

## Admin Project

### Insurance project:

Customer details are in contact object and Insurance details are in “Insurance\_c” given below. Create master details relationship in such a way that customer may have more than one Insurance policy.

Insurance\_c

Field Label	Types	Values
Insurance No	Picklist	INS-{000},0001
Insurance Types	Picklist	Life Insurance, Motor Insurance
Sub-Types	Picklist	Term plan, Unit Linked Insurance plan, Third party Insurance Fire
Insurance period	Picklist	10,20.30,3&2
Yearly premium	Formula	If Term plan=>100USD, If Unit Linked Insurance plan=>130USD, If Third party Insurance=>75USD
Status	Picklist	In force, Claimed, Surrendered
Maturity Date	Formula	Today+ Insurance period
Insurance value	Formula	Yearly premium*Insurance period
Date of Surrendered	Date	
Insure	Master-detail	To contact object

- 1) Create data modelling (object Relationship),Tab and include under new custom app called “Insurance” create both classic and Lightning

- 2) Create Field dependency between Insurance type and sub-types as follows

Insurance Types	Sub-Types
Life Insurance	Term plan
Life Insurance	Unit linked Insurance plan
Motor Insurance	Third party Insurance
Motor Insurance	Fire

Insurance Types	Insurance period
Term plan	10,15,20
Unit linked Insurance plan	10,15
Third party Insurance	3,2
Fire	2

- 3) Add necessary tabs under the app insurance
- 4) Customize page layout mark the status as required
- 5) Add at least 20 contact records and 3 to 5 Insurance records for each contact use import wizard/data loader
- 6) Roll up total number of policies under each contact
- 7) Roll up total no of life Insurance and total no of motor Insurance for each contact
- 8) Roll up how many in force and surrendered
- 9) Do not allow users to edit the policy records if surrendered and claimed
- 10) Custom-profile-Insurance (od salesforce platform License)

Object	Create	Read	Edit	Delete
Contact	Yes	Yes		No
Insurance	Yes	Yes		

- 11) Create roles

Insurance VP



Insurance Manager



## Insurance Agent

12) Create below users and assign the profile and roles as given

Name of User	User License	Profile (cloned from salesforce platform)	Role
Sam Jacob	Salesforce platform	Insurance	Insurance VP
Ram Kumar	Salesforce platform	Insurance	Insurance Manager
Suresh Reddy	Salesforce platform	Insurance	Insurance Agent

### 13) Email to Insurance Manager whenever the Insurance is surrendered

- I. Create a public group and include the users in the role insurance Manager & Insurance VP
- II. Create an email template and include the below Message  
Subject: {! Insurance\_c, Sub-Types}  
Has been surrendered

Dear manager

The below Insurance has been surrendered

Details

Insurance Name: {! Insurance\_c, Sub-Types}

Insurance Value: {! Insurance\_c, Insurance\_value\_c}

Date of Surrendered:

Maturity date:

Regards,

Insurance Team.

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14) Update date of surrendered with current date when status is changed to surrendered.

15) Implement validation to avoid users editing the status from surrendered to any other values and also restrict changing the field Insurance types

16) Provides extra permission only to users Sam Jacob & Ram Kumar to edit the Insurance records

17) Provide extra permission only to users Sam to edit the contact records

18) Restrict users to edit the Insurance records except users in the role of Insurance manager should be able to edit the Insurance Records which are not surrendered

19) Create a report of Insurance which shows total policy values by customer with a funnel chart

20) Create a welcome message on the home page (Lightning) and /or sidebar (do this in classic also)