

# Insurance Management System Salesforce Lightning

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**Abstract**— Our goal is to help customers buy online insurance with confidence," the economists said, "the news that the entire insurance industry is being taken over by e-commerce. Our research will help people who still rely on offline insurance to make online insurance understandable and easily acceptable. We used Salesforce CRM to develop this web-based application. For a new generation of professionals, online insurance is the bridge that connects the digital age with the challenges of adult life. As Internet access increases and a young generation of middle-class professionals is on the cusp of adulthood, online insurance is becoming increasingly-important.

Our research shows that while there are significant differences in customer attitudes and behaviours around the world, driven by different economic, demographic, competitive and regulatory environments, some underlying themes are remarkably consistent.

Listen to the voice of the customer and their requirements.

**KEYWORDS - SALESFORCE, INSURANCE, ONLINE, PREMIUM, TRANSACTION, POLICY, CRM .**

## I. INTRODUCTION

Our articles in this issue address look at the future of micro insurance, the challenges posed by the introduction of the Combine portal, and its impact on consolidation principles for insurance cells. This is an exciting and challenging time for insurers. Customer behaviour is changing rapidly. Technology, particularly the growth of online and social media, is fundamentally changing customer expectations about how products are marketed, priced, sold and serviced, and how companies are perceived. Internet-only companies have set new standards for customer focus and loyalty, raising the bar for players in all retail sectors. Customers want to be able to buy both property

and life and annuity insurance with a clear conscience.

The way that products are marketed, priced, sold and serviced, and how companies are perceived, is changing rapidly due to technology, especially the growth of online and social media. All sectors of the retail industry are being challenged by Internet-only companies' focus on customers and loyalty. Annuities and property insurance are both products customers want to buy with a clear conscience. In order to understand what they are buying, customers want products and buying processes that are simple and transparent. Trust is important to them, and they want to feel confident that what they are buying meets their needs and will build long-term relationships with insurance providers.

## II. LITERATURE SURVEY

- [1] Behavior towards consumers, pointing out that the provision of false information, the inability to understand the needs of consumers, and a lack of professionalism are the main unethical behaviors of insurance agents. A product that offers a large number of options or consists of a large number of usage steps is usually complex. When products are more complex and difficult to understand, the product leads to more uncertainty and risk.
- [2] Salesforce was born as a cloud. At the heart of distributed computing or cloud computing is the idea of programming that is conveyed as a service or SaaS.[2]Salesforce helps you manage your customer relationships, integrate with different frameworks, and build your own applications. This means that you do not need to install an application on your

computer. All you need is an Internet connection and a program, and you can log in from anywhere to access Salesforce.

- [3] We believe these trends show what the future of insurance in India will look like. Not only are people going online to check and compare insurance quotes because it is convenient, but for a growing number of Indians it has now become a necessity. As in many other areas, such as travel and retail, the Internet is now set to transform the insurance sector in India.
- [4] A Novarica study found that 63% of insurers plan to migrate to the cloud in 2019, and that number will increase in 2020-21. A Deloitte survey also found that 95% of respondents are already accelerating their digital transformation to maintain future viability. This is the same trend CFOs need to follow to grow and improve efficiency.
- [5] Insurers are actively exploring the potential of new technologies such as AI, APIs, microservices, chatbots, robotic process automation, Big Data, smart assistants, IoT sensors and wearables. However, many in the industry still lack an end-to-end digital strategy and the IT specialists needed to implement it.
- [6] How many Consumers Purchase Offline after Quoting online.

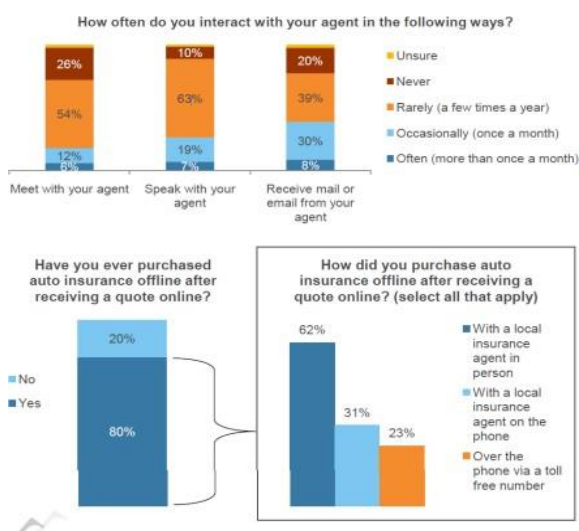


Fig 1.1: Insurance System Literature Survey

### III. EXISTING SYSTEM

The existing system of insurance industry is as

follows. It works on following track.

