Phase 9: Reporting, Dashboards & Security Review

☐ **Goal:** Provide insights through reports/dashboards while ensuring data security and compliance.

Reports

Policies by Status Report → Active, Expired, Cancelled.

Claims Report → Pending, Approved, Rejected.

Revenue Report → Premium collected by month.

Report Types

Custom Report Type: Customer + Policy + Claims (to track end-to-end).

Standard Report Types: Opportunities/Payments (if integrated).

Dashboards

Manager Dashboard:

Total Active Policies

Pending Claims by Agent

Monthly Premium Collection

Agent Dashboard:

My Customers & Policies

My Pending Claims

Dynamic Dashboards

Each **Agent** sees only their own policies/claims.

Manager sees entire org data.

Sharing Settings

Policies: Public Read/Write for Managers, Private for Agents.

Claims: Private (only owner + manager can see).

Field Level Security (FLS)

Hide **Sensitive Fields** (e.g., Customer Aadhaar/SSN, Payment Reference) from Agents.

Expose only to Managers/Admins.

Session Settings

Auto logout after 30 minutes inactivity.

Require re-login after password change.

Login IP Ranges

Restrict Agents → can only log in from office IPs.

Managers/Admins → broader access.

Audit Trail

Track:

Who approved claims.

Who modified premium values.

Changes to customer records.

☐ With this phase complete, the **Insurance Portal** ensures:

Transparent decision-making through **reports & dashboards**.

Data confidentiality with **field-level & sharing controls**.

Compliance-ready with **audit logs & IP/session restrictions**.