

Phase 3 – Data Modeling & Relationships

Standard & Custom Objects

Standard Objects Used:

- Account
- Contact

Custom Objects Created:

- Policy (Stores insurance policy details)
- Claim (Represents claims raised on policies)

Fields

Custom Fields Created:

- Policy: Policy Number (Auto Number), Policy Type (Picklist), Premium Amount (Currency)
- Claim: Claim Amount (Currency), Claim Status (Picklist), Date of Claim (Date)

SETUP > OBJECT MANAGER					
Policy					
Details	Fields & Relationships <small>17 items listed by field label</small>				
				Quick Find	New Deleted Fields Field Dependencies Set History Tracking
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Assigned Agent	Assigned_Agent__c	Lookup(User)		✓
Lightning Record Pages	Claim Amount	Claim_Amount__c	Currency(16, 2)		
Buttons, Links, and Actions	Coverage Amount	Coverage_Amount__c	Currency(16, 2)		
Compact Layouts	Created By	CreatedById	Lookup(User)		
Field Sets	Customer	Customer__c	Lookup(Account)		✓
Object Limits	End Date	End_Date__c	Date		
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Number of Claims	Number_of_Claims__c	Roll-up Summary (COUNT: Claim)		
Restriction Rules	Policy Duration (Days)	Policy_Duration_Days__c	Formula (Number)		
Sharing Rules	Policy Number	Policy_Number	Auto Number		✓
Triggers	Policy Type	Policy_Type__c	Picklist		
Flow Triggers	Premium	Premium__c	Currency(16, 2)		
Validation Rules	Record Type	RecordType	Record Type		✓
Conditional Field Formatting	Related Policy	Related_Policy__c	Master-Detail(Account)		✓
	Start Date	Start_Date__c	Date		
	Status	Status__c	Picklist		
	Total Claim Amount	Total_Claim_Amount__c	Roll-up Summary (SUM: Claim)		

SETUP > OBJECT MANAGER

Claim

Details

Fields & Relationships
12 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assigned Agent	User__c	Lookup(User)		✓
Assigned Officer	Assigned_Officer__c	Lookup(User)		✓
Claim Amount	Claim_Amount__c	Currency(16, 2)		
Claim Number	Name	Auto Number		✓
Claim Type	Claim_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Customer	Account__c	Lookup(Account)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Related Policy	Related_Policy__c	Master-Detail(Policy)		✓
Resolution Date	Resolution_Date__c	Date		
Status	Status__c	Picklist		
Submitted Date	Submitted_Date__c	Date		

Record Types

Created record types for Vehicle Policy and Health Policy with separate layouts.

SETUP > OBJECT MANAGER

Policy

Details

Record Types
3 Items, Sorted by Record Type Label

Q Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Health Policy		✓	Shilpa Shilpa, 9/19/2025, 6:23 AM
Life Policy		✓	Shilpa Shilpa, 9/19/2025, 6:25 AM
Vehicle Policy		✓	Shilpa Shilpa, 9/19/2025, 6:26 AM

Page Layouts

Configured different layouts for vehicle and health policies showing relevant fields only.

SETUP > OBJECT MANAGER

Policy

Details

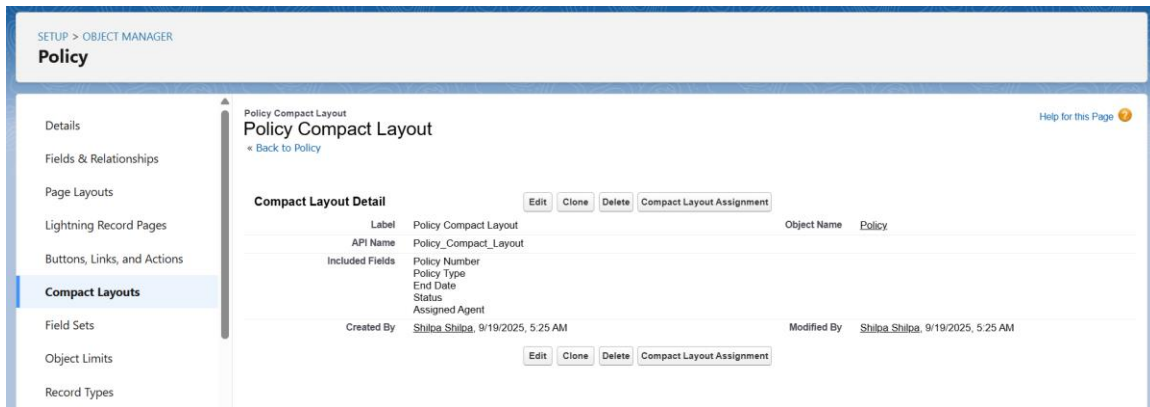
Page Layouts
1 Items, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Policy Layout	Shilpa Shilpa, 9/19/2025, 4:22 AM	Shilpa Shilpa, 9/19/2025, 7:22 AM

