Strategic ICT Project Report - Part B

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:

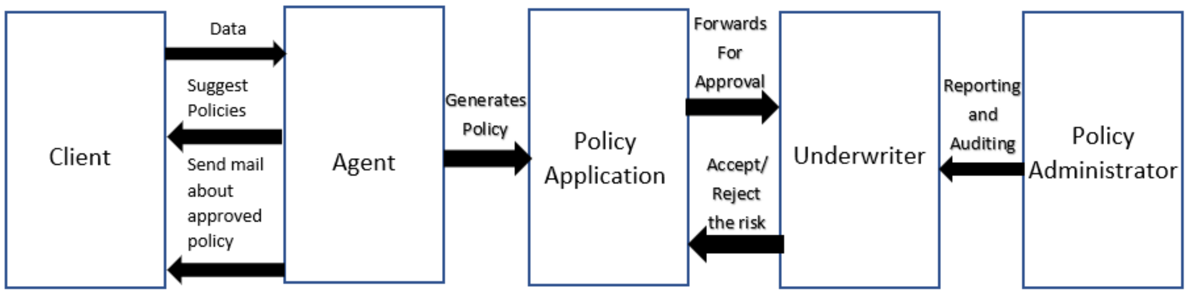


Figure 1: P&C Agency Portal Business Process Flow

- **Entity Relationship Diagram:**

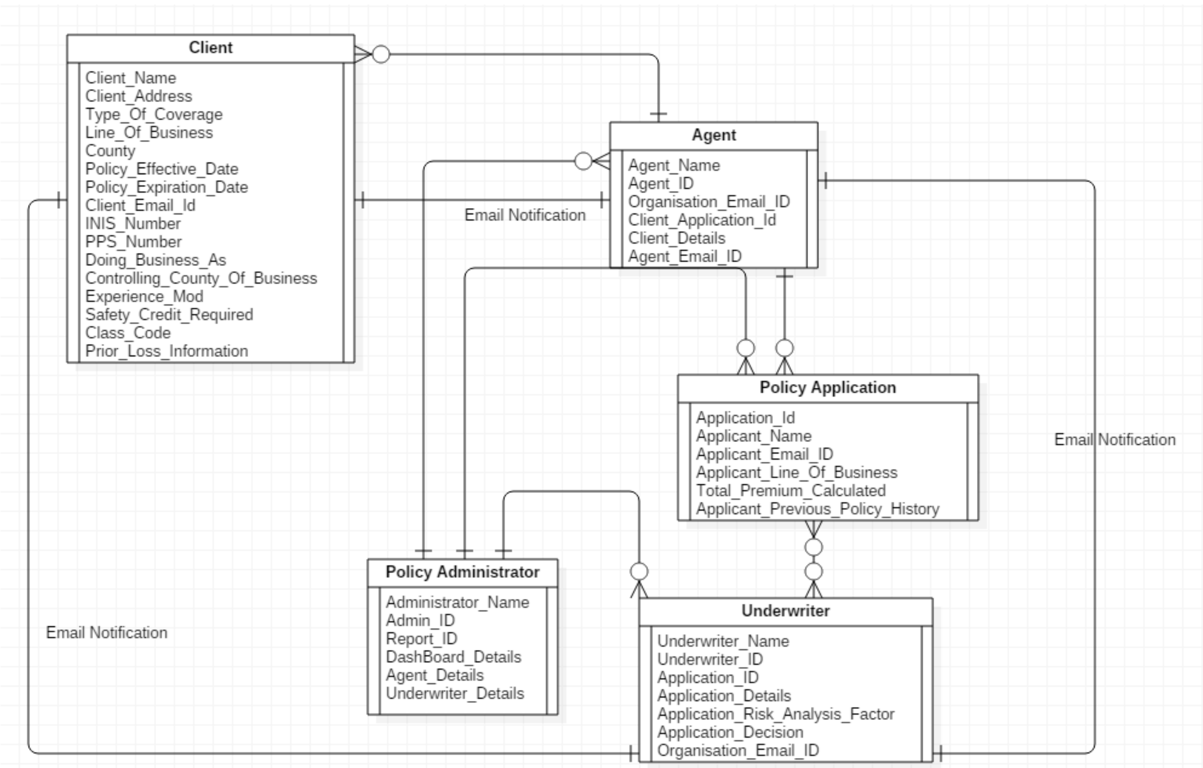
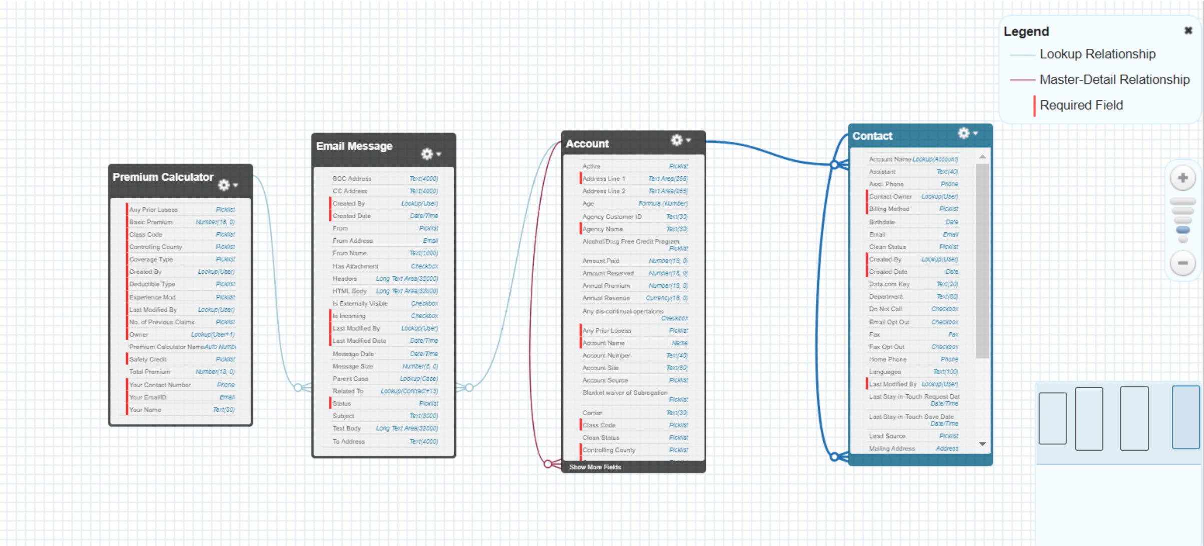


Figure 2: P&C Agency Portal Entity Relationship Diagram

- **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.

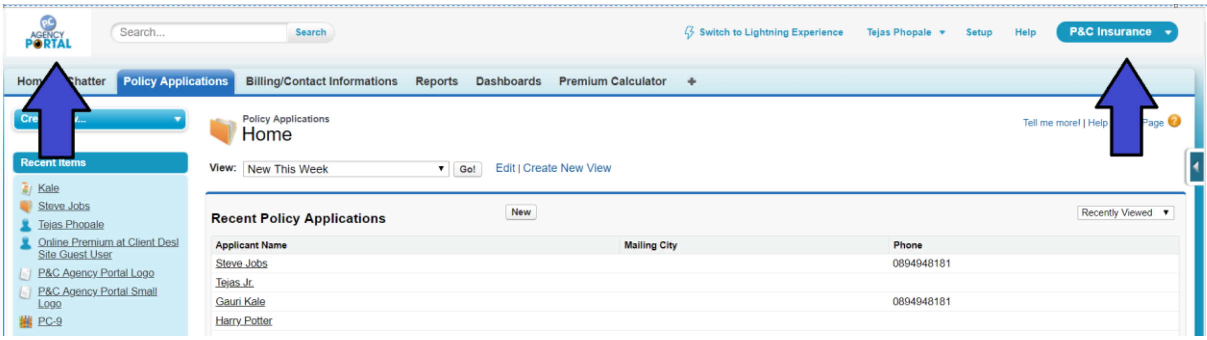
3) Policy Applications: Policy Application is the standard object of **Account** object. The people who has approached to get policy at P&C Agency Portal by any medium including Premium Calculator will be able to generate policy by Agent at agency or broker as client's desk. Broker has website for the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

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.

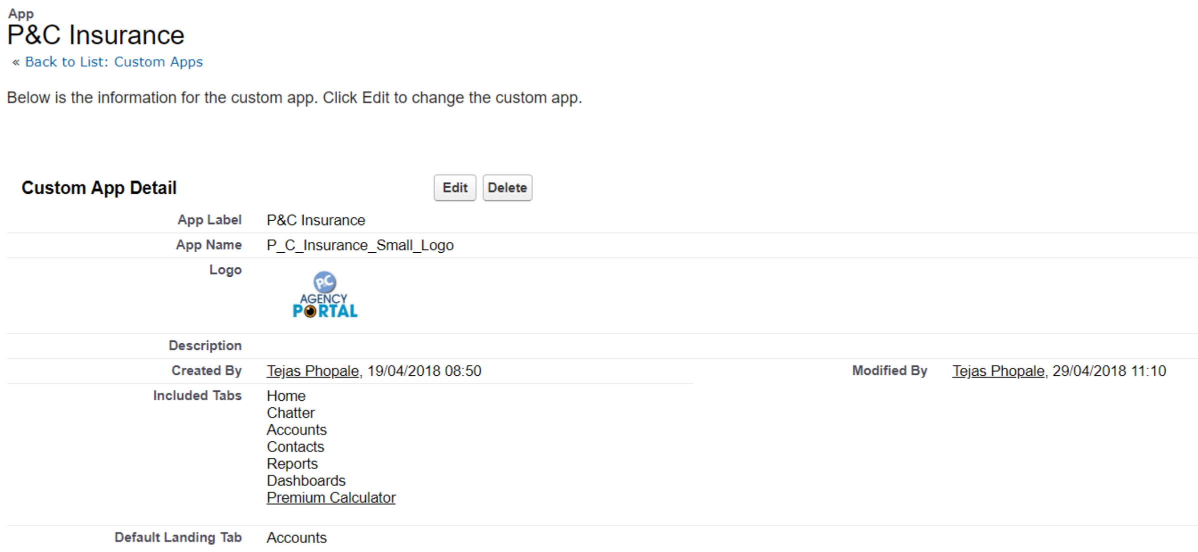
- **Description of process control features:**

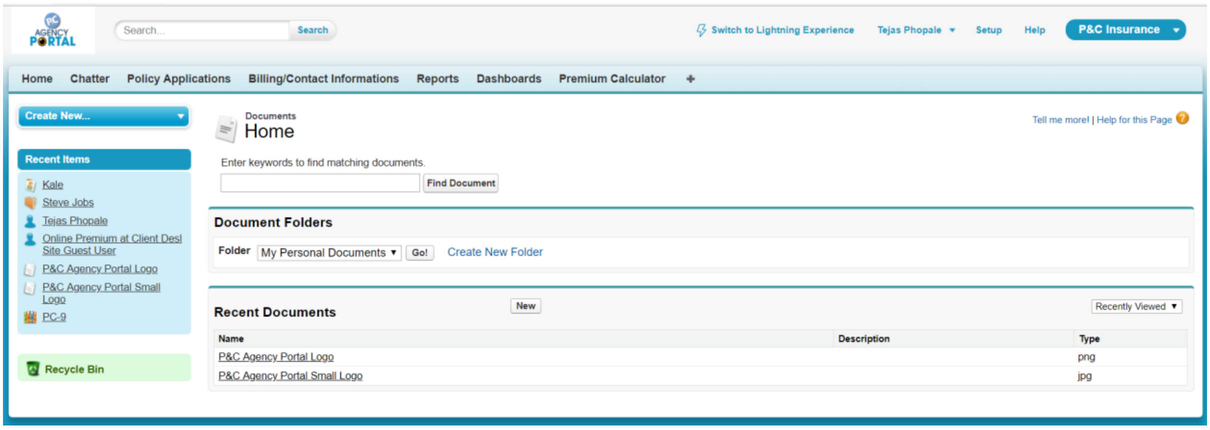
Design:

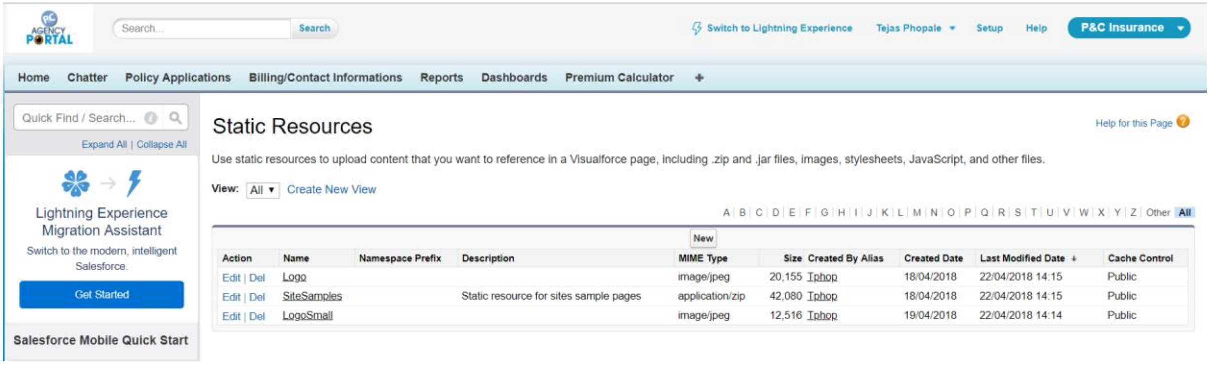
In this section of report, we have described the custom add-ons and different role level access.

