

**INSURANCE MANAGEMENT SYSTEM USING SALESFORCE
LIGHTNING**

*in partial fulfillment of the requirements for the award of the degree
of Bachelor of Engineering in*

INFORMATION TECHNOLOGY

Submitted by

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CERTIFICATE

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May 06, 2023

To whomsoever it Concern

I undersign give the certification of acknowledgement for **Abhinav Harkare** fourth year **Information Technology dept** student of **St. Vincent Pallotti College of Engineering and Technology Nagpur** for the successful completion of major project on "Insurance Management Application" from August 2022 to April 2023." under the mentorship of our Sweta Dey & Moin Baig

Yours Sincerely,
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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. The main purpose of this project is to estimate some important statistics of Micro insurance in the current market of India by gathering and analyzing data which is available. The statistics will be useful to prepare better insurance plans to boost up the Life Insurance industry in India.

Online Insurance management system is a web application which is developed for tracking the details of the insurance policy, customer details and company details. This web site is an online insurance Analysis and information management system that provides easy access of information regarding the people and resources of insurance. User can view their own personal details when login into the Policy Holder module. The Insurance management system is a complete solution for organizations, which need to manage insurance for their vehicles, equipment, buildings, and other resources. This insurance management website has facilities like search tools for insurance awareness articles, guidelines, illustrations through images for visitor

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LIST OF SYMBOLS, ABBREVIATION, NOMENCLATURE

SR NO.	ABBREVIATIONS	DEFINITION
1	CRM	Customer relationship management
2	SFDC	Salesforce developer console
3	UI	User Interface
4	HR	Human Resource
5	MRF	Manpower requisition form
6	ER DIAGRAM	Entity Relationship diagram
7	CEO	Chief executive officer
8	PaaS	Platform as a service

CHAPTER 1

INTRODUCTION

CHAPTER 1

INTRODUCTION

1.1 OVERVIEW

1.1.1 What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform that helps companies manage their sales, marketing, and customer service operations. The platform provides a range of tools and services, including data management, analytics, automation, and collaboration features.

Salesforce allows businesses to store and manage customer information in a centralized location, track leads and opportunities, automate sales processes, and provide customer support. The platform also provides a range of customization options and integrations with other systems, allowing businesses to tailor their CRM to their specific needs.

Salesforce is known for its user-friendly interface, extensive community support, and continuous innovation, making it one of the leading CRM platforms in the market today.

1.1.2 Salesforce Architecture

Salesforce is built on a multi-tenant architecture, which means that multiple customers share the same infrastructure, resources, and software. The platform is hosted on the cloud, which enables customers to access their data and applications from anywhere in the world using an internet connection.

The Salesforce architecture consists of four main layers:

1. **User Interface Layer:** The user interface layer is the front-end layer of the Salesforce platform. It includes the web-based user interface, the Lightning Experience interface, and the Salesforce mobile app. The user interface layer provides users with a user-friendly interface to interact with the platform.
2. **Application Layer:** The application layer includes the various applications and features that make up the Salesforce platform. This layer includes features like sales, marketing, customer service, and analytics.

3. Data Layer: The data layer stores all the data related to customers, accounts, leads, opportunities, and other objects. Salesforce uses a highly scalable and secure data model that ensures data integrity and security.

4. Platform Layer: The platform layer provides the infrastructure and services required to run the Salesforce platform. This includes the hardware, software, and network infrastructure required to support the platform's operations.

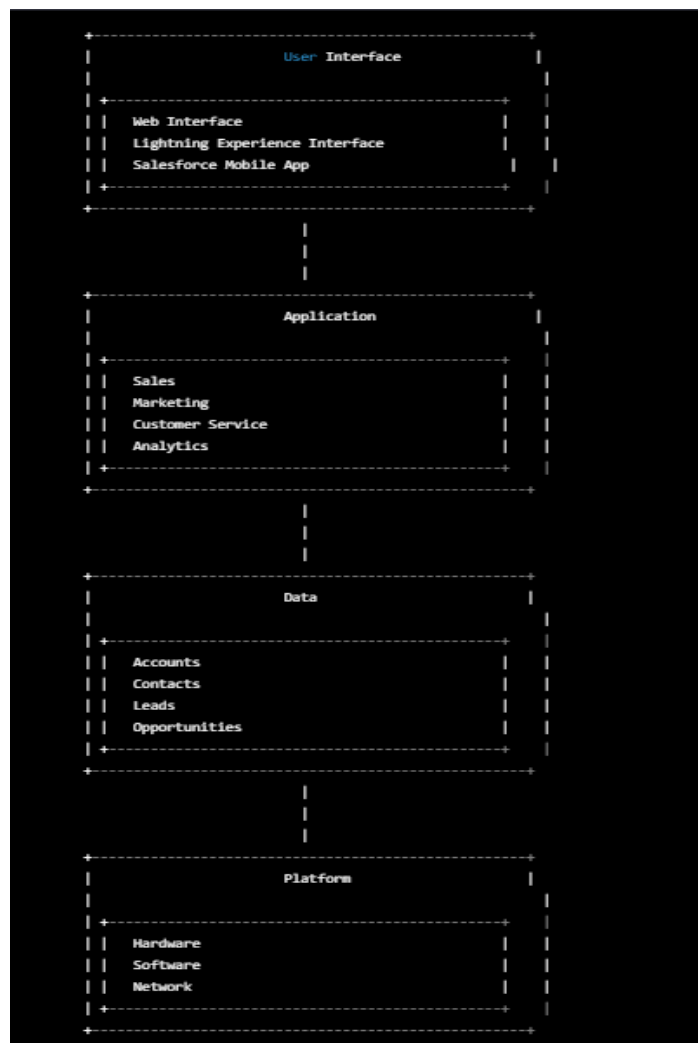


Figure 1.1.2.1 Salesforce Architecture

Overall, the Salesforce architecture is designed to be highly scalable, reliable, and secure. The platform is designed to handle large volumes of data and transactions, making it an ideal solution for large organizations with complex business processes.

1.2 PROBLEM STATEMENT

The insurance industry faces various challenges in managing customer information, policies, claims, and agents effectively. The traditional methods of managing these processes can be time-consuming, error-prone, and may not provide real-time information to decision-makers.

Some of the challenges faced by insurance companies include:

1. **Lack of centralized customer information:** Insurance companies may have customer information scattered across multiple systems, making it difficult to get a comprehensive view of the customer.
2. **Manual processes:** Traditional methods of managing policies, claims, and agents can be time-consuming and error-prone, leading to delays and inaccuracies in the process.
3. **Limited reporting capabilities:** Without real-time reporting capabilities, insurance companies may find it difficult to track key performance indicators and make informed decisions.
4. **Inefficient communication:** Inefficient communication between agents and customers can lead to delays in processing claims and other customer requests.

To address these challenges, an insurance management app in Salesforce can be developed to automate various tasks, reduce errors, and provide real-time information to decision-makers. The app can help insurance companies manage customer information, policies, claims, and agents effectively, improving business processes and customer satisfaction.

1.3 OBJECTIVES

The objectives of an insurance management app in Salesforce can include:

1. Centralize customer information: The app should be designed to centralize customer information from multiple sources, such as policy information, claims history, and communication records. This will provide a comprehensive view of the customer and enable faster and more accurate decision-making.
2. Automate processes: The app should automate various processes, such as policy management, claims processing, and agent management. This will reduce errors and time-consuming manual tasks, leading to increased efficiency and productivity.
3. Real-time reporting: The app should provide real-time reporting capabilities to track key performance indicators, such as claims processing times, customer satisfaction, and agent performance. This will enable insurance companies to make informed decisions and improve business processes.
4. Improve communication: The app should enable efficient communication between agents and customers, such as through chat or email. This will improve customer satisfaction and speed up the claims process.
5. Enhance security: The app should ensure the security of customer information and comply with relevant regulations, such as GDPR and CCPA. This will protect the privacy of customers and maintain the trust of stakeholders.
6. Provide a seamless user experience: The app should provide a seamless user experience for agents, customers, and other stakeholders. This will increase adoption and satisfaction with the app, leading to better outcomes for the insurance company.

1.4 ORGANISATION OF REPORT

Chapter 1- Knowledge of CRM and introduction to Salesforce, Salesforce Architecture, Problem statement, objectives

Chapter 2 - Review of Literature, Literature Survey.

Chapter 3 - Drawbacks of the Current system and need for proposed System, Project Planning, and the basis of developing a model for the recruiting application along with Salesforce features used.

Chapter 4 - System Implementation & Coding, Explanation of all modules with screenshot.

Chapter 5 - The testing mentioned in Software Engineering, Validation In Validation testing, Screenshots with explanation

Chapter 6 - Conclusion and Scope of future work

CHAPTER 2
REVIEW OF LITERATURE

CHAPTER 2

REVIEW OF LITERATURE

2.1 INTRODUCTION

The insurance industry is a highly competitive and regulated industry that requires efficient management of customer information, policies, claims, and agents. Traditional methods of managing these processes can be time-consuming, error-prone, and may not provide real-time information to decision-makers. To address these challenges, an insurance management app in Salesforce can be developed to automate various tasks, reduce errors, and provide real-time information to decision-makers.

Salesforce is a leading cloud-based customer relationship management (CRM) platform that provides a range of tools and features to manage customer information, sales, marketing, and service. An insurance management app in Salesforce can leverage the platform's capabilities to provide a centralized system for managing policies, claims, and agents.

The app can help insurance companies to manage customer information effectively, automate various tasks, reduce errors, and provide real-time information to decision-makers. By doing so, the app can help insurance companies to improve business processes, increase efficiency, and enhance customer satisfaction.

This project report aims to provide a detailed overview of an insurance management app in Salesforce. It will cover the problem statement, objectives, architecture, features, and benefits of the app. The report will also discuss the implementation process, including the development approach, testing, deployment, and maintenance.

2.2 LITERATURE SURVEY

A literature review is an evaluative report of information found in the literature related to your selected area of study. The review should describe, summarize, evaluate, and clarify this literature. It should give a theoretical base for the research and help you to determine the nature of your research.

When conducting research, a literature review is an essential part of the project because it covers all previous research done on the topic and sets the platform on which the current

research is based. No new research can be taken seriously without first reviewing the previous research done on the topic.

[1]

The use of Salesforce as a platform for building insurance management applications is becoming increasingly popular in the insurance industry. Here are some relevant literature sources that discuss the benefits and challenges of developing insurance management apps in Salesforce:

[2]

Salesforce for Insurance: An Overview by Salesforce provides an overview of the benefits of using Salesforce as a platform for insurance management. It discusses the capabilities of the Salesforce platform, such as the ability to centralize customer information and automate processes, and provides examples of how insurance companies have used Salesforce to improve their operations.

