



# **St. Vincent Pallotti College of Engineering and Technology**

## **DEPARTMENT OF INFORMATION TECHNOLOGY**

### **Academic Year 2022-23**



**Major Project Seminar**  
**on**

**“INSURANCE MANAGEMENT SYSTEM  
USING SALESFORCE”**

**Name of Industry:** Cymetrix Software

**Industry Mentor:** Sweta Dey

**Name of Guide:** Prof. Vishal Tiwari (Assistant Professor)

**Alumni Mentor:** Moin Baig

**Project Member:**

Abhinav Harkare

Arpita Jiddewar

Pranava Kapse

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# INTRODUCTION

- This project only deals with salesforce and its concept of admin and developer.
- With the power of Salesforce CRM driving insurance agents and customer service, your agency can revolutionise the way it manages customer relationships for optimal success.
- Salesforce isn't just insurance agency software.
- It's software in the cloud designed to continually meet your industry needs, supercharge productivity, and boost bottom lines.

# Literature Survey

Sr No	Title of Page	Author Name	Year	Findings
1	"Handbook of business-to-business "	MK Mantrala S Albers	2022	1. Salesforce Insurance Related Projects
2	"Journal of Business "	MI Ishaq, H Sarwar, A Azeez Ansari	2022	1. The manual system is prone to error. 2. It is time consuming.
3	"Journal of Advanced Research in Embedded "	D Arora	2020	1. Difficult to search for a data Most of the insurance organizations are not having any existing fully computerized system
4	"Internal marketing, salesforce performance and service delivery.Ss"	Ajemunigbohun, SA Oreshile	2018	1. difficult for a person to produce the report.

# COMPARATIVE ANALYSIS

PREVIOUS INSURANCE MANAGEMENT SYSTEM	CURRENT INSURANCE MANAGEMENT SYSTEM
Less scope, less accuracy.	More scope, less accuracy.
It is mostly paper Based .	It is online.
Every task need to be done in different applications.	Every task will done in one app.