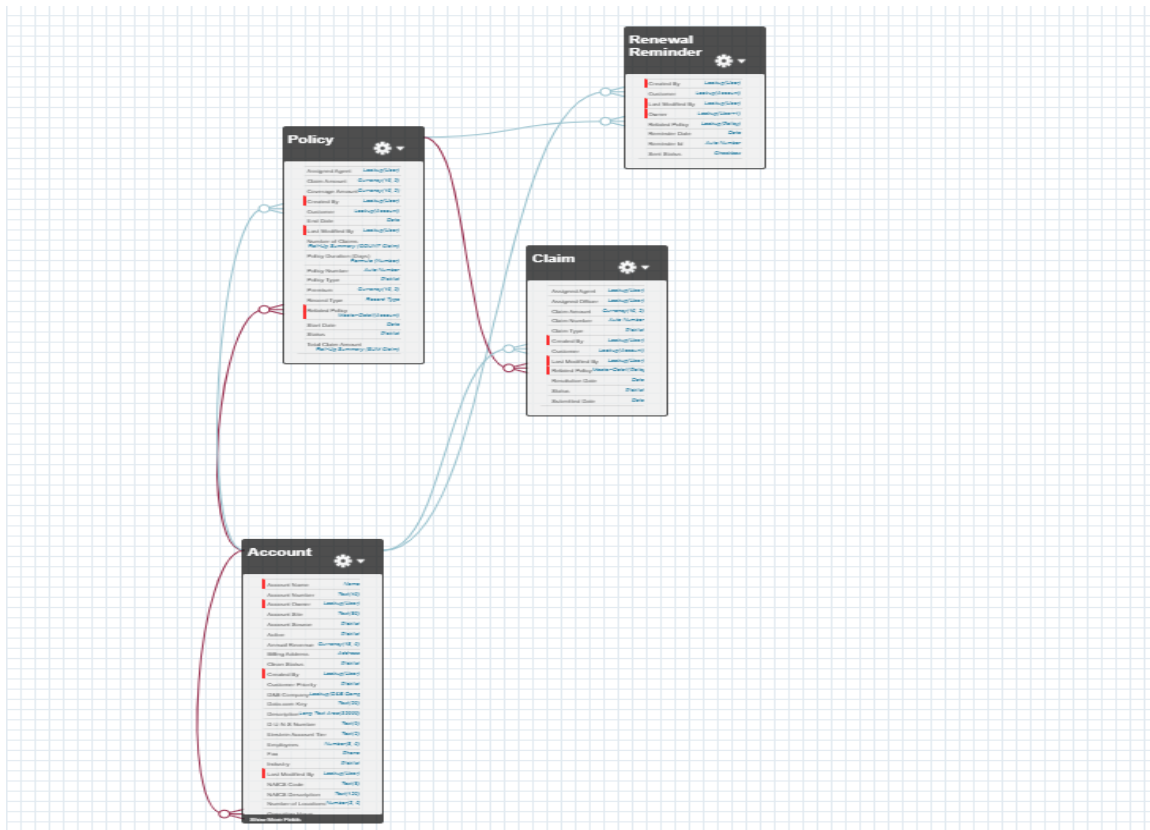
Compact Layouts

Configured compact layouts to display key fields in Lightning highlights panel and mobile.



Schema Builder

Used Schema Builder to visualize object relationships.



Lookup vs Master-Detail vs Hierarchical Relationships

Relationships Created:

- Policy → Claim: Master-Detail
- User → Claim: Lookup
- User → Manager: Hierarchical

Junction Objects

Created Agent Assignment as a junction object to enable many-to-many relationship between Policy and Agent.