[3]

Building the Future of Insurance with Salesforce by Deloitte discusses how Salesforce can be used to build next-generation insurance applications. It covers topics such as using Salesforce for customer engagement, underwriting, claims management, and analytics.

[4]

Salesforce for Insurance: Driving Customer-Centricity in the Digital Era by Accenture discusses how Salesforce can help insurance companies to become more customer-centric by providing a centralized view of customer information and enabling more efficient communication.

[5]

Challenges of Implementing Salesforce in the Insurance Industry by Nagendra Kumar and Jyoti Ahuja discusses the challenges of implementing Salesforce in the insurance industry, such as data quality issues, integration challenges, and cultural resistance to change. The authors also provide recommendations for overcoming these challenges.

[6]

Salesforce as an Insurance Management System: An Analysis by Tanuj Gupta analyzes the use

of Salesforce as an insurance management system and discusses the benefits and challenges of using the platform. The author concludes that Salesforce can provide significant benefits to insurance companies, but also highlights the need for careful planning and implementation to ensure success.

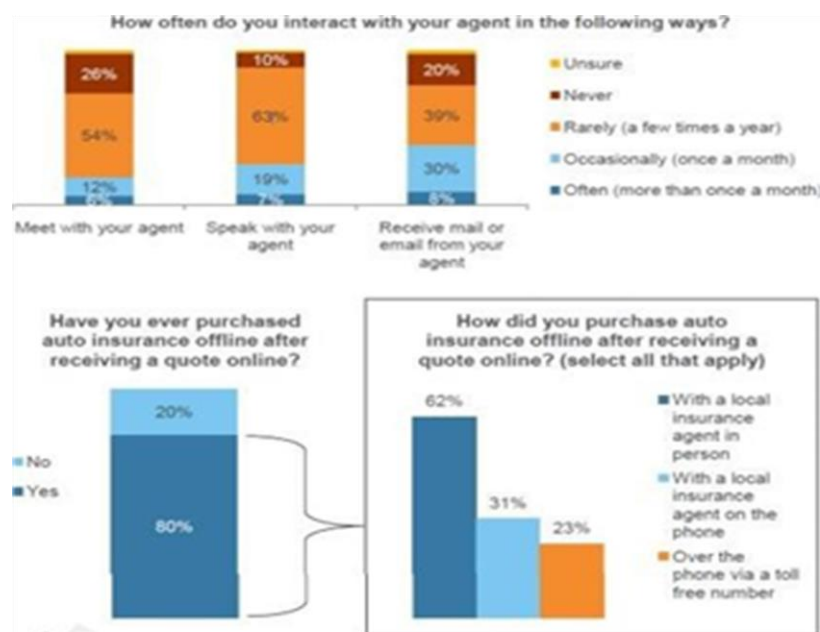
2.2.1 FEASIBILITY STUDY

A feasibility study is an evaluation of the practicality and potential success of a proposed project. It is typically conducted at the beginning of a project to assess its viability and help stakeholders make informed decisions about whether to proceed with the project.

The feasibility study examines various aspects of the project, such as its technical, economic, operational, legal, and regulatory feasibility. The goal of the study is to identify potential problems and challenges that may arise during the development and implementation of the project and to evaluate the risks and benefits of the project.

The legal and regulatory feasibility of the project involves assessing whether the project complies with relevant laws, regulations, and industry standards. This includes evaluating data privacy and security requirements and ensuring that the project meets industry-specific regulations.

Based on the results of the feasibility study, stakeholders can make informed decisions about whether to proceed with the project, modify the project scope, or abandon the project. The feasibility study can also help the project team to make informed decisions about the scope, budget, and timeline of the project.



2.2.2 TECHNICAL FEASIBILITY

The technical feasibility of developing an insurance management app using Salesforce depends on a few key factors. These include:

1. **Platform compatibility:** The first consideration is whether the Salesforce platform is compatible with the requirements of the insurance management app. This includes evaluating whether the platform can support the necessary features, integrations, and customizations required by the app.
2. **Technical resources:** Developing an app requires technical expertise and resources. The feasibility of the project depends on whether the development team has the necessary skills and experience to build the app using Salesforce. It also depends on whether the team has access to the required resources, such as development tools, testing environments, and production servers.
3. **Security:** Security is a critical consideration when developing an insurance management app. The feasibility of the project depends on whether the app can meet the security requirements of the insurance industry and comply with relevant regulations. Salesforce provides several security features and certifications that can help ensure the security of the app.
4. **Scalability:** The insurance management app needs to be scalable to accommodate the needs of a growing user base. The feasibility of the project depends on whether the app can scale effectively using Salesforce's infrastructure.

Overall, the technical feasibility of developing an insurance management app using Salesforce is high. The Salesforce platform provides a robust development environment, extensive customization options, and a scalable infrastructure. The platform also provides a range of security features and certifications that can help ensure the app meets industry-specific requirements. With the right technical expertise and resources, it is feasible to develop an effective insurance management app using Salesforce.

2.2.1 ECONOMICAL FEASIBILITY

The economic feasibility of developing an insurance management app using Salesforce depends on several factors, including development costs, ongoing maintenance costs, and the potential return on investment (ROI).

1. **Development Costs:** The development costs associated with building an insurance management app using Salesforce depend on the complexity of the app and the

technical expertise required to build it. These costs may include licensing fees, development tools, testing environments, and development resources. However, Salesforce offers various development tools and resources that can help reduce overall development costs.

2. **Maintenance Costs:** The ongoing maintenance costs associated with the insurance management app include server and database maintenance, bug fixes, feature enhancements, and updates. These costs can add up over time, but Salesforce provides a robust infrastructure that reduces overall maintenance costs.
3. **Return on Investment (ROI):** The potential ROI of the insurance management app depends on the market demand for the app, the pricing strategy, and the target customer base. The app could potentially generate revenue through subscription fees, usage fees, or commissions on insurance policies sold through the app. The ROI can be estimated by comparing the expected revenue generated by the app with the development and maintenance costs over a specified period.

2.2.2 OPERATIONAL FEASIBILITY

The operational feasibility of an insurance management app using Salesforce refers to whether the app can be integrated into the organization's existing operational processes and systems. This includes evaluating whether the app can effectively meet the needs of the users and whether the organization has the necessary resources to implement and maintain the app.

1. **User Acceptance:** One of the critical factors in the operational feasibility of the app is user acceptance. The app needs to be user-friendly and easy to use for the target audience. Salesforce offers various customization options to ensure that the app meets the specific needs of the users.
2. **Integration:** The insurance management app should be integrated with the organization's existing systems, including customer relationship management (CRM) systems, databases, and other applications. Salesforce provides several integration options, including application programming interfaces (APIs) and web services, which make it easier to integrate the app with other systems.
3. **Training:** The successful implementation of the insurance management app depends on whether the users are trained to use the app effectively. Salesforce provides various training resources, including online training courses, user manuals, and support

documentation, which can help ensure that users can use the app effectively.

4. **Maintenance:** The operational feasibility of the app also depends on whether the organization has the necessary resources to maintain and update the app. Salesforce provides ongoing support, maintenance, and updates for the app, which can help ensure that the app remains operational and up-to-date.

2.2.3 SCHEDULE FEASIBILITY

Schedule feasibility refers to whether the development of the insurance management app using Salesforce can be completed within a reasonable timeframe.

1. **Resource Availability:** The availability of resources, including the development team and any necessary hardware or software, can impact the schedule feasibility of the project. The organization needs to ensure that the development team has the necessary resources to complete the project on time.
2. **Development Approach:** The development approach used can also impact the schedule feasibility of the project. An agile development approach may be more suitable for developing the insurance management app as it allows for flexibility and can help ensure that the app meets the changing needs of the users.
3. **Development Timeframe:** The development timeframe for the insurance management app will depend on the complexity of the app, the scope of the project, and the availability of resources. It is essential to set realistic timelines and milestones to ensure that the project remains on track.
4. **Testing and Deployment:** Testing and deployment are critical phases in the development of the insurance management app. It is essential to allocate sufficient time for testing and ensure that the app is thoroughly tested to ensure its quality and reliability.

CHAPTER 3

PROPOSED SYSTEM

CHAPTER 3

PROPOSED SYSTEM

3.1 DRAWBACKS OF THE CURRENT SYSTEM AND NEED FOR THE PROPOSED SYSTEM

3.1.1 THE PROBLEM IS EXISTING SYSTEM

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 a bank, or we should contact an agent, or buy a policy online. If we go to the bank then 1st problem is where to enquire and how long is the procedure. And if we get the perfect place then this will become a very lengthy process as there are so many faults in this possibility. Then, although we bought the policy bank is not going to provide him with service.

3.1.2 SOLUTION

An insurance management app using Salesforce provides a comprehensive solution for managing insurance policies and claims. Some of the key solutions that the app can provide include:

1. **Policy Management:** The app allows users to create, manage, and track insurance policies, including policy information, premiums, coverage details, and renewal dates.
2. **Claims Management:** The app allows users to submit, process, and track insurance claims, including claim information, documentation, approvals, and payments.
3. **Customer Relationship Management (CRM):** The app includes CRM functionality that allows users to manage customer information, communications, and interactions, including sales leads, marketing campaigns, and customer support.
4. **Reporting and Analytics:** The app provides comprehensive reporting and analytics capabilities that allow users to generate reports, analyze data, and gain insights into

policy and claims performance.

5. Collaboration and Communication: The app includes collaboration and communication features that allow users to collaborate on policies and claims, share information and documents, and communicate with customers and team members.

3.2 PROJECT PLANNING

Project planning is part of project management, which relates to the use of schedules such as Gantt charts to plan and subsequently report progress within the project environment. Initially, the project scope is defined and the appropriate methods for completing the project are determined. Following this step, the durations for the various tasks necessary to complete the work are listed and grouped into a work breakdown structure. Project planning is often used to organize different areas of a project, including project plans, workloads, and the management of teams and individuals. The logical dependencies between tasks are defined using an activity network diagram that enables the identification of the critical path. Project planning is inherently uncertain as it must be done before the project is started. Therefore, the duration of the tasks is often estimated through a weighted average of optimistic, normal, and pessimistic cases. The critical chain method adds "buffers" in planning to anticipate potential delays in project execution. Float or slack time in the schedule can be calculated using project management software. Then the necessary resources can be estimated and costs for each activity can be allocated to each resource, giving the total project cost. At this stage, the project schedule may be optimized to achieve the appropriate balance between resource usage and project duration to comply with the project objectives.