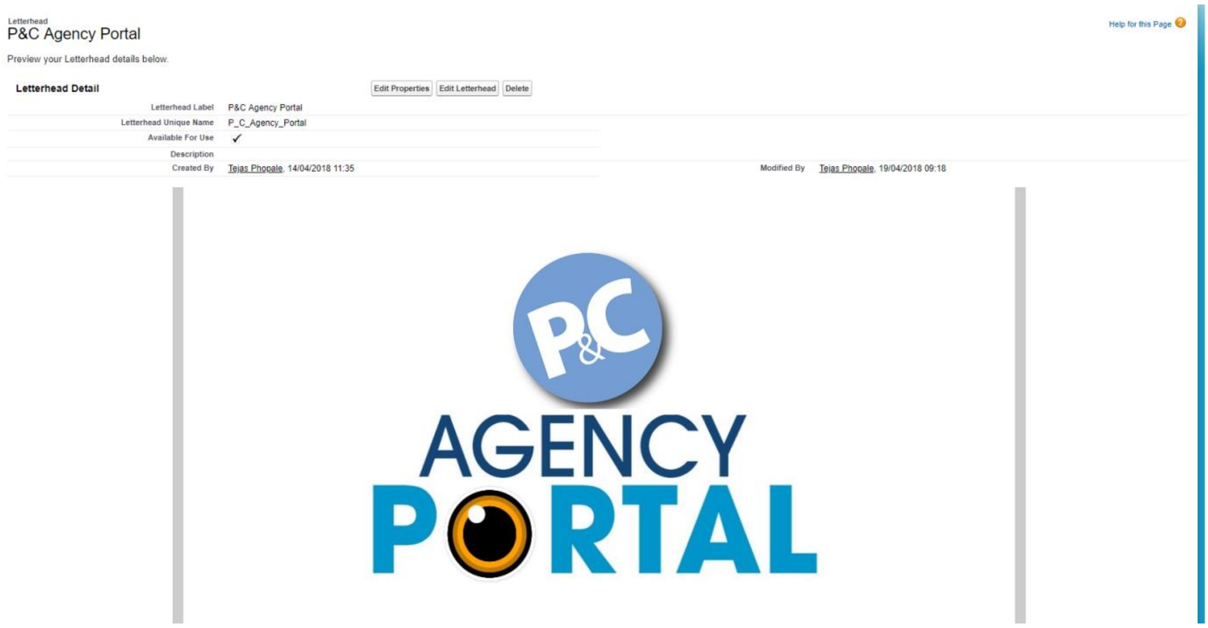


I have created a new app "P&C Insurance" and added logos in documents and static resources for Salesforce logo, letterhead and Visualforce pages. Below are the screenshots of the same:

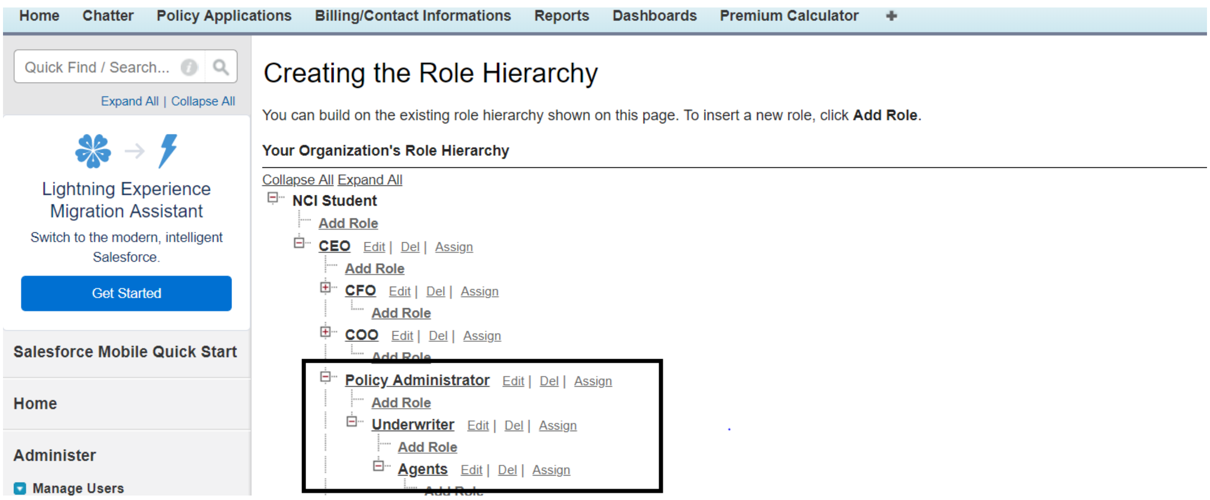




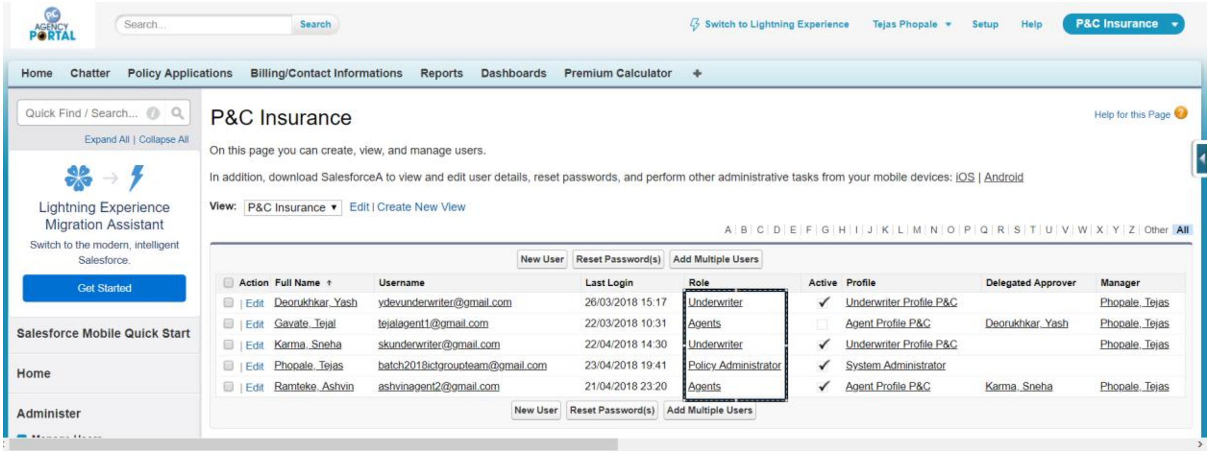




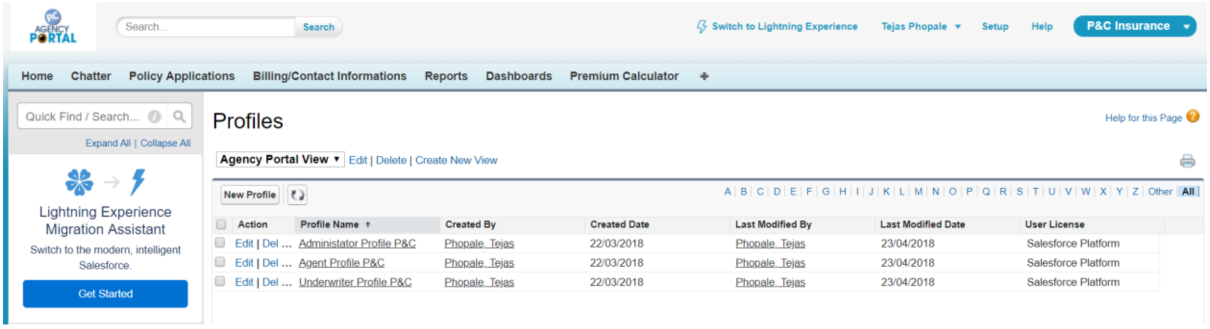
We have created role hierarchy wherein Agents reports to Underwriter and Underwriters reports to Policy Admin:

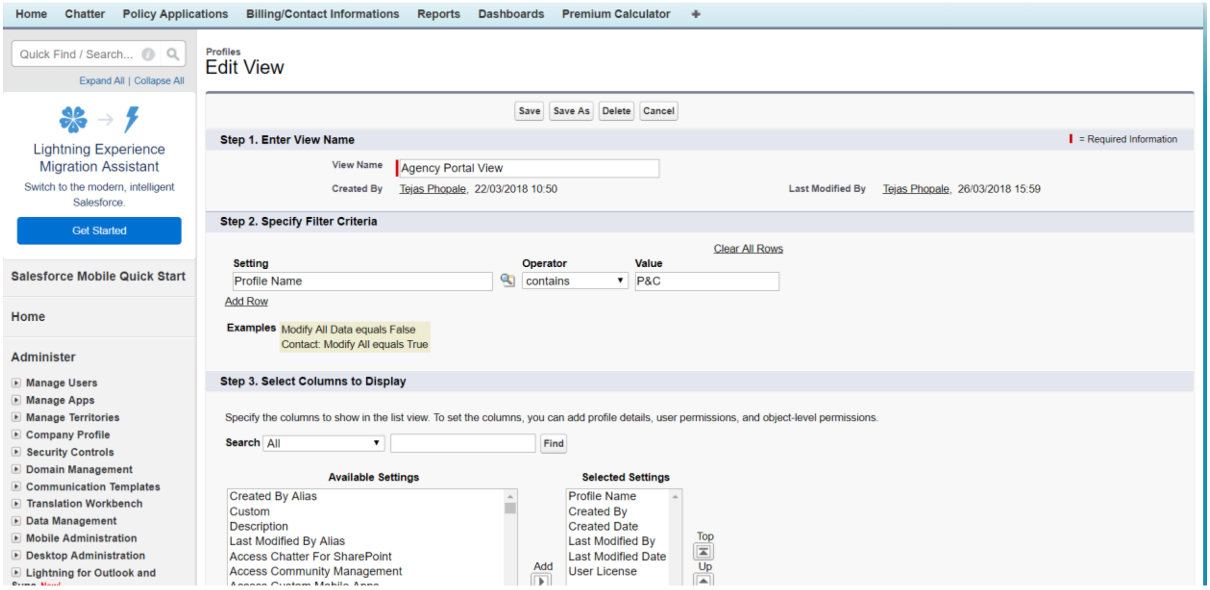


There are total five users: Two Agents, Two Underwrite and one Policy Administrator.



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





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
Accounts	✓	✓	✓	✓	☐	☐
Coaching	✓	✓	✓	✓	☐	☐
Contacts	✓	✓	✓	✓	☐	☐
D&B Companies	✓					
Documents	✓	✓	✓	✓	☐	☐
Feedback	✓	✓	✓	✓	☐	☐
Feedback Questions	✓	✓	✓	✓	☐	☐
Feedback Question Sets	✓	✓	✓	✓	☐	☐
Feedback Requests	✓	✓	✓	✓	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Feedback Templates	✓	✓	✓	✓	☐	☐
Goals	✓	✓	✓	✓	☐	☐
Goal Links	✓	✓	✓	✓	☐	☐
Ideas	✓	✓				
Metrics	✓	✓	✓	✓	☐	☐
Metric Data Links	✓	✓	✓	✓	☐	☐
Performance Cycles	✓	✓	✓	✓	☐	☐
Push Topics	✓	✓	✓	✓		
Streaming Channels	✓	✓	✓	✓	☐	☐

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Premium Calculator	✓	✓	✓	✓	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All

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
Accounts	✓	✓	✓	✓	✓	✓
Coaching	✓	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓	✓
D&B Companies	✓					
Documents	✓	✓	✓	✓	✓	✓
Feedback	✓	✓	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓	✓	✓

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Feedback Templates	✓	✓	✓	✓	✓	✓
Goals	✓	✓	✓	✓	✓	✓
Goal Links	✓	✓	✓	✓	✓	✓
Ideas	✓	✓				
Metrics	✓	✓	✓	✓	✓	✓
Metric Data Links	✓	✓	✓	✓	✓	✓
Performance Cycles	✓	✓	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓		
Streaming Channels	✓	✓	✓	✓	✓	✓

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Premium Calculator	✓	✓	✓	✓	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All

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

Standard Object Permissions

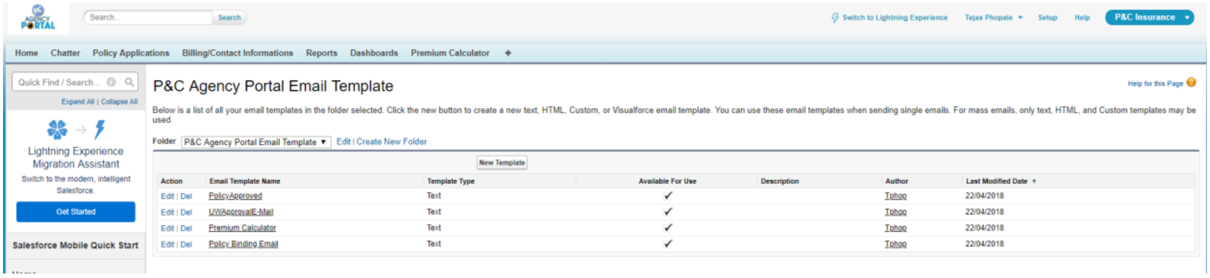
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓	✓	
Coaching	✓	✓	✓	✓	✓	
Contacts	✓	✓	✓	✓	✓	
D&B Companies	✓					
Documents	✓	✓	✓	✓	✓	
Feedback	✓	✓	✓	✓	✓	
Feedback Questions	✓	✓	✓	✓	✓	
Feedback Question Sets	✓	✓	✓	✓	✓	
Feedback Requests	✓	✓	✓	✓	✓	

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Feedback Templates	✓	✓	✓	✓	✓	
Goals	✓	✓	✓	✓	✓	
Goal Links	✓	✓	✓	✓	✓	
Ideas	✓	✓				
Metrics	✓	✓	✓	✓	✓	
Metric Data Links	✓	✓	✓	✓	✓	
Performance Cycles	✓	✓	✓	✓	✓	
Push Topics	✓	✓	✓	✓		
Streaming Channels	✓	✓	✓	✓	✓	

Custom Object Permissions

	Basic Access				Data Administration	
	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".



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.

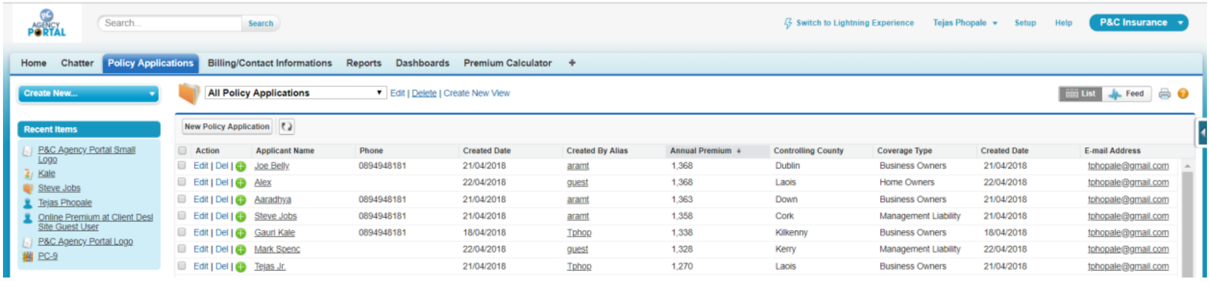
4) Premium Calculator: When any person enquires for the policy on website of organisation, they will receive an email with premium amount and coverage type to their person email id.

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.

