

SALESFORCE INSURANCE MANAGEMENT SOLUTION

Establish a lookup relationship between the "Contact" object, which contains customer details, and a custom object named "Insurance_c." This relationship should be designed to allow each customer to be associated with multiple insurance policies.

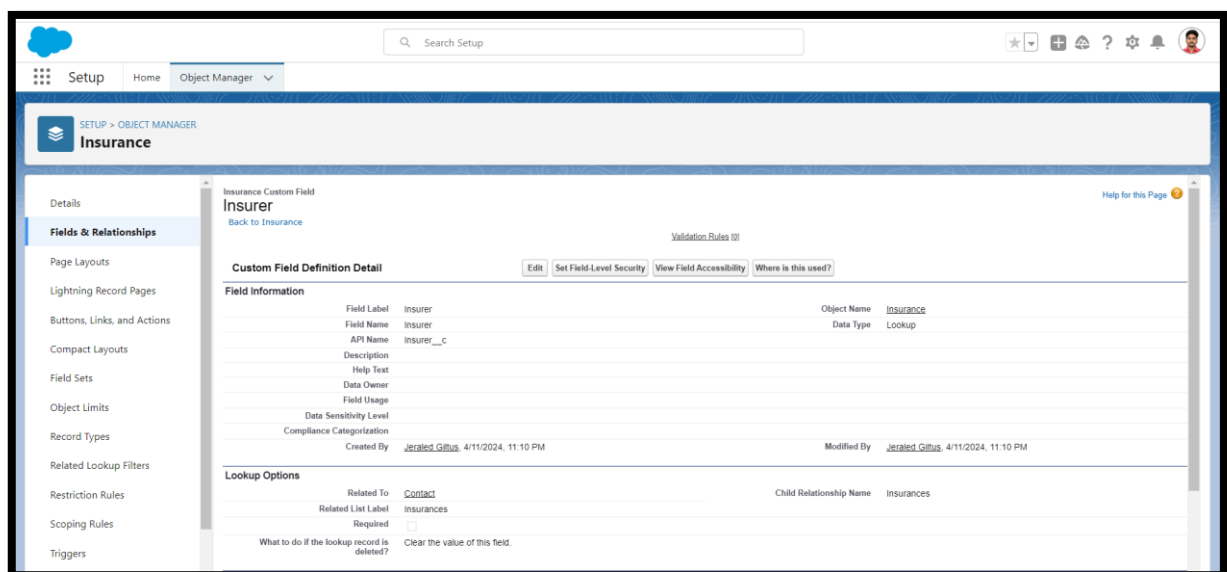
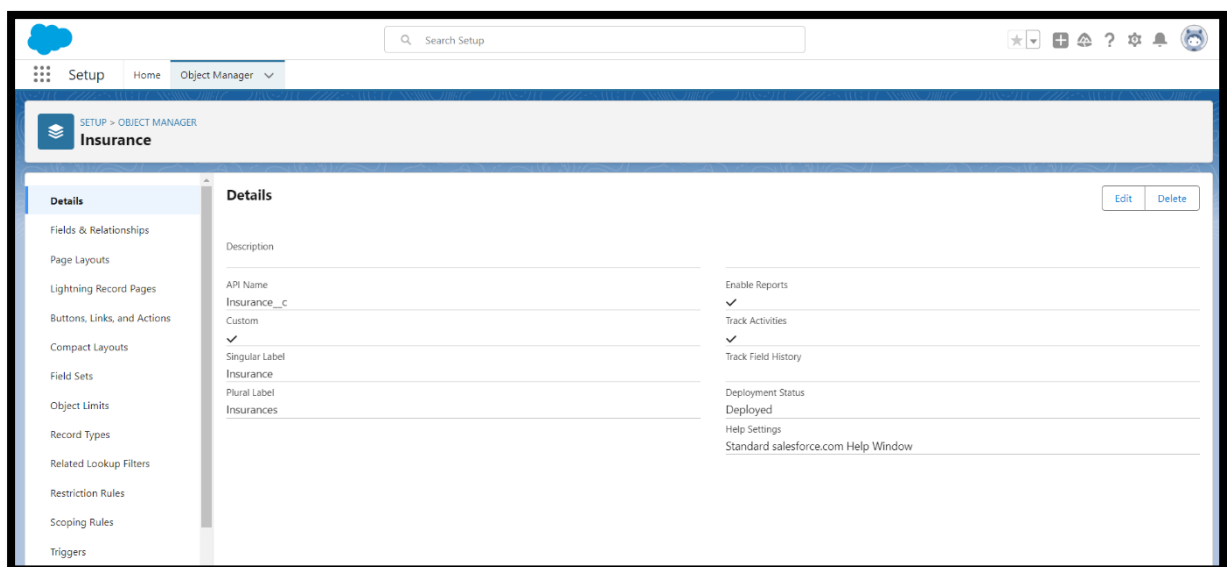
The screenshot shows the 'App Settings' page in the Salesforce Lightning App Builder. The left sidebar contains a navigation menu with 'App Settings' selected, and sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two sections: 'App Details' and 'App Branding'. In 'App Details', the 'App Name' is 'Insurance', 'Developer Name' is 'Jeraled', and 'Description' is 'Created an Custom App for Insurance'. In 'App Branding', an image of a house is uploaded, and the 'Primary Color Hex Value' is '#007002'. Below these sections are 'Org Theme Options' (with a checked box 'Use the app's image and color instead of the org's custom theme') and an 'App Launcher Preview' showing the app icon and name.