Gantt charts are usually created initially using an early start time approach, where each task is scheduled to start immediately when its prerequisites are complete. This method maximizes the float time available for all tasks. We worked on our project from April to August. First, we discussed our topic and the domain of the project in April. Then the Project is finalized and information is collected related to the project from April and then the planning and designing of the project were done from April to May. Lastly, the execution of the project was done in May. The following Gantt chart summarizes the work done in the project.

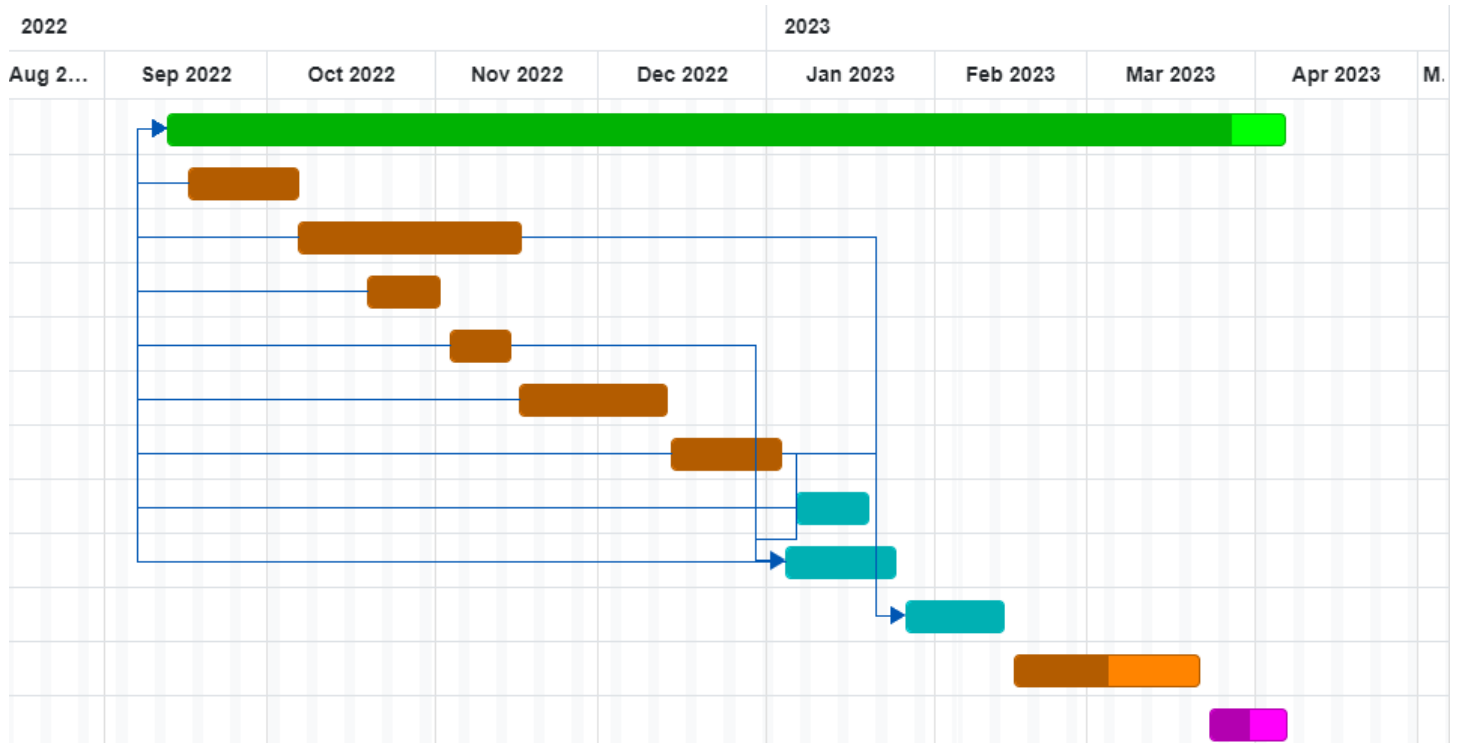


FIGURE 3.4.1 GANTT CHART

3.2.1 WORK BREAK DOWN STRUCTURE

In project management and systems engineering, a work breakdown structure (WBS) is a deliverable homeward breakdown of a project into smaller components. A work breakdown structure is a critical project deliverable that divides the work of the team into manageable chunks. A hierarchical breakdown of the overall scope of work that the project team must do to meet the project's objectives and create the intended deliverables.

According to the Project Management Institute, WBS is "a deliverable-oriented hierarchical decomposition of the work to be accomplished by the project team to achieve the project objectives and produce the needed deliverables" (PMI). A WBS structure must be built in such a way that each new level in the hierarchy includes all of the work required to fulfill its parent job, according to PMI's definition. This indicates that for a parent task element to be considered complete, it must have at least one child task.

Table. 3.2.2 Work Break Down Structure

TASK NO.	TASK	DURATION (in days)
1	DISCOVERY	15
2	PLANNING	25
3	LITERATURE SURVEY	10
4	SRS	6
5	SYSTEM ANALYSIS	15
6	SYSTEM DESIGN	10
7	SPRINT RELEASE	5
8	VERIFICATION TESTING	15
9	VALIDATION TESTING	12
10	DEPLOYMENT	10

3.3 SYSTEM DESCRIPTION AND SRS

3.3.1 CUSTOMER REQUIREMENTS

1. For the provider and the user to stay connected the customer requires a high-speed internetconnection.
2. For login purposes, the customer requires a username and password to use the application.

3.3.2 HARDWARE REQUIREMENTS

TABLE 3.3.2 HARDWARE REQUIREMENTS

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

3.3.3 SOFTWARE REQUIREMENTS

TABLE 3.3.3 SOFTWARE REQUIREMENTS

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

3.3.4 FUNCTIONAL REQUIREMENTS

- User Management: The ability to create, modify and delete user accounts, roles, and permissions.
- Lead and Opportunity Management: The ability to manage leads and opportunities, including capturing and tracking sales leads, managing pipelines, and forecasting.
- Contact and Account Management: The ability to manage customer and partner contacts, as well as account information, including financial details and other relevant data.

- **Sales and Marketing Automation:** The ability to automate sales and marketing tasks, including email campaigns, lead nurturing, and personalized messaging.
- **Reporting and Analytics:** The ability to generate real-time reports and dashboards that provide insights into customer engagement, sales trends, and other key performance indicators.
- **Collaboration and Communication:** The ability to facilitate collaboration and communication among teams, including task management, project management, and team chat.
- **Mobile Access:** The ability to access Salesforce through mobile devices, including smartphones and tablets, to enable remote working and field sales.
- **Integration with other systems:** The ability to integrate Salesforce with other systems, such as ERP or financial management systems, to enable seamless data exchange and business process automation.
- **Customization and Extensibility:** The ability to customize and extend Salesforce functionalities through the use of custom objects, fields, workflows, and other tools.
- **Security and Compliance:** The ability to ensure data security and compliance with regulatory requirements, such as GDPR or HIPAA, through robust access controls, data encryption, and other security measures.

3.3.5 NON-FUNCTIONAL REQUIREMENTS

- **Performance:** The system should perform efficiently and respond quickly to user requests, even under high load conditions.
- **Scalability:** The system should be able to handle increasing volumes of data and users without affecting performance.
- **Reliability:** The system should be highly reliable, with minimal downtime and quick recovery in case of failures.
- **Security:** The system should have robust security measures in place to protect data and prevent unauthorized access.
- **Usability:** The system should be easy to use and navigate, with a user-friendly interface that requires minimal training.
- **Compatibility:** The system should be compatible with different devices, browsers, and operating systems.

- Compliance: The system should comply with regulatory requirements and industry standards, such as GDPR, HIPAA, or PCI-DSS.
- Support: The system should have adequate support and documentation to assist users and administrators with any issues or questions.

3.4 SYSTEM ANALYSIS

3.4.1 ENTITY-RELATIONSHIP DIAGRAM

In the above ER diagram, The first object to create is the Account object. This object stores information about your account such as name and account number. Next, there is an object called Insurance which has a lookup with account and contact object this object consists of status and other information like account information insurance policies policy holder names. Next, there is the Transaction Object which consists of the Transaction date, status, its no, and amount and it has a lookup relation with the insurance and account object.

