Smart Banking CRM – Phase 3

Phase 3: Data Modeling & Relationships

● **Standard & Custom Objects**

Leverage Salesforce standard objects (Accounts, Contacts, Cases) and design custom objects like Customer, Loan, and Service Request to meet banking CRM needs.

● **Fields**

Define standard and custom fields (Text, Number, Formula, Picklist) to capture customer and loan-related data.

● **Record Types**

Use record types to differentiate processes, e.g., different loan categories (Home Loan, Personal Loan, Vehicle Loan).

● **Page Layouts**

Customize page layouts to show relevant fields and related lists for different user roles.

● **Compact Layouts**

Create compact layouts to highlight key fields in Salesforce mobile and Lightning UI.

● **Schema Builder**

Use Schema Builder to visualize and manage objects, fields, and relationships graphically.

● **Lookup vs Master-Detail vs Hierarchical Relationships**

Design relationships:
- Lookup for loosely coupled data (Customer ↔ Service Request).
- Master-Detail for dependent records (Customer ↔ Loan).
- Hierarchical for user-to-user relationships.

● **Junction Objects**

Create junction objects (e.g., Customer-Loan-Guarantor) to model many-to-many relationships.

● **External Objects**

Use external objects for integrating data stored outside Salesforce via Salesforce Connect.