INSURANCE__C

Field Label	Types	Values
Insurance No	Auto Number	INS-{000}
Insurance Types	Picklist	Life Insurance and Motor Insurance
Sub-Types	Picklist	Term Plan, Unit Linked Insurance Plan, Third Party Insurance and Fire
Insurance Period (in years)	Picklist	10, 15, 20, 3 & 2
Premium Paid?	CheckBox	Default: Unchecked
Yearly Premium	Formula	If Term Plan => 100 USD Unit Linked Insurance => 130 USD Third Party Insurance => 75 USD Fire => 50 USD
Status	Picklist	In-Force, Claimed, Surrendered
Maturity Year	Formula	Current Year + Insurance Period
Insurance Value	Formula	Yearly Premium * Insurance Period
Date of Surrendered	Date	
Insurer	Lookup	Parent is contact Object
Motor Vehicle No	Text Encrypted	
Vehicle Name	Text	
Owner's Name	Text	

Data Modeling:

- ✓ Create a lookup relationship between the "Contact" object and the custom object "Insurance__c" to associate each customer with multiple insurance policies.



Field Dependency:

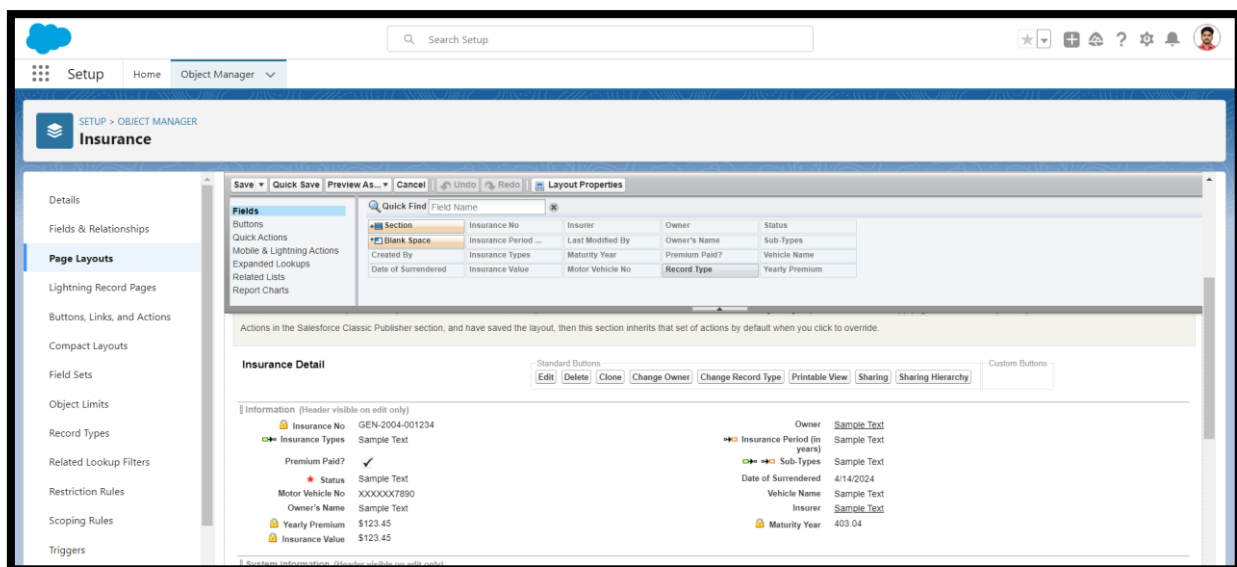
- ✓ Establish a field dependency between "Insurance Types" and "Sub-Types" to ensure proper categorization of insurance policies.