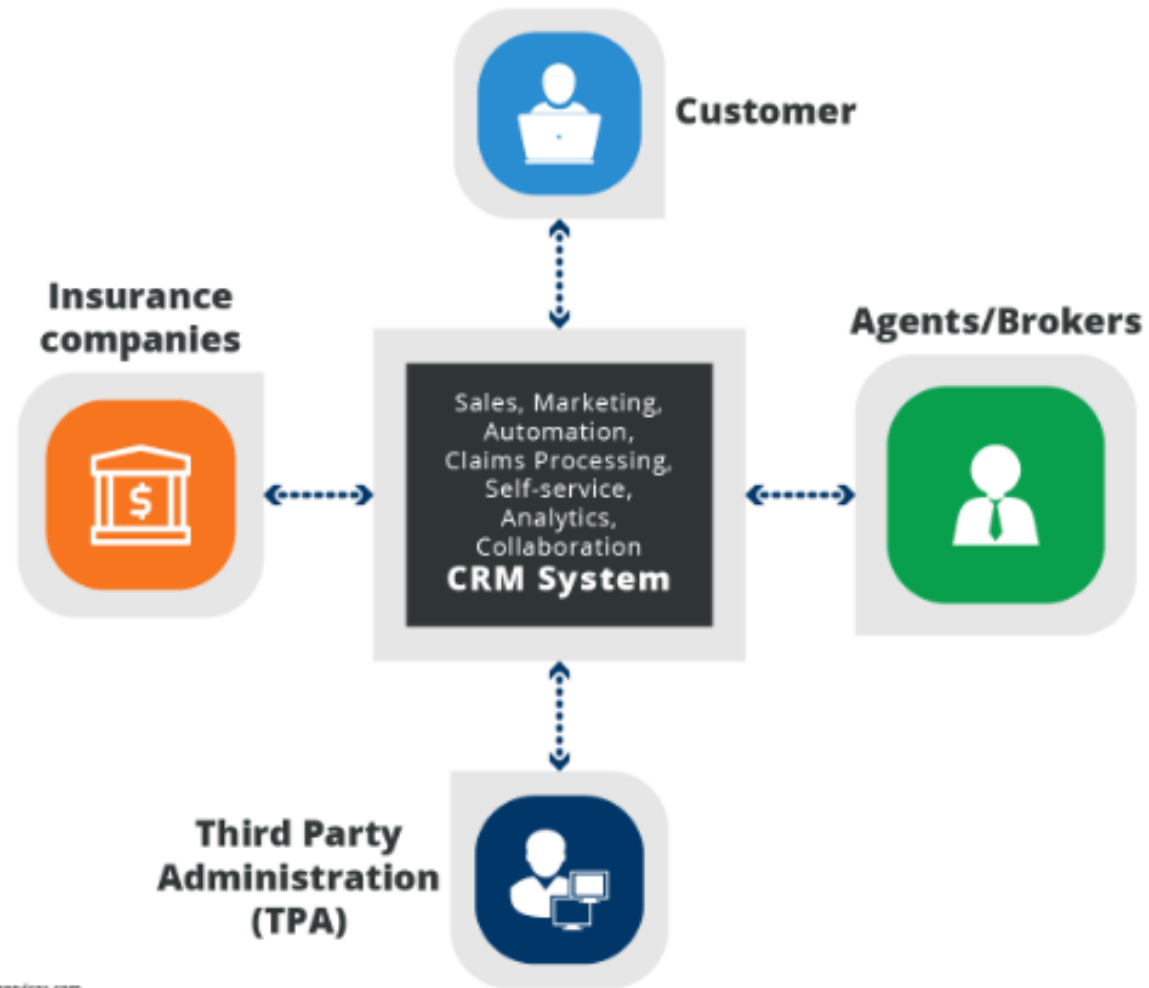
# Problem Definition

“Create an Insurance Management System with all features included in one application with salesforce CRM Admin concepts”

# 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.”

# Project Flow





# Hardware Requirements

System Information	Configuration Details
Processor	32 bit Processor
RAM	512MB/2GB/4GB/8GB
Router connection/Data Enabled	1 Mbps speed

# Software Requirements

System Information	Configuration Date
Operating System	Browsing Supported OS
Developing Environment	Trailhead.com Environment

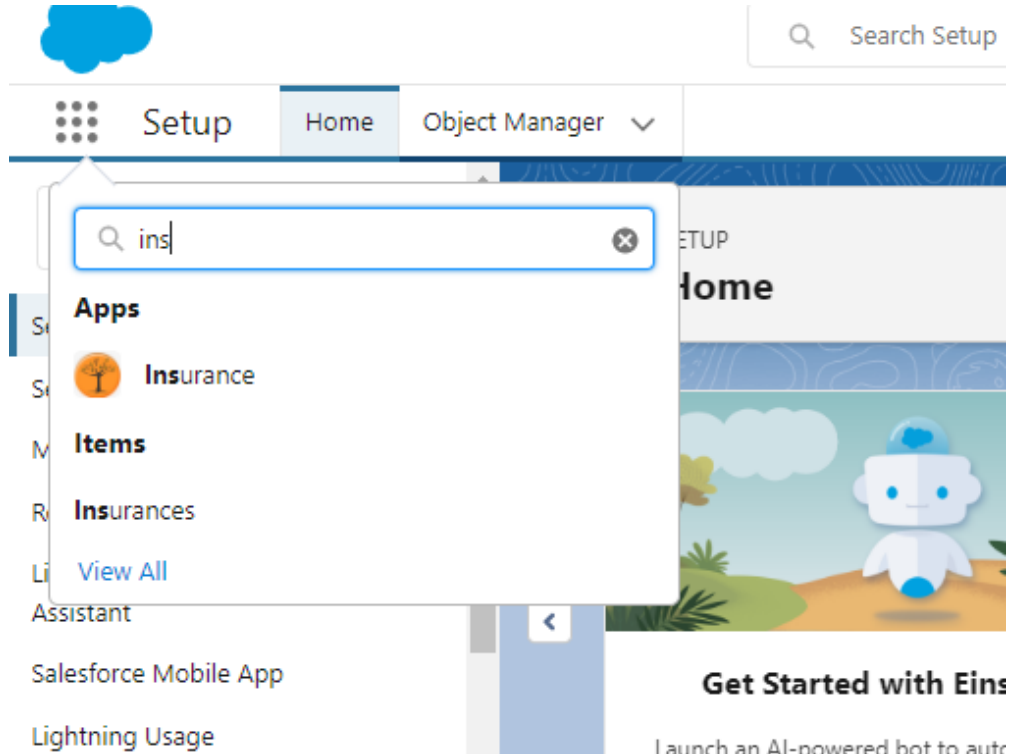
# Technology Platform Overview

Technical Platform	About
Salesforce	Salesforce is the customer company. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service.
Salesforce DataBase	Salesforce Database generates data for leads, tasks, opportunities, accounts, and notes. This is where the real data is kept. A range of record kinds is available for tying various business operations to users, customers, and administrators depending on their user profiles.