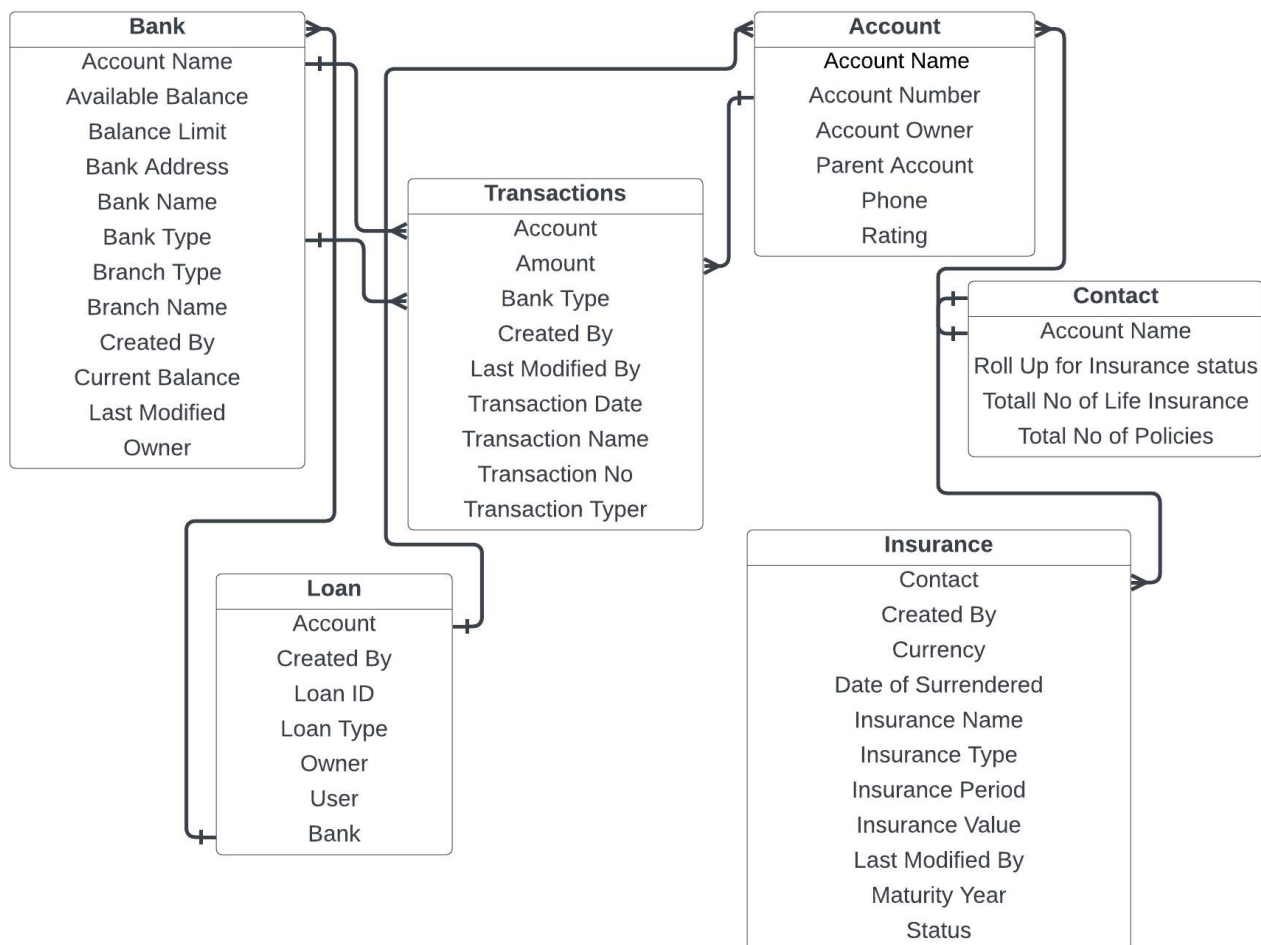


FIGURE: 3.4.2 ER DIAGRAM PLAN

3.5 SYSTEM DESIGN

3.5.1 SYSTEM ARCHITECTURE

1. **User Interface:** The user interface can be developed using Salesforce Lightning Design System (SLDS). SLDS provides a set of pre-built CSS, JavaScript, and design guidelines for building user interfaces that are consistent with the Salesforce platform.
2. **Data Model:** The data model can be designed using Salesforce's built-in data modeling tools, such as the Schema Builder. The data model should include objects for policyholders, policies, claims, and payments.
3. **Business Logic:** The business logic can be implemented using Apex, Salesforce's proprietary programming language. Apex can be used to create triggers, workflows, and other custom logic that automate business processes and enforce data integrity.
4. **Integrations:** The insurance management app may need to integrate with external systems, such as third-party data sources or payment gateways. These integrations can be implemented using Salesforce's API tools, such as REST and SOAP APIs.
5. **Security:** The insurance management app should be designed with security in mind. Salesforce provides a range of security features, such as role-based access control, field-level security, and data encryption.
6. **Reporting and Analytics**
7. **Mobile App:** To extend the functionality of the insurance management app, you may consider developing a mobile app using Salesforce's Mobile SDK.



FIGURE:3.5.1 PRESENT INSURANCE

3.5.2 FLOW CHART

A flow chart is a diagram that shows application flow how the application will run and how it going to execute below is the flow chart of our proposed insurance management system. The flow chart gives detailed information about the project flow.

A flowchart is a form of a diagram that depicts an algorithm, workflow, or process by depicting the steps as various types of boxes and linking them with arrows. It's a diagram that shows the individual steps of a process in order. It's a general tool that may be used to define a variety of processes, such as manufacturing, administrative, and service processes, and project plans.

The flowchart involves data collection, data preprocessing, variable selection, regression model building, and performance evaluation.

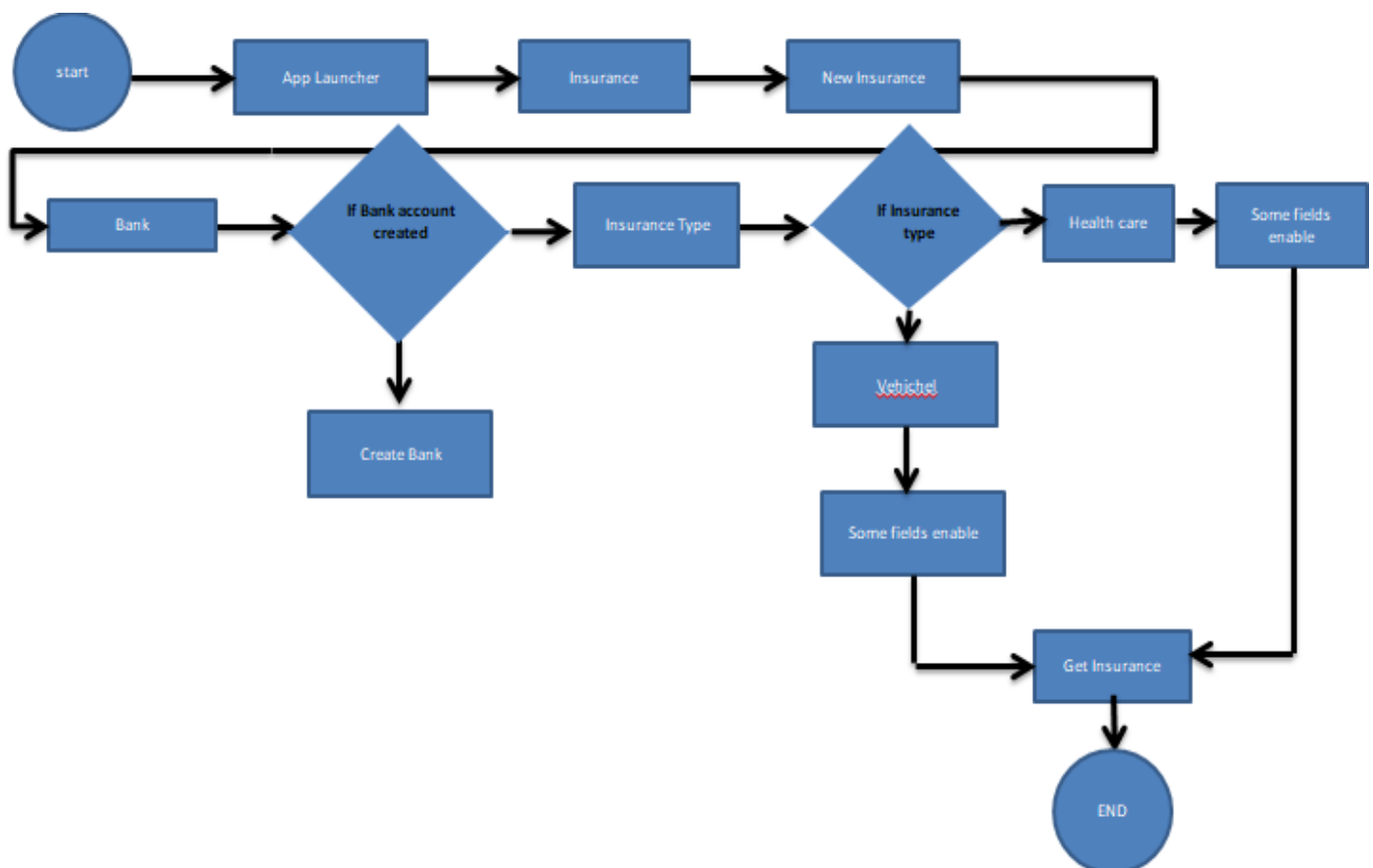


FIGURE 3.5.2 FLOW CHART

3.5.3 DATA FLOW DIAGRAM

Data Flow Diagram is abbreviated as DFD. DFD is a diagram that depicts the data flow of a system or process. It also provides information about each entity's inputs and outputs, as well as the process itself. There is no control flow in DFD, and there are no loops or decision rules.

A data flow diagram is a graphical representation of data „flow' across an information system, which models its process features. A data flow diagram (DFD) depicts the types of data that will be input to and output from the system, as well as where the data will come from and go. A data flow diagram can be depicted in a variety of ways. The DFD is a modeling tool for structured analysis. Data Flow Diagrams are widely used because they aid in visualizing the major phases and data involved in software-system processes.

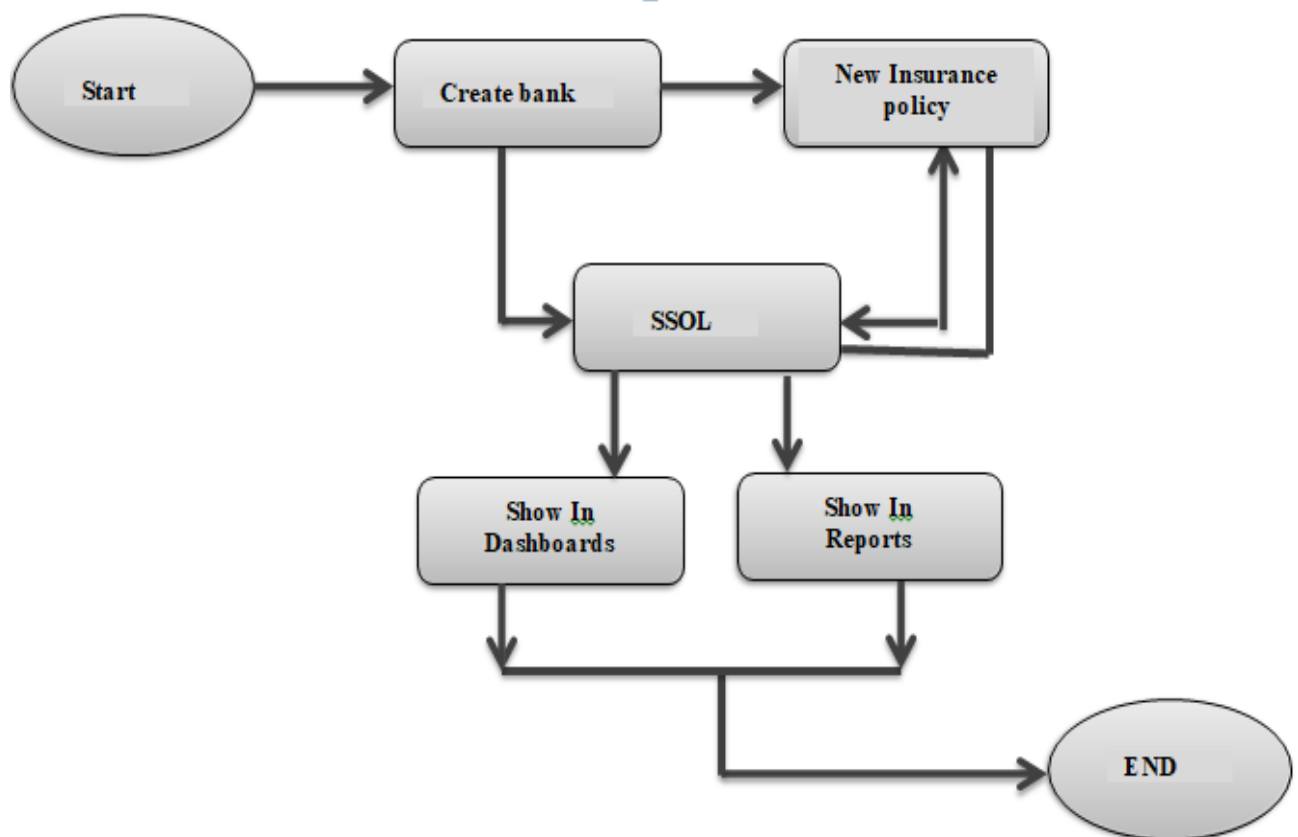


FIGURE 3.5.3 DATA FLOW DIAGRAM

3.5.4 USE CASE DIAGRAM

A Use case diagram at its simplest is a representation of a user's interaction with the system and depicts the specifications of a use case. A use case diagram will portray numerous styles of users of a system and the various ways in which they move with the system. This sort of diagram is usually utilized in conjunction with the matter use case and can often be among other types of diagrams as well.

