SALESFORCE ADMIN PROJECT -1

SALESFORCE INSURANCE MANAGEMENT SOLUTION

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VERSION HISTORY				
VERSION	**APPROVED BY**	**REVISION DATE**	**DESCRIPTION OF CHANGE**	**AUTHOR**
1.0	Sitharthan V	14/04/2024	Project Contributor	Sitharthan V
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1. ***PROJECT SUMMARY***

- ✓ The project needs to deploy a fully functional insurance management system within Salesforce platforms. This one involves generating custom objects including "Contact" as well as "Insurance__c" with a lookup relationship among them. Dependency fields are created which are interdependent, and one custom app is created named "Insurance" and made available under Classic and Lightning experiences.

- ✓ The page layouts are designed to be custom by marking certain things as mandatory and placing the appropriate data into the right fields. Users will not be allowed to edit insurance records on the account that are surrendered or claimed, this must be handled by the users assigned to specific profiles and permissions in the system.

- ✓ The rules relating to validation are established to guarantee cleanliness of data, such as restrictions on editing certain fields or changing statuses. Moreover, the project deals with incorporating roles in the role hierarchy assigning users with suitable profiles and role responsibilities assigned to them.

- ✓ In the end, the system is designed to facilitate a client contact and their associated insurance policy needs by implementing processes to ensure data reliability and security.

2. ***PROJECT DESCRIPTION***

- ✓ The project involves the creation of custom objects, fields, relationships, and user roles within Salesforce to facilitate the management of customer contacts and insurance policies. Additionally, the implementation of record types, field dependencies, validation rules, and permission sets will ensure data integrity, security, and ease of use.

3. ***PROJECT SCOPE***

- ✓ The scope of the project encompasses the design and configuration of the insurance management system within Salesforce, including the establishment of data models, user interface customization, automation of premium calculations, validation of policy status changes, and assignment of user permissions based on roles and profiles.

4. ***BUSINESS DRIVERS***

- ✓ The main forces behind this project are the necessity to achieve efficient operations along with data accuracy and security, maximum user access control and client experience harmony to be fulfilled by the insurance agents, managers and customers. The organization plans to solve the challenge of technicity by modernizing the insurance management process that will increase productivity and decrease the number of errors, hence, improve customer satisfaction.

5. **CURRENT PROCESS**

- ✓ Currently, the management of insurance policies relies on manual data entry, spreadsheets, and disparate systems, leading to inconsistencies, errors, and delays in policy processing and tracking. The lack of integrated user access controls also poses security risks and hampers data governance efforts.

6. ***PROPOSED PROCESS***

- ✓ The proposed process involves the creation of custom objects for Contact and Insurance, establishing a lookup relationship between them, configuring field dependencies, validation rules, and permission sets, and defining user roles within the Salesforce hierarchy. Additionally, record types will be utilized to differentiate between insurance agents specializing in people insurance and vehicle insurance.

7. ***FUNCTIONAL REQUIREMENTS***

- ✓ Creation of Contact and Insurance custom objects.
- ✓ Establishment of lookup relationship between Contact and Insurance.
- ✓ Configuration of custom fields for insurance details such as Insurance No, Types, Sub-Types, Premium Paid, etc.
- ✓ Implementation of field dependencies between Insurance Types and Sub-Types.
- ✓ Customization of page layouts to display relevant fields and mark Status as required.
- ✓ Creation of validation rules to prevent editing of surrendered or claimed policies.
- ✓ Definition of custom profiles and roles for users with specific access permissions.
- ✓ Utilization of record types to differentiate between People Insurance and Vehicle Insurance agents.
- ✓ Implementation of permission sets to grant extra editing permissions to specific users

7.1 PRIORITY

Priority	Value	Rating	Description
1	Critical	1	Establish a lookup relationship between Contact and Insurance objects, as it is fundamental for data integration.
2	Critical	1	Create custom fields for insurance details such as Insurance No, Types, Sub-Types, Premium Paid, etc.
3	Critical	1	Implement validation rules to prevent editing of surrendered or claimed policies to maintain data integrity.
4	High	2	Configure field dependencies between Insurance Types and Sub-Types to ensure accurate data entry.
5	High	2	Customize page layouts to display relevant fields and mark Status as required for better user experience.
6	High	2	Define custom profiles and roles for users with specific access permissions to ensure data security.
7	High	2	Utilize record types to differentiate between People Insurance and Vehicle Insurance agents for clarity.
8	Medium	3	Create permission sets to grant extra editing permissions to specific users, improving flexibility.
9	Low	4	Add necessary tabs under a custom app named "Insurance" for better organization, but not essential.
10	Low	4	Provide extra permission only to user Sam to edit the Contact records, which is a nice-to-have feature.
11	Future	5	Implementing additional features such as integration with external systems could be considered for future releases.

8. *REFERENCES*

Name	**Location**
Custom Objects: Quick Look	https://trailhead.salesforce.com/content/learn/modules/create-a-custom-object-quick-look
Data Modeling	https://trailhead.salesforce.com/content/learn/modules/data_modeling
Setup: Quick Look	https://trailhead.salesforce.com/content/learn/modules/setup-quick-look
Validation Rules	https://trailhead.salesforce.com/content/learn/modules/validation-rules
Formulas and Validations	https://trailhead.salesforce.com/content/learn/modules/point_click_business_logic
User Management	https://trailhead.salesforce.com/content/learn/modules/lex_implementation_user_setup_mgmt
Data Security	https://trailhead.salesforce.com/content/learn/modules/data_security
Security Basics	https://trailhead.salesforce.com/content/learn/modules/security_basics
Picklist Administration	https://trailhead.salesforce.com/content/learn/modules/picklist_admin