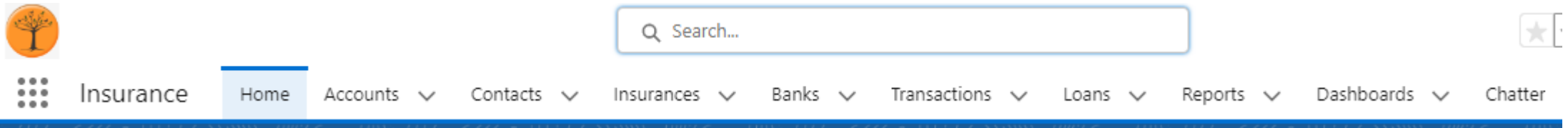
# Application Feature Overview

- ❖ Lead Management
- ❖ Client Management
- ❖ Application Fulfillment
- ❖ Detail Report
- ❖ Marketing

# Implementation Snapshots



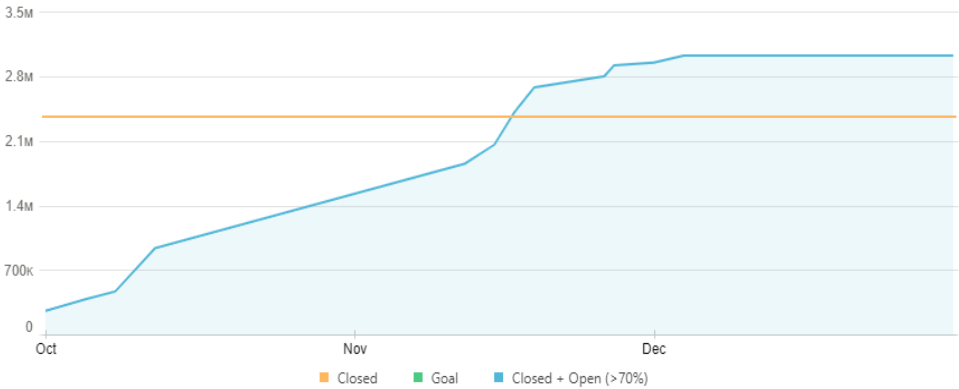
This screenshot shows the 'New Insurance' form. The form is titled 'New Insurance' and has a tab labeled 'Information'. The form contains several fields: 'Insurance Name' (required, red border, with a red error message 'Complete this field.'), 'Status' (dropdown menu, currently '--None--'), 'Insurance No' (dropdown menu, currently '--None--'), 'Date of Surrendered' (calendar icon), 'Insurance Type' (dropdown menu, currently '--None--', with a link 'View all dependencies'), 'DIGIT PRODUCTS' (dropdown menu, currently '--None--', with a link 'View all dependencies'), 'Contact' (search bar with 'Search Contacts...' and a magnifying glass icon), 'Sub-Types' (dropdown menu, currently '--None--', with a link 'View all dependencies'), 'Currency' (dropdown menu), and 'Insurance Period' (dropdown menu). At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.



