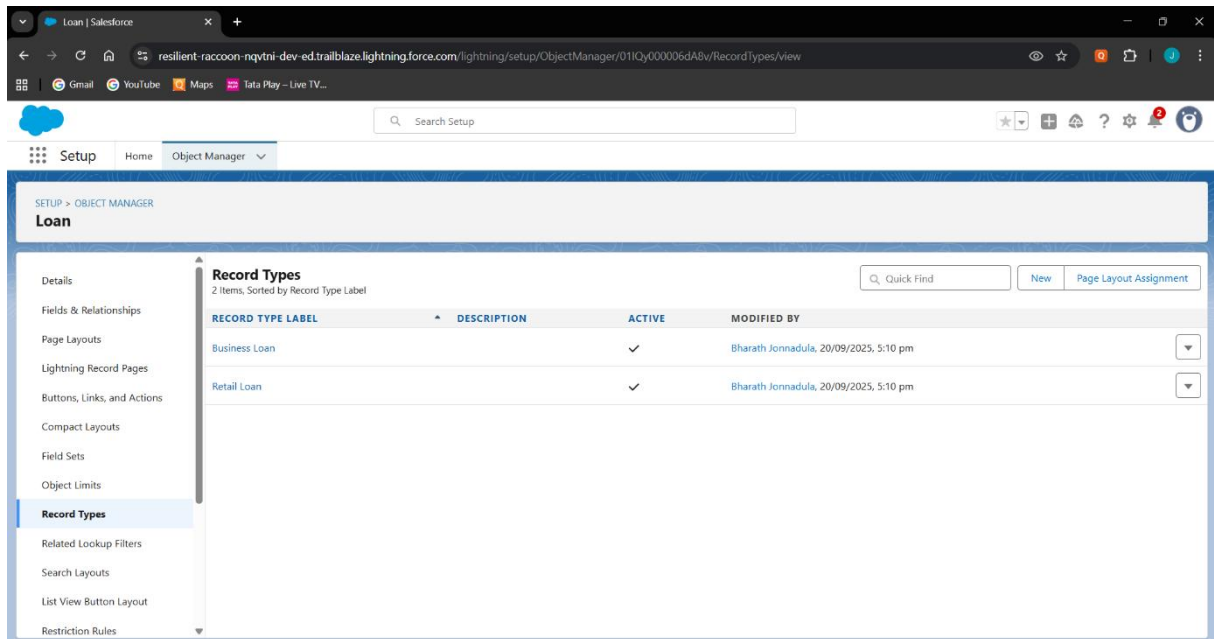
Fields

- **Loan:** Loan Number (Auto Number), Principal Amount (Currency), Interest Rate (Percent), Term Months (Number), Start Date (Date), Status (Picklist), Customer (Lookup to Account/Contact).
- **Payment:** Payment Date (Date), Amount (Currency), Payment Method (Picklist: Cash/UPI/Transfer), Status (Picklist: Paid/Overdue), Loan (Master-Detail).
- **Recovery:** Recovery Date (Date), Amount Recovered (Currency), Status (Picklist: Assigned/InProgress/Completed), Loan (Lookup), Assigned Agent (Lookup to User).
- **Loan Agent Assignment (junction):** Loan (Master-Detail), Assigned Agent (Lookup to User).



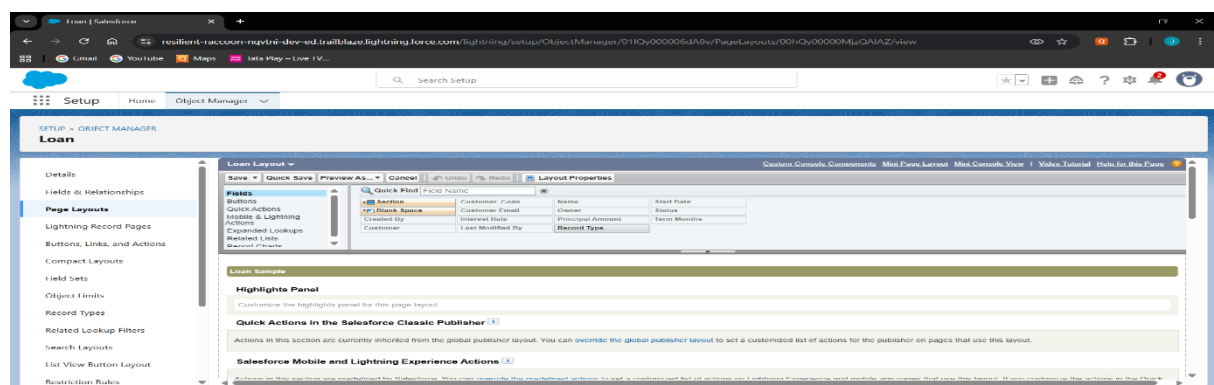
Record Types

- Loan: Retail Loan & Business Loan.
- Configure Status picklist values per record type (e.g., Retail = Active/Closed, Business = Active/Defaulted).



