

P&C Insurance Agency Portal

Version 1.0

Prepared By-

Tejas Phopale (x17162301)

MSc. In Data Analytics

National College of Ireland



I. Introduction:

P&C Insurance i.e. Property and Casualty insurance are the types of insurance that protects your own or business-related stuff by insuring with different coverages. Also, it covers liability coverage to help you to cover legal responsible accident to another person or person's belongings.

The "P&C Agency Portal" solution facilitates the employee of the organisations to operate well defined application which can generate new policy applications with approval hierarchy ends from Agent or Broker to Underwriter and audited by Policy Administrator. Also, people are facilitating with Online website wherein they can calculate the Premium amount by simply entering their requirement and help from support executives for further assistance with Premium amount posted on their personal Email address. The broker has reliable online website so that he/she can go to client's home/desk to avail facility to get their policy at feasible places.

II. Background, Scope & Services:

"P&C Agency portal" is the solution which generates new policy application for the peoples who wish to secure their properties and casualties. It will generate policy and calculate the premium amount based on different measures like county, coverage, deductible amount, experience mod, safety measures, class code, previous claims, prior losses etc. The responsibility of generating new policy is govern by agent or broker. The insured will get email notification with Premium amount and what coverage type he/she requested for. Agent/Broker sends that policy to underwriter for approval and underwriter will get email notification for the same.

The Underwriter will examine the policy and based on policies & criteria, he/she will make assessment of risk and reply with decision. The Underwriter makes recommendations to Management regarding loss ratios and profitability.

Underwriters are responsible for:

1. ASSESSMENT OF RISK
2. ACCEPTANCE OF RISK
3. REJECTION OF RISK

The Administrator are mainly responsible for auditing, reporting the policies and making hierarchy for the underwriters to lead agents/brokers. Also, Administrator fetch the report and maintain statistics based on Dashboard representation and provide updates to management team.

Following are the services provided by P&C Agency Portal:

- Generating Policy application for clients at organisation's office by Agents.
- Generating Policy application for clients at Client's desk by Brokers/Agents by using website. The location can be client's home or any other places outside the "P&C Agency Portal" office.
- Separate website for customers and non-customers to check the premium amount by simply entering personal details and required coverage. The person will get email

- notification and later our customer support executive will connect to those peoples for further assistance.
- The solution facilitates Underwriter to make decision based on risk assessment. Also, it provides weekly statistics for all policies during those periods.
 - The solution facilitates Administrator to get overall details solution, helps to manage agent/broker-underwriter hierarchy and audit the reports & dashboard to delivery to the management team.

III. Risk/Benefit assessment and Why Sales Force?

A good CRM system helps in increasing the accountability of the company by providing a better experience to the customers as well as employee. Instead of using traditional method which are more complicated and time consuming, Salesforce is easier and fast accessible, can be used widely, provides high level security.

We are developing our CRM using Sales Force as it is best proven and tested CRM platform. The advantages of using Sales Force are Low Cost, more Secure, Ease of Use, Flexibility and Customization, Mobile CRM, Better Customer Service, Analysis and Reporting functions, No software or hardware requirement, Automatic Updates etc.

IV. Implementation report, metadata and Content for database design:

- Description of architecture:

The critical steps for project plan are as follow:

1) The entities in our model are Client, Policy Application, Agent, Underwriter and Policy Administrator.

2) There would be hierarchy between multiple clients connecting to single agent/ broker and multiple agents/broker reports to the underwriter. The Policy administrator will be top of department to handle hierarchy and audit all the activities.

3) Client request for quotation of the policy by proving proof of identity and other details and based on details, Agent will generate a quotation and that quotation/application will be forwarded to the Underwriter for Decision based on given risk. The client will get an email regarding the status with the premium amount via Organisation Email ID. The Underwriter will get email notification once Agent submits for approval (Email Body contain "DO NOT REPLY" comment).

5) The underwriter will have authority to check all quotation/applications rose by the Agents and based on an assessment of risk he/she makes decision on it.

6) After Underwriter's Decision, Customer and Agent will get an email notification regarding decision by Underwriter from Organisation's generic email Id (Email Body contain "DO NOT REPLY" comment).

7) Policy Administrator defines underwriter's and agent's hierarchy, audits the status reports, analyse dashboard for the future outcome and provides statistics to management.

- **Business Process Flow Diagram:**

The below figure represents the business process followed in P&C Agency Portal:

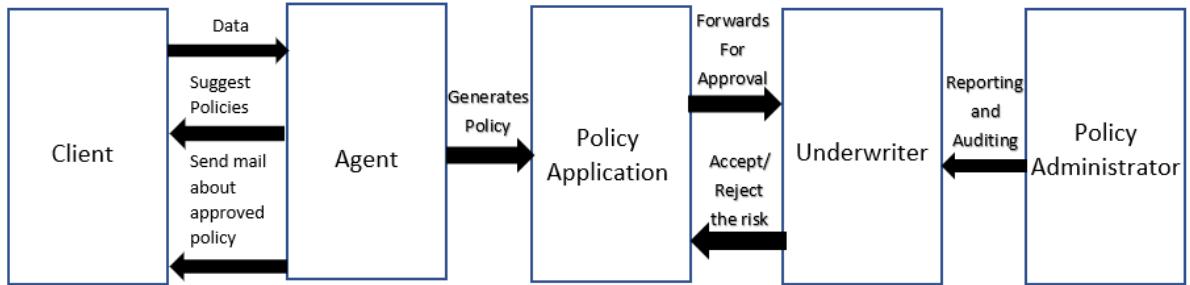


Figure 1: P&C Agency Portal Business Process Flow

- **Entity Relationship Diagram:**

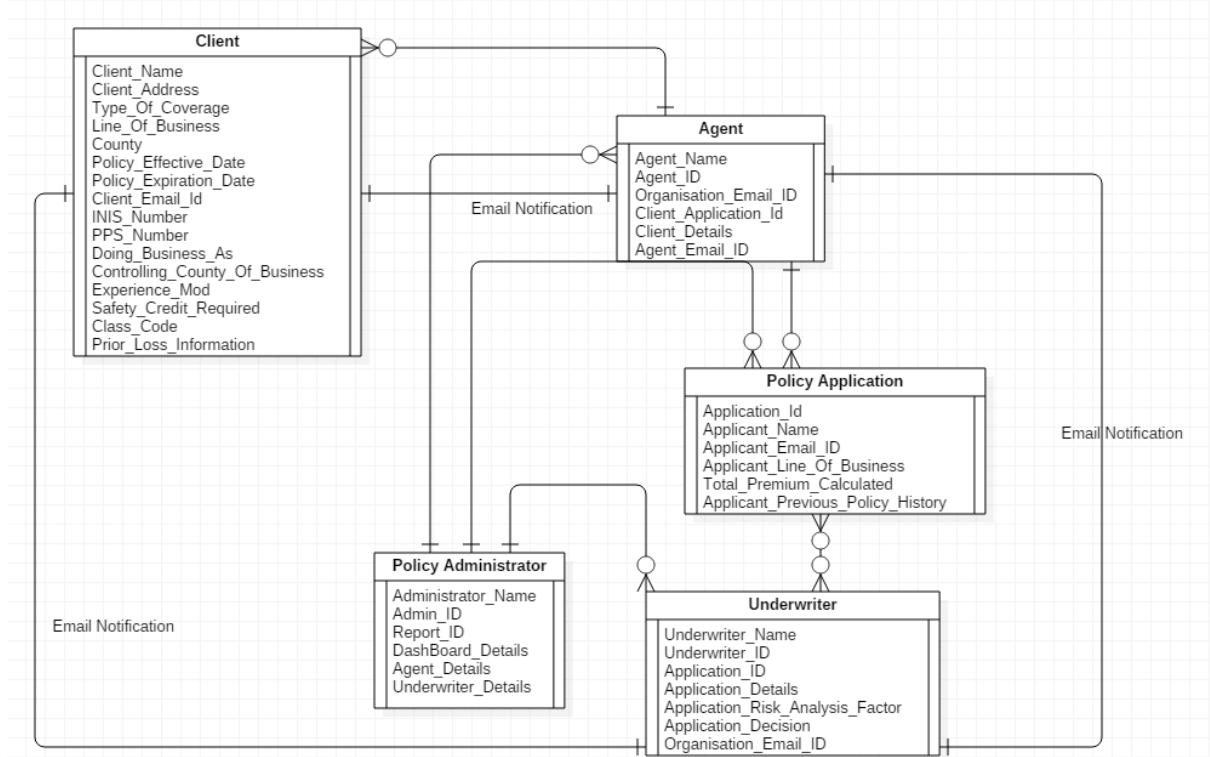
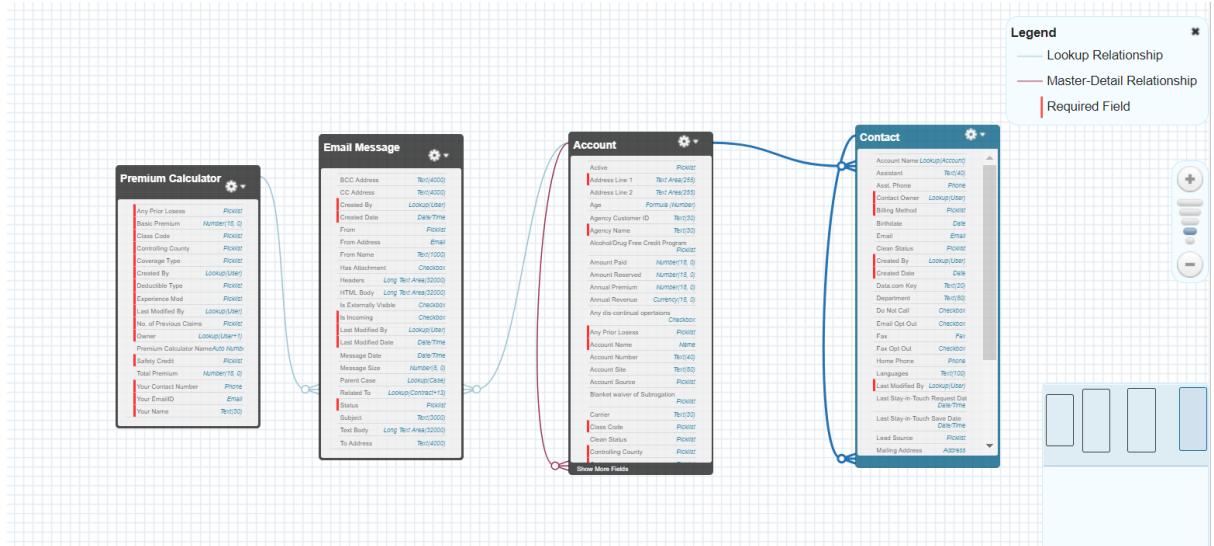


Figure 2: P&C Agency Portal Entity Relationship Diagram

- **Architecture:** The below screenshot is the schema diagram generated for the application using the schema builder:



We have visualized the application for simplicity and portability for both clients and users.

For this application we have used the below three important objects and two relevant objects.

Important Objects and their Relationships:

1) Premium Calculator: Premium Calculator is the custom object. We are using this object to facilitate website for non-customers or customers to check premium amount as per their requirement on the hosted website and they will get email notification for the same. Our customer support executive will check details of enquired person and contact for further assistance.

2) Email Message: Email message is the interconnected objects shown in schema builder which helps to get premium information to client also it helps to communicate between agent/broker and underwriter for policy application workflow.

3) Policy Applications: Policy Application is the standard object of **Account** object. The people who has approached to get policy at P&C Agency Portal by any medium including Premium Calculator will be able to generate policy by Agent at agency or broker as client's desk. Broker has website for the same to process policy application at client's desk or anywhere outside the organization.

4) Billing/Contact Information: Billing/Contact Information is standard object of **Contact** object. It has already lookup with Account Objects. So, by using inbuild functionality we have creating relationship among them. This object is useful to file the billing information of client which will be useful Billing Insurance solution to get data from this solution and get contacts details for CRM, offers and notifications.

- **Description of process control features:**

Design:

In this section of report, we have described the custom add-ons and different role level access.

The screenshot shows the Salesforce Home page. At the top, there's a navigation bar with links for Home, Chatter, Policy Applications, Billing/Contact Information, Reports, Dashboards, Premium Calculator, and a search bar. On the right side of the top bar, there are links for 'Switch to Lightning Experience', 'Tejas Phopale', 'Setup', 'Help', and a dropdown for 'P&C Insurance'. Below the top bar, there's a sidebar titled 'Recent Items' containing links to various Salesforce objects like Cases, Leads, and Contacts. The main content area is titled 'Policy Applications Home' and shows a list of 'Recent Policy Applications' with columns for Applicant Name, Mailing City, and Phone. A blue arrow points up from the bottom left towards the top bar, and another blue arrow points up from the bottom right towards the top bar.

I have created a new app “P&C Insurance” and added logos in documents and static resources for Salesforce logo, letterhead and Visualforce pages. Below are the screenshots of the same:

The screenshot shows the 'Custom App Detail' page for the 'P&C Insurance' app. At the top, it says 'App P&C Insurance' and has a link to 'Back to List: Custom Apps'. Below that, it says 'Below is the information for the custom app. Click Edit to change the custom app.' The page has sections for 'Custom App Detail', 'Edit', 'Delete', 'App Label' (P&C Insurance), 'App Name' (P_C_Insurance_Small_Logo), 'Logo' (a small logo icon), 'Description', 'Included Tabs' (Home, Chatter, Accounts, Contacts, Reports, Dashboards, Premium Calculator), 'Created By' (Tejas Phopale, 19/04/2018 08:50), 'Modified By' (Tejas Phopale, 29/04/2018 11:10), and 'Default Landing Tab' (Accounts). A blue arrow points up from the bottom left towards the top bar.