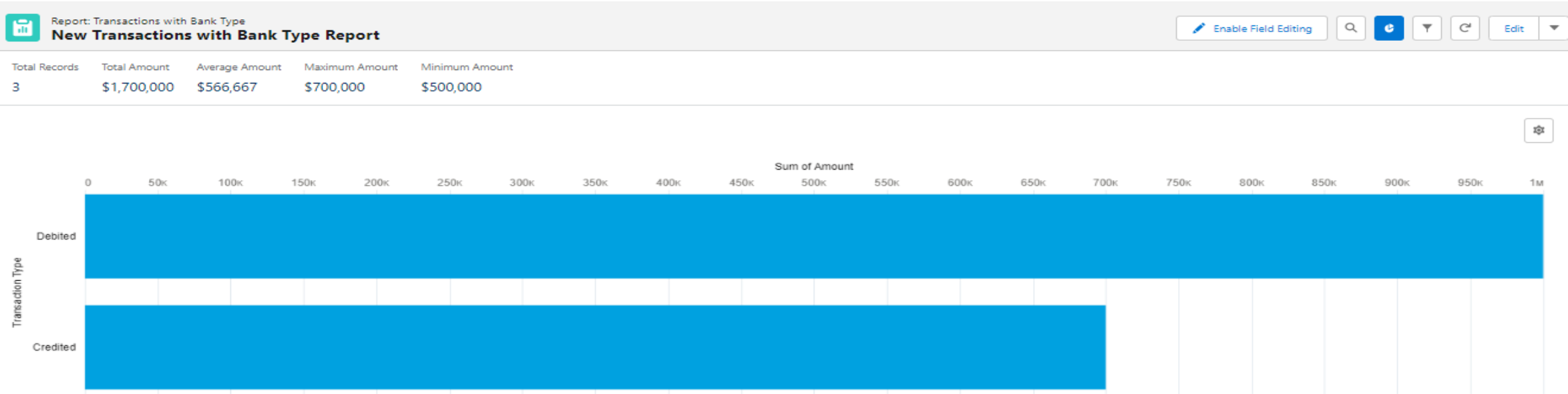
# Implementation Snapshots of Dashboards

## Quarterly Performance

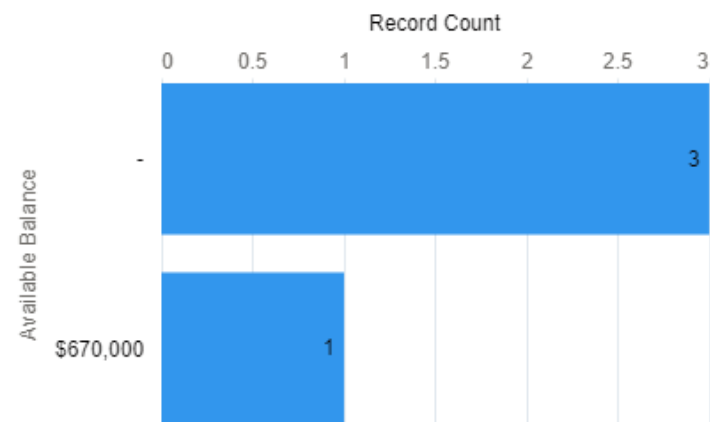
CLOSED \$2,375,000 OPEN (>70%) \$665,000 GOAL --



Transaction Type	Bank Type: Bank Type →	Public Sector Banks	Total
<input type="checkbox"/> Debited	Sum of Amount	\$1,000,000	\$1,000,000
	Average Amount	\$500,000	\$500,000
	Largest Amount	\$500,000	\$500,000
	Smallest Amount	\$500,000	\$500,000
	Record Count	2	2
<input type="checkbox"/> Credited	Sum of Amount	\$700,000	\$700,000
	Average Amount	\$700,000	\$700,000
	Largest Amount	\$700,000	\$700,000
	Smallest Amount	\$700,000	\$700,000
	Record Count	1	1
Total	Sum of Amount	\$1,700,000	\$1,700,000
	Average Amount	\$566,667	\$566,667
	Largest Amount	\$700,000	\$700,000
	Smallest Amount	\$500,000	\$500,000
	Record Count	3	3