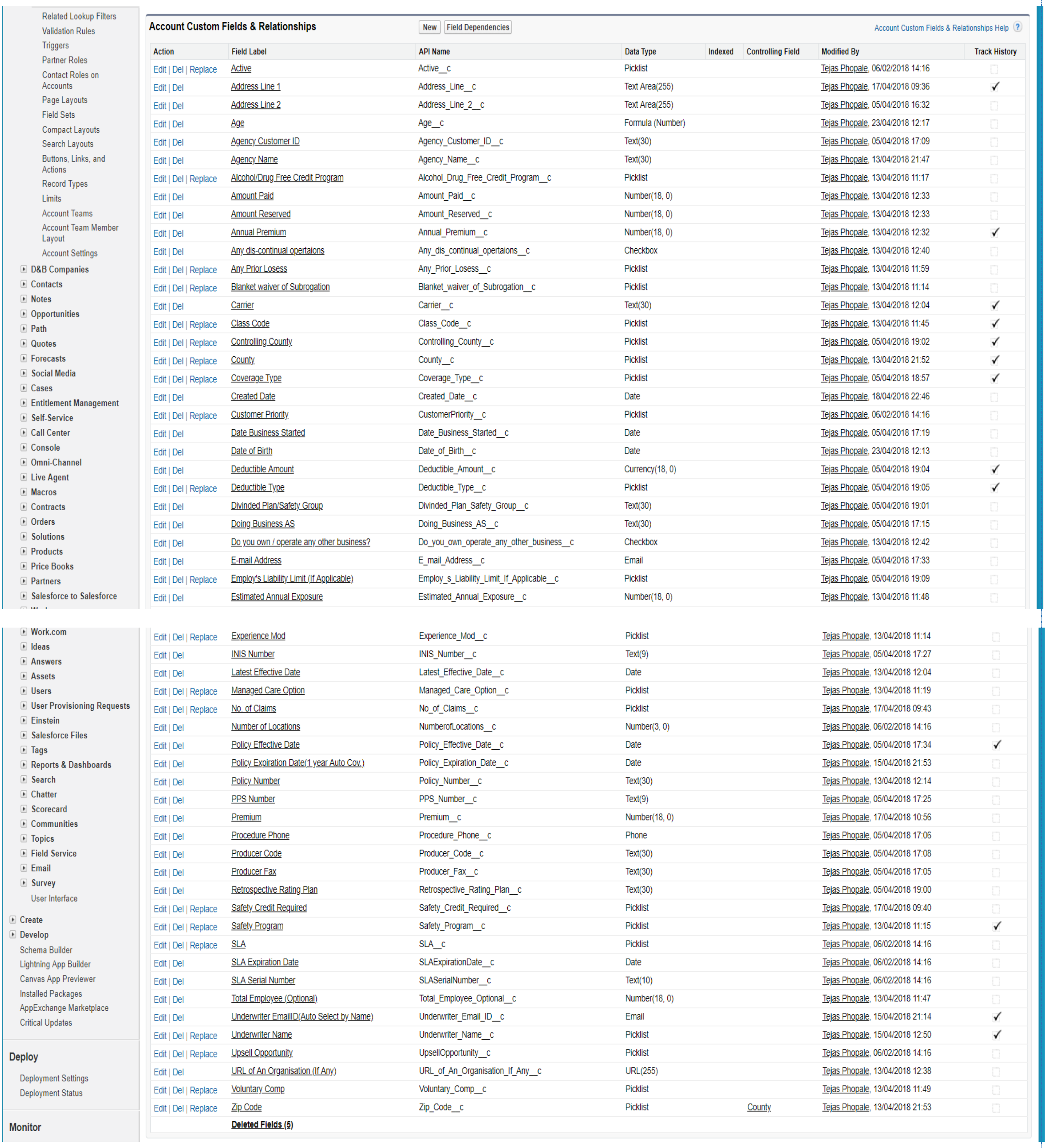
Policy Applications:

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:



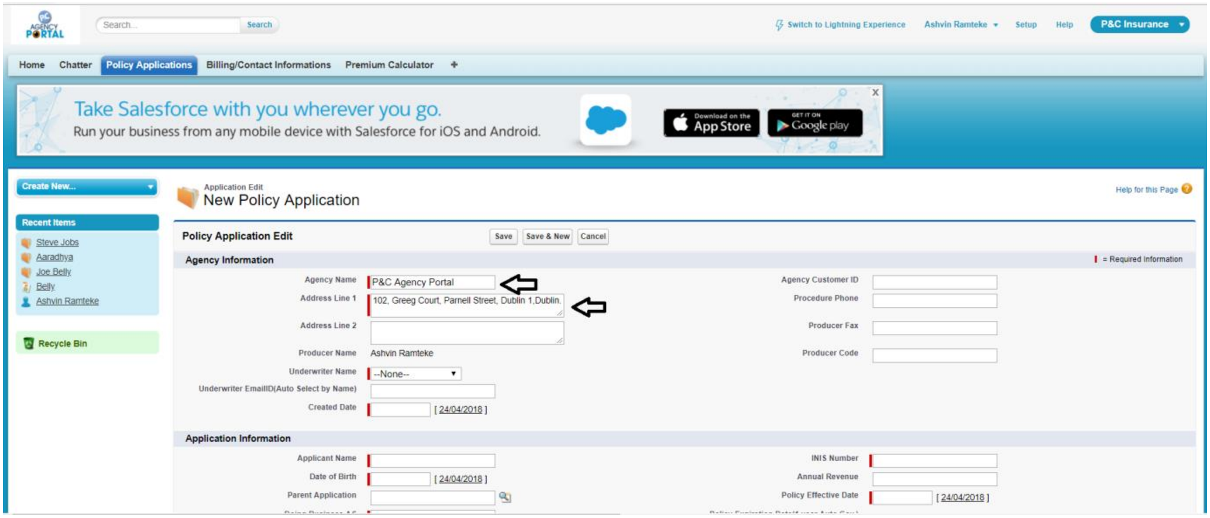
Action	Applicant Name	Phone	Created Date	Created By Alias	Annual Premium	Controlling County	Coverage Type	Created Date	E-mail Address
Edit | Del |	Joe Belly	0894948181	21/04/2018	aramt	1,368	Dublin	Business Owners	21/04/2018	tphopale@gmail.com
Edit | Del |	Alex		22/04/2018	guest	1,368	Laois	Home Owners	22/04/2018	tphopale@gmail.com
Edit | Del |	Aaradhya	0894948181	21/04/2018	aramt	1,363	Down	Business Owners	21/04/2018	tphopale@gmail.com
Edit | Del |	Steve Jobs	0894948181	21/04/2018	aramt	1,358	Cork	Management Liability	21/04/2018	tphopale@gmail.com
Edit | Del |	Gauri Kale	0894948181	18/04/2018	Tphop	1,338	Kilkenny	Business Owners	18/04/2018	tphopale@gmail.com
Edit | Del |	Mark Spenc		22/04/2018	guest	1,328	Kerry	Management Liability	22/04/2018	tphopale@gmail.com
Edit | Del |	Tejas Jr.		21/04/2018	Tphop	1,270	Laois	Business Owners	21/04/2018	tphopale@gmail.com

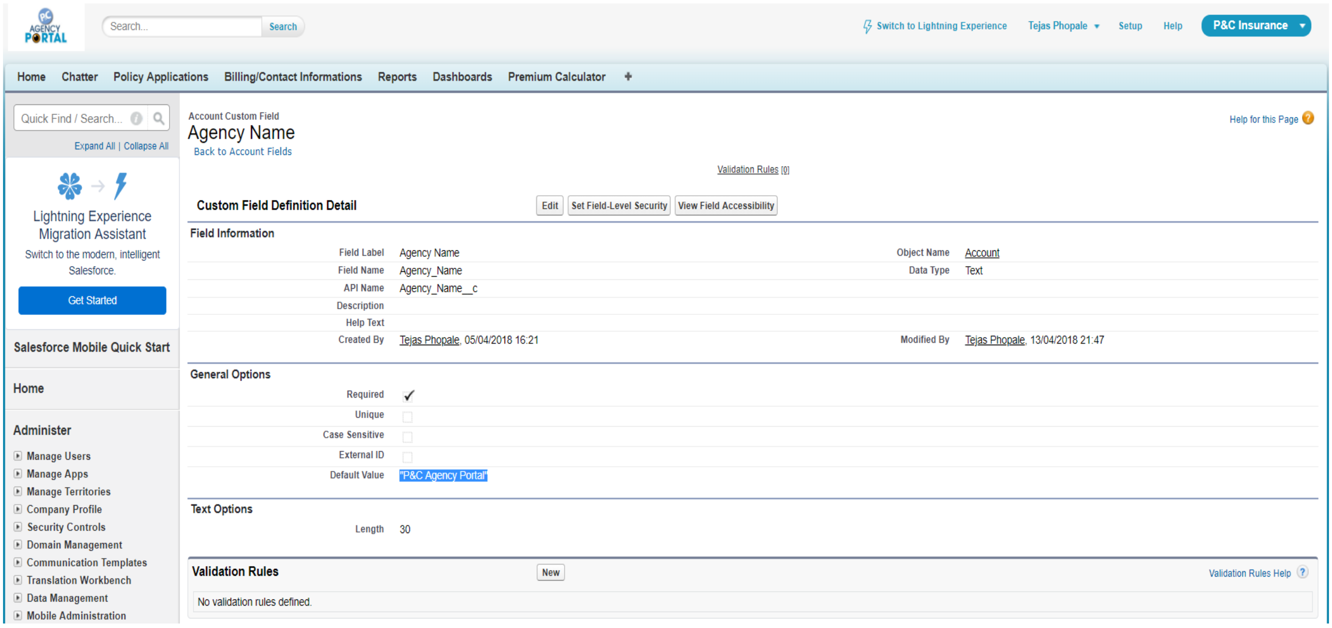
The List of new fields are added shown below:

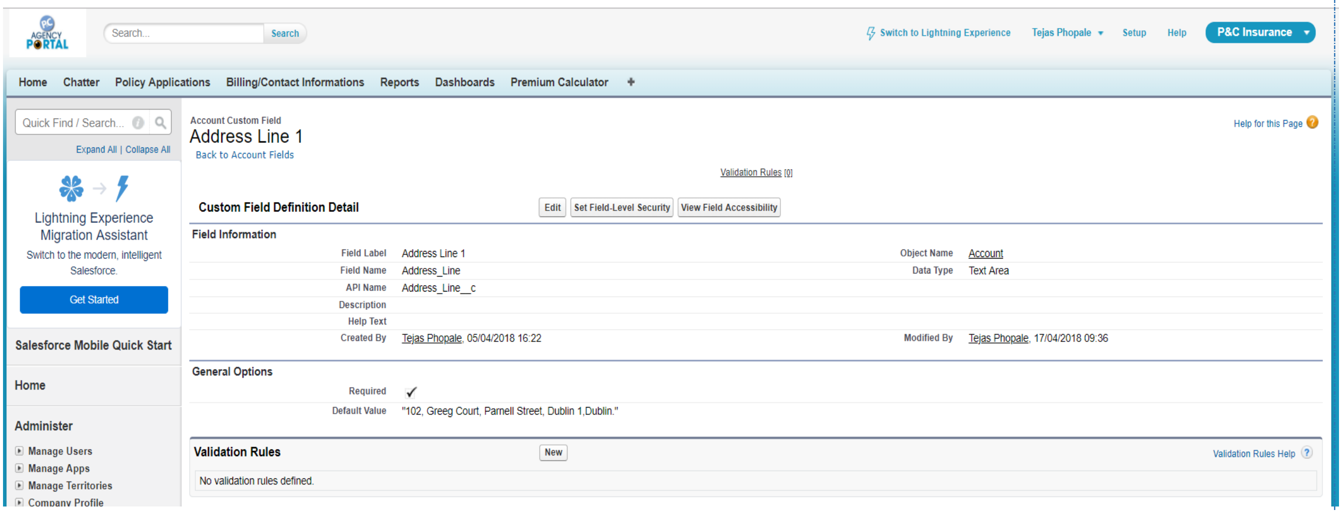


Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit | Del | Replace	Active	Active__c	Picklist			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	Address Line 1	Address_Line__c	Text Area(255)			Tejas Phopale, 17/04/2018 09:36	✓
Edit | Del	Address Line 2	Address_Line_2__c	Text Area(255)			Tejas Phopale, 05/04/2018 16:32	
Edit | Del	Age	Age__c	Formula (Number)			Tejas Phopale, 23/04/2018 12:17	
Edit | Del	Agency Customer ID	Agency_Customer_ID__c	Text(30)			Tejas Phopale, 05/04/2018 17:09	
Edit | Del	Agency Name	Agency_Name__c	Text(30)			Tejas Phopale, 13/04/2018 21:47	
Edit | Del | Replace	Alcohol/Drug Free Credit Program	Alcohol_Drug_Free_Credit_Program__c	Picklist			Tejas Phopale, 13/04/2018 11:17	
Edit | Del	Amount Paid	Amount_Paid__c	Number(18, 0)			Tejas Phopale, 13/04/2018 12:33	
Edit | Del	Amount Reserved	Amount_Reserved__c	Number(18, 0)			Tejas Phopale, 13/04/2018 12:33	
Edit | Del	Annual Premium	Annual_Premium__c	Number(18, 0)			Tejas Phopale, 13/04/2018 12:32	✓
Edit | Del	Any dis-continual opertaions	Any_dis_continual_opertaions__c	Checkbox			Tejas Phopale, 13/04/2018 12:40	
Edit | Del | Replace	Any Prior Losess	Any_Prior_Losess__c	Picklist			Tejas Phopale, 13/04/2018 11:59	
Edit | Del | Replace	Blanket waiver of Subrogation	Blanket_waiver_of_Subrogation__c	Picklist			Tejas Phopale, 13/04/2018 11:14	
Edit | Del	Carrier	Carrier__c	Text(30)			Tejas Phopale, 13/04/2018 12:04	✓
Edit | Del | Replace	Class Code	Class_Code__c	Picklist			Tejas Phopale, 13/04/2018 11:45	✓
Edit | Del | Replace	Controlling County	Controlling_County__c	Picklist			Tejas Phopale, 05/04/2018 19:02	✓
Edit | Del | Replace	County	County__c	Picklist			Tejas Phopale, 13/04/2018 21:52	✓
Edit | Del | Replace	Coverage Type	Coverage_Type__c	Picklist			Tejas Phopale, 05/04/2018 18:57	✓
Edit | Del	Created Date	Created_Date__c	Date			Tejas Phopale, 18/04/2018 22:46	
Edit | Del | Replace	Customer Priority	CustomerPriority__c	Picklist			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	Date Business Started	Date_Business_Started__c	Date			Tejas Phopale, 05/04/2018 17:19	
Edit | Del	Date of Birth	Date_of_Birth__c	Date			Tejas Phopale, 23/04/2018 12:13	
Edit | Del	Deductible Amount	Deductible_Amount__c	Currency(18, 0)			Tejas Phopale, 05/04/2018 19:04	✓
Edit | Del | Replace	Deductible Type	Deductible_Type__c	Picklist			Tejas Phopale, 05/04/2018 19:05	✓
Edit | Del	Divinded Plan/Safety Group	Divinded_Plan_Safety_Group__c	Text(30)			Tejas Phopale, 05/04/2018 19:01	
Edit | Del	Doing Business AS	Doing_Business_AS__c	Text(30)			Tejas Phopale, 05/04/2018 17:15	
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	
Edit | Del	E-mail Address	E_mail_Address__c	Email			Tejas Phopale, 05/04/2018 17:33	
Edit | Del | Replace	Employ's Liability Limit (If Applicable)	Employ_s_Liability_Limit_If_Applicable__c	Picklist			Tejas Phopale, 05/04/2018 19:09	
Edit | Del	Estimated Annual Exposure	Estimated_Annual_Exposure__c	Number(18, 0)			Tejas Phopale, 13/04/2018 11:48	
Edit | Del | Replace	Experience Mod	Experience_Mod__c	Picklist			Tejas Phopale, 13/04/2018 11:14	
Edit | Del	INIS Number	INIS_Number__c	Text(9)			Tejas Phopale, 05/04/2018 17:27	
Edit | Del	Latest Effective Date	Latest_Effective_Date__c	Date			Tejas Phopale, 13/04/2018 12:04	
Edit | Del | Replace	Managed Care Option	Managed_Care_Option__c	Picklist			Tejas Phopale, 13/04/2018 11:19	
Edit | Del | Replace	No. of Claims	No_of_Claims__c	Picklist			Tejas Phopale, 17/04/2018 09:43	
Edit | Del	Number of Locations	NumberofLocations__c	Number(3, 0)			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	Policy Effective Date	Policy_Effective_Date__c	Date			Tejas Phopale, 05/04/2018 17:34	✓
Edit | Del	Policy Expiration Date(1 year Auto Cov.)	Policy_Expiration_Date__c	Date			Tejas Phopale, 15/04/2018 21:53	
Edit | Del	Policy Number	Policy_Number__c	Text(30)			Tejas Phopale, 13/04/2018 12:14	
Edit | Del	PPS Number	PPS_Number__c	Text(9)			Tejas Phopale, 05/04/2018 17:25	
Edit | Del	Premium	Premium__c	Number(18, 0)			Tejas Phopale, 17/04/2018 10:56	
Edit | Del	Procedure Phone	Procedure_Phone__c	Phone			Tejas Phopale, 05/04/2018 17:06	
Edit | Del	Producer Code	Producer_Code__c	Text(30)			Tejas Phopale, 05/04/2018 17:08	
Edit | Del	Producer Fax	Producer_Fax__c	Text(30)			Tejas Phopale, 05/04/2018 17:05	
Edit | Del	Retrospective Rating Plan	Retrospective_Rating_Plan__c	Text(30)			Tejas Phopale, 05/04/2018 19:00	
Edit | Del | Replace	Safety Credit Required	Safety_Credit_Required__c	Picklist			Tejas Phopale, 17/04/2018 09:40	
Edit | Del | Replace	Safety Program	Safety_Program__c	Picklist			Tejas Phopale, 13/04/2018 11:15	✓
Edit | Del | Replace	SLA	SLA__c	Picklist			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	SLA Expiration Date	SLAExpirationDate__c	Date			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	SLA Serial Number	SLASerialNumber__c	Text(10)			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	Total Employee (Optional)	Total_Employee_Optional__c	Number(18, 0)			Tejas Phopale, 13/04/2018 11:47	
Edit | Del	Underwriter EmailID(Auto Select by Name)	Underwriter_Email_ID__c	Email			Tejas Phopale, 15/04/2018 21:14	✓
Edit | Del | Replace	Underwriter Name	Underwriter_Name__c	Picklist			Tejas Phopale, 15/04/2018 12:50	✓
Edit | Del | Replace	Upsell Opportunity	UpsellOpportunity__c	Picklist			Tejas Phopale, 06/02/2018 14:16	
Edit | Del	URL of An Organisation (If Any)	URL_of_An_Organisation_If_Any__c	URL(255)			Tejas Phopale, 13/04/2018 12:38	
Edit | Del | Replace	Voluntary Comp	Voluntary_Comp__c	Picklist			Tejas Phopale, 13/04/2018 11:49	
Edit | Del | Replace	Zip Code	Zip_Code__c	Picklist		County	Tejas Phopale, 13/04/2018 21:53	
	Deleted Fields (5)						