The screenshot shows the 'Documents Home' page. At the top, there's a navigation bar with links for Home, Chatter, Policy Applications, Billing/Contact Information, Reports, Dashboards, Premium Calculator, and a search bar. On the right side of the top bar, there are links for 'Switch to Lightning Experience', 'Tejas Phopale', 'Setup', 'Help', and a dropdown for 'P&C Insurance'. Below the top bar, there's a sidebar titled 'Recent Items' containing links to various Salesforce objects like Cases, Leads, and Contacts. The main content area is titled 'Documents Home' and shows a search bar, a 'Find Document' button, a 'Document Folders' section with a 'My Personal Documents' folder, and a 'Recent Documents' section listing files with their names, descriptions, and types. A blue arrow points up from the bottom left towards the top bar.

Screenshot of the Salesforce P&C Insurance Home page showing the Static Resources and Letterhead sections.

Static Resources

Use static resources to upload content that you want to reference in a Visualforce page, including .zip and .jar files, images, stylesheets, JavaScript, and other files.

View: All | Create New View

Action	Name	Namespace Prefix	Description	MIME Type	Size	Created By Alias	Created Date	Last Modified Date	Cache Control
Edit Del	Logo			image/jpeg	20,155	Iphop	18/04/2018	22/04/2018 14:15	Public
Edit Del	SiteSamples		Static resource for sites sample pages	application/zip	42,080	Iphop	18/04/2018	22/04/2018 14:15	Public
Edit Del	LogoSmall			image/jpeg	12,516	Iphop	19/04/2018	22/04/2018 14:14	Public

Letterhead
P&C Agency Portal
Preview your Letterhead details below.

Letterhead Detail

Letterhead Label	P&C Agency Portal	Edit Properties	Edit Letterhead	Delete
Letterhead Unique Name	P_C_Agency_Portal			
Available For Use	✓			
Description				
Created By	Tejas Phopale	14/04/2018 11:35	Modified By	Tejas Phopale

AGENCY PORTAL

We have created role hierarchy wherein Agents reports to Underwriter and Underwriters reports to Policy Admin:

Screenshot of the Salesforce P&C Insurance Home page showing the Role Hierarchy section.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

- NCI Student**
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - COO** [Edit](#) | [Del](#) | [Assign](#)
- Policy Administrator** [Edit](#) | [Del](#) | [Assign](#)
 - Underwriter** [Edit](#) | [Del](#) | [Assign](#)
 - Agents** [Edit](#) | [Del](#) | [Assign](#)

There are total five users: Two Agents, Two Underwrite and one Policy Administrator.

P&C Insurance

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [P&C Insurance](#) | [Edit](#) | [Create New View](#)

Action	Full Name	Username	Last Logon	Role	Active	Profile	Delegated Approver	Manager
Edit	Deorukhkar_Yash	ydevunderwriter@gmail.com	26/03/2018 15:17	Underwriter	<input checked="" type="checkbox"/>	Underwriter Profile P&C	Phopale_Tejas	
Edit	Gavate_Tejal	tejalagent1@gmail.com	22/03/2018 10:31	Agents	<input type="checkbox"/>	Agent Profile P&C	Phopale_Tejas	
Edit	Karma_Sneha	skunderwriter@gmail.com	22/04/2018 14:30	Underwriter	<input checked="" type="checkbox"/>	Underwriter Profile P&C	Phopale_Tejas	
Edit	Phopale_Tejas	batch2018ictgroupoteam@gmail.com	23/04/2018 19:41	Policy Administrator	<input checked="" type="checkbox"/>	System Administrator	Phopale_Tejas	
Edit	Ramteke_Ashvin	ashvintage2@gmail.com	21/04/2018 23:20	Agents	<input checked="" type="checkbox"/>	Agent Profile P&C	Karma_Sneha	

Also, there are three new profile in a new view called “Agency Portal View”.

Profiles

Agency Portal View | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Profile Name	Created By	Created Date	Last Modified By	Last Modified Date	User License
Edit	Administrator Profile P&C	Phopale_Tejas	22/03/2018	Phopale_Tejas	23/04/2018	Salesforce Platform
Edit	Agent Profile P&C	Phopale_Tejas	22/03/2018	Phopale_Tejas	23/04/2018	Salesforce Platform
Edit	Underwriter Profile P&C	Phopale_Tejas	22/03/2018	Phopale_Tejas	23/04/2018	Salesforce Platform

Edit View

Step 1. Enter View Name

View Name: **Agency Portal View**

Created By: Tejas Phopale, 22/03/2018 10:50

Last Modified By: Tejas Phopale, 26/03/2018 15:59

Step 2. Specify Filter Criteria

Setting: Profile Name Operator: contains Value: P&C

Step 3. Select Columns to Display

Available Settings: Created By Alias, Custom, Description, Last Modified By Alias, Access Chatter For SharePoint, Access Community Management, Access Custom Mobile Apps

Selected Settings: Profile Name, Created By, Created Date, Last Modified By, Last Modified Date, User License

The profiles are for Policy Admin, Agent and for the underwriter with different access level.

The Agents can able to view only those policies which are created by themselves (Screenshot for the same below).

Standard Object Permissions												
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	✓	□	Feedback Templates	✓	✓	✓	✓	□
Coaching	✓	✓	✓	✓	✓	□	Goals	✓	✓	✓	✓	□
Contacts	✓	✓	✓	✓	✓	□	Goal Links	✓	✓	✓	✓	□
D&B Companies	✓						Ideas	✓	✓			
Documents	✓	✓	✓	✓	✓	□	Metrics	✓	✓	✓	✓	□
Feedback	✓	✓	✓	✓	✓	□	Metric Data Links	✓	✓	✓	✓	□
Feedback Questions	✓	✓	✓	✓	✓	□	Performance Cycles	✓	✓	✓	✓	□
Feedback Question Sets	✓	✓	✓	✓	✓	□	Push Topics	✓	✓	✓	✓	□
Feedback Requests	✓	✓	✓	✓	✓	□	Streaming Channels	✓	✓	✓	✓	□

Custom Object Permissions												
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Premium Calculator	✓	✓	✓	✓	✓	□	Feedback Templates	✓	✓	✓	✓	✓

The Underwriter can able to modify the criteria and premium amount before approval. Underwriter has given all privileges except for the “Premium Calculator” (View All , Modify All operations are disable) because it can be useful for him/her to calculate the premium amount for dummy Calculation (Screenshot Below).

Standard Object Permissions												
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	✓	✓	Feedback Templates	✓	✓	✓	✓	✓
Coaching	✓	✓	✓	✓	✓	✓	Goals	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓	✓	Goal Links	✓	✓	✓	✓	✓
D&B Companies	✓						Ideas	✓	✓			
Documents	✓	✓	✓	✓	✓	✓	Metrics	✓	✓	✓	✓	✓
Feedback	✓	✓	✓	✓	✓	✓	Metric Data Links	✓	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓	✓	✓	Performance Cycles	✓	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓	
Feedback Requests	✓	✓	✓	✓	✓	✓	Streaming Channels	✓	✓	✓	✓	✓

Custom Object Permissions												
	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Premium Calculator	✓	✓	✓	✓	✓	□	Feedback Templates	✓	✓	✓	✓	✓

The Policy Administrator can view the activity but cannot modify any entries (Screenshot Below).

Standard Object Permissions																
	Basic Access					Data Administration										
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All				
Accounts	✓	✓	✓	✓	✓	□			Feedback Templates		✓	✓	✓	✓	✓	□
Coaching	✓	✓	✓	✓	✓	□			Goals		✓	✓	✓	✓	✓	□
Contacts	✓	✓	✓	✓	✓	□			Goal Links		✓	✓	✓	✓	✓	□
D&B Companies	✓								Ideas		✓	✓				
Documents	✓	✓	✓	✓	✓	□			Metrics		✓	✓	✓	✓	✓	□
Feedback	✓	✓	✓	✓	✓	□			Metric Data Links		✓	✓	✓	✓	✓	□
Feedback Questions	✓	✓	✓	✓	✓	□			Performance Cycles		✓	✓	✓	✓	✓	□
Feedback Question Sets	✓	✓	✓	✓	✓	□			Push Topics		✓	✓	✓	✓		
Feedback Requests	✓	✓	✓	✓	✓	□			Streaming Channels		✓	✓	✓	✓	✓	□
Custom Object Permissions																
	Basic Access					Data Administration										
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All				
Premium Calculator	□	□	□	□	□	□	□	□	□	□	□	□				

We have four different Email templates compressed in a view called “P&C Agency Portal Email Template”.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	PolicyApproved	Text	✓	Telco	22/04/2018	
Edit Del	UWApprovalE-Mail	Text	✓	Telco	22/04/2018	
Edit Del	Premium Calculator	Text	✓	Telco	22/04/2018	
Edit Del	Policy Binding Email	Text	✓	Telco	22/04/2018	

- 1) Policy Binding Email: Once all the details have been submitted from Policy Application, an Email with Agent Name, Premium Amount and Coverage type will be sent to client.
- 2) UWApprovalE-mail: When Agent sends Policy Application for approval, Email notification will be sent to the Underwriter.
- 3) Policy Approved: Once Policy is approved by the Underwriter, an email will be sent to the Client and Agent for confirmation.
- 4) Premium Calculator: When any person enquires for the policy on website of organisation, they will receive an email with premium amount and coverage type to their person email id.

V. Data Management Implementation and System Analysis:

In this section, we have described the object definitions, field list, validations and formulas, data, processes for each object, VisualForce pages, Apex Object and Apex Triggers.

Policy Applications:

This is a standard object Account which has been modified for reusability and simplicity. The object is renamed to “Policy Applications”. The view “All Policy Applications” has been edited as per important fields which required to show:

Screenshot of the Salesforce P&C Insurance Portal showing a list of Policy Applications.

Action	Applicant Name	Phone	Created Date	Created By Alias	Annual Premium +	Controlling County	Coverage Type	Created Date	E-mail Address
Edit Del 2	Joe Kelly	0894948181	21/04/2018	arant	1,368	Dublin	Business Owners	21/04/2018	thopale@gmail.com
Edit Del 3	Alex		22/04/2018	guest	1,368	Laois	Home Owners	22/04/2018	thopale@gmail.com
Edit Del 4	Aaradhna	0894948181	21/04/2018	arant	1,363	Down	Business Owners	21/04/2018	thopale@gmail.com
Edit Del 5	Steve Jobs	0894948181	21/04/2018	arant	1,358	Cork	Management Liability	21/04/2018	thopale@gmail.com
Edit Del 6	Gauri Kale	0894948181	18/04/2018	Tiboo	1,338	Kilkenny	Business Owners	18/04/2018	thopale@gmail.com
Edit Del 7	Mark Spenc		22/04/2018	guest	1,328	Kerry	Management Liability	22/04/2018	thopale@gmail.com
Edit Del 8	Tejas Jr.		21/04/2018	Tiboo	1,270	Laois	Business Owners	21/04/2018	thopale@gmail.com

The List of new fields are added shown below:

Account Custom Fields & Relationships							Account Custom Fields & Relationships Help	
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History	
Edit Del Replace	Active	Active_c	Picklist			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
Edit Del	Address Line 1	Address_Line__c	Text Area(255)			Tejas Phopale, 17/04/2018 09:36	<input checked="" type="checkbox"/>	
Edit Del	Address Line 2	Address_Line_2__c	Text Area(255)			Tejas Phopale, 05/04/2018 16:32	<input type="checkbox"/>	
Edit Del	Age	Age_c	Formula (Number)			Tejas Phopale, 23/04/2018 12:17	<input type="checkbox"/>	
Edit Del	Agency Customer ID	Agency_Customer_ID__c	Text(30)			Tejas Phopale, 05/04/2018 17:09	<input type="checkbox"/>	
Edit Del	Agency Name	Agency_Name__c	Text(30)			Tejas Phopale, 13/04/2018 21:47	<input type="checkbox"/>	
Edit Del Replace	Alcohol/Drug Free Credit Program	Alcohol_Drug_Free_Credit_Program__c	Picklist			Tejas Phopale, 13/04/2018 11:17	<input type="checkbox"/>	
Edit Del	Amount Paid	Amount_Paid__c	Number(18, 0)			Tejas Phopale, 13/04/2018 12:33	<input type="checkbox"/>	
Edit Del	Amount Reserved	Amount_Reserved__c	Number(18, 0)			Tejas Phopale, 13/04/2018 12:33	<input type="checkbox"/>	
Edit Del	Annual Premium	Annual_Premium__c	Number(18, 0)			Tejas Phopale, 13/04/2018 12:32	<input checked="" type="checkbox"/>	
Edit Del	Any dis_continual_operations	Any_Dis_Continual_Operations__c	Checkbox			Tejas Phopale, 13/04/2018 12:40	<input type="checkbox"/>	
Edit Del Replace	Any Prior Losses	Any_Prior_Losses__c	Picklist			Tejas Phopale, 13/04/2018 11:59	<input type="checkbox"/>	
Edit Del Replace	Blanket waiver of Subrogation	Blanket_Waiver_of_Subrogation__c	Picklist			Tejas Phopale, 13/04/2018 11:14	<input type="checkbox"/>	
Edit Del	Carrier	Carrier_c	Text(30)			Tejas Phopale, 13/04/2018 12:04	<input checked="" type="checkbox"/>	
Edit Del Replace	Class Code	Class_Code__c	Picklist			Tejas Phopale, 13/04/2018 11:45	<input checked="" type="checkbox"/>	
Edit Del Replace	Controlling County	Controlling_County__c	Picklist			Tejas Phopale, 05/04/2018 19:02	<input checked="" type="checkbox"/>	
Edit Del Replace	County	County_c	Picklist			Tejas Phopale, 13/04/2018 21:52	<input checked="" type="checkbox"/>	
Edit Del Replace	Coverage Type	Coverage_Type__c	Picklist			Tejas Phopale, 05/04/2018 18:57	<input checked="" type="checkbox"/>	
Edit Del	Created Date	Created_Date__c	Date			Tejas Phopale, 18/04/2018 22:46	<input type="checkbox"/>	
Edit Del Replace	Customer Priority	CustomerPriority_c	Picklist			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
Edit Del	Date Business Started	Date_Business_Startted__c	Date			Tejas Phopale, 05/04/2018 17:19	<input type="checkbox"/>	
Edit Del	Date of Birth	Date_of_Birth__c	Date			Tejas Phopale, 23/04/2018 12:13	<input type="checkbox"/>	
Edit Del	Deductible Amount	Deductible_Amount__c	Currency(18, 0)			Tejas Phopale, 05/04/2018 19:04	<input checked="" type="checkbox"/>	
Edit Del Replace	Deductible Type	Deductible_Type__c	Picklist			Tejas Phopale, 05/04/2018 19:05	<input checked="" type="checkbox"/>	
Edit Del	Divided Plan/Safety Group	Divided_Plan_Safety_Group__c	Text(30)			Tejas Phopale, 05/04/2018 19:01	<input type="checkbox"/>	
Edit Del	Doing Business AS	Doing_Business_AS__c	Text(30)			Tejas Phopale, 05/04/2018 17:15	<input type="checkbox"/>	
Edit Del	Do you own / operate any other business?	Do_You_Own_Operate_Any_Other_Business__c	Checkbox			Tejas Phopale, 13/04/2018 12:42	<input type="checkbox"/>	
Edit Del	E-mail Address	E_email_Address__c	Email			Tejas Phopale, 05/04/2018 17:33	<input type="checkbox"/>	
Edit Del Replace	Employ's Liability Limit (If Applicable)	Employ_S_Liability_Limit_If_Applicable__c	Picklist			Tejas Phopale, 05/04/2018 19:09	<input type="checkbox"/>	
Edit Del	Estimated Annual Exposure	Estimated_Annual_Exposure__c	Number(18, 0)			Tejas Phopale, 13/04/2018 11:48	<input type="checkbox"/>	
Work.com	Edit Del Replace	Experience Mod	Experience_Mod__c			Tejas Phopale, 13/04/2018 11:14	<input type="checkbox"/>	
Ideas	Edit Del	INIS Number	INIS_Number__c			Tejas Phopale, 05/04/2018 17:27	<input type="checkbox"/>	
Answers	Edit Del	Latest Effective Date	Latest_Effective_Date__c			Tejas Phopale, 13/04/2018 12:04	<input type="checkbox"/>	
Assets	Edit Del Replace	Managed Care Option	Managed_Care_Option__c			Tejas Phopale, 13/04/2018 11:19	<input type="checkbox"/>	
Users	Edit Del Replace	No. of Claims	No_of_Claims__c			Tejas Phopale, 17/04/2018 09:43	<input type="checkbox"/>	
User Provisioning Requests	Edit Del	Number of Locations	NumberofLocations__c			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
Einstein	Edit Del	Policy Effective Date	Policy_Effective_Date__c			Tejas Phopale, 05/04/2018 17:34	<input type="checkbox"/>	
Salesforce Files	Edit Del	Policy Expiration Date(1 year Auto Cov.)	Policy_Expiration_Date__c			Tejas Phopale, 15/04/2018 21:53	<input type="checkbox"/>	
Tags	Edit Del	Policy Number	Policy_Number__c			Tejas Phopale, 13/04/2018 12:14	<input type="checkbox"/>	
Reports & Dashboards	Edit Del	PPS Number	PPS_Number__c			Tejas Phopale, 05/04/2018 17:25	<input type="checkbox"/>	
Search	Edit Del	Premium	Premium_c			Tejas Phopale, 17/04/2018 10:56	<input type="checkbox"/>	
Chatter	Edit Del	Procedure Phone	Procedure_Phone__c			Tejas Phopale, 05/04/2018 17:06	<input type="checkbox"/>	
Scorecard	Edit Del	Producer Code	Producer_Code__c			Tejas Phopale, 05/04/2018 17:08	<input type="checkbox"/>	
Communities	Edit Del	Producer Fax	Producer_Fax__c			Tejas Phopale, 05/04/2018 17:05	<input type="checkbox"/>	
Topics	Edit Del	Retrospective Rating Plan	Retrospective_Rating_Plan__c			Tejas Phopale, 05/04/2018 19:00	<input type="checkbox"/>	
Field Service	Edit Del Replace	Safety Credit Required	Safety_Credit_Required__c			Tejas Phopale, 17/04/2018 09:40	<input type="checkbox"/>	
Email	Edit Del Replace	Safety Program	Safety_Program__c			Tejas Phopale, 13/04/2018 11:15	<input checked="" type="checkbox"/>	
Survey	Edit Del	SLA	SLA_c			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
User Interface	Edit Del Replace	SLA Expiration Date	SLAExpirationDate__c			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
Create	Edit Del	SLA Serial Number	SLASerialNumber__c			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
Develop	Edit Del Replace	Total Employee (Optional)	Total_Employee_Optional__c			Tejas Phopale, 13/04/2018 11:47	<input type="checkbox"/>	
Schema Builder	Edit Del Replace	Underwriter Email(D/Auto Select by Name)	Underwriter_Email_ID__c			Tejas Phopale, 15/04/2018 21:14	<input checked="" type="checkbox"/>	
Lightning App Builder	Edit Del Replace	Underwriter Name	Underwriter_Name__c			Tejas Phopale, 15/04/2018 12:50	<input checked="" type="checkbox"/>	
Canvas App Previewer	Edit Del Replace	Upsell Opportunity	UpsellOpportunity__c			Tejas Phopale, 06/02/2018 14:16	<input type="checkbox"/>	
Installed Packages	Edit Del	URL of An Organisation (If Any)	URL_of_An_Organisation_If_Any__c			Tejas Phopale, 13/04/2018 12:38	<input type="checkbox"/>	
AppExchange Marketplace	Edit Del Replace	Voluntary Comp	Voluntary_Comp__c			Tejas Phopale, 13/04/2018 11:49	<input type="checkbox"/>	
Critical Updates	Edit Del Replace	Zip Code	Zip_Code__c			County	Tejas Phopale, 13/04/2018 21:53	<input type="checkbox"/>
Deploy	Deleted Fields (6)							
Deployment Settings								
Deployment Status								
Monitor								

The Agent will take all needful information from client and create policy. By clicking on “New Policy Application”, it will open the screen as shown below with Agency Name and Address Line 1 auto populated by default values:

Policy Application Edit

New Policy Application

Agency Information

Agency Name: P&C Agency Portal

Address Line 1: 102, Greig Court, Parnell Street, Dublin 1,Dublin

Address Line 2:

Producer Name: Ashvin Ramteke

Underwriter Name: None

Underwriter Email: (Auto Select by Name)

Created Date: 24/04/2018

Application Information

Applicant Name:

Date of Birth: 24/04/2018

Parent Application:

INIS Number:

Annual Revenue:

Policy Effective Date: 24/04/2018

Custom Field Definition Detail

Field Information

Field Label: Agency Name

Field Name: Agency_Name

API Name: Agency_Name_c

Description:

Help Text:

Created By: Tejas Phopale 05/04/2018 16:21

Modified By: Tejas Phopale 13/04/2018 21:47

General Options

Required:

Unique:

Case Sensitive:

External ID:

Default Value: P&C Agency Portal

Text Options

Length: 30

Validation Rules

No validation rules defined.

Custom Field Definition Detail

Field Information

Field Label: Address Line 1

Field Name: Address_Line

API Name: Address_Line_c

Description:

Help Text:

Created By: Tejas Phopale 05/04/2018 16:22

Modified By: Tejas Phopale 17/04/2018 09:36

General Options

Required:

Default Value: "102, Greig Court, Parnell Street, Dublin 1,Dublin."

Validation Rules

No validation rules defined.

We have added validation rule for some of fields.

The first validation is for “Deductible Amount” which should not exceed 150 Euro.

Second is for “Policy Effective Date” which should not be less than Current Date (Screenshot Below):

The screenshot shows a "Policy Application Edit" page for "Will Smith". The "Agency Information" section contains several fields: Agency Name (P&C Agency Portal), Address Line 1 (102, Greig Court, Parnell Street, Dublin 1, Dublin), Producer Name (Ashvin Ramteke), Underwriter Name (Sneha Karma), Underwriter Email ID (Auto Selected by Name), and Created Date (24/04/2018). The "Application Information" section includes fields like Applicant Name (Will Smith), Date of Birth (19/06/1989), Parent Application (Transport Company), Doing Business As (Transport Company), URL of An Organisation (If Any), Date Business Started (24/04/2018), County (Dublin), Zip Code (D17), INIS Number (255657), Annual Revenue, Policy Effective Date (20/04/2018), Policy Expiration Date (1 year Auto Cov.), E-mail Address (tphopale@gmail.com), Phone (0894948181), and Fax. The "Policy Information" section shows Coverage Type (Commercial Package), Controlling County (Carlow), Retrospective Rating Plan, Deductible Amount (170), Deductible Type (Business Apartment), and Employe's Liability Limit (If Applicable) (-None-). A red error message at the top right states: "Error: Invalid Data. Review all error messages below to correct your data. + Deductible_Amount should not be greater than 150 Euro + Policy Effective Date can not be less than Today's Date". A note indicates that red fields require attention.

The screenshot shows the "Account Validation Rules" page. It includes a "Quick Find / Search..." bar, a "Help for this Page" link, and a "Migration Assistant" sidebar with "Get Started" and "Salesforce Mobile Quick Start" buttons. The main content area displays validation rules:

Action	Rule Name	Error Location	Error Message	Active	Modified By
Edit Del	Deductible_Amount_Not_More_than_150	Top of Page	Deductible_Amount should not be greater than 150 Euro	✓	Tejas Phopale, 24/04/2018 11:32
Edit Del	Eff_Date_Can_not_less_than_current_Date	Top of Page	Policy Effective Date can not be less than Today's Date	✓	Tejas Phopale, 24/04/2018 11:31

A "Quick Tips" box lists "Useful Sample Validation Rules".

The screenshot shows the "Validation Rule Detail" page for the rule "Deductible_Amount_Not_More_than_150". The page includes a "Validation Rule Detail" header with "Edit" and "Clone" buttons, and a table with the following data:

Rule Name	Description	Active	Modified By
Deductible_Amount_Not_More_than_150	Deductible_Amount should not be greater than 150 Euro	✓	Tejas Phopale, 24/04/2018 11:32

Details for the rule include:

- Rule Name:** Deductible_Amount_Not_More_than_150
- Error Condition Formula:** Deductible_Amount_c > 150
- Error Message:** Deductible_Amount should not be greater than 150 Euro
- Description:** Deductible_Amount should not be greater than 150 Euro
- Created By:** Tejas Phopale, 18/04/2018 22:54
- Modified By:** Tejas Phopale, 24/04/2018 11:32

The “Policy Expiration Date” will take 1 year from Effective Date using Workflow rule.

The field called “Underwriter EmailID” will get auto populated by selecting the “Underwriter Name”. This functionality has been achieved by adding another workflow rule shown below. Also, Agent can write it manually if EmailID got changed and not updated in system it.

Workflow Rule
Underwriter Email ID
[Back to List: Workflow Rules](#)

Workflow Rule Detail

Rule Name	Underwriter Email ID	Edit	Clone	Deactivate
Active	<input checked="" type="checkbox"/>			
Description				
Rule Criteria	Account: Underwriter_EmailID(Auto Select by Name) NOT EQUAL TO nujkhshbd			
Created By	Tejas Phopale 15/04/2018 20:39			
Object	Account	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	
Modified By	Tejas Phopale 15/04/2018 21:26			

Workflow Actions

Immediate Workflow Actions

Type	Description
Field Update	Underwriter Email ID

Field Update
Underwriter Email ID
[Back to List: Workflow Rules](#)

[Rules Using This Field Update \(1\)](#) | [Approval Processes Using This Field Update \(0\)](#)

Field Update Detail

Name	Underwriter Email ID	Edit	Delete
Unique Name	Underwriter_Email_ID		
Description			
Object	Account		
Field to Update	Account: Underwriter_EmailID(Auto Select by Name)		
Field Data Type	Email	<input checked="" type="checkbox"/>	
Re-evaluate Workflow Rules after Field Change	IF(CONTAINS(TEXT(Underwriter_Name__c) , "yash") , "tphopale@gmail.com" , "batch2018ictgroupteam@gmail.com")		

Rules Using This Field Update

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	Underwriter_Email_ID		Account	<input checked="" type="checkbox"/>

[Approval Processes Using This Field Update](#)

We have created **Field dependency** of County and Zip code. By changing county, it will display only those Zip codes which are under selected county (Screenshot Below).

Account Field Dependencies

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies

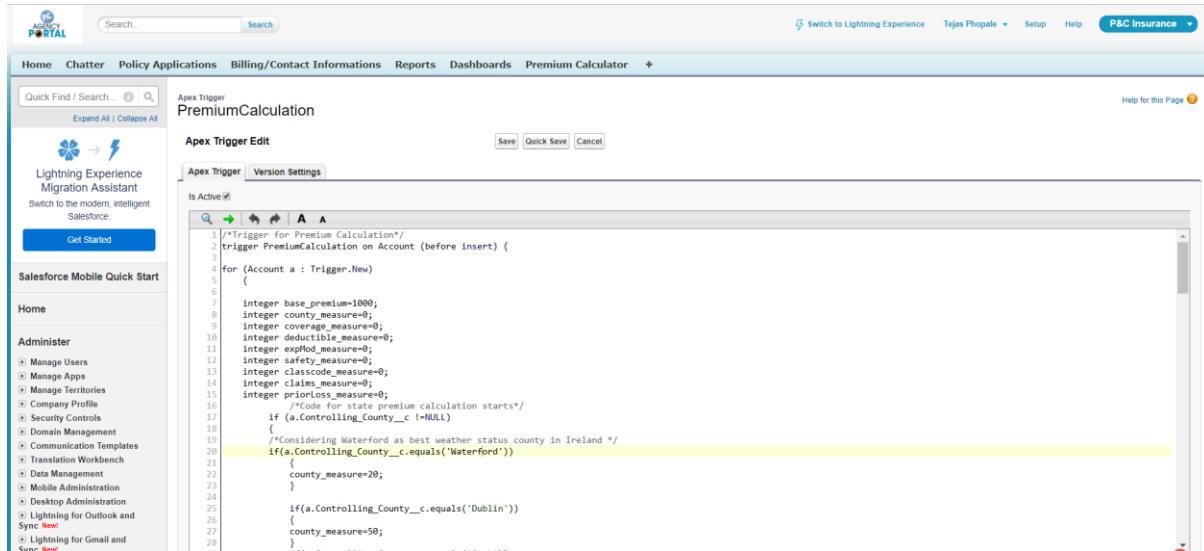
Action	Controlling Field	Dependent Field	Modified By
Edit Del	County	Zip Code	Tejas Phopale 22/04/2018 13:09

County	Dublin
Zip Code	--None--
Policy Information	
Coverage Type	D3
Controlling County	D4
Retrospective Rating Plan	D5
Divinded Plan/Safety Group	D6
Rating Factors and Classifications	
Experience Mod	D11
PPS Number	D13
Blanket waiver of Subrogation	D14
Safety Program	D15
Alcohol/Drug Free Credit Program	D16
Managed Care Option	D19

County	Cork
Zip Code	--None--
Policy Information	
Coverage Type	P75
Controlling County	P81
Retrospective Rating Plan	P51
Divinded Plan/Safety Group	P61

The most important part of the solution is to calculated **Premium Amount**. The column name for this is "**Annual Premium**". The Premium Calculation has been achieved by **Apex Trigger**.

