

Phase 6: User Interface Development

1. Lightning App Builder

- Created a **custom Lightning App** for Policy Management.
- App includes:
 - Home Page with key metrics (Number of Policies, Claims in Review)
 - Navigation to Policy, Claim, Agent objects

Clone Lightning App Insurance CRM

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


App Details

* App Name ⓘ
Insurance_CRM_clone

* Developer Name ⓘ
Insurance_CRM_clone

Description ⓘ
App to manage Policies and Claims

App Branding

Image ⓘ


Primary Color Hex Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Progress bar: 0% 25% 50% 75% 100%

[Quick Save](#) [Next](#)

2. Record Pages

- Configured **Record Pages** for Policy__c and Claim__c objects:
 - Displayed relevant fields only
 - Added Highlights Panel to show key information (Assigned Agent, Status, Claim Amount)

SETUP > OBJECT MANAGER

Policy

- 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
- Object Access
- Triggers
- Flow Triggers

Lightning Record Pages

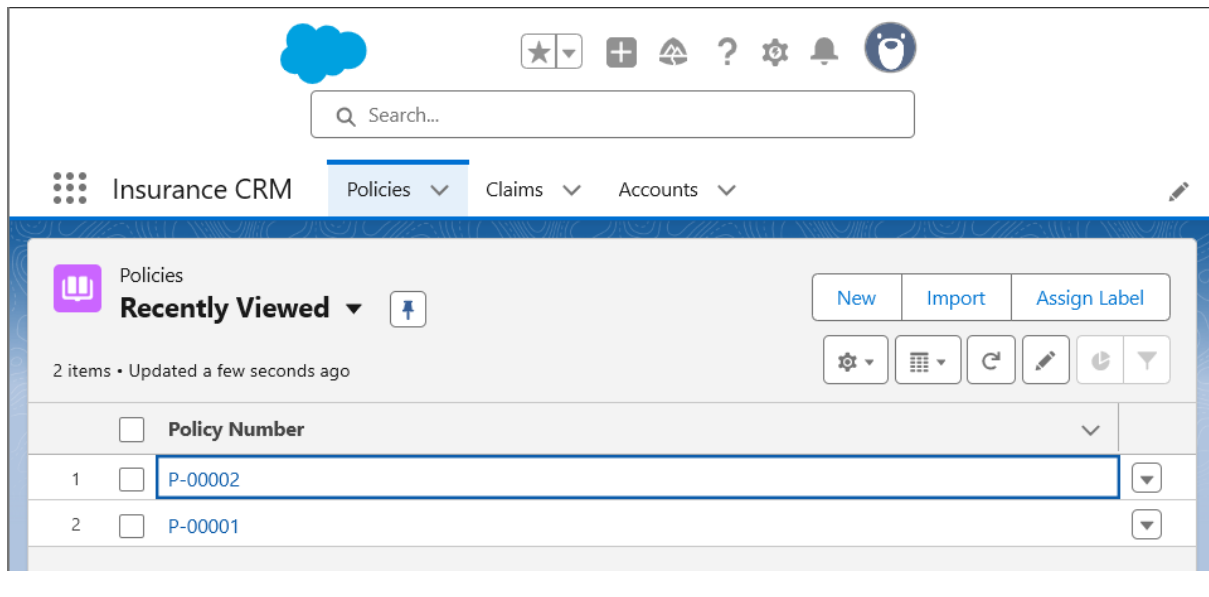
0 Items. Sorted by Label

LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNMENTS	MODIFIED BY
No custom Lightning pages to show for this object.				

[New](#) [View Page Assignments](#)

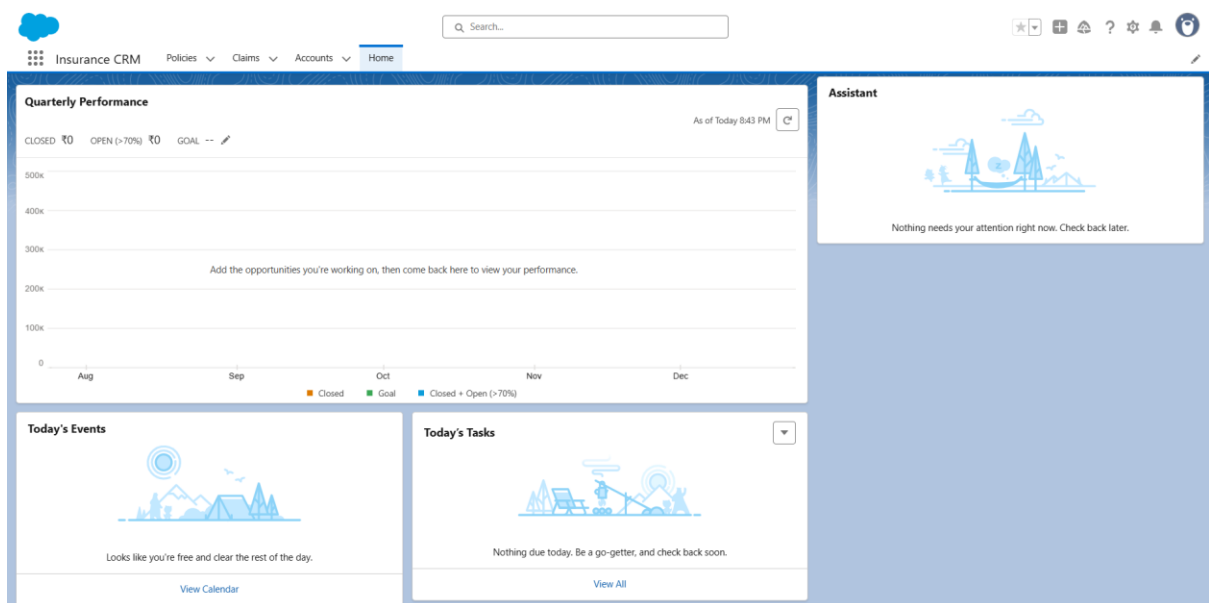
3. Tabs

- Added **custom tabs** for:
 - Policy
 - Claim
 - Agent Assignment
- Standard tabs for Accounts and Users included



4. Home Page Layouts

- Created a **custom home page layout** for Managers:
 - Components included: Reports chart, Tasks, Notifications
- Assigned layout to **Manager Profile**



5. Utility Bar

- Added **Utility Bar** items:
 - Quick Create Policy
 - Task Overview
 - Notifications

Reports							
Recent		Q Search recent reports...			New Report	New Folder	⚙️
3 items							
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	Claim Status Report		Public Reports	Shilpa Shilpa	9/24/2025, 9:04 PM		▼
Created by Me	Policies by Status	Shows count of policies grouped by status.	Public Reports	Shilpa Shilpa	9/24/2025, 8:32 PM		▼
Private Reports							
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/12/2025, 7:24 PM		▼
All Reports							
FOLDERS							
All Folders							