

SALESFORCE INSURANCE MANAGEMENT SOLUTION

Establish a lookup relationship between the "Contact" object, which contains customer details, and a custom object named "Insurance__c." This relationship should be designed to allow each customer to be associated with multiple insurance policies.

INSURANCE__C

Field Label	Types	Values
Insurance No	Auto Number	INS-{000}
Insurance Types	Picklist	Life Insurance and Motor Insurance
Sub-Types	Picklist	Term Plan, Unit Linked Insurance Plan, Third Party Insurance and Fire
Insurance Period (in years)	Picklist	10, 15, 20, 3 & 2
Premium Paid?	CheckBox	Default: Unchecked
Yearly Premium	Formula	If Term Plan => 100 USD Unit Linked Insurance => 130 USD Third Party Insurance => 75 USD Fire => 50 USD
Status	Picklist	In-Force, Claimed, Surrendered
Maturity Year	Formula	Current Year + Insurance Period
Insurance Value	Formula	Yearly Premium * Insurance Period
Date of Surrendered	Date	
Insurer	Lookup	Parent is contact Object
Motor Vehicle No	Text Encrypted	
Vehicle Name	Text	
Owner's Name	Text	

Data Modeling:

- ✓ Create a lookup relationship between the "Contact" object and the custom object "Insurance__c" to associate each customer with multiple insurance policies.

SETUP > OBJECT MANAGER

Insurance

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Insurance Custom Field

Insurer

Back to Insurance

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Insurer	Object Name	Insurance
Field Name	Insurer	Data Type	Lookup
API Name	Insurer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sitharthan V. 13/04/2024, 11:34 am	Modified By	Sitharthan V. 13/04/2024, 11:34 am

Lookup Options

Related To	Contact	Child Relationship Name	Insurances
Related List Label	Insurances		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Field Dependency:

- ✓ Establish a field dependency between "Insurance Types" and "Sub-Types" to ensure proper categorization of insurance policies.

Insurance Types	Sub-Types
Life Insurance	Term Plan
Life Insurance	Unit Linked Insurance Plan
Motor Insurance	Third Party Insurance
Motor Insurance	Fire

Sub-Types	Insurance Period
Term Plan	10, 15, 20
Unit Linked Insurance Plan	10, 15
Third Party Insurance	3, 2
Fire	2

User Interface:

- ✓ Customize page layouts to mark the "Status" field as required and organize tabs under a new custom app named "Insurance" for both Classic and Lightning applications.

Data Population:

- ✓ Create at least 10 contact records and 3 to 5 different insurance records for each contact for testing purposes.

Security and Permissions:

- ✓ Define a custom profile named "Insurance" with specific object permissions for Contacts and Insurances. Assign roles within the hierarchy (Insurance VP, Insurance Manager, Insurance Agent) to users accordingly.

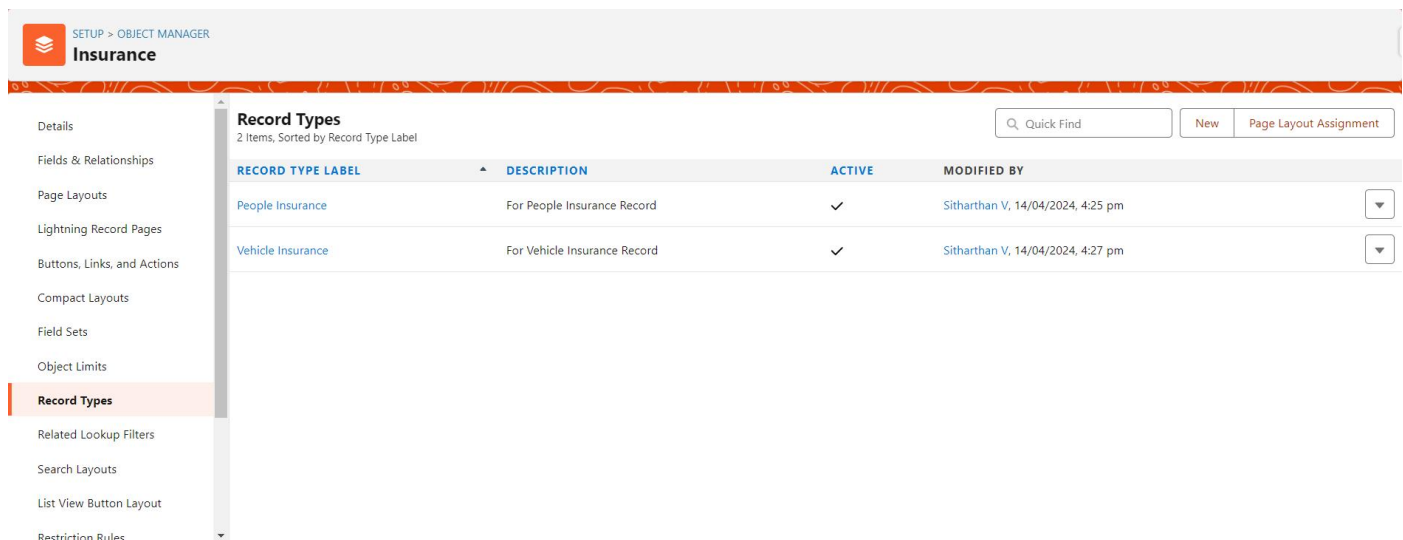
Object	Create	Read	Edit	Delete
Contact	Yes	Yes		No
Insurance	Yes	Yes		

