Phase 6: User Interface Development

This phase focused on designing and customizing the user interface of the **Insurance Policy Automation System** to make navigation simpler and record management more efficient for users such as **Agents, Managers, and Admins**.

The major UI components implemented in this project include:

- Custom Tabs

- App Creation

- Page Layouts for various custom objects

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1. App Creation – "Insurance Policy Management"

Purpose:

To provide a centralized workspace that contains all the relevant objects (**Customer, Policy, Claim, and Mentor**) under a single app for smooth operation and better accessibility.

Implementation Steps:

1. Navigate to **Setup → App Manager → New Lightning App**

2. Click **New Lightning App** and fill in the details:

   o **App Name:** Insurance Policy Management

   o **Developer Name:** Insurance_Policy_Management

3. Select **Navigation Style:** Standard Navigation

4. Add **Navigation Items (Tabs):**

   o Home

   o Customer

   o Policy

   o Claim

   o Mentor

5. Assign the app to the required user profiles (**System Administrator, Standard User**)

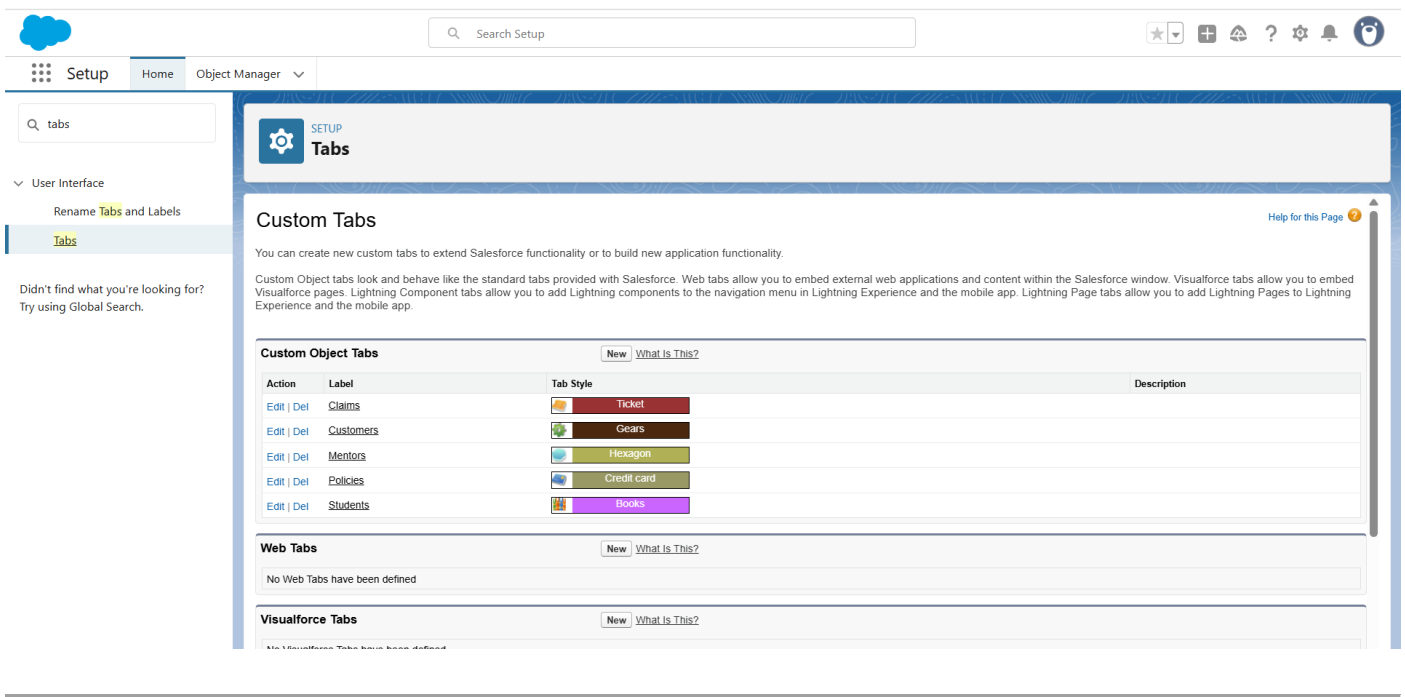6. Click **Finish** to create and launch the app

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2. Custom Tabs Creation

Purpose:

Tabs help users navigate directly to different records or modules such as **Customer**, **Policy**, **Claim**, and **Mentor**.

Implementation Steps:

1. Go to **Setup → Tabs → New**

2. Choose **Custom Object Tab**

3. Select the desired custom object (e.g., **Customer**)

4. Enter the **Tab Label** and select a **Tab Style** (icon and color)

5. Repeat the process for all required objects:

   o Customer

   o Policy

   o Claim

   o Mentor

6. Add these tabs to the **Insurance Policy Management App** navigation bar

3. Page Layout Customization

Purpose:

To display only the relevant fields and related lists for each object, ensuring that data entry and record viewing are simple and organized.

Implementation Steps:

1. Navigate to **Setup → Object Manager → Select Object (e.g., Policy)**

2. Click **Page Layouts → Edit** (or create a new layout)

3. Add or arrange required fields:

   o **For Customer:** Name, Email, Contact Number, Address

   o **For Policy:** Policy Number, Type, Premium, Coverage Amount, Start & End Dates

   o **For Claim:** Claim Type, Amount, Status, Submission Date

4. Add **Related Lists** (e.g., Customer → Policies → Claims) for linked data visibility

5. Save the layout and assign it to the appropriate profiles