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:



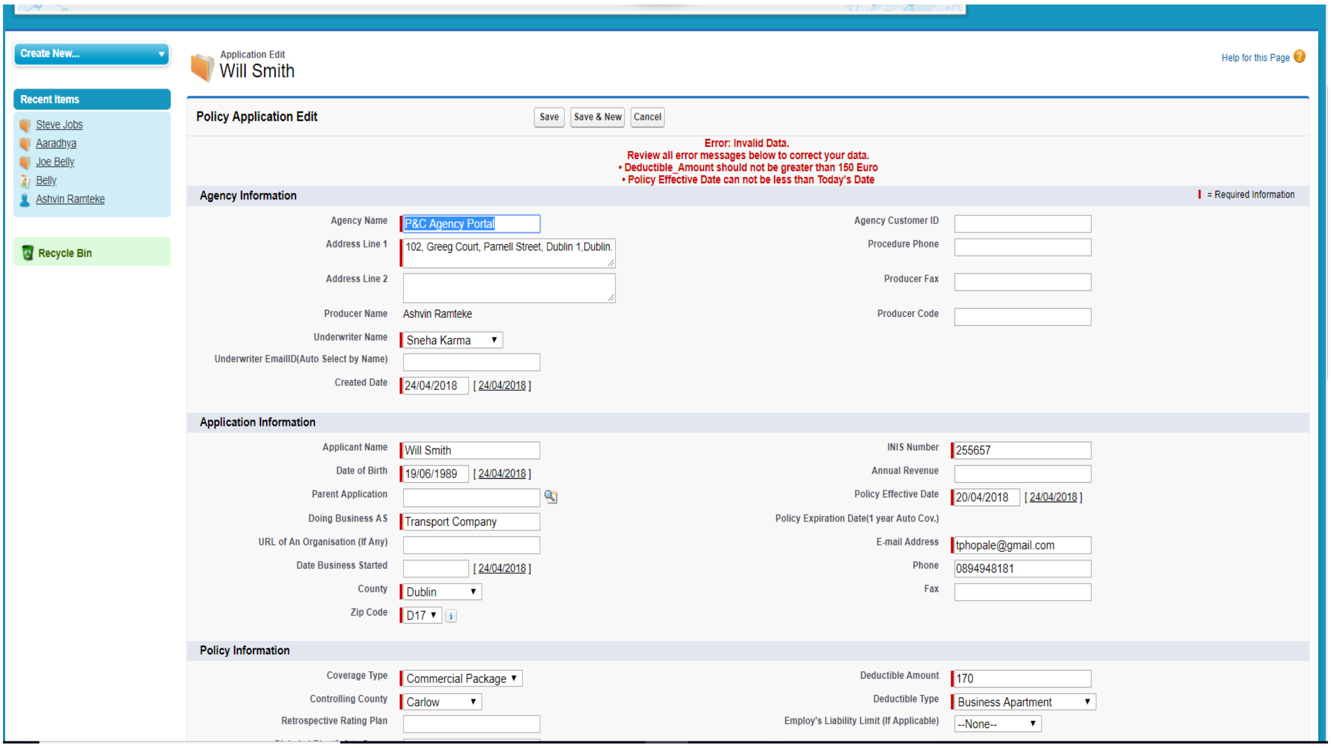


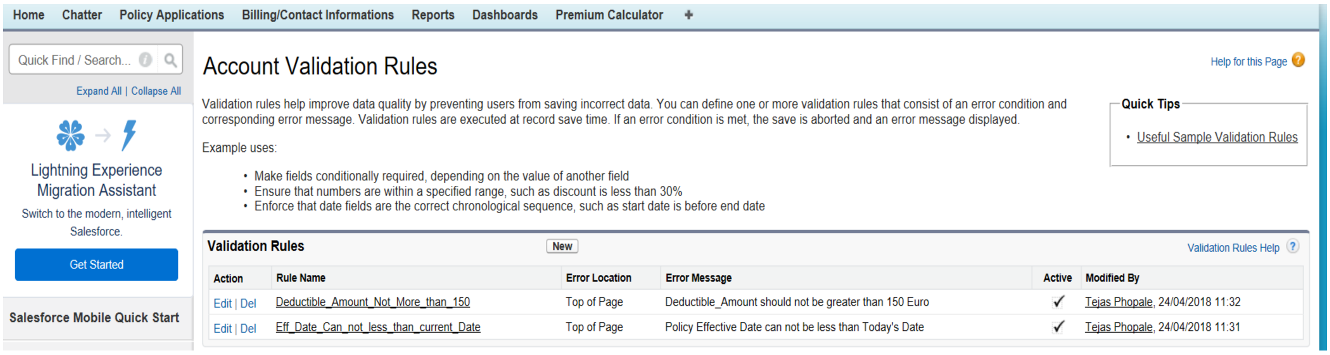


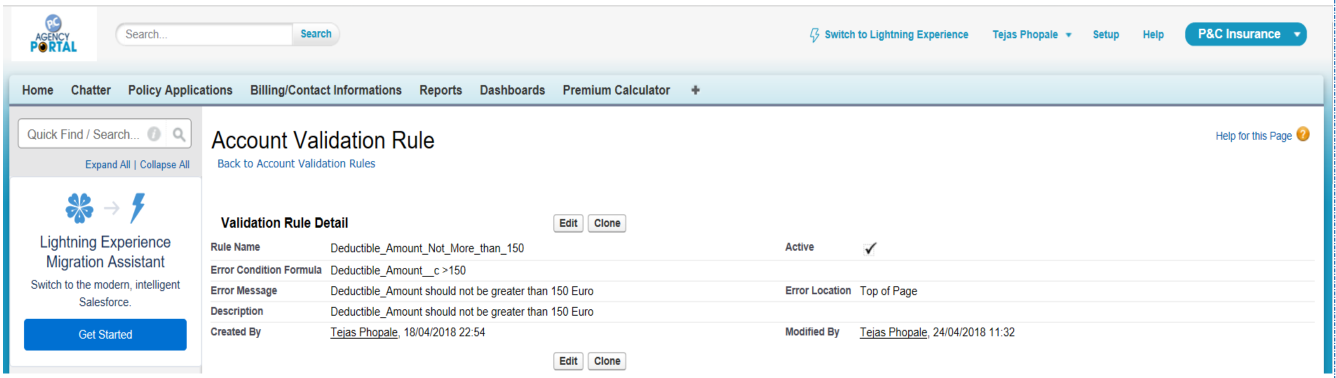
We have added validation rule for some of fields.

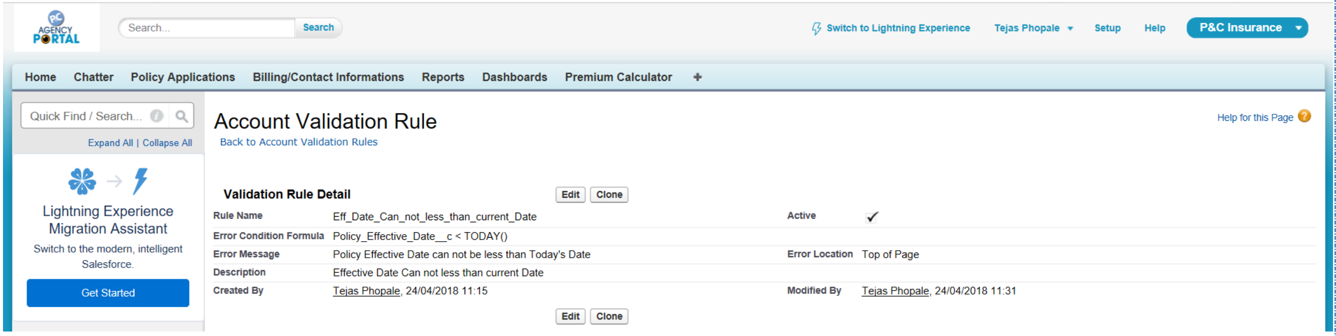
The first validation is for “Deductible Amount” which should not exceed 150 Euro.

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

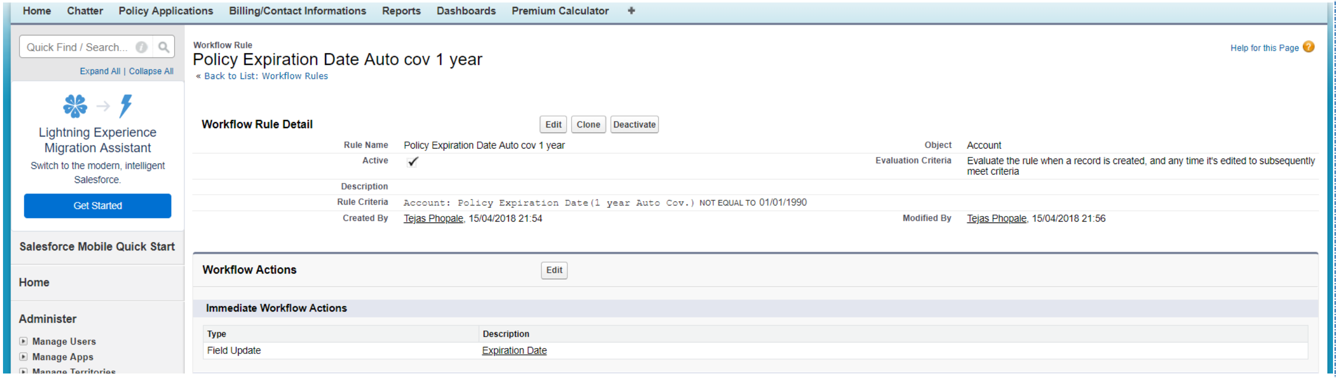


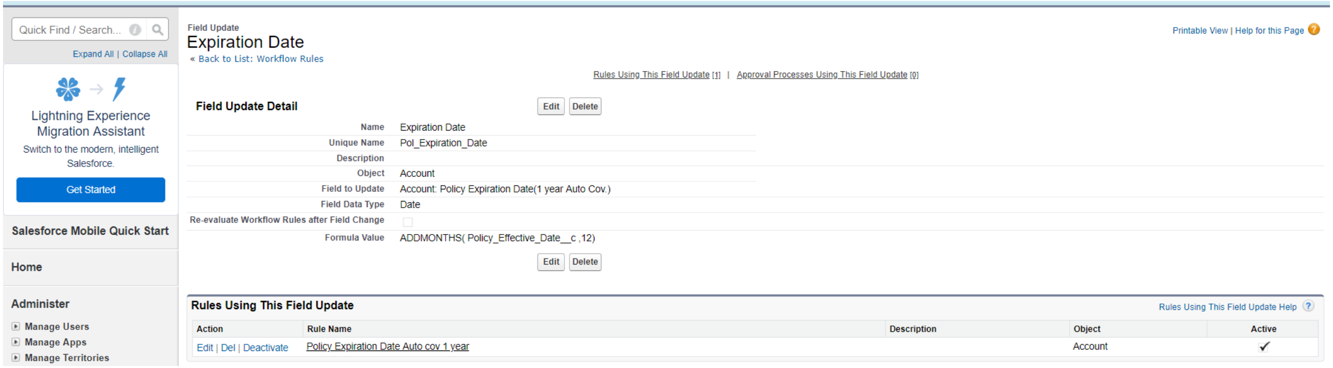




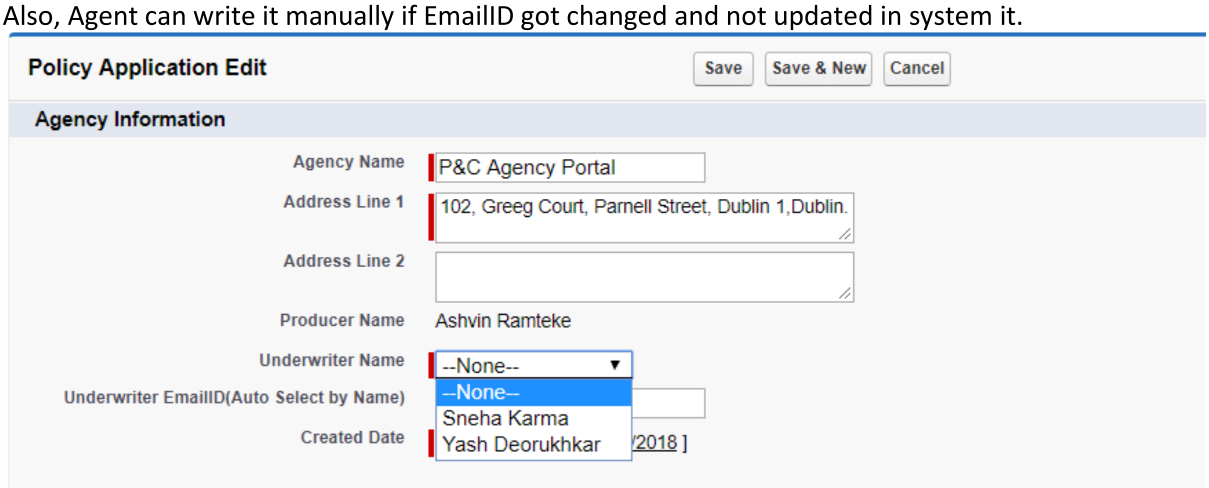


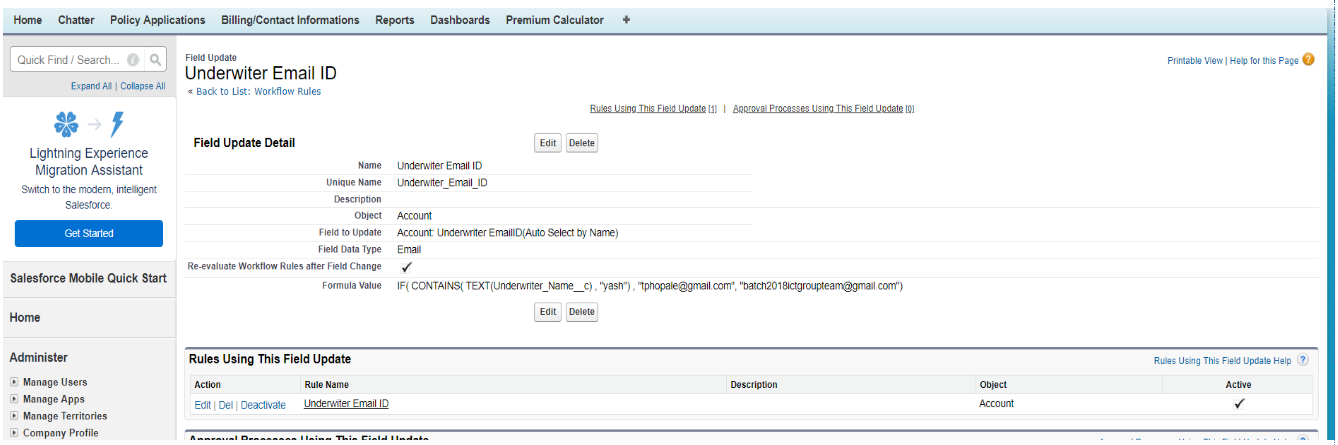
The "Policy Expiration Date" will take 1 year from Effective Date using Workflow rule.