Here user will be entering the input data required for the predictions from which the user will get respective output as predicted marks.

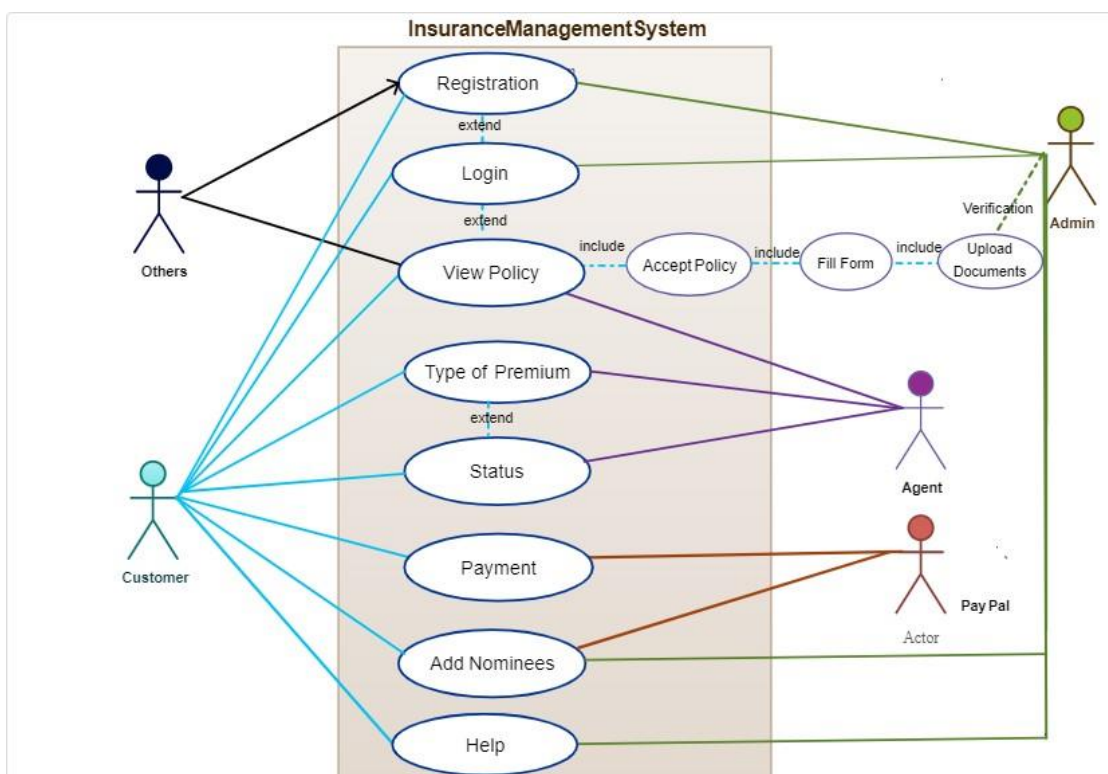


FIGURE 3.5.4 USE CASE DIAGRAM

3.5.5 INTERFACE DESIGN

Designing the interface for an insurance management app in Salesforce should prioritize ease of use, simplicity, and consistency with the Salesforce platform.

- **Navigation:** The navigation should be intuitive and easy to understand, with clearly labeled buttons and links. You can use the App Launcher to provide easy access to different sections of the app and customize the navigation bar to include frequently used features.
- **Layout:** The layout should be clean and uncluttered, with a logical flow of information. Use standard Salesforce components such as tables, lists, and forms to ensure consistency with the platform. Consider grouping related information into tabs or sections to simplify the user experience.
- **Color and branding:** Use color and branding to create a consistent look and feel for the app. You can use the Salesforce Lightning Design System to create a visually appealing interface that aligns with your brand.
- **Mobile responsiveness:** Ensure that the interface is responsive and mobile-friendly, with an optimized layout for smaller screens. Use the Salesforce Mobile App to preview and test the interface on mobile devices.
- **Accessibility:** Design the interface with accessibility in mind, making sure it is usable for people with disabilities. Use Salesforce's Accessibility Checker to identify and fix any accessibility issues.
- **Feedback and validation:** Provide feedback to users when they take an action, such as submitting a form or completing a task. Use validation rules to ensure that data is entered correctly and to prevent errors.
- **Personalization:** Allow users to personalize their interface, such as customizing their dashboard or setting their preferences. This can increase engagement and make the app more user-friendly.

CHAPTER 4

IMPLEMENTATION AND CODING

CHAPTER 4

SYSTEM IMPLEMENTATION & CODING

4.1 DEVELOPMENT AREA

4.1.1 CUSTOM APPS

Salesforce provides a separate segment in which applications can be developed and we can always start building a new application. We are using a trailhead playground to learn developing the app which is like a copy of the developer edition in which we can build custom apps and practice with Salesforce. We are Developing Insurance Management Application In Salesforce Developer Edition.

4.1.2 OBJECTS IN SALESFORCE

Those items in Salesforce are material storage tables. The key entity in the Salesforce data model describes business-related accounts/companies and entities, such as clients, partners, and rivals. Pre-defined objects in Salesforce are called standard objects. Objects that are created for the solution are called custom objects Now that the package is in place we can start creating our custom objects. The first thing is creating a custom object for reviews.

1. From Setup, click Object Manager.
2. Click Create, select Custom Object, and fill in the details.
3. In the Deployment Status section, ensure Deployed is selected.
4. In the Search Status section, select Allow Search.
5. In the Object Creation Options section, select Add Notes and Attachments related list to the default page layout.

In the same way, For the Insurance app, we have these custom objects: -

1. Bank
2. Insurance
3. Transaction
4. Loan

5. Reports & Dashboard
6. Contacts
7. Account

4.1.3 FIELDS IN SALESFORCE

Salesforce contains fields that are considered variables in the Salesforce environment, in other words, the user with the help of these fields can develop their custom object or can use the objects that are predefined using these fields. Some of the fields that are used in Salesforce are text area, formula, currency, picklist, and many more. These fields lead users to the next level of development. Similarly, we are creating custom fields on our custom job posting object which are as follows: -

1. Insurance No
2. Insurance Type
3. Amount
4. Insurance Period

4.1.4 RELATIONSHIPS IN SALESFORCE

The Force.com platform supports two types of relationships between objects between parent and child. They are relationships of lookups and relationships of master-detail. These relationships work in databases like foreign keys and connect two different objects, creating a relationship.

The look-up relationship creates a normal relationship with other objects in which now by creating the relationship we can direct from one object to the other and can create many one-to-one and many-to-many relationships. Lookup relationships are necessary because in certain situations, but not always, a relation between two objects is needed. A lookup relationship is used in situations such as relaying more than one parent record to the child record and linking to widely shared data, such as reference data.

The master-detail relationship is a much more powerful relationship in Salesforce; the object on which the master-detail is created is the child object and the object referenced is the parent object.



FIGURE 4.1 RELATIONSHIPS

4.1.5 SCHEMA BUILDER IN SALESFORCE

Salesforce Database Creator offers a complex framework to display new template objects, custom fields, and database relationships. It removes the need to check out the specifics of a master-detail relationship from page to page or to add a whole new custom field to an item in a schema. In this schema builder, all the objects are connected via our custom junction object. The position object has a self-relationship with itself and on the other hand, our junction object Job.

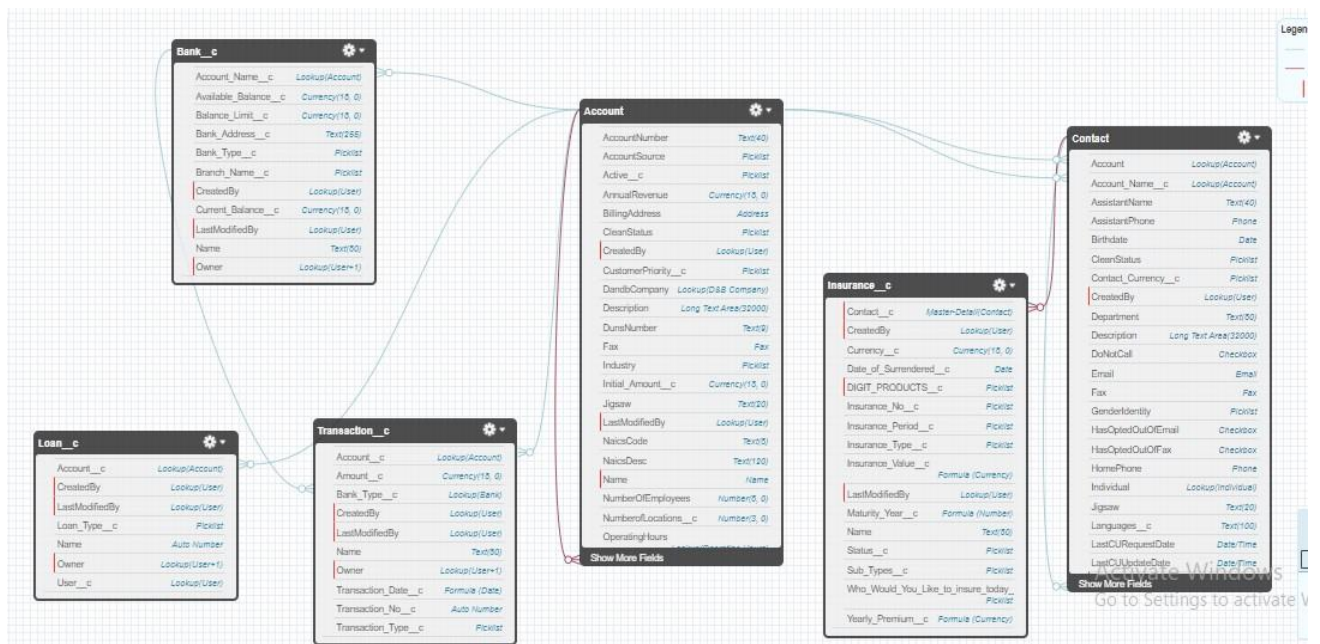


FIGURE 4.1.5 SALESFORCE SCHEMA BUILDER

4.1.6 SECURITY AND SHARING RULES IN SALESFORCE

The provision of Salesforce towards security can be seen on many levels some of which are listed below: -

1. Object Level Access: for object accessibility.
2. Field Level Access: for field accessibility.
3. Record Level Access: for record accessibility.
4. Profiles: Every user in Salesforce has a profile now using these profiles he can access or cannot access different things that are present in Salesforce. These profiles are created by the administrator of the domain the user is using. Every profile has a different set of security and sharing rules.
5. Permission Sets: Permission sets are like profiles but they give access to different stuff than the profile. It is one step higher in security through this the admin can decide to give access to fields and other related objects.
6. Field Level Permissions: If a user can view/edit fields for a given object or not.
7. Organization-Wide Default Settings: These are the default permissions and user sets defined by the organization at the default level.
8. Role Hierarchies: Like in any organization these are used to set up a hierarchy in which now people have different permission sets.
9. Sharing rules: Controlling record-level access when files are shared between the users or profiles of an organization has exceptions for org-wide defaults.
10. Manual sharing: This takes control of all the usage limitations. Someone should exchange the documents with individual people. App rights and the profile limit what the app can see. The changes made in the Salesforce desktop site are reflected in the app and mobile users to obtain the data of their organization without special configuration.