Insurance VP
Insurance Manager
Insurance Agent

Name of the User	User License	Profile Name	Role
Sam Jacob	Salesforce Platform	Insurance	Insurance VP
Ram Kumar	Salesforce Platform	Insurance	Insurance Manager
Jeraled Giltus	Salesforce Platform	Insurance	Insurance Agent

Record Types:

- ✓ Consider there are two types of Insurance Agents such as People Insurance and Vehicle Insurance. When people insurance group creates insurance record, the picklist field Insurance Types should display only the option - Life Insurance and the fields such as Motor Vehicle No, Vehicle Name and Owner's Name should not displayed in the page layout. When an agent belong to Vehicle Insurance creates insurance record then he/she should only see Vehicle insurance option in same picklist field.



The screenshot shows the Salesforce Setup interface for the 'Insurance' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (highlighted), Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Record Types' and shows '2 Items, Sorted by Record Type Label'. It contains a table with columns: RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. The table lists two record types: 'People Insurance' and 'Vehicle Insurance', both of which are active and were modified by 'Sitharthan V' on 14/04/2024 at 4:25 pm and 4:27 pm respectively. There are 'New' and 'Page Layout Assignment' buttons at the top right of the table.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
People Insurance	For People Insurance Record	✓	Sitharthan V, 14/04/2024, 4:25 pm
Vehicle Insurance	For Vehicle Insurance Record	✓	Sitharthan V, 14/04/2024, 4:27 pm

Validation Rules:

- ✓ Implement validation rules to prevent users from editing the "Status" field once surrendered and restrict changes to the "Insurance Types" field.

1. Do not allow users to edit the policy record if surrendered or claimed.

RULE 1 :

AND

```
(  
    ISPICKVAL(Status__c, "Surrendered"),  
    ISCHANGED(Status__c)  
)
```

RULE 2 :

AND

```
(  
    ISPICKVAL(Status__c, "Claimed"),  
    ISCHANGED(Status__c)  
)
```

)
2.Implement validation to avoid users editing the status from surrendered to any other value and also restrict changing the field Insurance Types.

RULE 3:

AND

(
 ISCHANGED(Status__c),
 ISPICKVAL(PRIORVALUE(Status__c), "Surrendered"),
 NOT(ISPICKVAL(Status__c , "Surrendered"))
)

RULE 4:

ISCHANGED(Insurance_Types__c)

Permission Sets:

- ✓ Create permission sets to grant additional editing permissions to specific users, such as Sam Jacob and Ram Kumar, for both insurance and contact records.
- ✓ Provide extra permission only to users Sam Jacob & Ram Kumar to edit the Insurance records.
- ✓ Provide extra permission only to user Sam to edit the Contact records Permission Set

Security Restrictions:

Restrict users from editing insurance records except for those with the "Insurance" profile, ensuring that only unsurrendered policies are editable.

RULE 5 :

AND

(
\$Profile.Name <> "Custom-Insurance Profile",
ISPICKVAL(Status__c, "Surrendered")
)