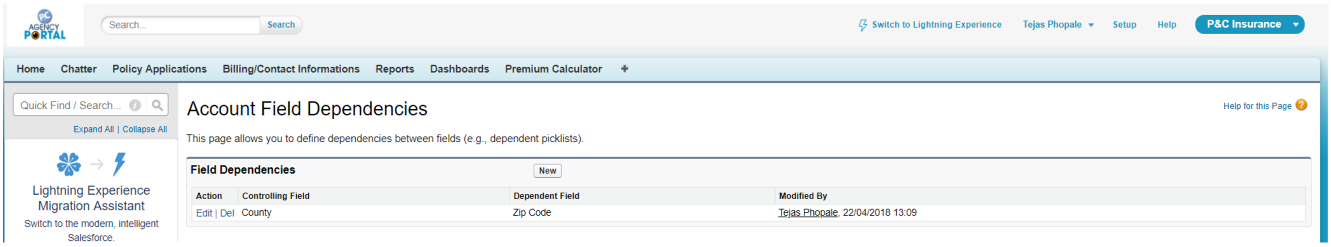


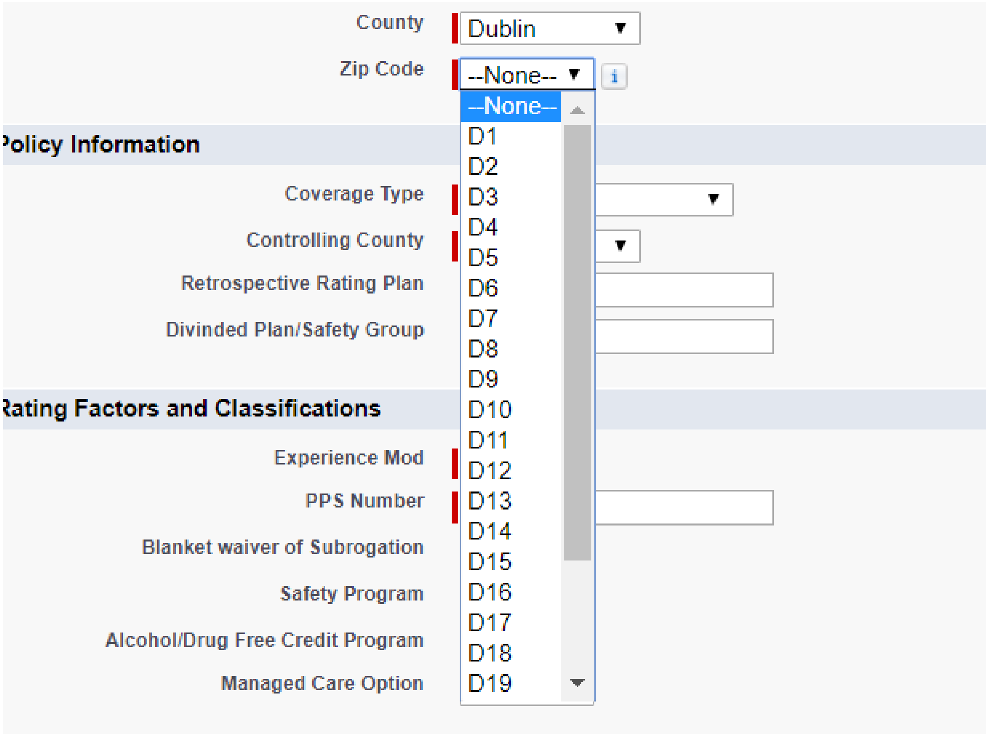
The filed called "Underwriter EmailID" will get auto populated by selecting the "Underwriter Name". This functionality has been achieved by adding another workflow rule shown below.
Also, Agent can write it manually if EmailID got changed and not updated in system it.

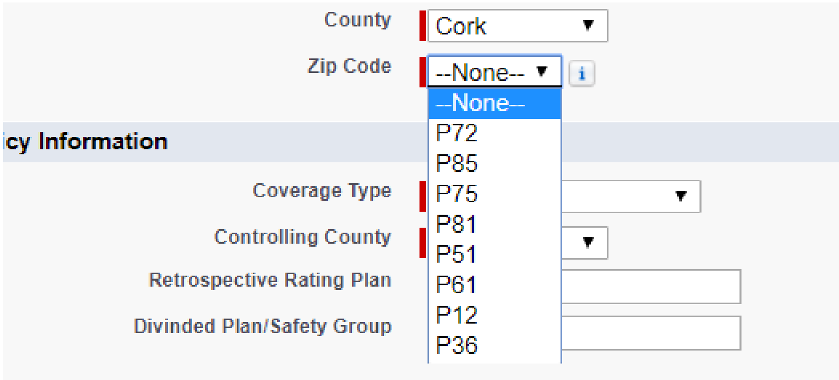




We have created **Field dependency** of County and Zip code. By changing county, it will display only those Zip codes which are under selected county (Screenshot Below).

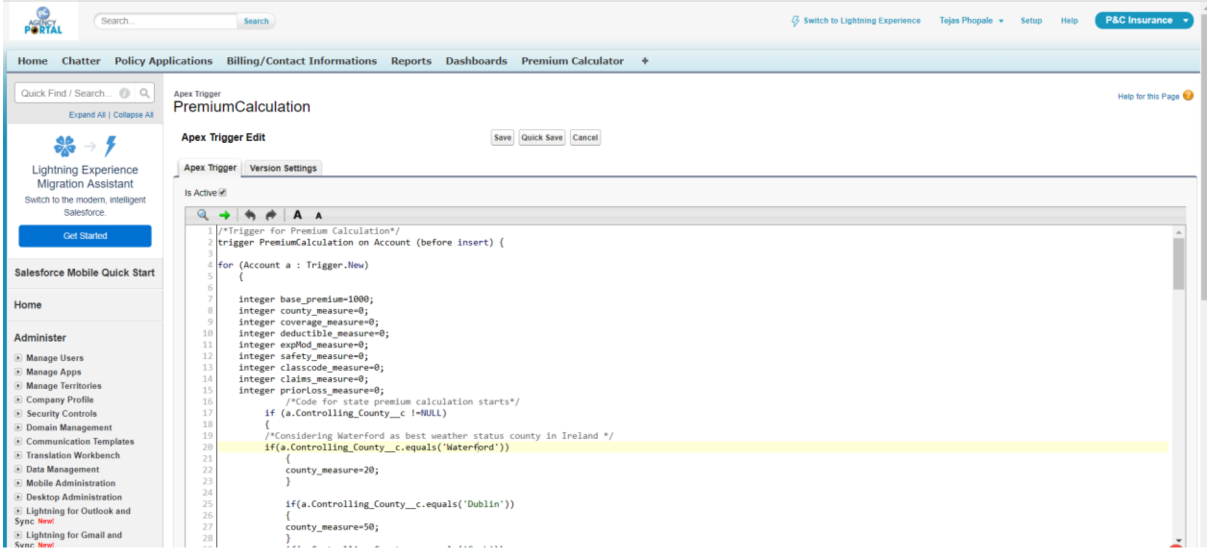






The most important part of the solution is to calculated **Premium Amount**. The column name for this is "**Annual Premium**". The Premium Calculation has been achieved by **Apex Trigger**.

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;
     }
 }
```

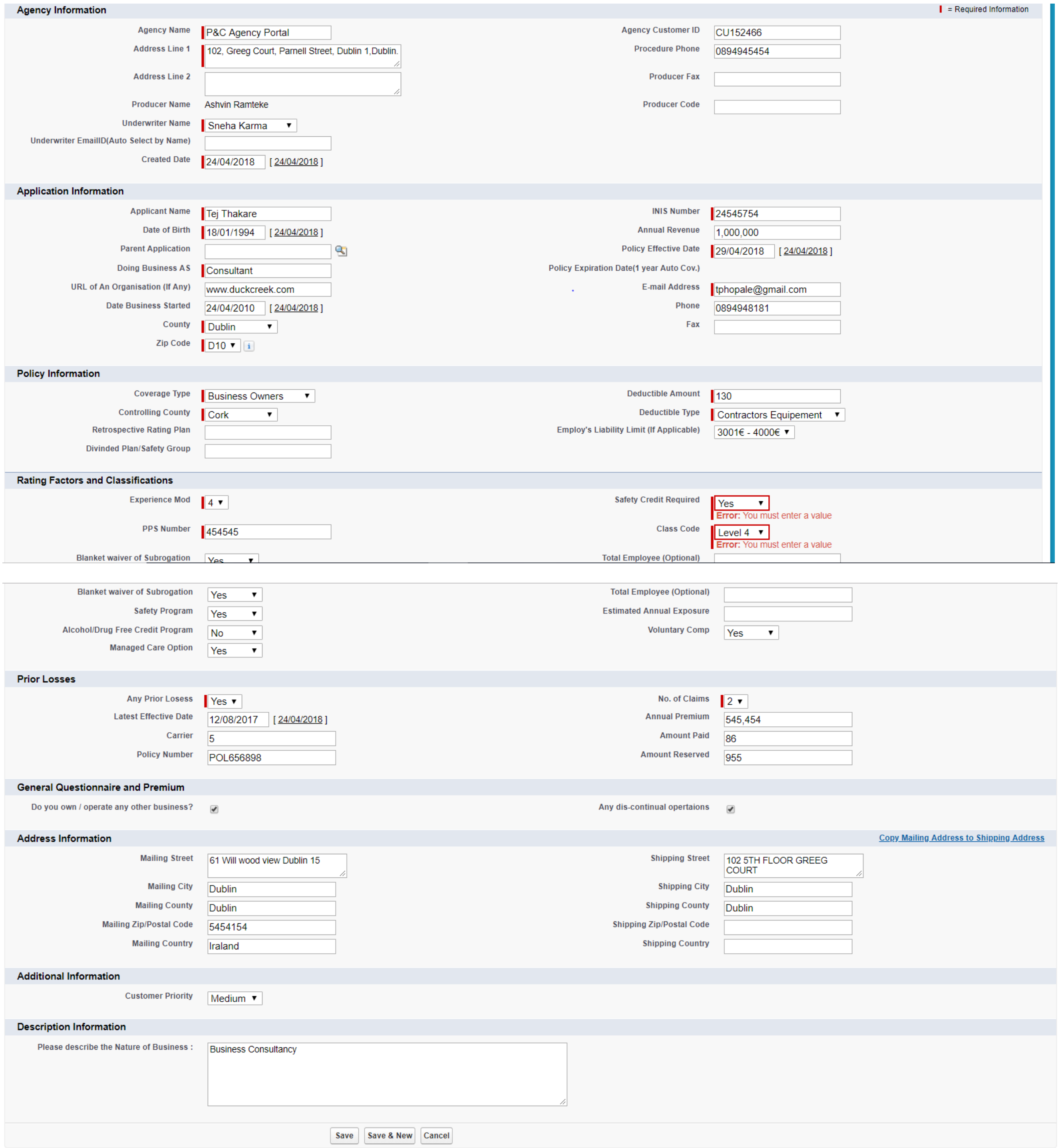
```
 /*Code for Safety Credit ends*/

/*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, Greeg 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 EmailID(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 Equipement
Retrospective Rating Plan		Employ's Liability Limit (If Applicable)	3001€ - 4000€
Divinded Plan/Safety Group			

Rating Factors and Classifications

Experience Mod	4	Safety Credit Required	Yes Error: You must enter a value
PPS Number	454545	Class Code	Level 4 Error: You must enter a value
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 Losess	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?	✔	Any dis-continual opertaions	✔

Address Information — Copy Mailing Address to Shipping Address

Mailing Street	61 Will wood view Dublin 15	Shipping Street	102 5TH FLOOR GREEG COURT
Mailing City	Dublin	Shipping City	Dublin
Mailing County	Dublin	Shipping County	Dublin
Mailing Zip/Postal Code	5454154	Shipping Zip/Postal Code	
Mailing Country	Iraland	Shipping Country	