4.1.7 VALIDATION RULES IN SALESFORCE

Validation guidelines ensure that the data that a user inserts into a database complies with the requirements that you define before the database can be saved. A validation either contains a rule or formula which evaluates the data in one or more fields and returns a "Real" or "False" value. It may also contain an error message to be shown to the user when the rule returns a "Real" value due to an invalid value.

4.1.8 AUTOMATION TOOLS

Using automation tools is a very important solution for business processes because today everybody wants a personalized experience. Automation has many features but all together in simple words, it does reduce the mechanical work by making the process automatic. Automation solutions and tools provided by Salesforce are based on: -

- Integration of various systems.
- Configuration of process logic.
- Designing and building an end-user experience.
- Making the experience available from anywhere: desktop or mobile devices, internalapps, or external portals.

4.2 TOOLS

Automation processes are provided by Salesforce with the use of lightning flow which is an integrated process. The lightning flow consists of two types of declarative point clicks tools called the process builder to build processes and flow builder to build flows. To sum up the differences.

- Lightning Flow is the name of the product.
- Process Builder and Flow Builder are the names of the tools.
- Use Process Builder to make processes; use Flow Builder to make flows.

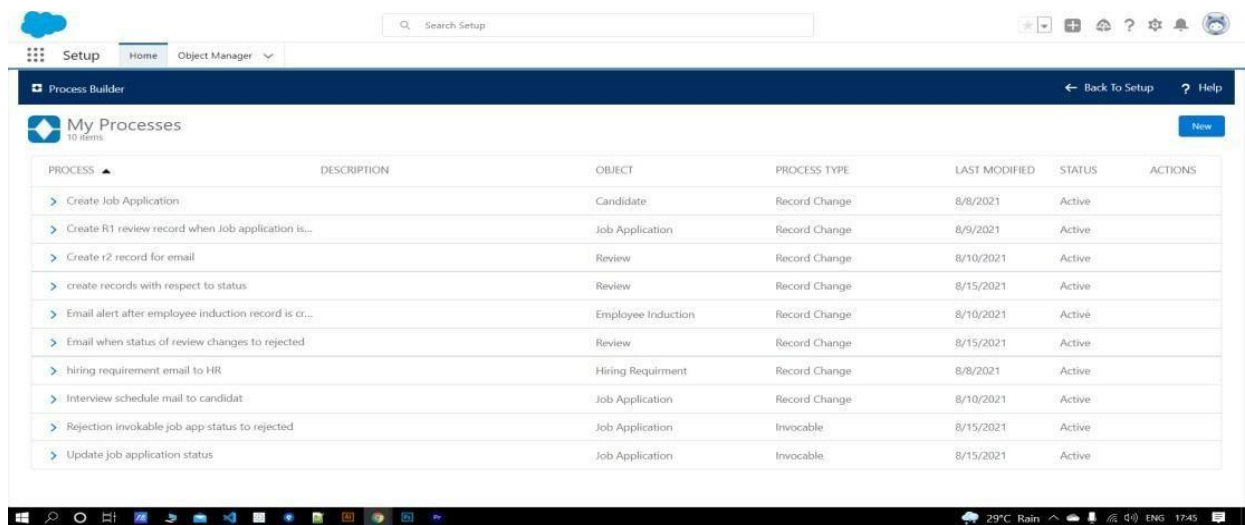
4.2.1 PROCESS BUILDER

This app contains many automated processes which use process builder tools. Some use cases are to trigger emails to candidates and create new records on cross objects when a condition evaluates to true.

Process builder uses three steps:

First: Select the object on which the process is triggered

Second: Criteria; setting the criteria for which the process is fired.



The screenshot displays the Salesforce Process Builder interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Process Builder' section is active, showing 'My Processes' with 10 items. A table lists various processes, including 'Create Job Application', 'Create R1 review record', 'Create r2 record for email', 'create records with respect to status', 'Email alert after employee induction', 'Email when status of review changes to rejected', 'hiring requirement email to HR', 'Interview schedule mail to candidat...', 'Rejection invocable job app status to rejected', and 'Update job application status'. Each row includes details on the object, process type, last modified date, status, and actions.

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Create Job Application		Candidate	Record Change	8/8/2021	Active	
> Create R1 review record when Job application is...		Job Application	Record Change	8/9/2021	Active	
> Create r2 record for email		Review	Record Change	8/10/2021	Active	
> create records with respect to status		Review	Record Change	8/15/2021	Active	
> Email alert after employee induction record is cr...		Employee Induction	Record Change	8/10/2021	Active	
> Email when status of review changes to rejected		Review	Record Change	8/15/2021	Active	
> hiring requirement email to HR		Hiring Requirement	Record Change	8/8/2021	Active	
> Interview schedule mail to candidat...		Job Application	Record Change	8/10/2021	Active	
> Rejection invocable job app status to rejected		Job Application	Invocable	8/15/2021	Active	
> Update job application status		Job Application	Invocable	8/15/2021	Active	

FIGURE 4.2.1.1 PROCESS

Third: Action; the action that needs to be fired after evaluation of the criteria to be true.

4.3 USER INTERFACE

Salesforce Main Page

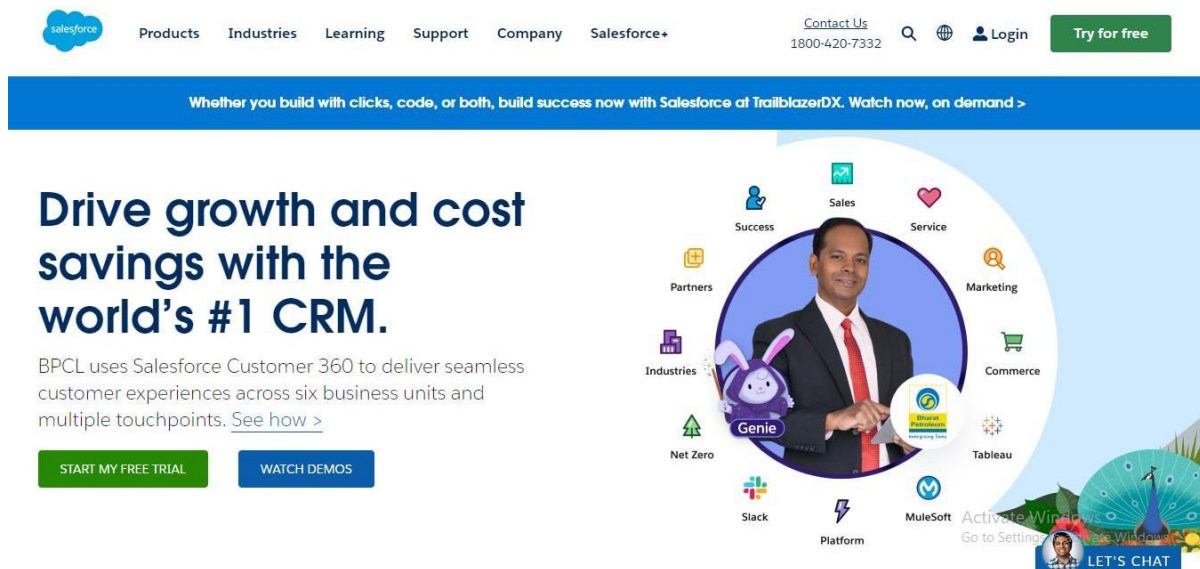


FIGURE 4.3.1 SALESFORCE MAIN

Login To Salesforce

After Registration user can log in to the Salesforce application environment by providing a username and password. The Login Page is as follows •