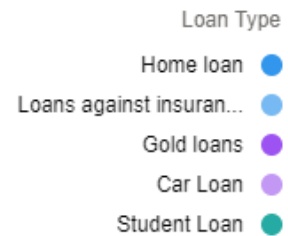


### New Banks with Account Name Report



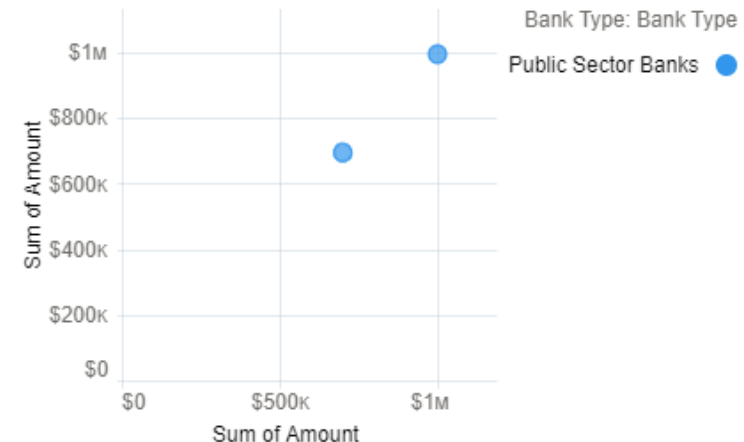
[View Report \(New Banks with Account Name Report\)](#)

### given how many loans



[View Report \(given how many loans\)](#)

### New Transactions with Bank Type Report

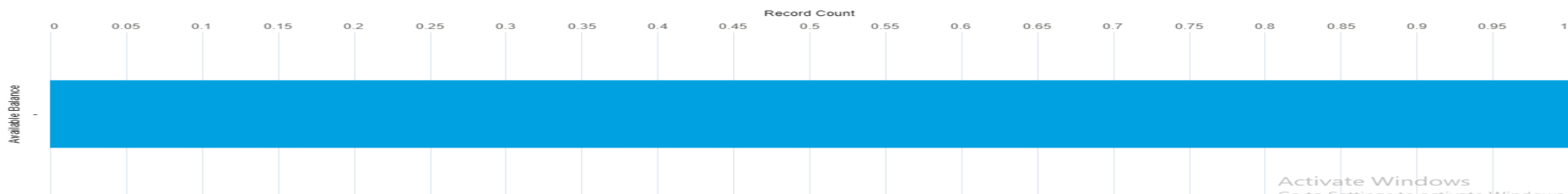


[View Report \(New Transactions with Bank Type Report\)](#)

### New Loans with Account Report



Total Records  
1



Activate Windows  
Go to Settings to activate Windows.

## DashBoards

## New Transaction Report

# Conclusion

- We have created Insurance Application after going through different papers and find some issues which makes existing insurance application unsucessfull.
- We have Developed this web application on Salesforce Platform



# References

1. MK Mantrala, S Albers - Handbook of business-to-business 2022
2. D Arora ,Journal of Advanced Research in Embedded, 2020
3. K Karunarathna, DGL Rasika - Wayamba Journal of Management, 2021
4. Ajemunigbohun, SA Oreshil INTERNAL MARKETING, SALESFORCE PERFORMANCE AND SERVICE DELIVERY.SS - Annals of the University 2018
5. ZM Njagi Salesforce persnolity trusts - 2019
6. CC Eason, N Kirkpatrick Business Education 2019

# 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.

Therefore, in the future, the created application can:

- Apex developing tools.