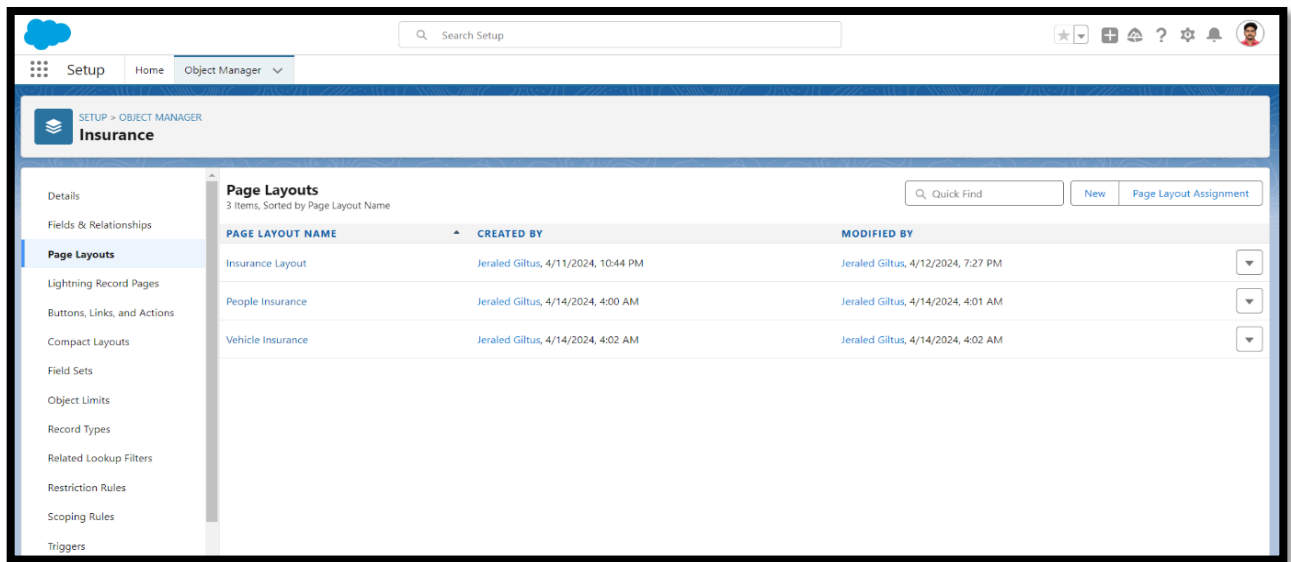
Insurance Types	Sub-Types
Life Insurance	Term Plan
Life Insurance	Unit Linked Insurance Plan
Motor Insurance	Third Party Insurance
Motor Insurance	Fire

Sub-Types	Insurance Period
Term Plan	10, 15, 20
Unit Linked Insurance Plan	10, 15
Third Party Insurance	3, 2
Fire	2

User Interface:

- ✓ Customize page layouts to mark the "Status" field as required and organize tabs under a new custom app named "Insurance" for both Classic and Lightning applications.





Data Population:

- ✓ Create at least 10 contact records and 3 to 5 different insurance records for each contact for testing purposes.

Security and Permissions:

- ✓ Define a custom profile named "Insurance" with specific object permissions for Contacts and Insurances. Assign roles within the hierarchy (Insurance VP, Insurance Manager, Insurance Agent) to users accordingly.