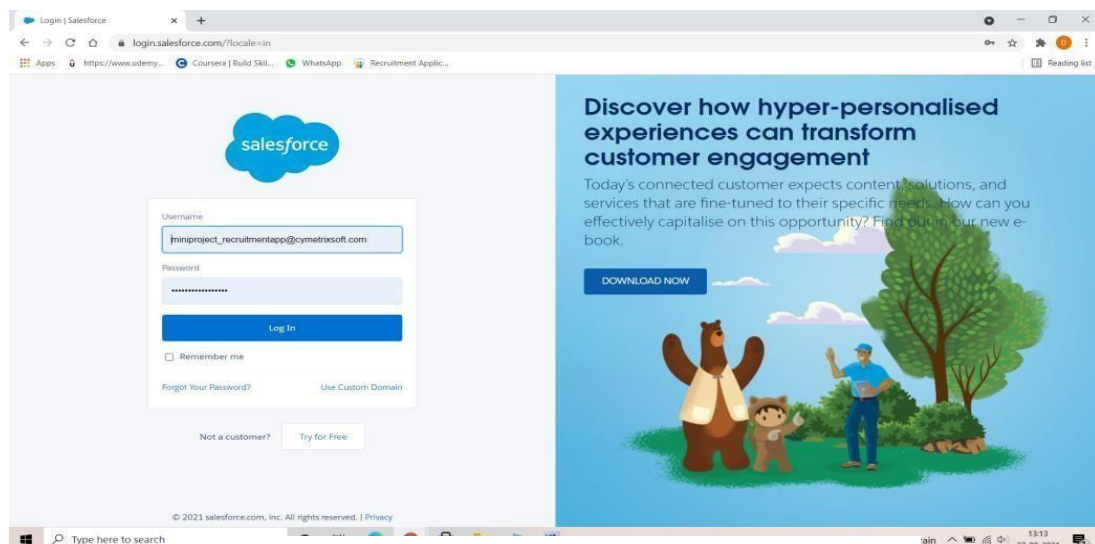


FIGURE 4.4.2 SALESFORCE

Insurance Management System Initial Page

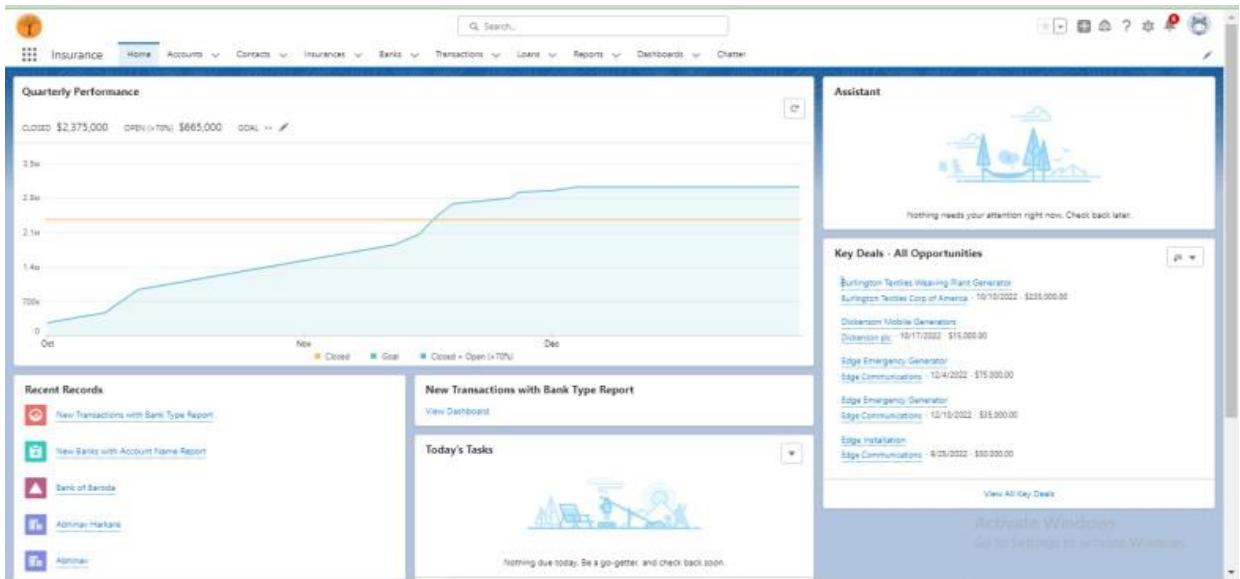


FIGURE 4.4.3 INITIAL PAGE

It is the first page the Insurer will see when they Log into Salesforce org. It contains useful dashboards for Agents to keep track of Insurance activities occurring in the company.

The screenshot shows the 'New Bank' form in Salesforce. The form is titled 'New Bank' and has a tab for 'Information'. The fields are as follows:

- * Bank Name:** A required text field with a red border and a red error message 'Complete this field.'
- Account Name:** A text field with a search icon and a placeholder 'Search Accounts...'.
- Bank Type:** A dropdown menu with '--None--' selected.
- Bank Address:** A text field.
- Branch Name:** A dropdown menu with '--None--' selected.
- Balance Limit:** A text field.
- Available Balance:** A text field.
- Current Balance:** A text field.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows the Salesforce interface with a sidebar for 'Insurances' and a 'Recently Viewed' list.

FIGURE 4.3.4 NEW BANK ACCOUNT

It is a new bank account opening page those who want to create a new insurance policy must have a bank account in any bank.

FIGURE 4.3.5 NEW INSURANCE POLICY

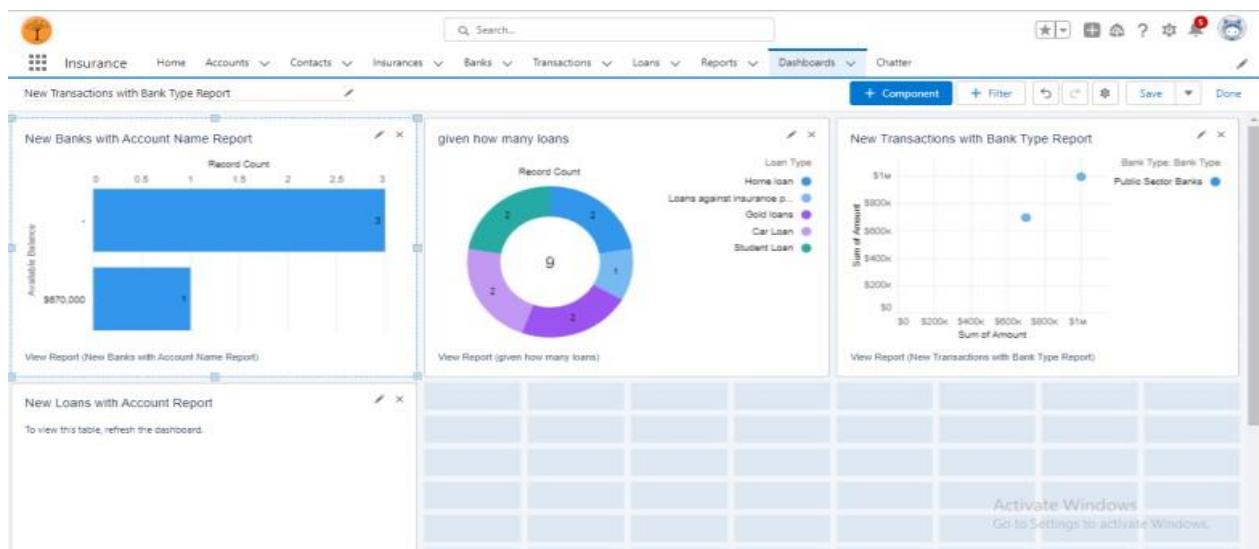


FIGURE 4.3.6 DAHBOARDS

Above Figure 4.3.6 is a **Dashboards** page that only Agent can see.

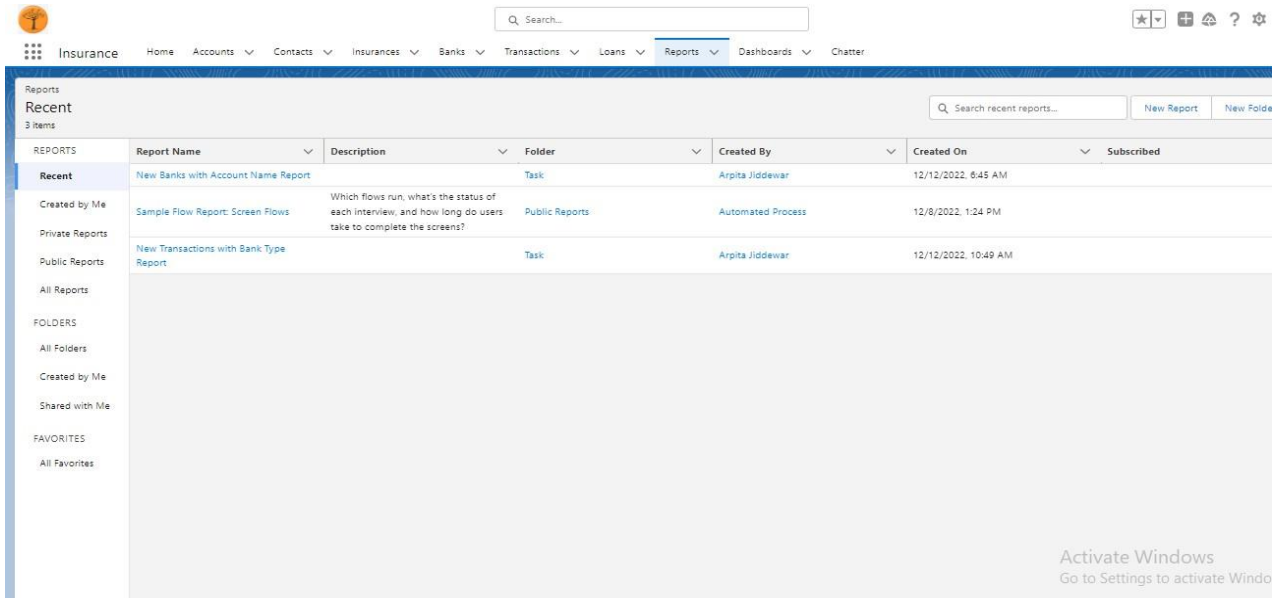


FIGURE 4.3.7 REPORTS

Above Figure 4.3.7 is a **Reports** page which only the Agent can see.