The screenshot and code mentioned below.



Code Description for Premium Calculation:

As we don't have actual Rating engine to perform premium calculation, the Annual Premium has been calculated based on factors such as selected base_premium, county_measure, coverage_measure, deductible_measure, expMod_measure, safety_measure, classcode_measure, claims_measure and priorLoss_measure. We have given some default values based on combinations to every parameters what Agent has selected to calculate the amount.

Code for Premium Calculation:

```
/*Trigger for Premium Calculation*/
trigger PremiumCalculation on Account (before insert) {
for (Account a : Trigger.New)
{
    integer base_premium=1000;
    integer county_measure=0;
    integer coverage_measure=0;
    integer deductible_measure=0;
    integer expMod_measure=0;
    integer safety_measure=0;
    integer classcode_measure=0;
    integer claims_measure=0;
    integer priorLoss_measure=0;

    /*Code for state premium calculation starts*/
    if (a.Controlling_County__c !=NULL)
    {
        /*Considering Waterford as best weather status county in Ireland */
        if(a.Controlling_County__c.equals('Waterford'))
```

```
{  
    county_measure=20;  
}  
  
if(a.Controlling_County__c.equals('Dublin'))  
{  
    county_measure=50;  
}  
  
if(a.Controlling_County__c.equals('Cork'))  
{  
    county_measure=80;  
}  
else {  
    county_measure=70;  
}  
}  
/*Code for state premium calculation ends*/
```

```
/*Code for Coverage Type starts*/  
if (a.Coverage_Type__c!=NULL){  
    if(a.Coverage_Type__c.startsWith('Commercial'))  
    {  
        coverage_measure=70;  
    }  
    if(a.Coverage_Type__c.endsWith('Owners'))  
    {  
        coverage_measure=40;  
    }else {  
        coverage_measure=10;  
    }  
}  
/*Code for Coverage Type ends*/
```

```
/*Code for Deductible Type starts*/  
if (a.Deductible_Type__c!=NULL){  
    if(a.Deductible_Type__c.startsWith('Personal'))  
    {  
        deductible_measure=25;  
    }else{
```

```
deductible_measure=50;  
}  
}  
/*Code for Deductible Type ends*/
```

```
/*Code for Experience Mod Starts*/  
if (a.Experience_Mod__c!=NULL){  
    if(a.Experience_Mod__c.equals('1'))  
    {  
        expMod_measure=5;  
    }  
    if(a.Experience_Mod__c.equals('2'))  
    {  
        expMod_measure=10;  
    }  
    if(a.Experience_Mod__c.equals('3'))  
    {  
        expMod_measure=15;  
    }  
    if(a.Experience_Mod__c.equals('4'))  
    {  
        expMod_measure=20;  
    }  
    if(a.Experience_Mod__c.equals('5'))  
    {  
        expMod_measure=25;  
    }  
}
```

```
/*Code for Experience Mod ends*/
```

```
/*Code for Safety Credit Starts*/  
  
if (a.Safety_Credit_Required__c!=NULL){  
    if(a.Safety_Credit_Required__c.equals('Yes'))  
    {  
        safety_measure=53;  
    }  
}
```

```

/*Code for Safety Credit ends*/

/*Code for Class Code Starts*/
if(a.Class_Code__c !=NULL){
    if(a.Class_Code__c.equals('Level 1'))
    {
        classcode_measure=5;
    }
    if(a.Class_Code__c.equals('Level 2'))
    {
        classcode_measure=15;
    }
    if(a.Class_Code__c.equals('Level 3'))
    {
        classcode_measure=25;
    }
    if(a.Class_Code__c.equals('Level 4'))
    {
        classcode_measure=35;
    }
    if(a.Class_Code__c.equals('Level 5'))
    {
        classcode_measure=45;
    }
}

/*+ priorLoss_measure*/

/*Code for Class Code Ends*/

/*Code for No. of claims starts*/
if(a.No_of_Claims__c !=NULL){
    if(a.No_of_Claims__c.equals('1'))
    {
        claims_measure=50;
    }
    if(a.No_of_Claims__c.equals('2'))

```

```

{
    claims_measure=100;
}

if(a.No_of_Claims__c.equals('3'))
{
    claims_measure=150;
}
}

/*Code for No. of claims ends*/


/*Code for Any prior losses starts*/
if(a.Any_Prior_Losess__c !=NULL){
    if(a.Any_Prior_Losess__c.equals('yes'))
    {
        priorLoss_measure=50;
    }
}
/*Code for Any prior losses ends*/


/*Final Annual Premium*/
a.Annual_Premium__c = base_premium +
county_measure+coverage_measure+deductible_measure+expMod_measure+safety_measure+classcode_measure+claims_measure+
priorLoss_measure;

}
}

```

Once all the information about Client has been entered by Agent, the premium value will be calculated (Screenshot below).

Agency Information						* = Required Information
Agency Name	P&C Agency Portal			Agency Customer ID	CU152466	
Address Line 1	102, Greig Court, Parnell Street, Dublin 1,Dublin.			Procedure Phone	0894945454	
Address Line 2				Producer Fax		
Producer Name	Ashvin Ramteke			Producer Code		
Underwriter Name	Sneha Karma					
Underwriter Email ID(Auto Select by Name)						
Created Date	[24/04/2018] [24/04/2018]					
Application Information						
Applicant Name	Tej Thakare			INIS Number	24545754	
Date of Birth	[18/01/1994]	[24/04/2018]		Annual Revenue	1,000,000	
Parent Application				Policy Effective Date	[29/04/2018] [24/04/2018]	
Doing Business AS	Consultant			Policy Expiration Date(1 year Auto Cov.)		
URL of An Organisation (If Any)	www.duckcreek.com			E-mail Address	tphopale@gmail.com	
Date Business Started	[24/04/2010] [24/04/2018]			Phone	0894948181	
County	Dublin			Fax		
Zip Code	D10					
Policy Information						
Coverage Type	Business Owners			Deductible Amount	130	
Controlling County	Cork			Deductible Type	Contractors Equipment	
Retrospective Rating Plan				Employ's Liability Limit (if Applicable)	3001€ - 4000€	
Divided Plan/Safety Group						
Rating Factors and Classifications						
Experience Mod	4			Safety Credit Required	Yes	
PPS Number	1454545			Error: You must enter a value		
Blanket waiver of Subrogation	Yes			Class Code	Level 4	
				Error: You must enter a value		
				Total Employee (Optional)		
Blanket waiver of Subrogation	Yes			Total Employee (Optional)		
Safety Program	Yes			Estimated Annual Exposure		
Alcohol/Drug Free Credit Program	No			Voluntary Comp	Yes	
Managed Care Option	Yes					
Prior Losses						
Any Prior Losses	Yes			No. of Claims	2	
Latest Effective Date	[12/08/2017] [24/04/2018]			Annual Premium	545,454	
Carrier	5			Amount Paid	86	
Policy Number	POL656898			Amount Reserved	955	
General Questionnaire and Premium						
Do you own / operate any other business?				<input checked="" type="checkbox"/> Any dis-continual operations <input checked="" type="checkbox"/>		
Address Information						
Mailing Street	61 Will wood view Dublin 15			Shipping Street		
Mailing City	Dublin			Shipping City	102 5TH FLOOR GREEG COURT	
Mailing County	Dublin			Shipping County	Dublin	
Mailing Zip/Postal Code	5454154			Shipping Zip/Postal Code		
Mailing Country	Ireland			Shipping Country		
Additional Information						
Customer Priority	Medium					
Description Information						
Please describe the Nature of Business :				Business Consultancy		
				Save	Save & New	Cancel

Policy Application Detail

Agency Information

Agency Name	P&C Agency Portal	Agency Customer ID	CU152466
Address Line 1	102, Greig Court, Parnell Street, Dublin 1.Dublin.	Procedure Phone	0894945454
Address Line 2		Producer Fax	
Producer Name	Ashvin Ramteke [Change]	Producer Code	
Underwriter Name	Sneha Karna		
Underwriter EmailID(Auto Select by Name)	batch2018ictgrouteam@gmail.com		
Created Date	24/04/2018	INIS Number	24545754
Applicant Name	Tej Thakare [View Hierarchy]	Annual Revenue	€1,000,000
Date of Birth	18/01/1994	Policy Effective Date	29/04/2018
Parent Application		Policy Expiration Date(1 year Auto Cov.)	29/04/2019
Age	24.00	E-mail Address	hobhobal@gmail.com
Doing Business As	Consultant	Phone	0894948181
URL of An Organisation (If Any)	http://www.duckcreek.com	Fax	
Date Business Started	24/04/2010		
County	Dublin		
Zip Code	D10		

Policy Information

Coverage Type	Business Owners	Deductible Amount	€130
Controlling County	Cork	Deductible Type	Contractors Equipment
Retrospective Rating Plan		Employer's Liability Limit (If Applicable)	300 IE - 4000IE
Divided Plan/Safety Group			

Rating Factors and Classifications

Experian Mod	4	Safety Credit Required	Yes
PPS Number	454545	Class Code	Level 4
Blanket waiver of Subrogation	Yes	Total Employee (Optional)	
Safety Program	Yes	Estimated Annual Exposure	
Alcohol/Drug Free Credit Program	No	Voluntary Comp	Yes
Managed Care Option	Yes		

Prior Losses

Any Prior Losses	Yes	No. of Claims	2
Latest Effective Date	12/08/2017	Annual Premium	1,378
Carrier	5	Amount Paid	86
Policy Number	POL656898	Amount Reserved	955

General Questionnaire and Premium

Do you own / operate any other business?	✓	Any dis-continual operations	✓
Mailing Address	81 Mill wood view Dublin 15 Dublin Dublin 5454154 Ireland	Shipping Address	105 5TH FLOOR GREEG COURT Dublin Dublin

The White Arrows shows calculated data from the workflow and apex trigger executions.

The Brown Arrows indicates the **Tab Layout** for the Policy Application Screen by editing Layout.

The Client will get Email Notification Once Policy is initiated and policy goes for approval by underwriter once Agent clicks on “Submit for approval” button.

Gmail

Compose

Inbox (50,957)

DO NOT REPLY

Hi Tej Thakare ,

Our agent Ashvin Ramteke has generated policy for Business Owners with Premium 1,378 Euro with Policy Effective Date 29/04/2018.

Thanks and Regards,

P&C Agency Portal

The Email Template contains some mapping fields which makes it dynamic (Screenshot Below).

Text Email Template
Policy Binding Email

Email Template Detail

Folder	P&C Agency Portal Email Template	Available For Use	✓
Email Template Name	Policy Binding Email	Last Used Date	
Template Unique Name	Policy_Binding_Email	Times Used	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	Tejas Phopale [Change]		
Description			
Created By	Tejas Phopale, 14/04/2018 12:14	Modified By	Tejas Phopale, 22/04/2018 13:13

Email Template

Plain Text Preview

-----DO NOT REPLY-----

Hi {!Account.Name} ,

Our agent {!Account.CreatedBy} has generated policy for {!Account.Coverage_Type__c} with Premium {!Account.Annual_Premium__c} Euro with Policy Effective Date {!Account.Policy_Effective_Date__c}.

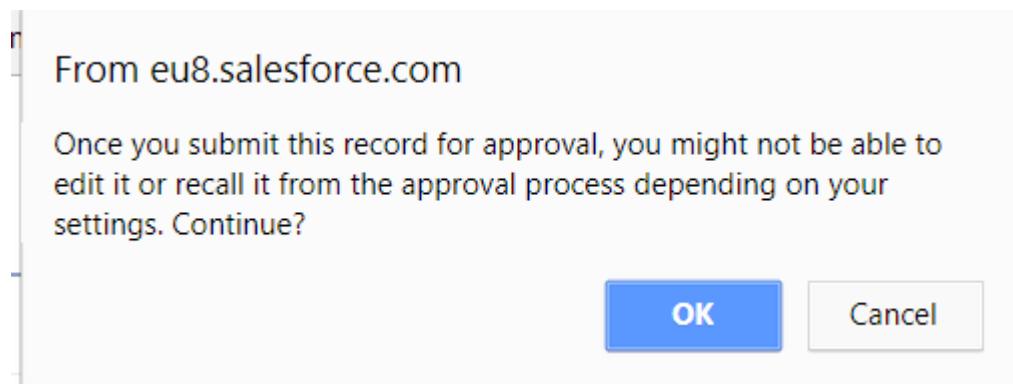
Thanks and Regards,

{!Account.Agency_Name__c}

Policy Application Detail

		Edit	Delete	Submit for Approval
▼ Agency Information				
Agency Name	P&C Agency Portal	Agency Customer ID	CU152466	
Address Line 1	102, Greig Court, Parnell Street, Dublin 1,Dublin.	Procedure Phone	0894945454	
Address Line 2		Producer Fax		
Producer Name	Ashvin Ramteke [Change]	Producer Code		
Underwriter Name	Sneha Karma			
Underwriter Email ID(Auto Select by Name)	batch2018ictgroupteam@gmail.com			
Created Date	24/04/2018	INIS Number	24545754	
Applicant Name	Tej Thakare [View Hierarchy]	Annual Revenue	€1,000,000	
Date of Birth	18/01/1994	Policy Effective Date	29/04/2018	
Parent Application		Policy Expiration Date(1 year Auto Cov.)	29/04/2019	
Age	24.00	E-mail Address	tphopale@gmail.com	
Doing Business AS	Consultant	Phone	0894948181	
URL of An Organisation (If Any)	http://www.duckcreek.com	Fax		
Date Business Started	24/04/2010			
County	Dublin			
Zip Code	D10			

After clicking on highlighted button, popup will be shown for confirmation. Click on Ok.