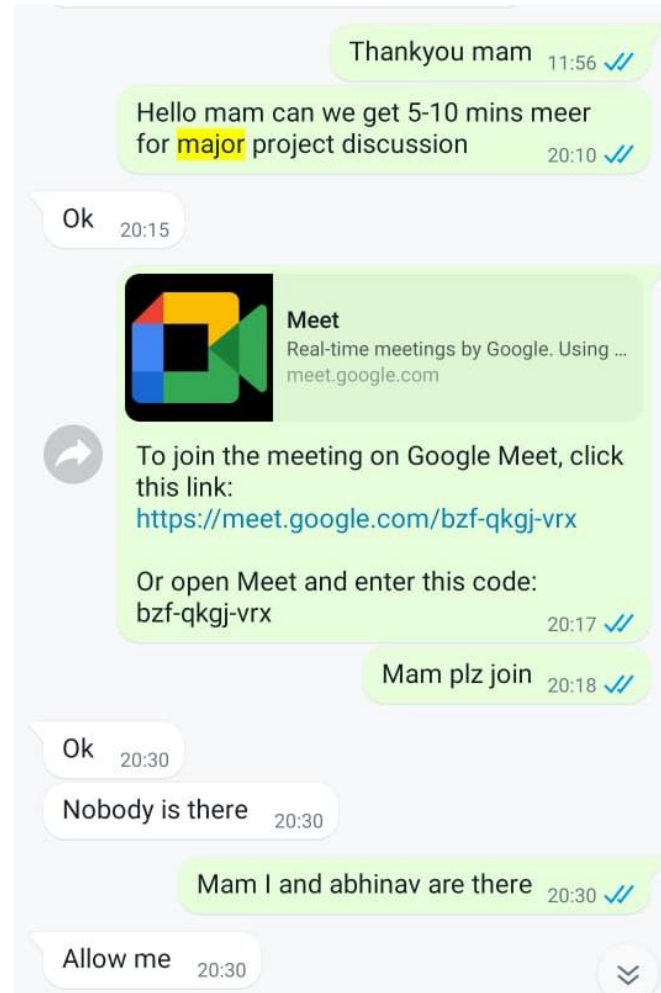
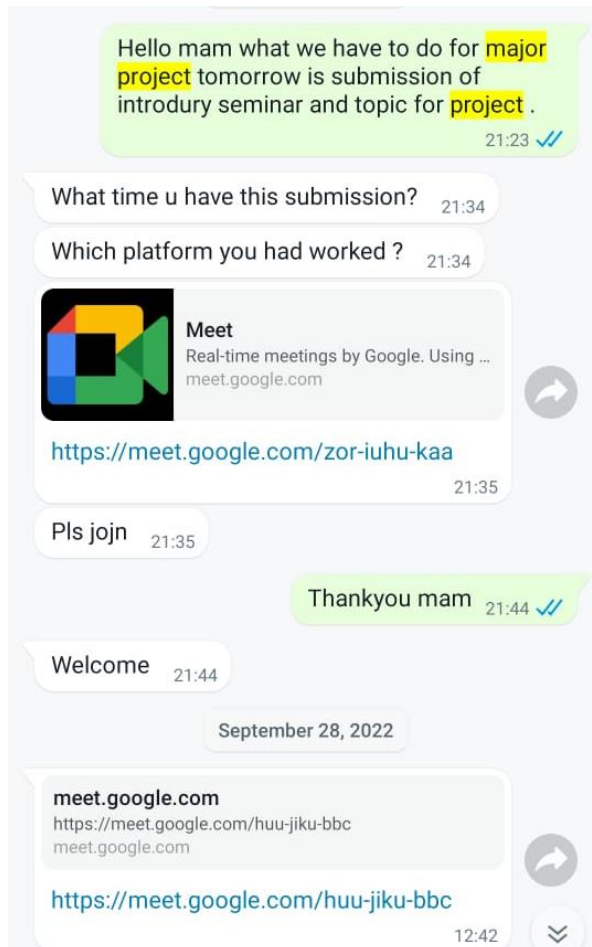
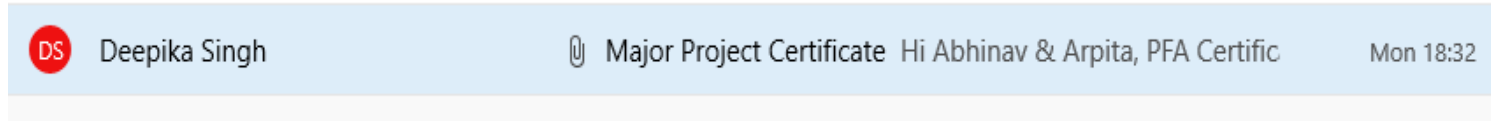
- Using self-developed classes and triggers

- Using Flows and Screens

- Data analytics could also be implemented for smoother and more prompt reports.

- Automate AI Business Tools

# Freed Cam Status



## Major Project Certificate



To: Abhinav Harkare; ARPITA JIDDEWAR

[Save all attachments](#)



Hi Abhinav & Arpita,

PFA Certificate.

**Thanks & Regards**

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Go to Settings to activate Windows.

# GitHub Account

Sr. No.	Name of the students	Account	Link
1	Arpita Jiddewar	jiddewararpita4	<a href="https://github.com/jiddewararpita4">https://github.com/jiddewararpita4</a>
2	Abhinav Harkare	abhi11harkare	<a href="https://github.com/abhi11harkare">https://github.com/abhi11harkare</a>
3	Pranav Kapse	PranavKapse	<a href="https://github.com/PranavaKapse">https://github.com/PranavaKapse</a>

THANK YOU!

**ANY SUGGESTIONS ?**