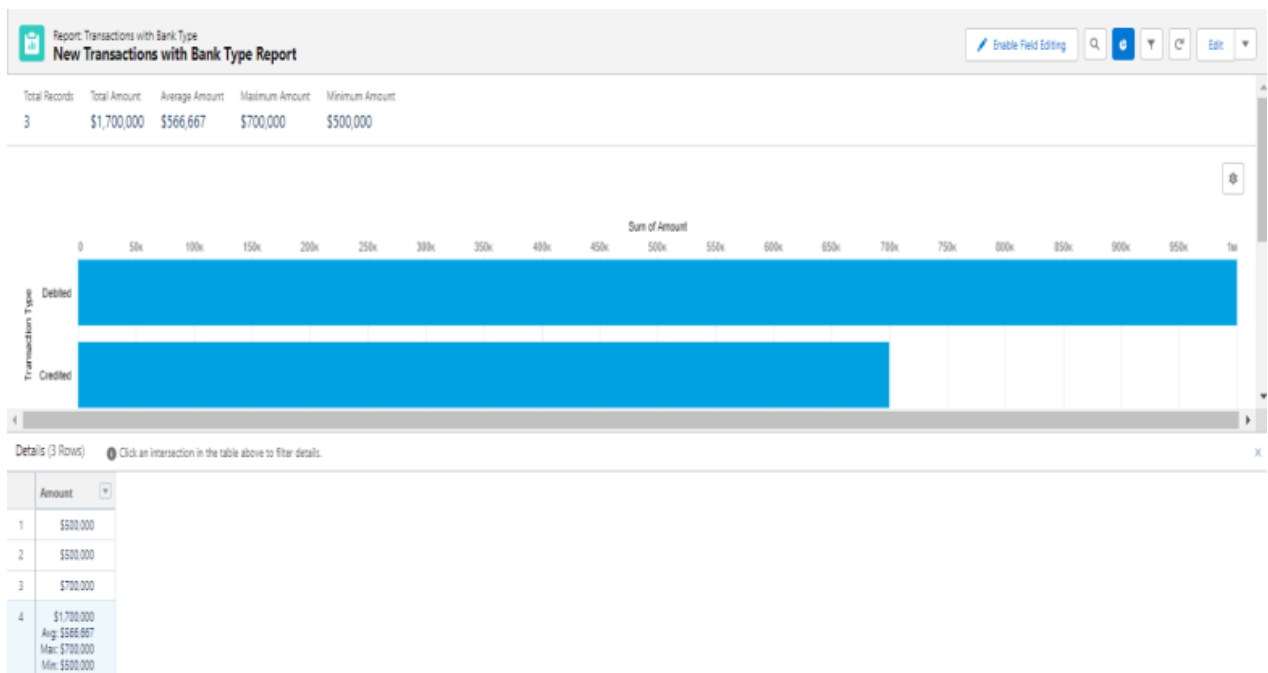


FIGURE 4.3.8 NEW TRANSACTIONS WITH BANK TYPE REPORT PAGE

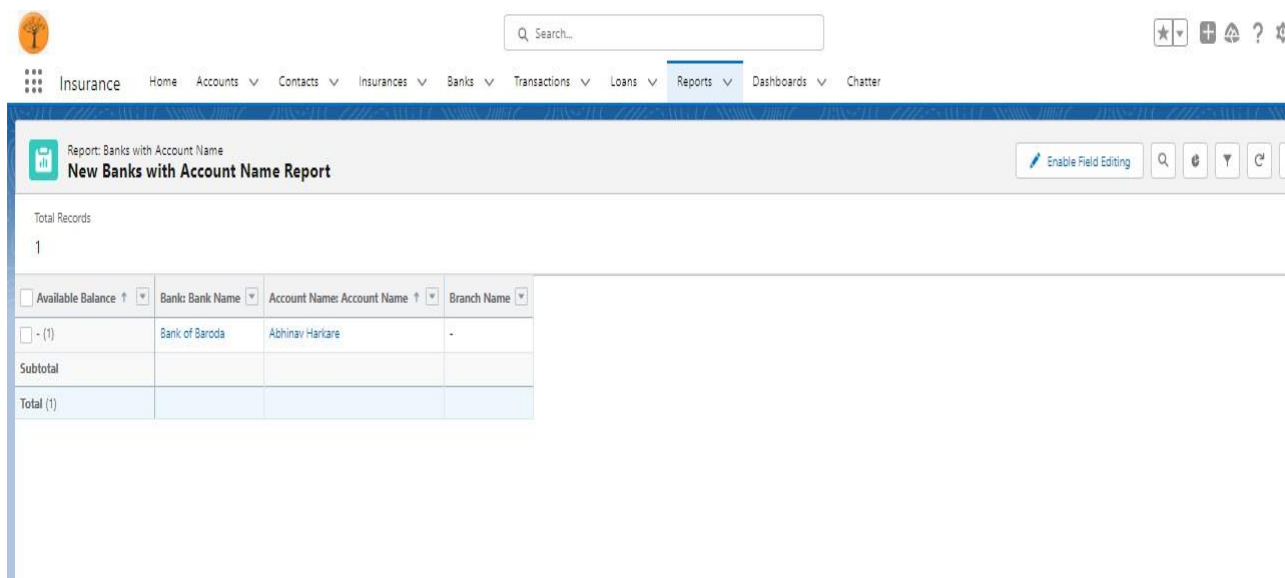


FIGURE 4.3.9 NEW BANKS WITH ACCOUNT NAME REPORT PAGE

The above figure, 4.3.9 shows the New Banks with the Account Name of the customers on the Insurance portal along with the Branch Name Available Balance in his account.

CHAPTER 5

TESTING

CHAPTER 5

TESTING

5.1 TESTING IN SALESFORCE

5.1.1 UNIT TESTING

Unit tests are testing processes in which tests are run in large condos using the help of test classes. Each test class contains different types of cases or input values so that the outcome does provide the required solution.

Unit testing is black-box testing and it's a software development process in which Salesforce test classes are developed in apex on the developer console and these consoles are run through the Salesforce platform only.

Unit testing is usually an automated process but sometimes it is done in self mode i.e. it is used in EXTREME PROGRAMMING which Is a programmatic declaration of continuous testing and revision.

1. Conditions of testing: Normal Conditions –
A variety of states are tested.
2. Edge Cases –
Input conditions are bad – Conditions on the boundary
 1. Some Regressions
Force. com-specifics – Apex reaches, Triggers, etc.

5.1.2 UAT TESTING

User acceptance testing is one of the final steps before the project or the developed application is deployed. The end-users who use the application are the best testers as from the beginning till the end almost everything depends on user experience. For the above type of user experience, we need to conduct acceptance testing so that the application is deployed confidently as the user is with us and the application will serve the purpose. Bugs are also removed with the help of usability testing. There are some bugs that the developer doesn't recognize the first time.

5.1.3 HOW TESTING IS DONE

In our simple project, we have not used the apex developing tool or visual force pages so we can't use the provided testing tools on the other hand Salesforce provides us with a demo of the recruiting app created. We can simply launch our app from our Salesforce playground or the developer org and can test the implemented features. For further deployment of the app, we have to buy an enterprise edition of Salesforce where we get different sandboxes that can be used for proper development and testing of the application along with the implementation of apex classes and visual force pages in a proper manner.

5.1.4 TEST CASES

Software testing is an important part of software quality assurance because it provides the final check of specifications, design, and code generation. The growing visibility of software as a system element, as well as the expenses associated with software as a system failure, are driving forces for well-planned, thorough testing. It's pretty uncommon for a software development company to devote 30 to 40% of a project's total work to testing. Human-related software testing (e.g., flight control, nuclear reactor monitoring) can be three to five times more expensive than all other software engineering processes put together. Testing is the process of running a program to detect errors.

TABLE 5.3 TEST CASES TABLE

Sr. No	Test Cases	Input	Actions
1	Test Case for Login	Correct Username and Password. Incorrect Username or password or both of them.User login Successfully.	User login Successfully. Your login attempt has failed. The username or password may be incorrect
2	Test Case for Insurance Record	Not Empty.	Error: Insurance Name is Mandatory
3	Test cases for Dependent Fields	If you Do not choose the parent Field Dependent field will not allow you to insert data.	First, select Parent Field
4	Test cases for Formula Field	IF(ISPICKVAL(Sub_Types__c , 'TERM PLAN'), 100, IF(ISPICKVAL(Sub_Types__c , 'UNIT LINKED INSURANCE PLAN'), 130, IF(ISPICKVAL(Sub_Types__c, ' THIRD PARTY INSURANCE'), 75, IF(ISPICKVAL(Sub_Types__c, 'FIRE'), 50, NULL))))	The field Will be blank

New Insurance

Information

* Insurance Name Complete this field.

* Status Complete this field.

Insurance No

Insurance Type View all dependencies

* DIGIT PRODUCTS View all dependencies

Sub-Types View all dependencies

Insurance Period

* Contact

Currency

We hit a snag.

Review the following fields

- Insurance Name
- Status

Cancel Save & New Save

FIGURE 5.1.4.1 TEST CASE FOR INSURANCE RECORD

Edit Dependencies

Insurance Type

* DIGIT PRODUCTS Complete this field.

Sub-Types

Insurance Period

Who Would You Like to insure today

Cancel Apply

FIGURE 5.1.4.2 TEST CASES FORDEPENDENT FIELDS

CHAPTER 6

CONCLUSION & FUTURE SCOPE

CHAPTER 6

CONCLUSION AND SCOPE OF FUTURE WORK

6.1 CONCLUSION

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

Not only the high class people anyone can get their Insurance Policies and get their benefits. It is not just for quadragenarian children old people can also get its benefits.

The Insurance app was a small implementation of Salesforce features but an important implementation as every organization has its management team and using this small implementation can give them a quick start.

6.2 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 savings, the other big reason is of course safety. The main benefit of insurance is to provide support in times of need.

1. Developed to be used by all people
2. Can be used by students for study purposes.
3. It eradicates fake policy-providing websites.
4. This project can bring a revolution in the insurance industry.
5. Keeps the capability to centralize the insurance industry in India and shall keep

Like all the major Projects this project also has a huge scope for improvement but accomplishing those would have been difficult and tedious in the given time interval. Therefore, in the future, the created application can:

1. Apex developing tools.
2. Using self-developed classes and triggers
3. Using Flows and Screens
4. Data analytics could also be implemented for smoother and more prompt reports.
5. Automate AI Business Tools

CHAPTER 7

REFERENCES

CHAPTER 7

REFERENCE

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CHAPTER 8
ANNEXURE

CHAPTER 8

ANNEXURE I –STAKEHOLDERS AND PROJECT MEMBERS' DETAILS

1. Stakeholder Details

Project Title: INSURANCE MANAGEMENT APPLICATION USING SALESFORCE

Project Type: INDUSTRY-BASED PROJECT

Stakeholders:

Sr no.	Stakeholder	Name	The designation, Company name	Contact No.	email id
1	Industry Mentor	Sweta Dey	Salesforce Developer Cymetrix Software	8779430975	Sweta.dey@cymetrixsoft.com
2	Project Guide	Vishal Tiwari	Assistant Professor, SVP CET	8308831248	vtiwari@stvince ntngp.edu.in
3	Alumni Mentor	Moin baig	Senior Software Developer	7249173913	moin.b@cymetrixsoft.com

2. Project Members Details

Sr no.	Name	Roll no	Contact no.	Email id
1	Arpita Jiddewar	02	7517064362	arpitaj.it20d@stvincentngp.edu.in
2	Abhinav Harkare	32	9834682261	abhi11harkare@gmail .com
3	Pranava Kapse	59	9921253768	pranavakapse@gmail.com

ANNEXURE II – PROJECT-SPECIFIC PO MAPPING TABLE

Program Outcomes	Weak	Moderate	Strong
PO1-Engineering Knowledge			✓
PO2-Problem Analysis			✓
PO3-Design/Development of Solutions			✓
PO4-Conduct Investigations of Complex Problems		✓	
PO5-Modern Tool Usage			✓
PO6-The engineer and society			✓
PO7-Environment and Sustainability		✓	
PO8-Ethics		✓	
PO9-Individual and Teamwork			✓
PO10-Communication			✓
PO11-Project management and finance		✓	
PO12-Life-Long learning			✓

Subject Mapping:

This project is completely Product-based and to implement it we went through various existing projects and modules similar to this. We studied the papers and documentation. It helped in modifying and getting better output for our project.

Quality of Product:

- | | |
|---|--|
| <input checked="" type="checkbox"/> Environment | <input checked="" type="checkbox"/> Safety |
| <input checked="" type="checkbox"/> Ethics | <input checked="" type="checkbox"/> Cost |

Type of Project:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Application | <input checked="" type="checkbox"/> Product |
| <input type="checkbox"/> Research | <input type="checkbox"/> Review |