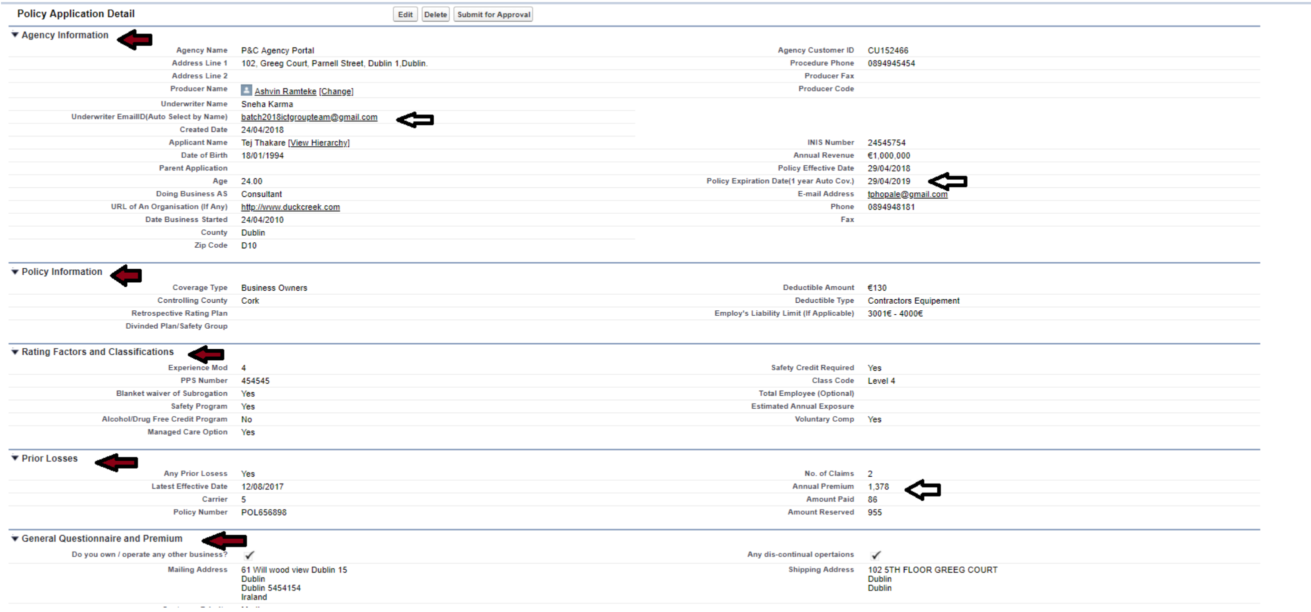
Additional Information

Customer Priority: Medium

Description Information

Please describe the Nature of Business : Business Consultancy

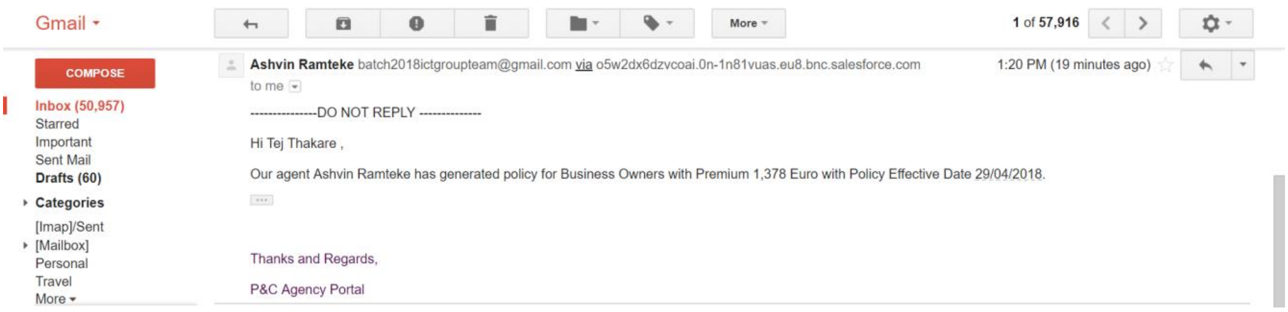
Save | Save & New | Cancel



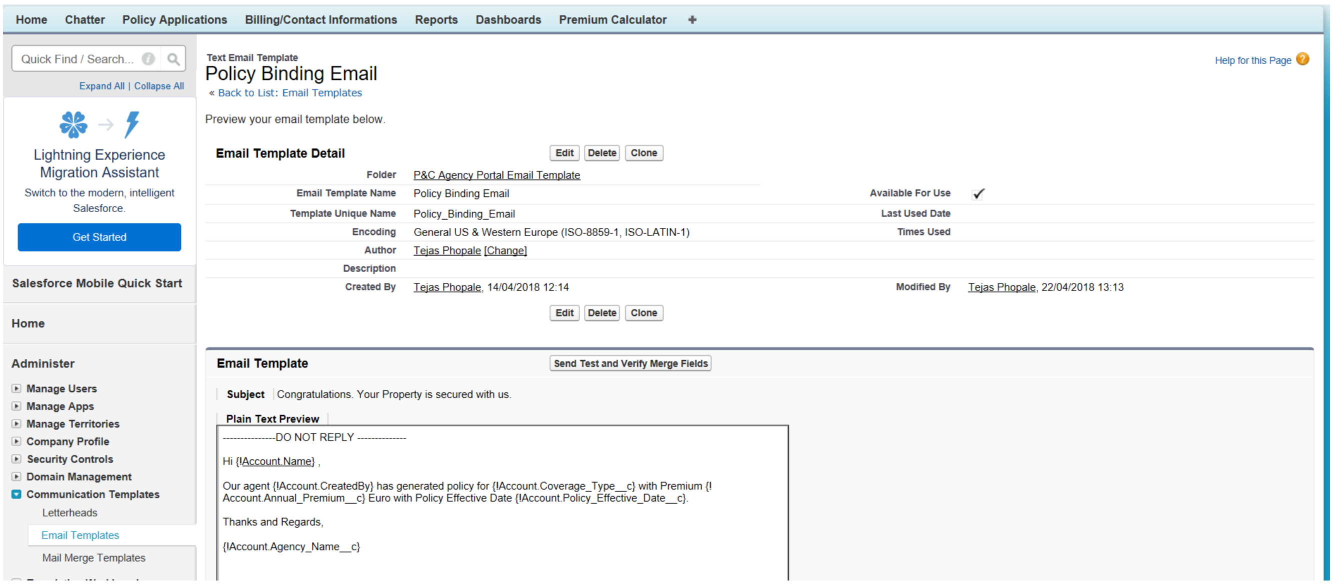
The White Arrows shows calculated data from the workflow and apex trigger executions.

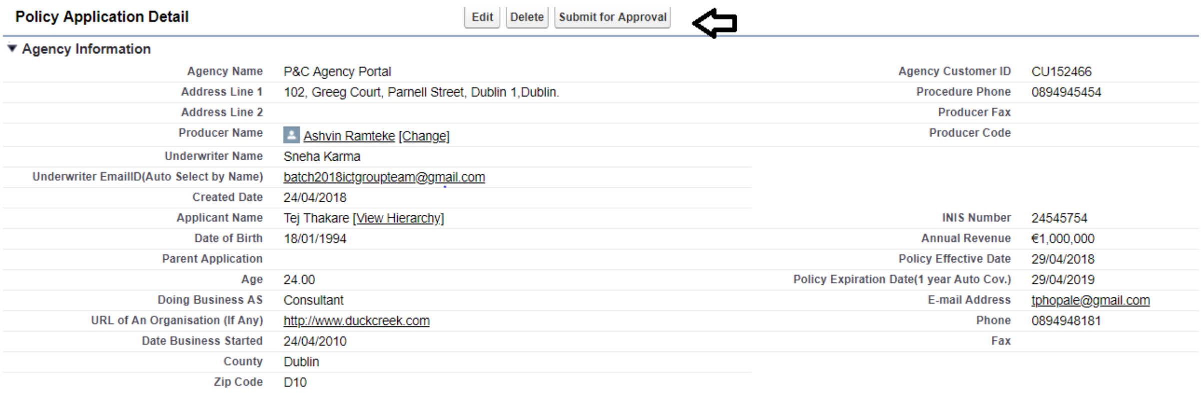
The Brown Arrows indicates the **Tab Layout** for the Policy Application Screen by editing Layout.

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.

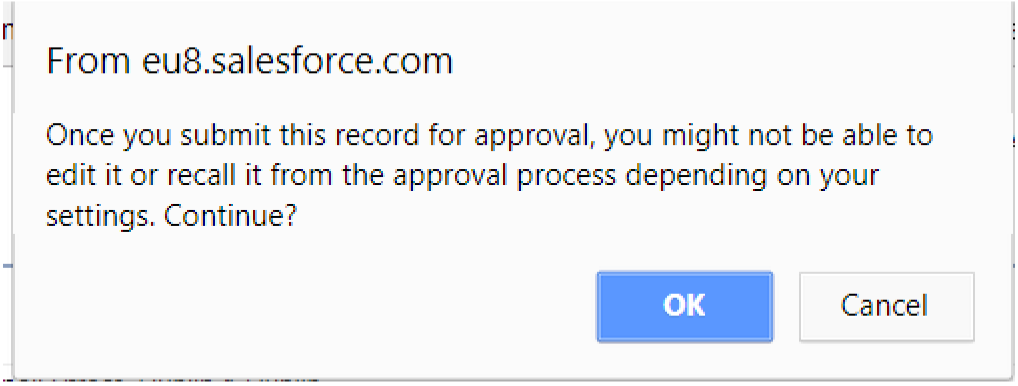


The Email Template contains some mapping fields which makes it dynamic (Screenshot Below).

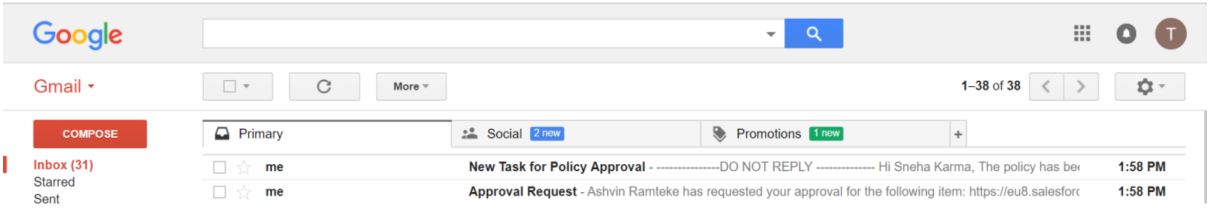


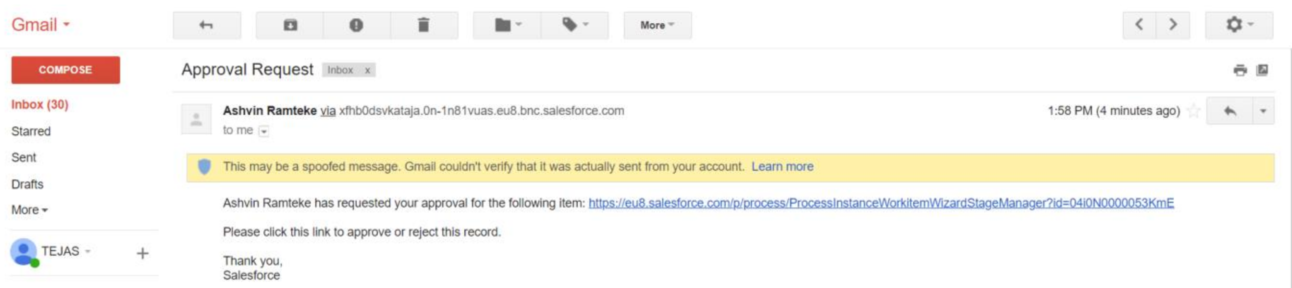


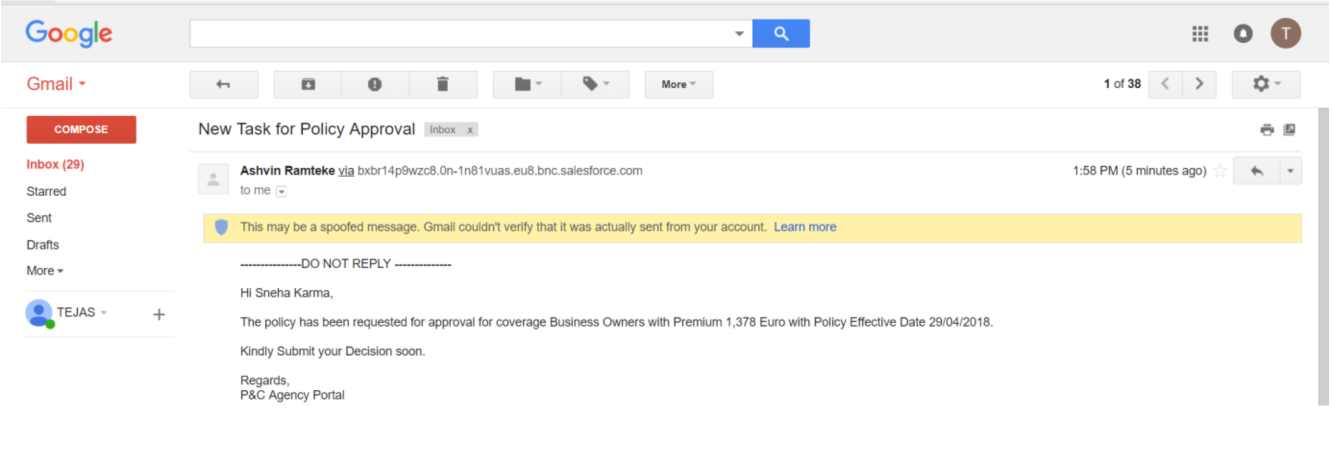
After clicking on highlighted button, popup will be shown for confirmation. Click on Ok.



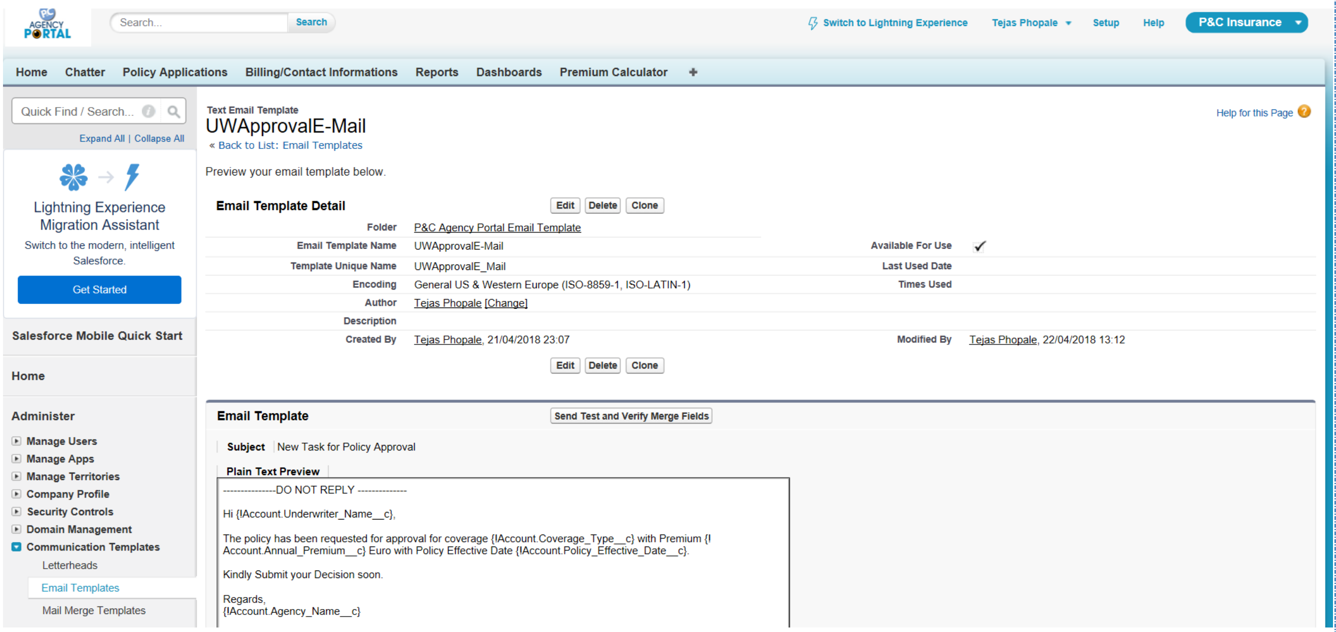
The Underwriter will get two email notifications. One is automated by Salesforce and another we have written in Email Template (Screenshot Below).