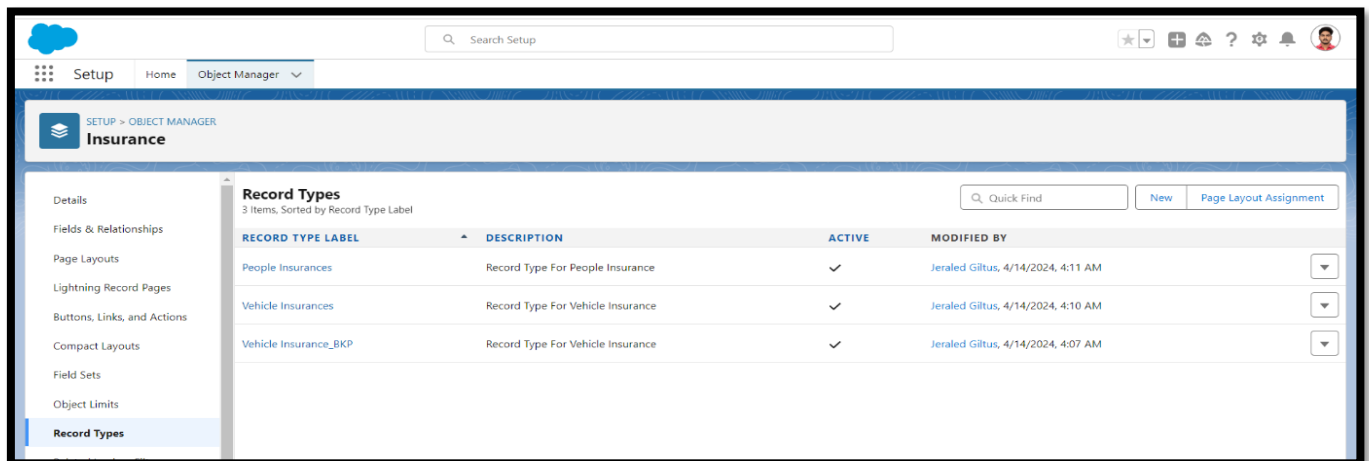
Object	Create	Read	Edit	Delete
Contact	Yes	Yes		No
Insurance	Yes	Yes		

Insurance VP
Insurance Manager
Insurance Agent

Name of the User	User License	Profile Name	Role
Sam Jacob	Salesforce Platform	Insurance	Insurance VP
Ram Kumar	Salesforce Platform	Insurance	Insurance Manager
Sitharthan	Salesforce Platform	Insurance	Insurance Agent

Record Types:

- ✓ Consider there are two types of Insurance Agents such as People Insurance and Vehicle Insurance. When people insurance group creates insurance record, the picklist field Insurance Types should display only the option - Life Insurance and the fields such as Motor Vehicle No, Vehicle Name and Owner's Name should not displayed in the page layout. When an agent belong to Vehicle Insurance creates insurance record then he/she should only see Vehicle insurance option in same picklist field.



Validation Rules:

- ✓ Implement validation rules to prevent users from editing the "Status" field once surrendered and restrict changes to the "Insurance Types" field.

1. Do not allow users to edit the policy record if surrendered or claimed.

RULE 1 :

AND

(
ISPICKVAL(Status__c, "Surrendered"),
ISCHANGED(Status__c)
)

RULE 2 :

AND

(
ISPICKVAL(Status__c, "Claimed"),
ISCHANGED(Status__c)
)

)
2.Implement validation to avoid users editing the status from surrendered to any other value and also restrict changing the field Insurance Types.

RULE 3:

AND

(
 ISCHANGED(Status__c),
 ISPICKVAL(PRIORVALUE(Status__c), "Surrendered"),
 NOT(ISPICKVAL(Status__c , "Surrendered"))
)

RULE 4:

ISCHANGED(Insurance_Types__c)

Permission Sets:

- ✓ Create permission sets to grant additional editing permissions to specific users, such as Sam Jacob and Ram Kumar, for both insurance and contact records.
- ✓ Provide extra permission only to users Sam Jacob & Ram Kumar to edit the Insurance records.
- ✓ Provide extra permission only to user Sam to edit the Contact records Permission Set

Security Restrictions:

Restrict users from editing insurance records except for those with the "Insurance" profile, ensuring that only unsurrendered policies are editable.

RULE 5 :

AND

(
\$Profile.Name <> "Custom-Profile",
ISPICKVAL(Status__c, "Surrendered")
)

Setup

Home

Object Manager

Search Setup

Insurance

SETUP > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Validation Rules

5 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Insurance_Claimed_Rule	Status	You cannot edit the record when the status is Claimed	✓	Jeraled Giltus, 4/12/2024, 11:46 PM	
Insurance_Surrendered_Rule	Status	You cannot edit the record when the status is Surrendered	✓	Jeraled Giltus, 4/12/2024, 8:05 PM	
Rule_3	Status	You Cannot Change the Status	✓	Jeraled Giltus, 4/14/2024, 4:34 AM	
Rule_4	Insurance Types	Insurance Type cannot be edited	✓	Jeraled Giltus, 4/14/2024, 4:40 AM	
Rule_5	Top of Page	You Cannot have Permission to edit the record	✓	Jeraled Giltus, 4/14/2024, 5:14 AM	