The Underwriter will get two email notifications. One is automated by Salesforce and another we have written in Email Template (Screenshot Below).

Google

Gmail ▾

Compose

Inbox (31)
Starred
Sent

Primary **Social 2 new** **Promotions 1 new**

New Task for Policy Approval - -----DO NOT REPLY ----- Hi Sneha Karma, The policy has been submitted for approval. Approval Request - Ashvin Ramteke has requested your approval for the following item: <https://eu8.salesforce.com/p/process/ProcessInstanceWorkItemWizardStageManager?id=04l0N0000053KmE>

Gmail ▾

Compose

Inbox (30)
Starred
Sent
Drafts
More ▾

Approval Request **Inbox** x

Ashvin Ramteke via xfb0dsvkataja.0n-1n81vuas.eu8.bnc.salesforce.com to me 1:58 PM (4 minutes ago)

This may be a spoofed message. Gmail couldn't verify that it was actually sent from your account. [Learn more](#)

Ashvin Ramteke has requested your approval for the following item: <https://eu8.salesforce.com/p/process/ProcessInstanceWorkItemWizardStageManager?id=04l0N0000053KmE>

Please click this link to approve or reject this record.

Thank you,
Salesforce

New Task for Policy Approval

Ashvin Ramteke via bxbr14p9wzc8.0n-1n81vus.eu8.bnc.salesforce.com to me 1:58 PM (5 minutes ago)

This may be a spoofed message. Gmail couldn't verify that it was actually sent from your account. [Learn more](#)

-----DO NOT REPLY-----

Hi Sneha Karma,

The policy has been requested for approval for coverage Business Owners with Premium 1,378 Euro with Policy Effective Date 29/04/2018.

Kindly Submit your Decision soon.

Regards,
P&C Agency Portal

The Email Template for second email is shown below:

Email Template Detail

UWApproveE-Mail

Preview your email template below.

Folder	P&C Agency Portal Email Template	Available For Use	
Email Template Name	UWApproveE-Mail	✓	
Template Unique Name	UWApproveE_Mail	Last Used Date	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	Times Used	
Author	Tejas Phopale [Change]		
Description			
Created By	Tejas Phopale, 21/04/2018 23:07	Modified By	Tejas Phopale, 22/04/2018 13:12

Email Template

Plain Text Preview

-----DO NOT REPLY-----

Hi {!Account.Underwriter_Name__c},

The policy has been requested for approval for coverage {!Account.Coverage_Type__c} with Premium {!Account.Annual_Premium__c} Euro with Policy Effective Date {!Account.Policy_Effective_Date__c}.

Kindly Submit your Decision soon.

Regards,
{!Account.Agency_Name__c}

When Underwriter click on the first email notification (shown above), system will redirect to the screen for approval. Also, policy can be viewed by clicking on view button as shown below. Underwriter need to login with own credentials to perform these actions.

After examining the policy risk, Underwriter will click on approve or reject button.

Click on “Approve” the policy is approved and status will be updated as active. The Agent and Client will get Email notification for approved policy (Screenshot below).

Tej Thakare

Recent Items

- Tej Thakare
- Steve Jobs
- Sneha Karma

Create New... Create New...

Hide Feed Click to add topics:

Post File New Task More Share

Followers Follow

No followers.

Write something... Share

Show All Updates Show All Updates

Billing/Contact Information | Open Activities | Activity History | Notes & Attachments | Approval History

Policy Application Detail

Agency Information

Agency Name	P&C Agency Portal	Agency Customer ID	CU152466
Address Line 1	102, Greig Court, Parnell Street, Dublin 1,Dublin.	Procedure Phone	0894945454
Address Line 2		Producer Fax	
Producer Name	Ashvin Ramteke [Change]	Producer Code	
Underwriter Name	Sneha Karma		
Underwriter Email/ID/Auto Select by Name	batch2018ictgroupteam@gmail.com		
Created Date	24/04/2018	INIS Number	24545754
Applicant Name	Tej Thakare [View Hierarchy]	Annual Revenue	€1,000,000
Date of Birth	18/01/1994		

Text Email Template Edit Delete Clone

PolicyApproved

Back to List: Email Templates Help for this Page

Email Template Detail

Folder	P&C Agency Portal Email Template	Available For Use ✓
Email Template Name	PolicyApproved	Last Used Date
Template Unique Name	PolicyApproved	Times Used
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	
Author	Tejas Phopale [Change]	
Description		
Created By	Tejas Phopale, 21/04/2018 23:36	Modified By Tejas Phopale , 22/04/2018 13:12

Email Template Send Test and Verify Merge Fields

Subject Policy has been Approved

Plain Text Preview

-----DO NOT REPLY -----
Hi,
The policy has been approved for {!Account.Coverage_Type__c} of {!Account.Name} with Policy Effective Date {!Account.Policy_Effective_Date__c}.
Regards,
{!Account.Agency_Name__c}

Gmail Compose Inbox More

1 of 57,918 Next Previous Settings

Policy has been Approved

Sneha Karma batch2018ictgroupteam@gmail.com via d1bq9h1m8tys.on-1n81vuas.eu8.bnc.salesforce.com to me More Print Reply Forward Delete

2:12 PM (16 minutes ago) Starred More

-----DO NOT REPLY -----
Hi,
The policy has been approved for Business Owners of Tej Thakare with Policy Effective Date 29/04/2018.
Regards,

The approval process has been maintained by preparing the approval process shown below:

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Migration Assistant
Switch to the modern, intelligent Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Lightning for Outlook and Sync New!
- Lightning for Gmail and Sync New!
- Email Administration
- Google Apps
- Data.com Administration

Approval Processes

Account: AgentToUWapproval

< Back to Approval Process List

Process Definition Detail

Process Name	AgentToUWapproval	Active	<input checked="" type="checkbox"/>
Unique Name	AgentToUWapproval	Next Automated Approver Determined By	
Description			
Entry Criteria	Account: Account Name NOTEQUAL TO acdf		
Record Editability	Administrator OR Current Approver		
Approval Assignment Email Template			
Initial Submitters	Account Owner		
Created By	Tejas.Phopale: 21/04/2018 22:47		
Modified By	Tejas.Phopale: 21/04/2018 23:44		

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Edit	Email Alert	Email For approval

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions	1	Step 1			User Tejas Phopale	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Next, click on “New Billing/Contact Information” button to insert billing details. It will be helpful for Billing solution to get details by extraction process. We have created new task, activity history, Notes & attachments and approval history.

Billing/Contact Informations

Action	Billing/Contact information Name	Title	Business/Own Email	Phone
Edit Del	Tel Thakare		tphopale@gmail.com	0894946181

Open Activities

Action	New Task	New Event	Open Activities Help
No records to display			

Activity History

Action	New Call	Mail Merge	Send an Email	Activity History Help
No records to display				

Notes & Attachments

Action	New Note	Attach File	Notes & Attachments Help
No records to display			

Approval History

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)	24/04/2018 14:12	Pending	Tejas Phopale	Tejas Phopale		Pending
Approval Request Submitted	24/04/2018 14:12	Submitted	Sneha Karma	Sneha Karma		
Step: Step 1	24/04/2018 14:12	Approved	Tejas Phopale	Sneha Karma	I have verified the policy its approved...	Approved
Approval Request Submitted	24/04/2018 13:58	Submitted	Ashvin Ramteke	Ashvin Ramteke		

Billing/Contact Information:

The “Billing/Contact Information” is the customize object of Contact. We have added some fields which are shown below:

Contact Custom Fields & Relationships							Contact Custom Fields & Relationships Help (?)
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit Del Replace	Billing Method	Billing_Method__c	Picklist			Tejas Phopale, 13/04/2018 16:59	✓
Edit Del	Created Date	Created_Date__c	Date			Tejas Phopale, 18/04/2018 22:47	□
Edit Del	Languages	Languages__c	Text(100)			Tejas Phopale, 06/02/2018 14:16	□
Edit Del Replace	Payment Plan	Payment_Plan__c	Picklist			Tejas Phopale, 13/04/2018 17:04	✓
Deleted Fields (1)							

We can able to add billing details for the clients and get all details required for P&C Suite required to perform process like “Billing” and “Claims” solutions.

This screenshot shows the "Billing/Contact Information Edit" page. It includes sections for "Billing/Contact Information Owner" (Ashvin Ramteke), "Address Information" (Mailing Street: 532 Parnell Street, Mailing City: PARRELL STREET, Mailing State/County: DUBLIN1, Mailing Zip/Postal Code: Dublin 1, Other Street: 532 Parnell Street, Other City: PARRELL STREET, Other State/Province: DUBLIN1, Other Zip/Postal Code: Dublin 1, Other Country: Ireland), "Additional Information" (Languages: English), and "Description Information" (Old Customer). The page has standard save buttons at the bottom.

This screenshot shows the "Billing/Contact Information Detail" page for Will Smith. It displays the same contact information as the edit page, along with activity history (Open Activities, Activity History, Notes & Attachments, HTML Email Status), and a "Workflow Rules" section. The page also includes a "Billing/Contact Information Detail" table with columns for Name, Department, Birthdate, Lead Source, Billing Method, Payment Plan, Created Date, Mailing Address, Languages, and Last Modified By.

Combining Policy Application and Contact using VisualForce

We have added one add-on **VisualForce page functionality using Apex class and Apex Trigger** for Underwriter. The page is for **Underwriter** to get Policy generated summary of today's date wherein we have added one controller class file which fetches the data from database from Account (i.e. Policy Application) object and Contact (i.e. Billing/Contact Information) object. The code for controller is shown below:

```
public with sharing class Controller {
```

```
List<Account> acts=[Select Name,Coverage_Type__c,Controlling_County__c,Annual_Premium__c from Account where Created_Date__c=:system.today()];
```

```
List<Contact> cont=[Select Name,Billing_Method__c,Payment_Plan__c,Email from Contact where Created_Date__c=:system.today()];
```

```
public List<Account> getacts(){  
    return acts;  
}
```

```
public List<Contact> getcont(){  
    return cont;  
}
```

```
}
```

The screenshot shows the Salesforce Apex Class Detail page for a class named 'Controller'. The page includes the following details:

- Apex Class Detail:** Shows the class name 'Controller' and its status as 'Active'.
- Class Body:** Displays the Apex code provided in the question.
- Metadata:** Shows the Namespace Prefix, Created By (Tejas Phopale), and Last Modified By (Tejas Phopale).
- Sidebar:** Includes the Lightning Experience Migration Assistant and the Salesforce Mobile Quick Start menu.

```
1 public with sharing class Controller {  
2       
3         List<Account> acts=[Select Name,Coverage_Type__c,Controlling_County__c,Annual_Premium__c from Account where Created_Date__c=:system.today()];  
4         List<Contact> cont=[Select Name,Billing_Method__c,Payment_Plan__c,Email from Contact where Created_Date__c=:system.today()];  
5       
6     public List<Account> getacts(){  
7         return acts;  
8     }  
9       
10    public List<Contact> getcont(){  
11        return cont;  
12    }  
13 }
```

The Visualforce page and its implementation shown below:

Page Detail

Label: Policy_Stat_For_Underwriter
Namespace Prefix:
Available for Lightning Experience, Lightning Communities, and the mobile app
Require CSRF protection on GET requests
Created By: Tejas Phopale, 18/04/2018 22:15

Visualforce Markup

```
<apex:page controller="Controller">
    <h1>Congratulations</h1>
    <apex:pageblock>
        <apex:outputText value="Policy Applications Summary" style="font-size:26px; color:green; "><br/>
            <apex:pageBlockTable value="{!accts}" var="a">
                <apex:column value="{!a.Name}"/>
                <apex:column value="{!a.Controlling_County__c}"/>
                <apex:column value="{!a.Coverage_Type__c}"/>
                <apex:column value="{!a.Annual_Premium__c}"/>
            </apex:pageBlockTable>
        <apex:outputText value="Billing/Contact Summary" style="font-size:26px; color:green; "><br/>
            <apex:pageBlockTable value="{!cont}" var="a" >
                <apex:column value="{!a.Name}"/>
                <apex:column value="{!a.Payment_Plan__c}"/>
                <apex:column value="{!a.Billing_Method__c}"/>
                <apex:column value="{!a.Email}"/>
            </apex:pageBlockTable>
        </apex:pageBlock>
    </apex:page>
```

Congratulations

Policy Applications Summary

Applicant Name	Controlling County	Coverage Type	Annual Premium
Will Smith	Carlow	Commercial Package	1,328
Tej Thakare	Cork	Business Owners	1,378

Billing/Contact Summary

Name	Payment Plan	Billing Method	Business/Own Email
Will Smith	Eleven Payments	Both Mail and Email	
Tej Thakare	Quarterly	Both Mail and Email	tphopale@gmail.com

The Broker has privileges to provide service at client's desk. So, to enable this functionality we have created VisualForce page and hosted site using inbuild Salesforce functionality.

