

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:
 - **App Name:** Insurance Policy Management
 - **Developer Name:** Insurance_Policy_Management
 3. Select **Navigation Style:** Standard Navigation
 4. Add **Navigation Items (Tabs):**
 - Home
 - Customer
 - Policy
 - Claim
 - 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

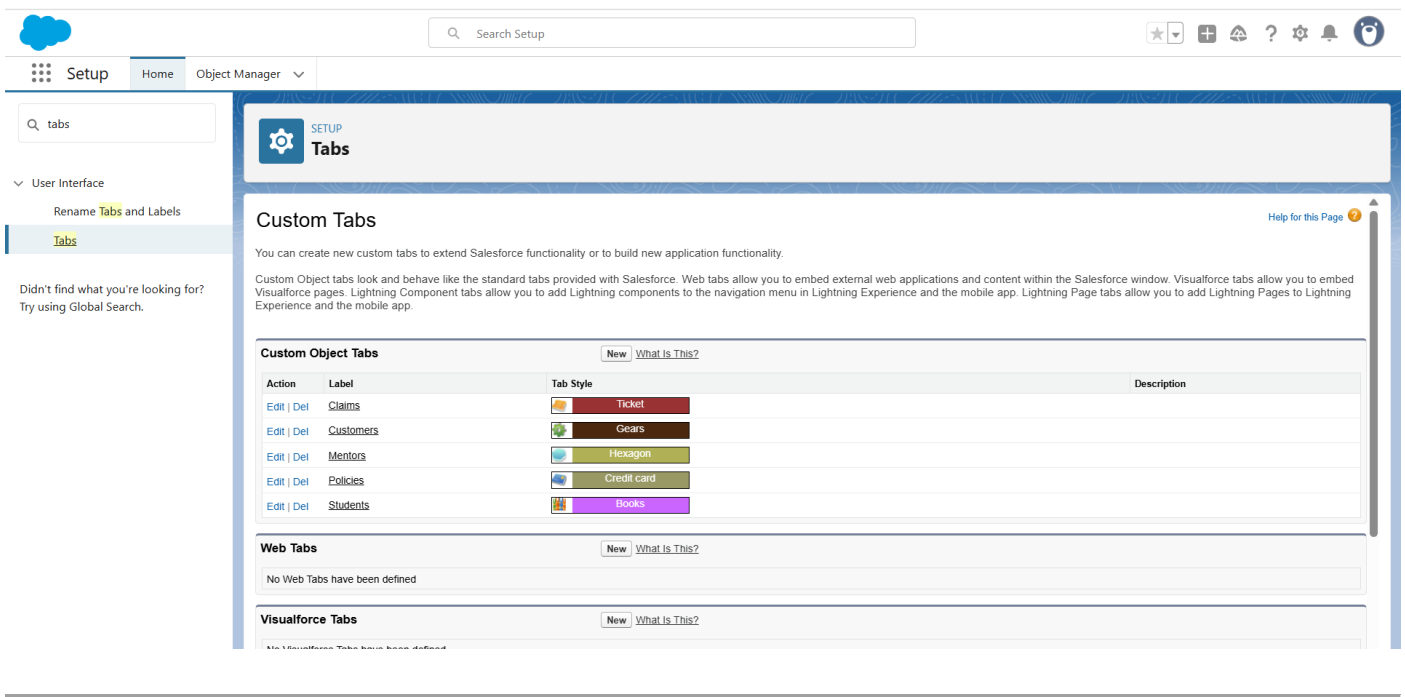
Purpose:

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:
 - Customer
 - Policy
 - Claim
 - 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:
 - **For Customer:** Name, Email, Contact Number, Address
 - **For Policy:** Policy Number, Type, Premium, Coverage Amount, Start & End Dates
 - **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

SETUP > OBJECT MANAGER

Policy

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section End Date Policy Name

Blank Space Last Modified By Policy Type

Created By Owner Premium

Customer Policy Name Start Date

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Policy Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Custom Buttons

Information (Header visible on edit only)

Policy Name Sample Text Owner Sample Text

Policy Name Sample Text

Policy Type Sample Text

Premium \$123.45

Start Date 10/4/2025

End Date 10/4/2025

Customer Sample Text

System Information (Header visible on edit only)

SETUP > OBJECT MANAGER

Claim

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

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Record Types

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Scoping Rules

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Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section Claim Name Last Modified By Status

Blank Space Claim Number Owner

Amount Claim Policy Policy

Claim Date Created By Policy Type

Claim Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Custom Buttons

Information (Header visible on edit only)

Claim Name Sample Text Owner Sample Text

Claim Number GEN-2004-001234

Claim Date 10/4/2025

Amount \$123.45

Status Sample Text

Policy Sample Text

Policy Type Sample Text

Claim Policy Sample Text

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

Custom Links (Header visible on edit only)

SETUP > OBJECT MANAGER

Customer

Details

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Quick Find Field Name

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Related Lists

Report Charts

Section Date of Birth Last Modified By Phone

Blank Space Email Last Name

Created By First Name Last Name

Customer Name First Name Owner

Customer Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Custom Buttons

Information (Header visible on edit only)

Customer Name Sample Text Owner Sample Text

First Name Sample Text

Last Name Sample Text

Email sarah.sample@company.com

Phone 1-415-555-1212

Date of Birth 10/4/2025

First Name Sample Text

Last Name Sample Text

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

Custom Links (Header visible on edit only)