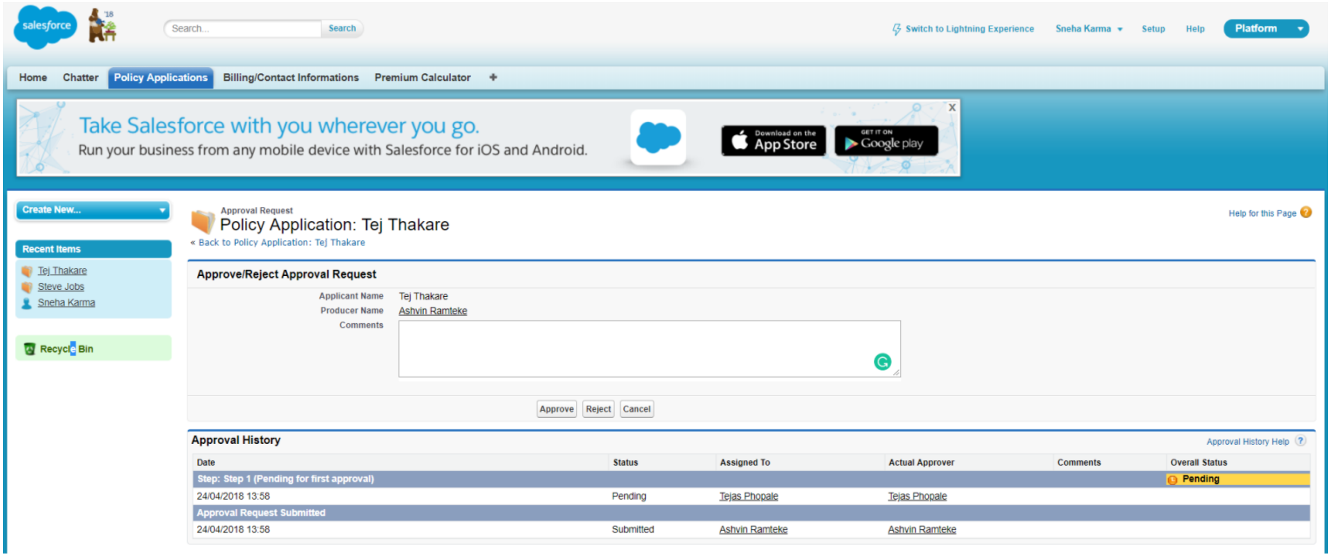


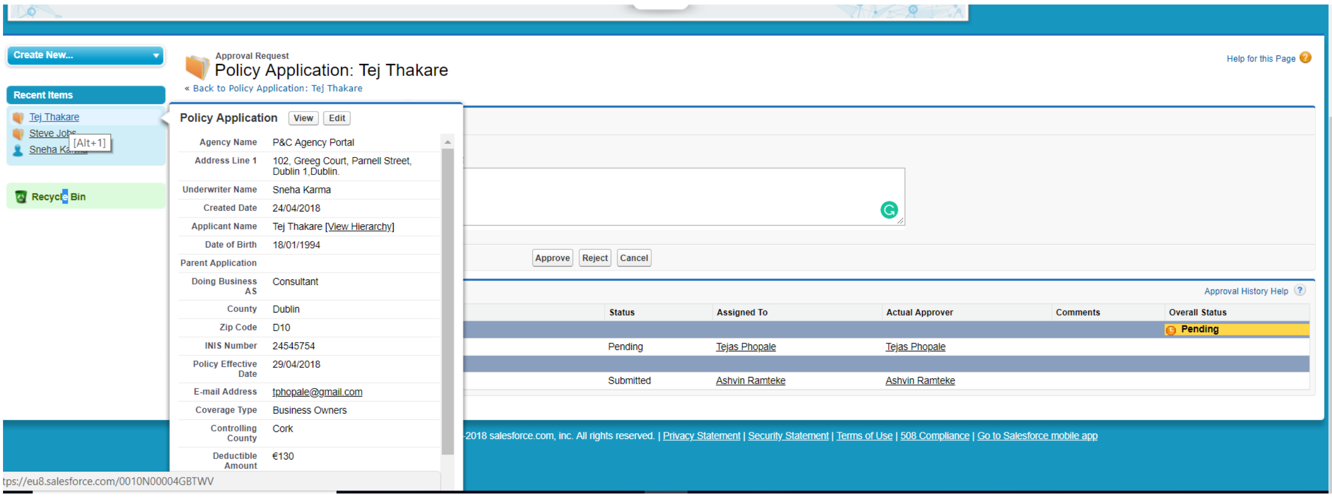


The Email Template for second email is shown below:

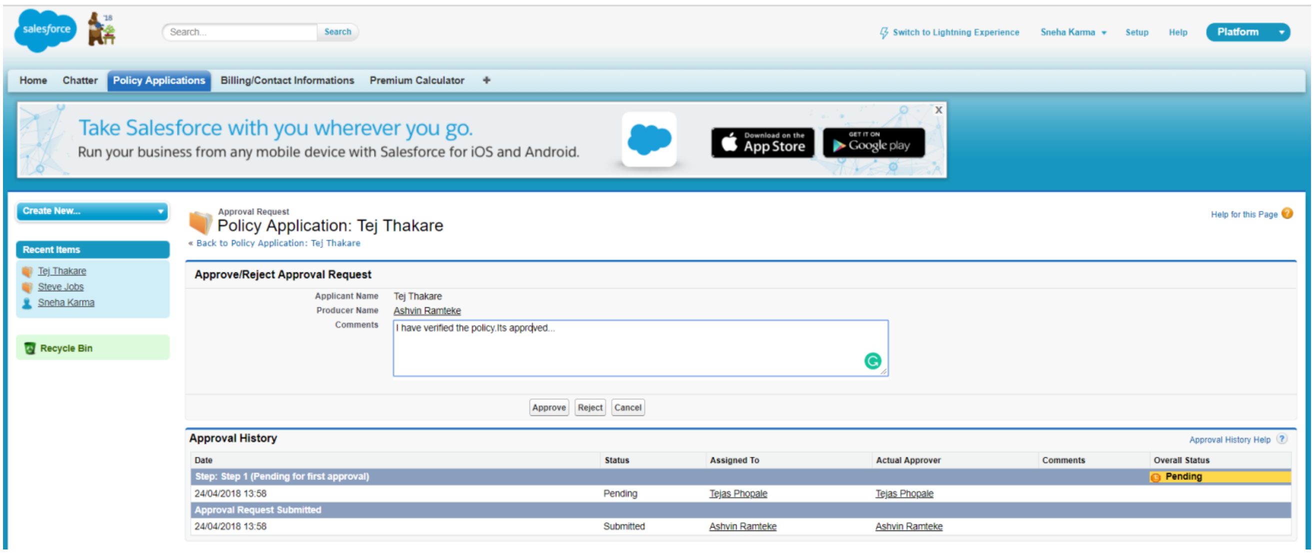


When Underwriter click on the first email notification (shown above), system will redirect to the screen for approval. Also, policy can be viewed by clicking on view button as shown below. Underwriter need to login with own credentials to perform these actions.

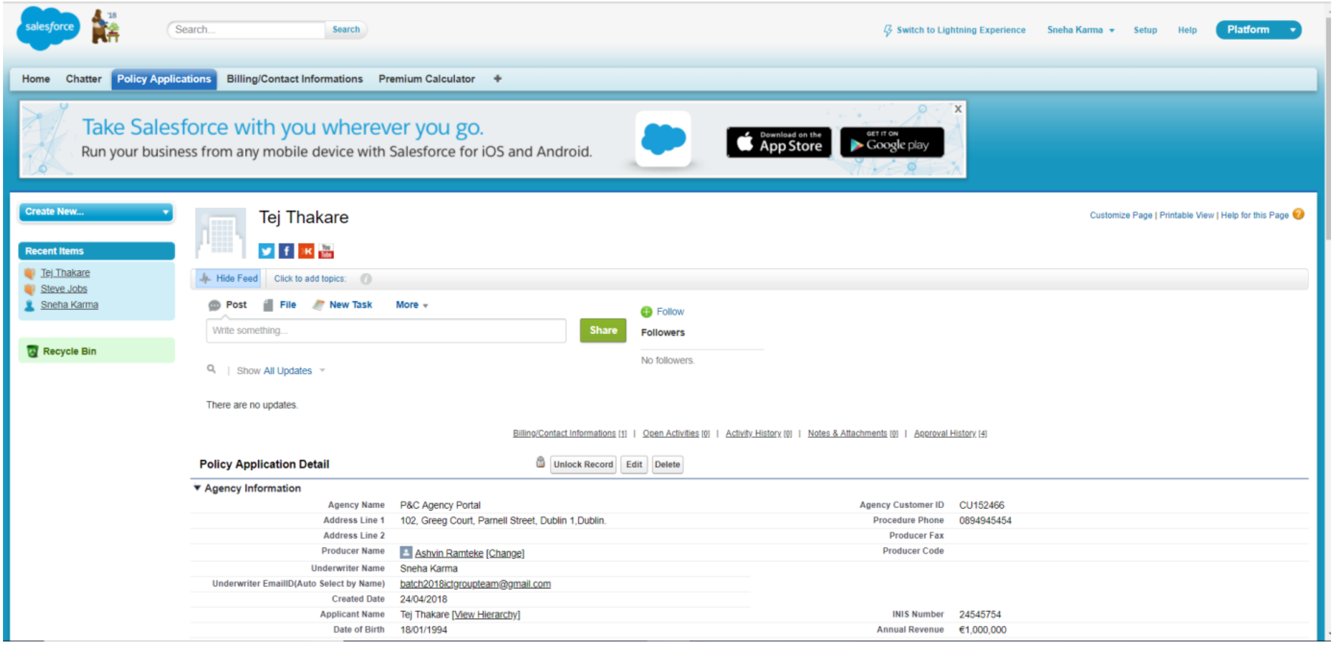


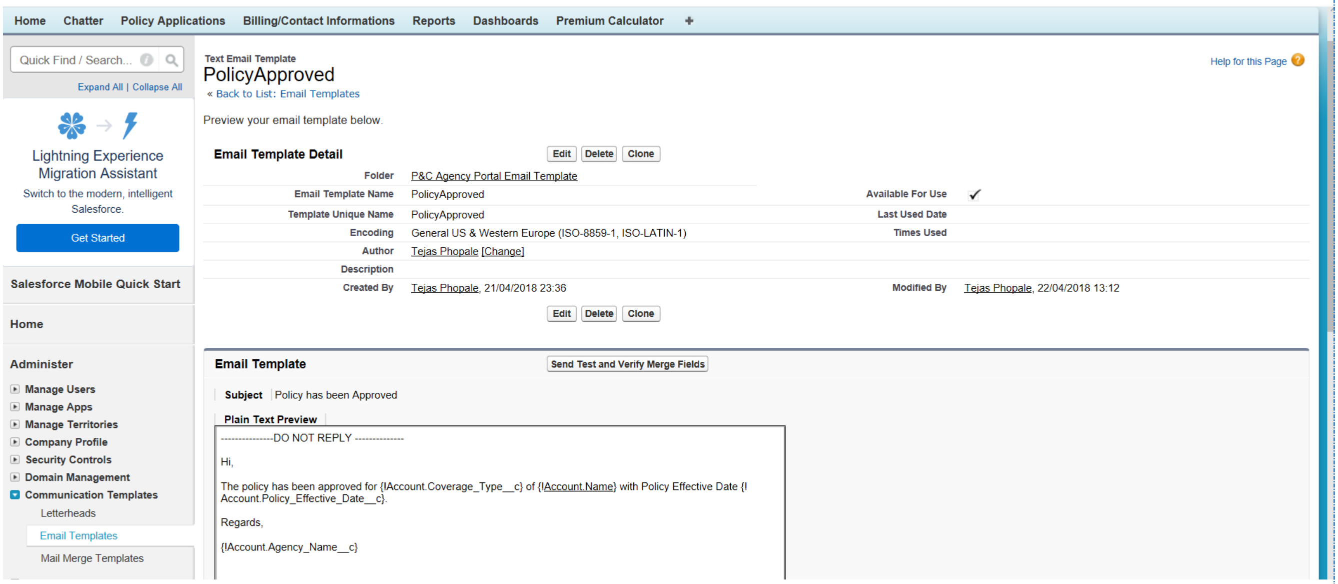


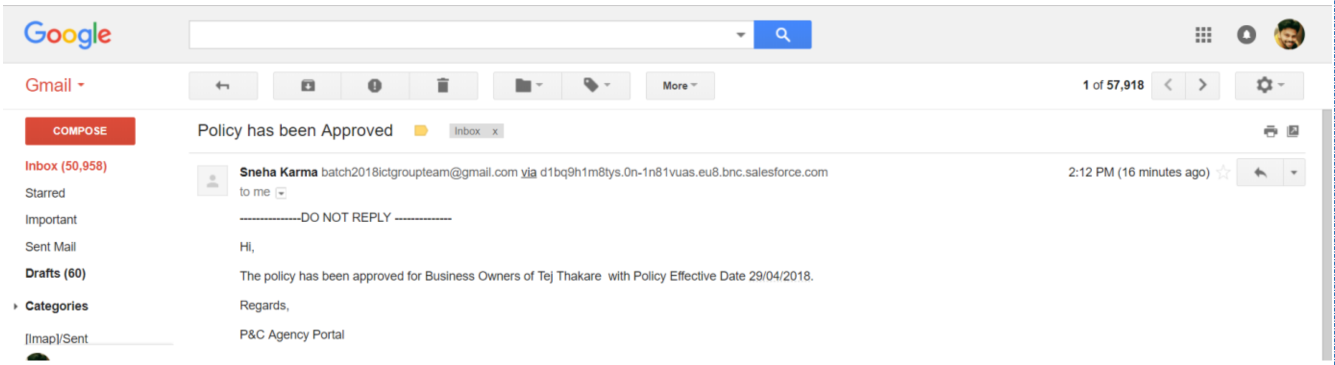
After examining the policy risk, Underwriter will click on approve or reject button.