We are using two separate Visualforce pages highlighted and described in below images of customized view:

Action	Label	Name	Namespace Prefix	API Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit Del Security	PnC_Policy_Stat_For_Underwriter	PnC_Policy_Stat_For_Underwriter		42.0		Tphop	18/04/2018 22:15	Tphop	24/04/2018 15:11
Edit Del Security	AccountsDetails	PnC_page1_Account		42.0		Tphop	19/04/2018 00:18	Tphop	21/04/2018 11:07
Edit Del Security	ContactDetails	PnC_page2ContactDetails		42.0		Tphop	19/04/2018 00:20	Tphop	21/04/2018 10:53
Edit Del Security	Free online quote template	PnC_Free_online_quote_template		42.0		Tphop	18/04/2018 11:22	Tphop	21/04/2018 08:49

Switch to Lightning Experience Tejas Phopale Setup Help P&C Insurance

Home Chatter Policy Applications Billing/Contact Informations Reports Dashboards Premium Calculator +

Quick Find / Search... Search

Visualforce Page PnC_page1_Account Help for this Page

Page Detail

Label	AccountsDetails
Namespace Prefix	Available for Lightning Experience, Lightning Communities, and the mobile app
Require CSRF protection on GET requests	Description
Last Modified By Tejas Phopale, 24/04/2018 15:24	Created By Tejas Phopale, 19/04/2018 00:18

Visualforce Markup Version Settings

```
<apex:page standardController="Account" showHeader="False">
<apex:pagemessages /><apex:pageMessages>
<apex:stylesheet value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/css/bootstrap-combined.min.css"/>
<apex:includeScript value="https://ajax.googleapis.com/ajax/libs/jquery/1.8.3/jquery.min.js" />
<apex:includeScript value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/js/bootstrap.min.js" />

<div align="Center">
<table border="0" cellpadding="0" cellspacing="0" style="width:100%">
<tr>
<td><apex:image id="theImage" value="{!$Resource.Logo}" /></td>
</tr>
</table>
</div>

<apex:form>
<apex:pageBlock showHeader="true" title="Policy Application" columns="1" collapsible="false">
<apex:inputField value="{!Account.Agency_Name_c}" />
<apex:inputField value="{!Account.Address_Line_1_c}" />
<apex:inputField value="{!Account.Address_Line_2_c}" />
<apex:inputField value="{!Account.Address_Line_3_c}" />
<apex:inputField value="{!Account.Underwriter_Name_c}" />
<apex:inputField value="{!Account.Created_Date_c}" />
<apex:inputField value="{!Account.Name}" />
<apex:inputField value="{!Account.Doing_Business_AS_c}" />
<apex:inputField value="{!Account.County_c}" />
<apex:inputField value="{!Account.Postal_Code_c}" />
<apex:inputField value="{!Account.State_Province_c}" />
<apex:inputField value="{!Account.Policy_Effective_Date_c}" />
<apex:inputField value="{!Account.E_mail_Address_c}" />
<apex:inputField value="{!Account.Coverage_Type_c}" />
<apex:inputField value="{!Account.Controlling_County_c}" />
<apex:inputField value="{!Account.Deductible_Amount_c}" />
<apex:inputField value="{!Account.Deductible_Type_c}" />
<apex:inputField value="{!Account.Insurance_Status_c}" />
<apex:inputField value="{!Account.PPS_Number_c}" />
<apex:inputField value="{!Account.Safety_Credit_Required_c}" />
<apex:inputField value="{!Account.Class_Code_c}" />
<apex:inputField value="{!Account.Any_Prior_Losses_c}" />
<apex:inputField value="{!Account.No_of_Claims_c}" />
<apex:commandbutton onclick="return confirmSave(); " value="Submit" action="{!!save}" />
</apex:pageBlock>
</apex:form>
<script>
//Function to make the user confirm the save/
function confirmSave(){
    return confirm("Your Application details uploaded successfully.");
}
</script>
</apex:page>
```

Platform Cache

Switch to Lightning Experience Tejas Phopale Setup Help P&C Insurance

Home Chatter Policy Applications Billing/Contact Informations Reports Dashboards Premium Calculator +

Quick Find / Search... Search

Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce. Get Started

Salesforce Mobile Quick Start Home

Administrator Manage Users Manage Apps Manage Territories Company Profile Security Controls Domain Management Communication Templates Translation Workbench Data Management Mobile Administration Desktop Administration

Lightning for Outlook and Sync New! Lightning for Gmail and Sync New! Email Administration Google Apps Data.com Administration

Build Customize Create Develop Apex Classes Apex Triggers Apex Test Execution Apex Settings API Visualforce Components Custom Permissions Custom Metadata Types Custom Settings Email Services Lightning Components Lightning LockerService

Visualforce Pages

Visualforce Page PnC_page2ContactDetails Help for this Page

Page Detail

Label	ContactDetails	Edit Delete Clone Where is this used? Show Dependencies Preview
Namespace Prefix	Available for Lightning Experience, Lightning Communities, and the mobile app	
Require CSRF protection on GET requests	<input type="checkbox"/>	
Description		
Last Modified By	Tejas Phopale, 21/04/2018 10:53	

Visualforce Markup Version Settings

```
<apex:page id="Contact" name="Contact" standardController="Contact" showHeader="False">
<apex:pageMessages>
<apex:stylesheet value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/css/bootstrap-combined.min.css"/>
<apex:includeScript value="https://ajax.googleapis.com/ajax/libs/jquery/1.8.3/jquery.min.js" />
<apex:includeScript value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/js/bootstrap.min.js"/>

<div align="Center">
<table border="0" cellspacing="0" cellpadding="0">
<tr>
<td><apex:image id="theImage" value="{!$Resource.Logo}" /></td>
</tr>
</table>
</div>

<apex:form>
<apex:pageBlock>
<div align="Center">
<apex:outputText value="Fill the Complete Form Details" style="font-size:26px; color:green; "/><br/>
</div>

<div align="center">
<apex:pageBlockSection showHeader="true" title="Billing/Contact Details" columns="1" collapsible="false">
<apex:inputField value="{!Contact.Salutation}"/>
<apex:inputField value="{!Contact.LastName}"/>
<!--<apex:inputField value="{!Contact.Account}"/>-->
<apex:inputField value="{!Contact.Billing_Method__c}"/>
<apex:inputField value="{!Contact.Billing_Plan__c}"/>
<apex:inputField value="{!Contact.Created_Date__c}"/>
<apex:inputField value="{!Contact.Phone}"/>
<apex:inputField value="{!Contact.Description}"/>
<apex:commandbutton onclick="return confirmSave();" value="SUBMIT" action="={!save}" />
</apex:pageBlockSection>
</div>

</apex:pageBlock>
</apex:form>

<script>
//function to make the user confirm the save/
function confirmSave() {
return confirm("Thanks for the interest, You will get Email with Premium Amount.");
}
</script>
</apex:page>
```

[Edit](#) [Delete](#) [Clone](#) [Where is this used?](#) [Show Dependencies](#) [Preview](#)

The Site we have hosted is label as “Online Premium at Client Desk”.

Switch to Lightning Experience Tejas Phopale Setup Help P&C Insurance

Home Chatter Policy Applications Billing/Contact Informations Reports Dashboards Premium Calculator +

Quick Find / Search... Search

Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce. Get Started

Salesforce Mobile Quick Start Home

Administrator Manage Users Manage Apps Manage Territories Company Profile Security Controls Domain Management Communication Templates Translation Workbench Data Management Mobile Administration

Sites What is a Site? Help for this Page

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Your Force.com Domain MyCompany.force.com

Your Sites

- MyCompany.force.com/developers
- MyCompany.force.com/customers
- MyCompany.force.com/marketing

Create Your Force.com Sites

Your Salesforce site domain name is **freeonlinepremiumcheck-developer-edition.eu8.force.com**

Salesforce Sites Terms and Conditions

Sites (freeonlinepremiumcheck-developer-edition.eu8.force.com)

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	Online Premium at Client Desl	http://freeonlinepremiumcheck-developer-edition.eu8.force.com		<input checked="" type="checkbox"/>	Force.com	Tejas Phopale, 22/04/2018 14:13

Site Details
Online Premium at Client Desl

Site Detail

Site Label	Online Premium at Client Desl	Site Name	Online_Premium_By_Broker
Site Description		Site Contact	Tejas Phopale
Active	<input checked="" type="checkbox"/>	Login	Not Allowed
Active Site Home Page	PnC_page1_Account [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjacking Protection Level	Allow framing by the same origin only (recommended)	Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> Edit
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> Edit	Enable Content Sniffing Protection	<input checked="" type="checkbox"/> Edit
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> Edit	Referrer URL Protection	<input checked="" type="checkbox"/> Edit
Guest Access to the Support API	<input type="checkbox"/> Edit		
Created By	Tejas Phopale, 18/04/2018 23:04	Last Modified By	Tejas Phopale, 24/04/2018 15:39
	Edit Public Access Settings Login Settings URL Redirects Deactivate		

Custom URLs

Action	Domain Name	Path	Certificate and Key	Certificate Expiration Date	Site Primary Custom URL
Edit Del View Preview as Admin	freeonlinepremiumcheck-developer-edition.eu8.force.com	/onlinePremiumClientDesk			

In Public Access Settings, we have given permission to the objects.

Standard Object Permissions

	Basic Access		Data Administration			
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Assets	<input type="checkbox"/>	<input type="checkbox"/>				
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>				
Cases	<input type="checkbox"/>	<input type="checkbox"/>				
Coaching	<input type="checkbox"/>	<input type="checkbox"/>				
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Contracts	<input type="checkbox"/>	<input type="checkbox"/>				
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Feedback	<input type="checkbox"/>	<input type="checkbox"/>				
Feedback Questions	<input type="checkbox"/>	<input type="checkbox"/>				
Feedback Question Sets	<input type="checkbox"/>	<input type="checkbox"/>				
Feedback Requests	<input type="checkbox"/>	<input type="checkbox"/>				
Goals	<input type="checkbox"/>	<input type="checkbox"/>				

Custom Object Permissions

	Basic Access		Data Administration			
	Read	Create	Edit	Delete	View All	Modify All
Premium Calculator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The VisualForce page looks like this:

Fill The Complete Form Details
Policy Application

Agency Name	P&C Agency Portal
Address Line 1	102, Greig Court, Parnell Street,
Address Line 2	
Underwriter Name	—None—
Created Date	24/04/2018
Applicant Name	
Doing Business As	
County	—None—
Zip Code	—None—
INIS Number	
Policy Effective Date	24/04/2018
E-mail Address	
Coverage Type	—None—
Controlling County	—None—
Deductible Amount	
Deductible Type	—None—
Experience Mod	—None—
PPS Number	
Safety Credit Required	—None—
Class Code	—None—
Any Prior Losses	—None—
No. of Claims	—None—

Submit

After filling all important details, the page will get redirected to contact details. This functionality is managed at page assignment highlighted below.

Error Pages		Page Assignment	Error Pages Help
Action	Error Condition	Site Page Name	Site Page Description
Preview	Authorization Required Page (401)	PnC_page2ContactDetails	
Preview	Limit Exceeded Page (509)	BandwidthExceeded	Default Lightning Platform Limit Exceeded page
Preview	Maintenance Page(500/503)	InMaintenance	Default Lightning Platform In Maintenance page
Preview	Page Not Found Page (404)	FileNotFoundException	Default Lightning Platform Page/Data Not Found page
Preview	Generic Error Page	Exception	Default Lightning Platformmm page for post-authentication errors

By filling the Policy Application details and click on 'Submit' it will redirect to the Contact Details (Screenshot below).

Policy Application Form (Screenshot 1)

Agency Name	P&C Agency Portal
Address Line 1	102, Greig Court, Parnell Street,
Address Line 2	
Underwriter Name	Sneha Karma
Created Date	24/04/2018 [24/04/2018]
Applicant Name	Tibi
Doing Business AS	NPO
County	Cork
Zip Code	P81
INIS Number	5454154
Policy Effective Date	27/04/2018 [24/04/2018]
E-mail Address	tphopale@gmail.com
Coverage Type	Commercial Property
Controlling County	Kerry
Deductible Amount	120
Deductible Type	Business Apartment
Experience Mod	3
PPS Number	141524
Safety Credit Required	Yes
Class Code	Level 4
Any Prior Losses	Yes
No. of Claims	2

Submit

Created Date: 24/04/2018 [24/04/2018]

Applicant Name: Tibi

Doing Business AS: NPO

County: Cork

Zip Code: P81

INIS Number: 5454154

Policy Effective Date: 27/04/2018 [24/04/2018]

E-mail Address: tphopale@gmail.com

Coverage Type: Commercial Property

Controlling County: Kerry

Deductible Amount: 120

This site says...
Your Application details uploaded successfully.
OK **Cancel**

The Contact VisualForce Page is shown below:

```

Visualforce Markup Version Settings

<apex:page id="Contact" name="Contact" standardController="Contact" showheader="False">
    <apex:pageMessages /><apex:pageMessages>
    <apex:stylesheet value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/css/bootstrap-combined.min.css"/>
        <apex:includeScript value="https://ajax.googleapis.com/ajax/libs/jquery/1.8.3/jquery.min.js" />
        <apex:includeScript value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/js/bootstrap.min.js"/>
    <div align="Center">
        <table border="0" cellspacing="0" cellpadding="0">
            <tr>
                <td><apex:image id="theImage" value="{$Resource.Logo}" /></td>
            </tr>
        </table>
    </div>
    <apex:form>
        <apex:pageBlock>
            <div align="Center">
                <apex:outputText value="Fill The Complete Form Details" style="font-size:26px; color:green; "/><br/>
            </div>
            <div align="center">
                <apex:pageBlockSection showHeader="true" title="Billing/Contact Details" columns="1" collapsible="false">
                    <apex:inputField value=" {!Contact.Salutation} " />
                    <!--<apex:inputField value=" {!Contact.LastName} " />-->
                    <apex:inputField value=" {!Contact.Account} " />
                    <apex:inputField value=" {!Contact.Billing_Method_c} " />
                    <apex:inputField value=" {!Contact.Payment_Plan_c} " />
                    <apex:inputField value=" {!Contact.Created_Date_c} " />
                    <apex:inputField value=" {!Contact.Phone} " />
                    <apex:inputField value=" {!Contact.Description} " />
                    <apex:commandbutton onclick="return confirmSave(); " value=" SUBMIT " action=" {!save} " />
                </apex:pageBlockSection>
            </div>
        </apex:pageBlock>
    </apex:form>
    <script>
        /Function to make the user confirm the save/
        function confirmSave() {
            return confirm("Thanks for the interest, You will get Email with Premium Amount.");
        }
    </script>
</apex:page>

```

The Broker need to fill these details and click on submit to get those details on the P&C Agency Portal Solution. The email notifications, approvals and other functionalities are same like shown in “Policy Application” and “Contact/Billing”.