- Self service
- Take service through agents
- Take service online

Means there are only three way to access the insurance and whole industry works on only these three tier. If we want to buy a life insurance policy, we may select various ways. Either we should contact to bank, or we should contact an agent, or buy a policy online. If we go to bank then 1st problem is where to enquire and how long is the procedure? And if we gets perfect place then 317 International Journal of Engineering Research & Technology (IJERT) IJERT [www.ijert.org](http://www.ijert.org) ICONECT' 14 Conference

Proceedings 3 this will become very lengthy process. As there are so many faults in this possibility. Then, although we bought the policy then bank is not going to provide him service. We have to do all things. In that condition for our betterment only we have to do work. If we call an agent then whether the agent is IRDA certified or not? This is a big problem. For their business these agents might be sells the policy in wrong way, in that, we, customer has to survive.

### IV. PROBLEM STATEMENT

The existing insurance system has a lengthy procedure for obtaining life insurance. It may also contain a chain of intermediaries. If we want to buy a life insurance policy, we may select various ways. Either we should contact to bank, or we should contact an agent, or buy a policy online. If we go to bank then 1st problem is where to enquire and how long is the procedure? And if we gets perfect place then this will become very lengthy process as there are so many faults in this possibility. Then, although we bought the policy then bank is not going to provide him service. We have to do all things. In that condition for our betterment only we have to do work.

### V. PROPOSED SYSTEM

The insurance industry is in need of technical simplification, which means instead of using several different applications like Excel, desktop- based insurance management app, quoting tool, accounting app, separate rating

app, file storage, manual data transfer, etc, a single platform is a much better alternative, that also over the cloud so no installations are needed.

The insurance industry needs technological simplification, which means moving away from multiple disparate applications such as Excel, PC- based insurance management applications, quote tools, accounting applications, separate pricing, file storage, manual data transfers, etc. choice for a platform, which is also in the cloud, so no installation is required. "

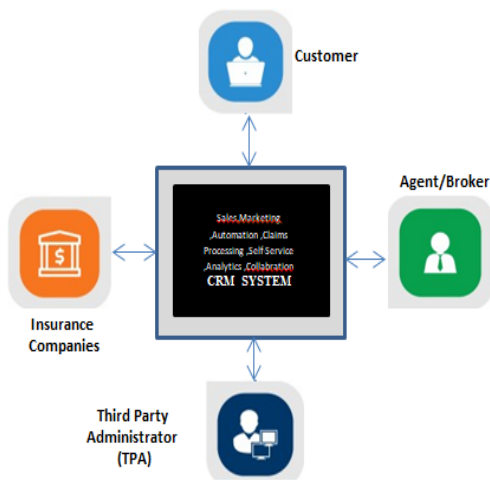


Fig 2.1: Present Insurance Plan

## VI. IMPLEMENTATION

Thus, we meet all the requirements set out in the proposed system.

### Still How It Is Different From Others?

1. We try to bring the bank close to the customer. This means that he does not have to go to the bank, and secondly, we try to minimize the work of the agents. In our system, the agent is thrown out of the system.
2. All data is centralized in one place. The customer does not have to go everywhere, he gets all information about all products of all stores in one place.

3. For customer inquiries there is a comment field or the possibility of a live chat. There will be a video for all products of all banks.
4. When a new user registers on our website, we give him a unique number (owner ID), but to make the system more secure (because the unique ID can be stolen), after registration he takes out a policy with any insurance company. Since in our system we replicate this owner ID into the dummy database of all companies associated with us, we can link him to any insurance company.
5. Customer can login anytime to see details about premiums and payment .
6. Premium calculator facility.
7. Payment system.
8. Proper feedback system to do dynamic changes in our system. We are going to use - Database query are of SOSL and SOQL.
9. All Data insertions Query here we have SOSL and SOQL Database .

