

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:
 - o Customer
 - o Policy
 - o Claim
 - o Mentor
6. Add these tabs to the **Insurance Policy Management App** navigation bar

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The 'Custom Tabs' section lists five custom object tabs:

Action	Label	Tab Style	Description
Edit Del	Claims	Ticket	
Edit Del	Customers	Gears	
Edit Del	Mentors	Hexagon	
Edit Del	Policies	Credit card	
Edit Del	Students	Books	

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

SETUP > OBJECT MANAGER

Policy

Page Layouts

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

Fields

Section	End Date	Policy Name
Blank Space	Last Modified By	Policy Type
Customer	Owner	Premium
	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)

Custom Links (Header visible on edit only)

SETUP > OBJECT MANAGER

Claim

Page Layouts

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

Fields

Section	Claim Name	Last Modified By	Status
Blank Space	Claim Number	Owner	
Amount	Claim Policy	Policy	
Claim Date	Created By	Policy Type	

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.

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)

Custom Links (Header visible on edit only)

SETUP > OBJECT MANAGER

Customer

Page Layouts

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

Fields

Section	Date of Birth	Last Modified By	Phone
Blank Space	Email	Last Name	
Created By	First Name	Last Name	
Customer Name	First Name	Owner	

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.

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)

Custom Links (Header visible on edit only)