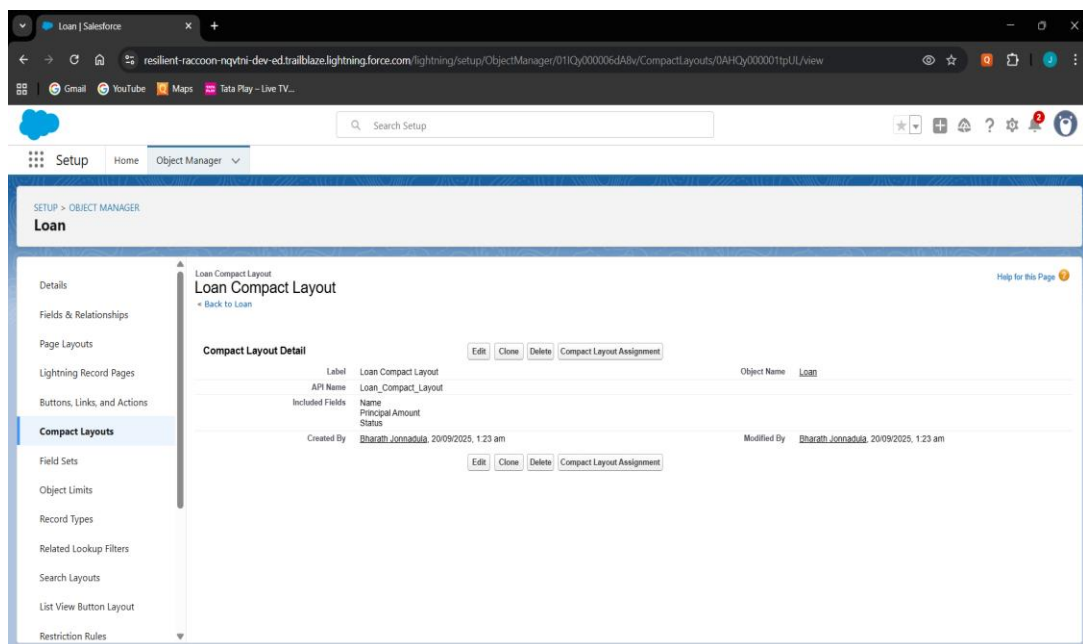
Page Layouts

- Loan Layout: sections for Basic Info, Financials, Dates & Status. Related Lists = Payments, Recoveries, Loan Agent Assignments.
- Payment Layout: fields for Date, Amount, Method, Status.
- Recovery Layout: fields for Date, Amount Recovered, Status, Assigned Agent.



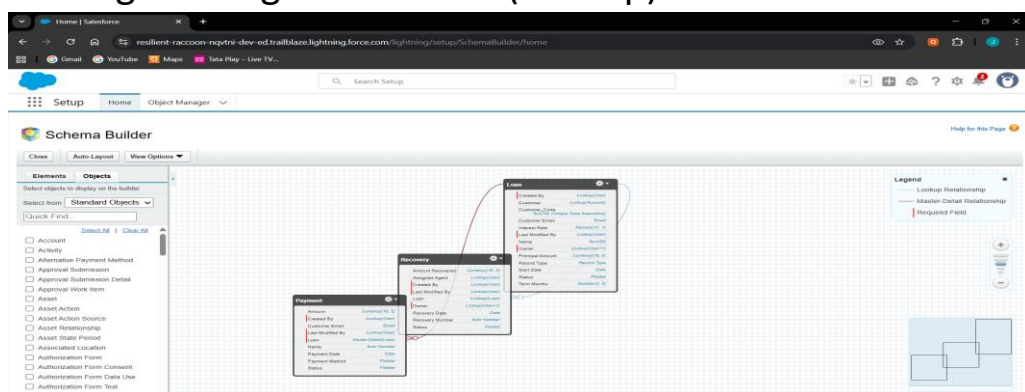
Compact Layouts

- Loan Compact Layout: Loan Number, Principal Amount, Status, Customer.
- Payment Compact Layout: Payment Date, Amount, Status.
- Recovery Compact Layout: Recovery Date, Amount Recovered, Status.



Schema Builder

- Visualize Loan, Payment, Recovery, and Loan Agent Assignment objects.
- Confirm relationships: Loan–Payment (Master-Detail), Loan–Recovery (Lookup), Loan–LoanAgentAssignment (Master-Detail), LoanAgentAssignment–User (Lookup).



Lookup vs Master-Detail vs Hierarchical

- Payment → Loan = Master-Detail (payments always tied to loans).
- Recovery → Loan = Lookup (independent audit records).
- Loan Agent Assignment → Loan = Master-Detail, → User = Lookup.
- Hierarchical not used (only for User object).

Junction Objects

- Loan Agent Assignment to handle many-to-many between Loans and Agents.
- Enables multiple agents handling multiple loans.

External Objects

- Concept: Connect to external payment system using Salesforce Connect.
- Example: Show legacy payment history without storing inside Salesforce.