## VII. PRESENT WORK

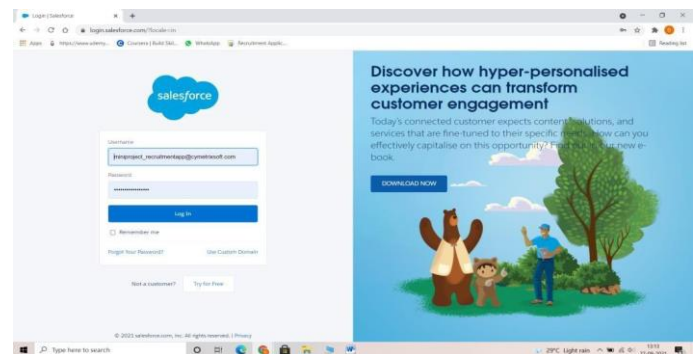


Fig 3.1 Login Page

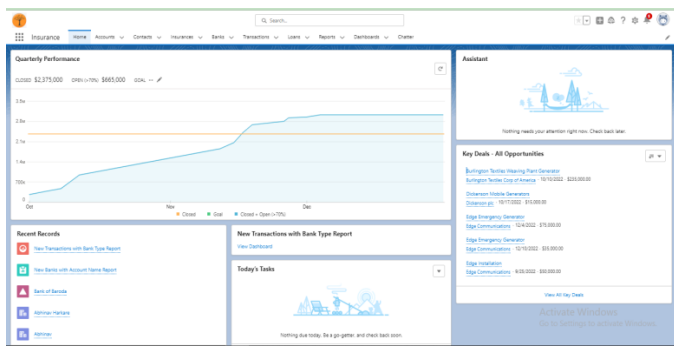


Fig 3.2 Home Page

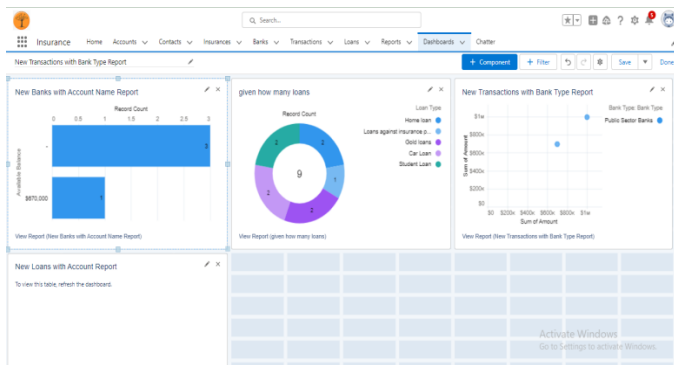


Fig 3.2 Insurance Dashboard

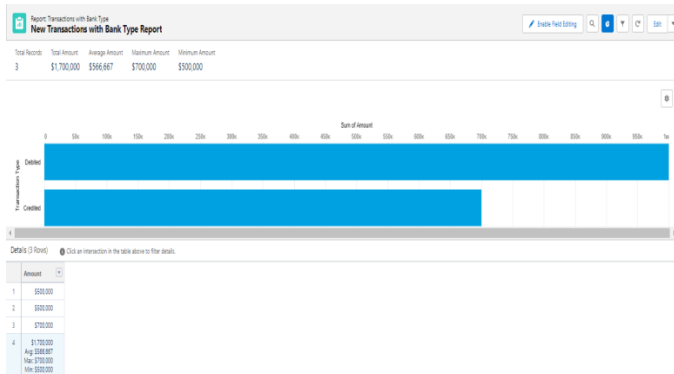


Fig 3.2 Insurance Report

## VIII. FUTURE SCOPE

Today almost everybody who is starting to earn is taking insurance. There are some possible reasons why people are doing so. One of the most common reasons that people give today is to save tax. Apart from tax saving, the other big reason is of course safety. The main benefit of insurance is to provide support at times of need.

1. Developed to be used by the all the people
2. Can be used by the students for study purpose.
3. It eradicates the fake policy providing

websites.

Keeps the capability to centralize all the insurance industry in India and shall keep transparency in industry. This project can bring a revolution in the insurance industry.

## IX. CONCLUSION

By the implementation of this website, there shall be a transparency in the field of insurance industry and will help in the centralization of the insurance taking policies. There has to be a control over the money invested but the insurance companies in a huge diversity like India. If such system is implemented it could result in various helps to the public as well as the governmental body for the development of the country.

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