Fill The Complete Form Details

Billing/Contact Details

Salutation	Mr.
Last Name	Bell
Billing Method	Both Mail and Email
Payment Plan	Five Payments
Created Date	24/04/2018 24/04/2018
Phone	54545
Please enter details here that may helpful to underwriter in their review	
Old Client	
<input type="button" value="SUBMIT"/>	



Salutation	Mr.
Last Name	Bell
Billing Method	Both Mail and Email
Payment Plan	Five Payments
Created Date	24/04/2018 24/04/2018
Phone	54545
Please enter details here that may helpful to underwriter in their review	
<input type="button" value="Old Client"/>	
<div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin: auto;"> <p>This site says...</p> <p>Thanks for the interest. You will get Email with Premium Amount.</p> <p style="text-align: center;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>	

Premium Calculator:

The premium Calculator is the custom object specially designed for peoples who wish to check their premium amount based on their criteria and get Email with selected Coverage type with premium amount. Our P&C Agency Portal customer support executive or Agents can check those details from system database and connect to that people for further assistance. Even users can use this object for dummy instances to verify the premium.

The premium Calculator has only important fields which has Enquirer Details and Premium Check list.

Quick Find / Search...
Help for this Page

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the API.

Action	Label	Master Object	Deployed	Description
Edit Del	Premium Calculator		✓	
Deleted Objects (2)				

Lightning Experience Migration Assistant

Switch to the modern, intelligent Salesforce

[Get Started](#)

The screenshot shows the Salesforce Setup interface. On the left, a sidebar lists various setup categories like Desktop Administration, Sync New!, Build, Create, Develop, etc. The main content area is divided into three sections:

- Custom Fields & Relationships**: A table listing custom fields with columns for Action, Field Label, API Name, Data Type, Indexed, Controlling Field, Modified By, and Track History. Fields include Any_Prior_Losess__c, Basic_Premium__c, Class_Code__c, Controlling_County__c, Coverage_Type__c, Deductible_Type__c, Experience_Mod__c, No_of_Previous_Claims__c, Safety_Credit__c, Total_Premium__c, Your_Contact_Number__c, Your_EmailID__c, and Your_Name__c.
- Related Lookup Filters**: A section stating "No related lookup filters defined."
- Validation Rules**: A section stating "No validation rules defined."
- Triggers**: A table listing triggers with columns for Action, Name, API Version, Status, Size Without Comments, and Last Modified By. One trigger, "VisualPageForPremium", is listed with API Version 42.0, Active status, size 4,036, and last modified by Tejas Phopale on 17/04/2018 at 15:59.

We have written a trigger called “VisualPageForPremium” shown in above screenshot which calculate the premium value and sends the amount to email Template.

The logic behind the Premium Calculation is same as Annual Premium of Policy Application Object explained in “#Policy Application” section **except Base Premium value is getting fetch from default parameter value highlighted in below screenshot.**

The screenshot shows the P&C Insurance Premium Calculator Edit page. The top navigation bar includes Home, Chatter, Policy Applications, Billing/Contact Informations, Reports, Dashboards, Premium Calculator, and a search bar. The main content area is titled "New Premium Calculator". It contains a "Premium Calculator Edit" form with the following fields:

Information		Save Save & New Cancel	
Your Name	<input type="text"/>	Owner	Tejas Phopale
Your Contact Number	<input type="text"/>	* = Required Information	
Your EmailID	<input type="text"/>		
Basic Premium	<input type="text" value="1,000"/>		
Controlling County	<input type="text" value="--None--"/>		
Coverage Type	<input type="text" value="--None--"/>		
Deductible Type	<input type="text" value="--None--"/>		
Experience Mod	<input type="text" value="--None--"/>		
Safety Credit	<input type="text" value="--None--"/>		
Class Code	<input type="text" value="--None--"/>		
Any Prior Losess	<input type="text" value="--None--"/>		
No. of Previous Claims	<input type="text" value="--None--"/>		
Total Premium	<input type="text"/>		

At the bottom of the form are buttons for Save, Save & New, and Cancel.

Apex Trigger Version Settings Trace Flags

```

1 trigger VisualPageForPremium on Premium_Calculator__c (before insert) {
2
3 for (Premium_Calculator__c pc : Trigger.New)
4 {
5
6     integer base_premium=Integer.valueOf(pc.Basic_Premium__c);
7     integer county_measure=0;
8     integer coverage_measure=0;
9     integer deductible_measure=0;
10    integer expMod_measure=0;
11    integer safety_measure=0;
12    integer classcode_measure=0;
13    integer claims_measure=0;
14    integer priorLoss_measure=0;
15
16    /*Code for state premium calculation starts*/
17    if (pc.Controlling_County__c !=NULL)
18    {
19        /*Considering Waterford as best weather status county in Ireland */
20        if(pc.Controlling_County__c.equals('Waterford'))
21        {
22            county_measure=20;
23        }
24
25        if(pc.Controlling_County__c.equals('Dublin'))
26        {
27            county_measure=50;
28        }
29        if(pc.Controlling_County__c.equals('Cork'))
30        {
31            county_measure=80;
32        }
33        else {
34            county_measure=70;
35        }
36    }
37
38    pc.Total_Premium__c = base_premium + county_measure + coverage_measure + deductible_measure + expMod_measure + safety_measure + classcode_measure + claims_measure + priorLoss_measure;
39
40 }
41
42 }
```

As we have only 1 site to registration access in Salesforce developer edition, we are going to demonstrate functionality by modifying with Premium Calculator Visualforce page:

The screenshot shows the Salesforce Developer Edition interface with the following details:

- Page Detail:**
 - Label: Free online quote template
 - Namespace Prefix: PnC_Free_online_quote_template
 - Available for Lightning Experience, Lightning Communities, and the mobile app:
 - Description: (empty)
 - Last Modified By: Tejas Phopale, 21/04/2018 08:49
 - Created By: Tejas Phopale, 18/04/2018 11:22
- Visualforce Markup:**

```

<apex:page standardController="Premium_Calculator__c" showheader="False">
<apex:pagemessages /><apex:pagemessages />
<apex:stylesheet value="https://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/css/bootstrap-combined.min.css"/>
<apex:includeScript value="https://ajax.googleapis.com/ajax/libs/jquery/1.8.3/jquery.min.js" />
<apex:includeScript value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/js/bootstrap.min.js"/>

<div align="Center">
<table border="0" cellspacing="0" cellpadding="0">
<tr>
<td><apex:image id="theImage" value="{!!$Resource.Logo}" /></td>
</tr>
</table>
</div>

<apex:form>
<apex:pageBlock>
<div align="Center">
<apex:outputText value="Free online quote" style="font-size:26px; color:green; "/><br/>
</div>

<div align="center">
<apex:pageBlockSection showHeader="true" title="Smart Way to get Premium" columns="1" collapsible="false">
<apex:inputField value="{!!Premium_Calculator__c.Name__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Your_Contact_Number__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Your_EmailID__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Your_Country__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Coverage_Type__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Deductible_Type__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Experience_Mod__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Safety_Credit__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Class_Code__c}" />
<apex:inputField value="{!!Premium_Calculator__c.Any_Prior_Losses__c}" />
<apex:inputField value="{!!Premium_Calculator__c.No_of_Previous_Claims__c}" />
<apex:commandButton onclick="return confirmSave();;" value="SUBMIT" action="{!!save}" />
</apex:pageBlockSection>
</div>

</apex:pageBlock>
</apex:form>

<script>
//Function to make the user confirm the save/
function confirmSave() {
    return confirm("Thanks for the interest, You will get Email with Premium Amount.");
}
</script>
</apex:page>
```
- Version Settings:** (selected tab)
- Visualforce Pages:** (selected tab)
- Platform Cache**
- Sites**

The “Active Home page” has been modified with above VisualForce page(Screenshot below).

This screenshot shows the 'Site Edit' page for a site named 'Online Premium at Client Desl'. The page includes fields for Site Label (set to 'Online Premium at Client'), Site Name (set to 'Online_Premium_By_Brc'), Site Description (empty), Site Contact (set to 'Tejas Phopale'), Default Web Address (set to 'http://freeonlinepremiumcheck-developer-edition.eu8.force.com/onlinePremiumClientDes'), Active status (checked), Active Site Home Page (set to 'PnC_Free_online_quote'), Inactive Site Home Page (set to 'InMaintenance'), Site Template (set to 'SiteTemplate'), Site Robots.txt (empty), Site Favorite Icon (empty), Analytics Tracking Code (empty), URL Rewriter Class (empty), Enable Feeds (unchecked), Clickjack Protection Level (set to 'Allow framing by the same origin only (recommended)'), and Require Secure Connections (HTTPS) (checked). The page also features a sidebar with various Salesforce links like Home, Chatter, Policy Applications, Billing/Contact Informations, Reports, Dashboards, Premium Calculator, and a Lightning Experience Migration Assistant.

After hitting on site URL, we will get our webpage and person will get email notification after filling online form. Our customer executive or Agent will look for all the details which eventually present in database and connect them for future assistance (Screenshot below).

This screenshot shows the 'Free online quote' VisualForce page. The page has a purple header with the text 'Free online quote' and 'Smart Way to get Premium'. Below the header is a form with the following fields: Your Name, Your Contact Number, Your EmailID, Controlling County (dropdown menu), Coverage Type (dropdown menu), Deductible Type (dropdown menu), Experience Mod (dropdown menu), Safety Credit (dropdown menu), Class Code (dropdown menu), Any Prior Losses (dropdown menu), and No. of Previous Claims (dropdown menu). At the bottom left of the form is a 'SUBMIT' button.



This site says...

Thanks for the interest. You will get Email with Premium Amount.

OK **Cancel**

Your Name	Ciaran Hayden
Your Contact Number	88954845
Your EmailID	tphopale@gmail.com
Controlling County	Cavan
Coverage Type	Business Owners
Deductible Type	Automobile Manufacturing
Experience Mod	4
Safety Credit	Yes
Class Code	Level 4
Any Prior Lossess	Yes
No. of Previous Claims	3

SUBMIT

Google

Gmail ▾

COMPOSE

Inbox (50,962)

Starred

Important

Sent Mail

Drafts (60)

Categories

imap/Sent

TEJAS +

GAURAV PHOPA

P&C Agency Portal

Online Premium at Client Desi Site Guest User batch2018ictgroupteam@gmail.com via x38fhkv6xcoilo.0n-1n81vuas.eu8.bnc.salesforce.c

to me ▾

-----DO NOT REPLY-----

Hello Ciaran Hayden,

Thank you for connecting with P&C Agency Portal. As per your criteria, the final premium amount would be 1,418 Euro for coverage Business Owners with Policy Effective Date .

Our customer executive will connect you soon for further details.

Thanks and Regards,

Support Team
P&C Agency Portal

Switch to Lightning Experience Tejas Phopale ▾ Setup Help P&C Insurance

Home Chatter Policy Applications Billing/Contact Informations Reports Dashboards Premium Calculator

Create New... All ▾ Edit | Delete | Create New View

New Premium Calculator Change Owner

Action	Premium Calculator Name	Created Date	Your Contact Number	Your EmailID	Total Premium	Coverage Type	Controlling County
Edit Del	PC-10	24/04/2018	88954845	tphopale@gmail.com	1,418	Business Owners	Cavan
Edit Del	PC-2	17/04/2018	9773636241	tphopale@gmail.com	1,308	Business Owners	Dublin
Edit Del	PC-3	17/04/2018	9783855	tphopale@gmail.com	1,353	Business Owners	Dublin
Edit Del	PC-4	17/04/2018	0894948181	tphopale@gmail.com	1,293	Farm Owners	Dublin
Edit Del	PC-5	17/04/2018	0894948181	tphopale@gmail.com	1,288	Commercial Package	Dublin
Edit Del	PC-6	18/04/2018	0894948181	sskulki@gmail.com	1,333	Commercial Package	Dublin
Edit Del	PC-7	18/04/2018	0894948181	tphopale@gmail.com	1,303	Farm Owners	Dublin
Edit Del	PC-8	19/04/2018	0894948181	tphopale@gmail.com	1,303	Business Owners	Cavan
Edit Del	PC-9	22/04/2018	0894948181	tphopale@gmail.com	1,318	Commercial Auto	Dublin

VI. Management Reports & Dashboards:

The Policy Administrator has access for all Reports and Dashboard. The use of Reports and dashboard is to get all the statistics required for analysis for any duration. The Policy Administrator will audit the same and provide statistics to management.

Reports:

We have created 4 reports based on the uploaded data. For each case study a report is created which can be used for analysis.

Action	Name	Folder	Created By
<input checked="" type="checkbox"/>	Administration Dashboard	My Personal D...	Phopale_Tejas
<input type="checkbox"/>	User Access Audit	My Personal C...	Phopale_Tejas
<input type="checkbox"/>	Premium Enquiry Statistics	My Personal C...	Phopale_Tejas
<input type="checkbox"/>	Policy Agent/Broker	My Personal C...	Phopale_Tejas
<input type="checkbox"/>	New Policy Applications	My Personal C...	Phopale_Tejas

1) New Policy Applications :

This report provides details of new policy application generate at daily basis so the Policy Administrator will track every day effort utilisation vs outcome. The report is grouped by Created Date. This report helps to find statistical everyday progress.

 **New Policy Applications**

Report Generation Status: Complete

Report Options:

Summarize information by: Operator Applicant Name Filter
Created Since

Grouped By:	Created Date			
Sorted By:	Created Date ↑			
Applicant Name	Producer Name	Application Owner Alias	Last Modified Date	Application ID
<input type="checkbox"/> Created Date: 15/04/2018 (4 records)				
Anna Hathway	Tejas Phopale	Iphop	17/04/2018	0010N00004FUJvI
Emma Watson	Tejas Phopale	Iphop	17/04/2018	0010N00004FUJvq
Harry Potter	Tejas Phopale	Iphop	17/04/2018	0010N00004FUJyu
Ron Whisley	Tejas Phopale	Iphop	17/04/2018	0010N00004FUK3W
<input type="checkbox"/> Created Date: 18/04/2018 (1 record)				
Gauri Kale	Tejas Phopale	Iphop	18/04/2018	0010N00004FWGtF
<input type="checkbox"/> Created Date: 21/04/2018 (4 records)				
Tejas Jr.	Tejas Phopale	Iphop	21/04/2018	0010N00004G9t5I
Joe Belly	Ashvin Ramteke	aramt	21/04/2018	0010N00004G9uwg
Aaradhyaa	Ashvin Ramteke	aramt	21/04/2018	0010N00004GA1ub
Steve Jobs	Ashvin Ramteke	aramt	21/04/2018	0010N00004GA1ul
<input type="checkbox"/> Created Date: 22/04/2018 (2 records)				
Mark Spenc	Online Premium at Client Desl Site Guest User	guest	22/04/2018	0010N00004GA2Da
Alex	Online Premium at Client Desl Site Guest User	guest	22/04/2018	0010N00004GA2Dk
<input type="checkbox"/> Created Date: 24/04/2018 (3 records)				
Will Smith	Ashvin Ramteke	aramt	24/04/2018	0010N00004GBT6k
Tej Thakare	Ashvin Ramteke	aramt	24/04/2018	0010N00004GBTWV
Tibi	Online Premium at Client Desl Site Guest User	guest	24/04/2018	0010N00004GBUmW
Grand Totals (14 records)				

2) Policy Agent/Broker :

The “Policy Agent/Broker” report provides detailed information regarding which Agent/Broker has brought revenue in terms of policies. This report is grouped by Producer Name. The Policy Admin can estimate efforts of agents & broker and qualitfy grading accordingly.

 **Policy Agent/Broker**

Report Generation Status: Complete

Report Options:

Summarize information by: **Producer Name** Operator **starts with** Applicant Name Filter Created Since

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Producer Name
Sorted By: Producer Name + ▾

Application Owner Alias	Producer Name: Email	Owner Role	Applicant Name	Application Site	Created Date	Last Modified Date	Application ID
<input type="checkbox"/> Producer Name: Ashvin Ramteke (5 records)							
aramt	batch2018ictgroupteam@gmail.com	-	Will Smith	-	24/04/2018	24/04/2018	0010N00004GBT6K
aramt	batch2018ictgroupteam@gmail.com	-	Tej Thakare	-	24/04/2018	24/04/2018	0010N0004GBTWV
aramt	batch2018ictgroupteam@gmail.com	-	Joe Belly	-	21/04/2018	21/04/2018	0010N00004G9uwg
aramt	batch2018ictgroupteam@gmail.com	-	Aaradhyा	-	21/04/2018	21/04/2018	0010N00004GA1ub
aramt	batch2018ictgroupteam@gmail.com	-	Steve Jobs	-	21/04/2018	21/04/2018	0010N00004GA1ul
<input type="checkbox"/> Producer Name: Online Premium at Client Desl Site Guest User (3 records)							
guest	batch2018ictgroupteam@gmail.com	-	Mark Spenc	-	22/04/2018	22/04/2018	0010N00004GA2Da
guest	batch2018ictgroupteam@gmail.com	-	Tibi	-	24/04/2018	24/04/2018	0010N00004GBUmw
guest	batch2018ictgroupteam@gmail.com	-	Alex	-	22/04/2018	22/04/2018	0010N00004GA2DK
<input type="checkbox"/> Producer Name: Tejas Phopale (22 records)							
Tphop	batch2018ictgroupteam@gmail.com	-	GenePoint	-	06/02/2018	06/02/2018	0010N00004AICyZ
Tphop	batch2018ictgroupteam@gmail.com	-	United Oil & Gas_UK	-	06/02/2018	06/02/2018	0010N00004AICyX
Tphop	batch2018ictgroupteam@gmail.com	-	United Oil & Gas_Singapore	-	06/02/2018	06/02/2018	0010N00004AICyY
Tphop	batch2018ictgroupteam@gmail.com	-	Edge Communications	-	06/02/2018	06/02/2018	0010N00004AICyP
Tphop	batch2018ictgroupteam@gmail.com	-	Burlington Textiles Corp of America	-	06/02/2018	06/02/2018	0010N00004AICyQ
Tphop	batch2018ictgroupteam@gmail.com	-	Pyramid Construction Inc.	-	06/02/2018	06/02/2018	0010N00004AICyR
Tphop	batch2018ictgroupteam@gmail.com	-	Dickenson plc	-	06/02/2018	06/02/2018	0010N00004AICyS
Tphop	batch2018ictgroupteam@gmail.com	-	Grand Hotels & Resorts Ltd	-	06/02/2018	06/02/2018	0010N00004AICyT
Tphop	batch2018ictgroupteam@gmail.com	-	Express Logistics and Transport	-	06/02/2018	06/02/2018	0010N00004AICyV
Tphop	batch2018ictgroupteam@gmail.com	-	University of Arizona	-	06/02/2018	06/02/2018	0010N00004AICyW
Tphop	batch2018ictgroupteam@gmail.com	-	United Oil & Gas Corp.	-	06/02/2018	06/02/2018	0010N00004AICyU

3) Premium Enquiry Statistics :

This report provides statistical analysis of the number of people enquired about the policy premium. This report is categorized based on different coverage type. The Policy Admin can provide those details to Customer executive section to connect those people to generate new opportunities of policies from them by assisting as per their needs.

 Premium Enquiry Statistics

Report Generation Status: Complete

Report Options:

Summarize information by: Coverage Type Show My premium calculator

Time Frame Date Field Premium Calculator: Created Date Range Custom From To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Premium Calculator: Premium Calculator Name	Your Name	Your EmailID	Controlling County	Total Premium
PC-2	John Ben	tphopale@gmail.com	Dublin	1,308
PC-3	Goerge	tphopale@gmail.com	Dublin	1,353
PC-8	TEJAS PHOPALE	tphopale@gmail.com	Cavan	1,303
Coverage Type: Business Owners (3 records)				
PC-1	TEJAS PHOPALE	tphopale@gmail.com	-	-
Coverage Type: Commercial Auto (1 record)				
PC-5	Pulkit Garg	tphopale@gmail.com	Dublin	1,288
PC-6	Shridhar	sskulki@gmail.com	Dublin	1,333
Coverage Type: Commercial Package (2 records)				
PC-4	Akash Hande	tphopale@gmail.com	Dublin	1,293
PC-7	Gauri Kale	tphopale@gmail.com	Dublin	1,303
Grand Totals (8 records)				

4) User Access Audit:

The User Access Audit report provides history of user login which could be useful for auditing and security purpose. The underwriter can examine those footprints and it will be helpful while Audit inspection.



Search...

Search

Home Chatter Policy Applications Billing/Contact Informations Reports Dashboards Premium Calculator +

User Access Audit

Report Generation Status: Complete

Report Options:

Summarize information by:

Profile

View

Active Users

Time Frame

Date Field

Last Login

Range

Custom

From

To

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Grouped By: Profile

Sorted By: Profile

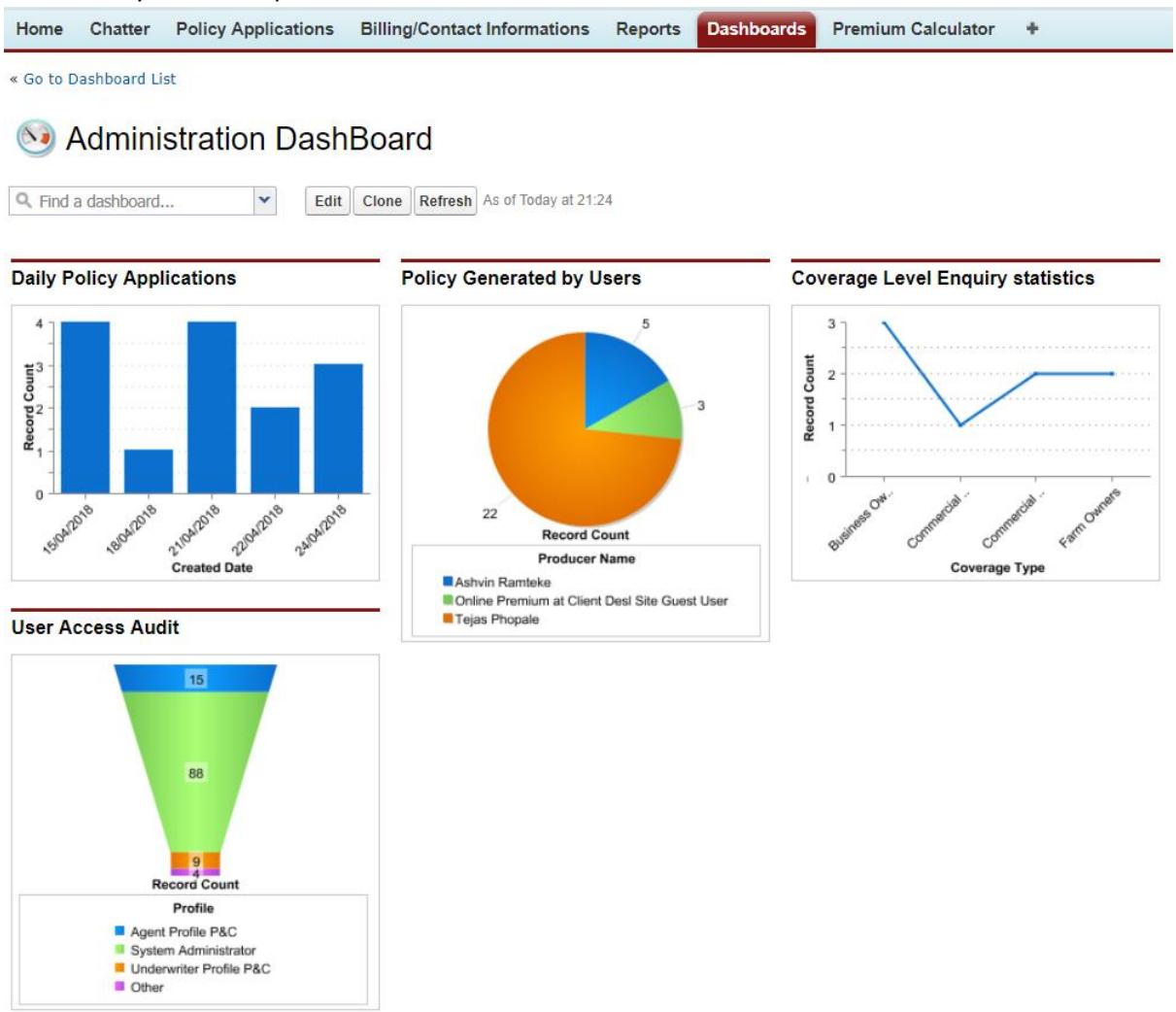
First Name	Last Name	Login Date/Time	Alias	Active	Last Login
<input type="checkbox"/> Profile: Agent Profile P&C (15 records)					
Ashvin	Ramteke	22/03/2018 10:34	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	22/03/2018 12:27	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	22/03/2018 12:27	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 22:31	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 22:31	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 22:54	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 23:10	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 23:20	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 23:20	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 10:47	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 10:47	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 13:12	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 13:12	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 13:12	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 14:19	aramt	<input checked="" type="checkbox"/>	24/04/2018 14:19

 [Profile: Analytics Cloud Integration User \(1 record\)](#)Integration User integ [Profile: Analytics Cloud Security User \(1 record\)](#)Security User sec [Profile: Chatter Free User \(1 record\)](#)- Chatter Expert Chatter [Profile: Online Premium at Client Desk Profile \(1 record\)](#)Online Premium at Client Desl Site Guest User guest [Profile: System Administrator \(88 records\)](#)

Tejas	Phopale	06/02/2018 14:23	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	06/02/2018 14:27	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	06/02/2018 14:29	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	11/02/2018 14:17	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:48	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:48	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:49	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:49	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	20/02/2018 08:58	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06
Tejas	Phopale	20/02/2018 08:58	Iphop	<input checked="" type="checkbox"/>	24/04/2018 21:06

Dashboard:

The Dashboard provides realtime summarisation in graphical manner for data analytics. We have created dashboard based on our report's dimensions. We have created total four dynamic component in dashboard.



1) Daily Policy Applications :

This dashboard represents “New Policy Applications” report which shows daywise count of generated policies.

2) Policy Generated By Users :

This Dashboard represents “Policy Agent/Broker” report to get effort analysis by Agents/Broker. The effort esimation has been calculated based on this graph.

3) Coverage Level Enquiry staticstics :

This dashboard represents “Premium Enquiry statistics” report to get number of enquiries at portal. The management can analyse those graph and based on demand ratio they can provide some offers or discount on those coverage types for business profits.

4) User Access Audit :

This dashboard represents “User Access Audit” report to get all user login activity to track suspicius activity for security and audit maintainance.

VII. Conclusion:

Using the “P&C Agency Portal” application which is created in Salesforce will be very beneficial for the business of P&C Agency Portal solution. It will provide a high efficiency of storing and analysing information and providing reliable solution to clients and users. Also, it will help in better decision making using the reporting and dashboard functionalities with fast and efficient access to every entity.