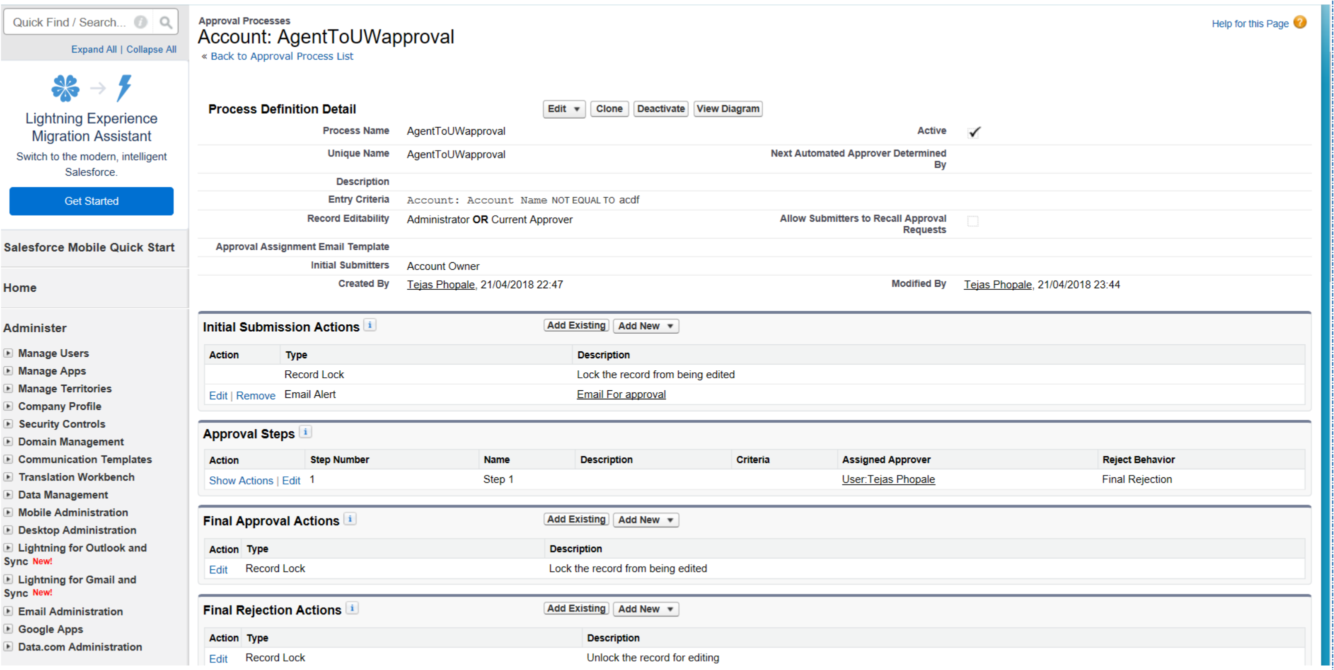
Click on "Approve" the policy is approved and status will be updated as active. The Agent and Client will get Email notification for approved policy (Screenshot below).



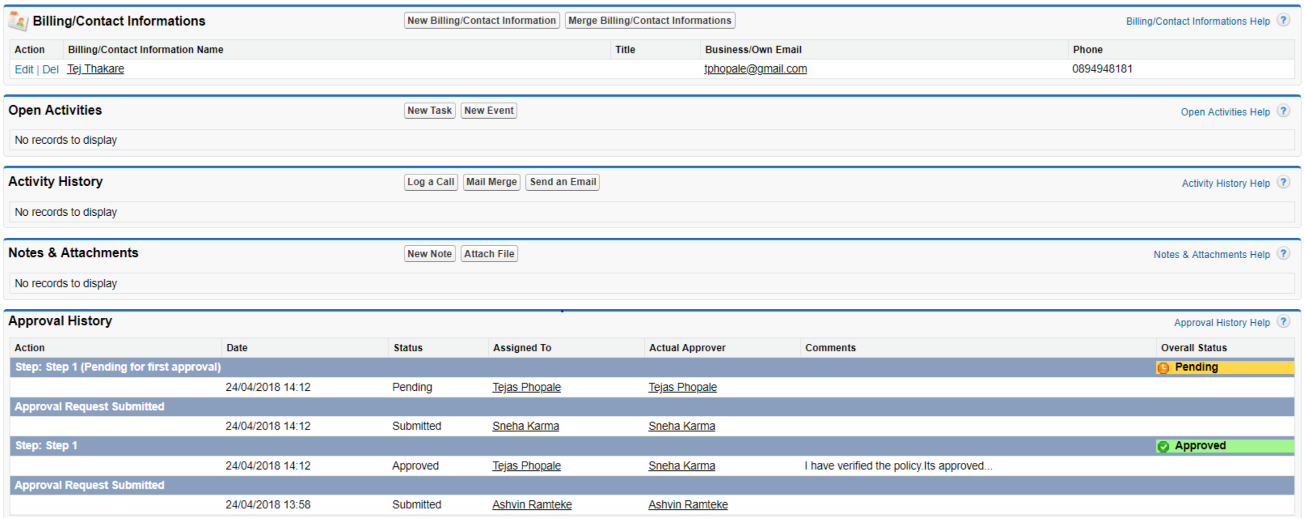




The approval process has been maintained by preparing the approval process shown below:



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.



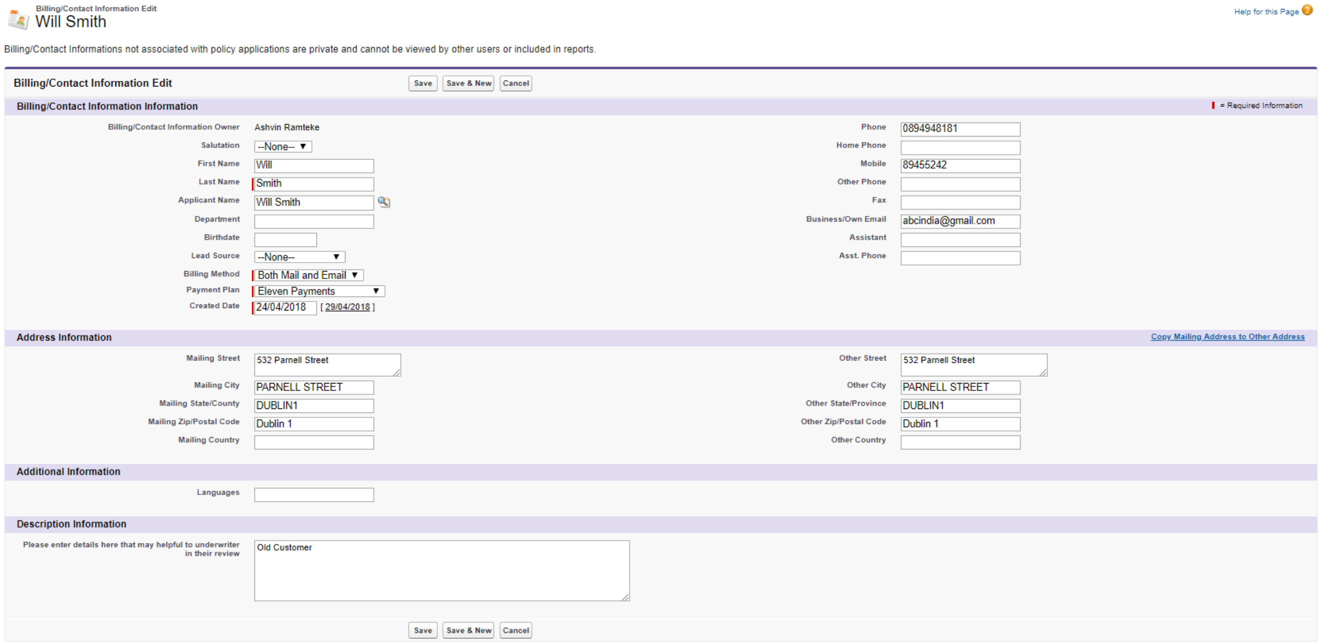
Billing/Contact Information:

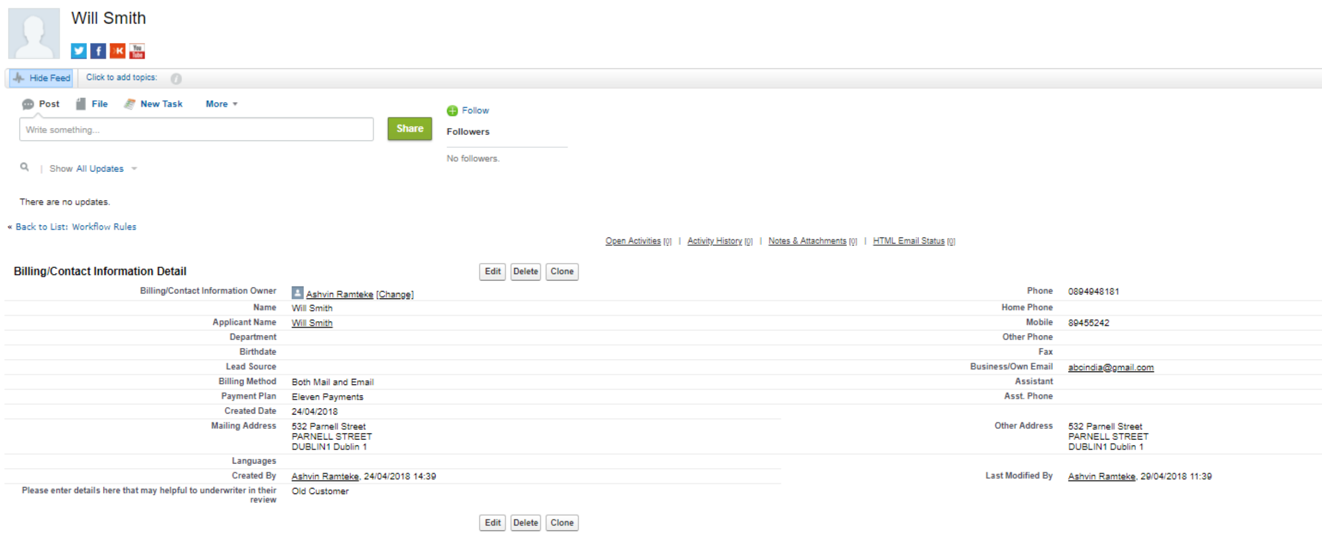
The “Billing/Contact Information” is the customize object of Contact. We have added some fields which are shown below:

Contact Custom Fields & Relationships New | Field Dependencies — 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.



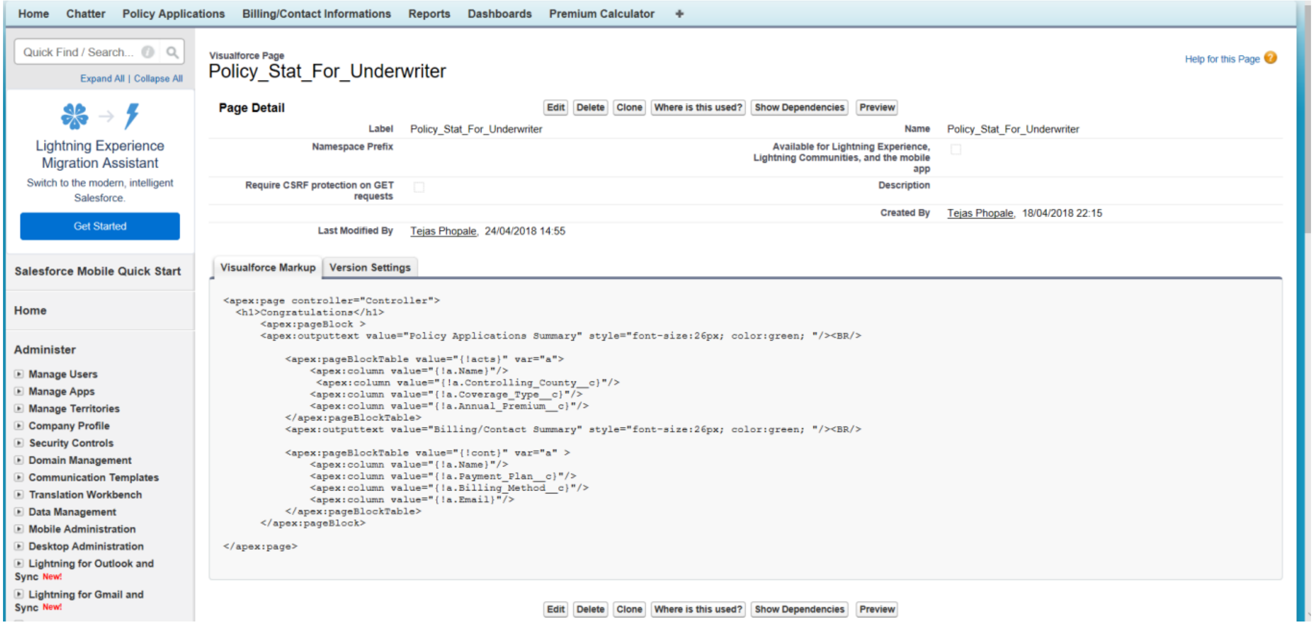


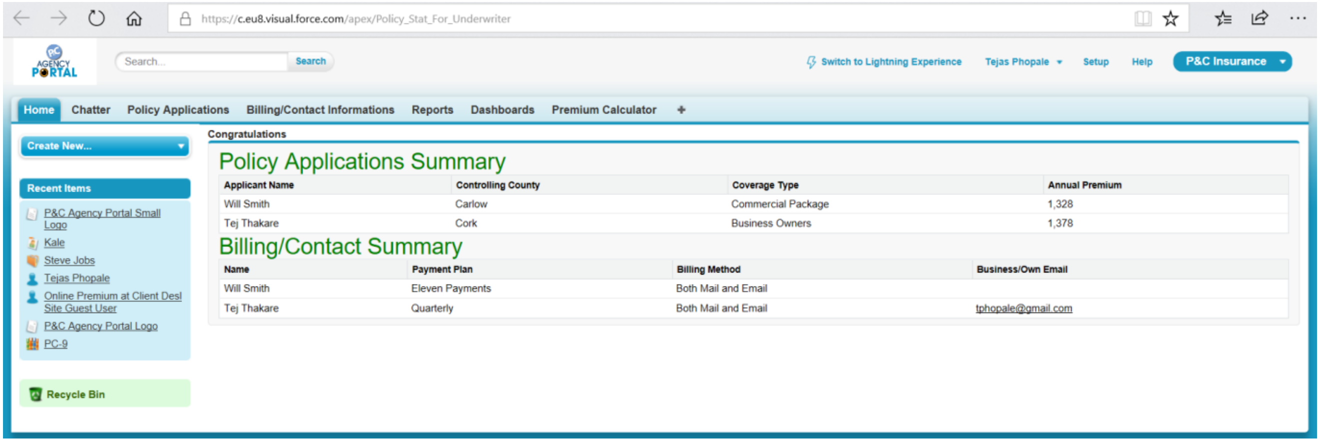
Combining Policy Application and Contact using VisualForce

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;
}

}
```

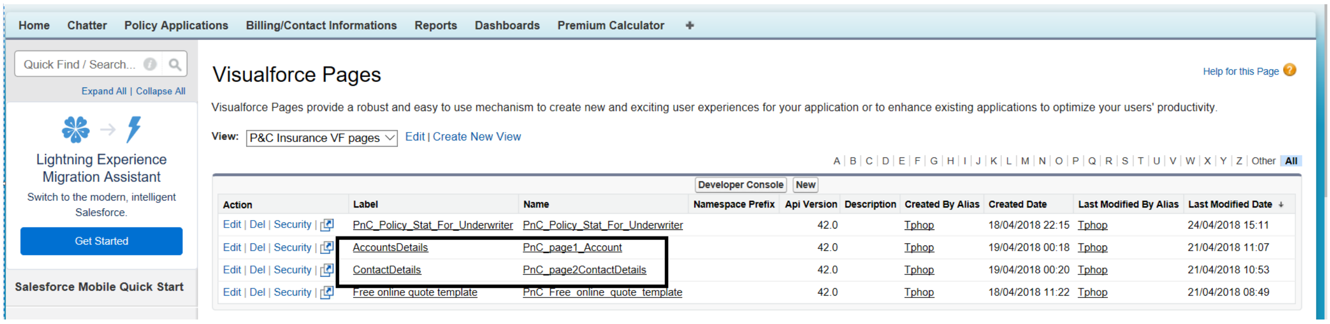
The Visualforce page and its implementation shown below:

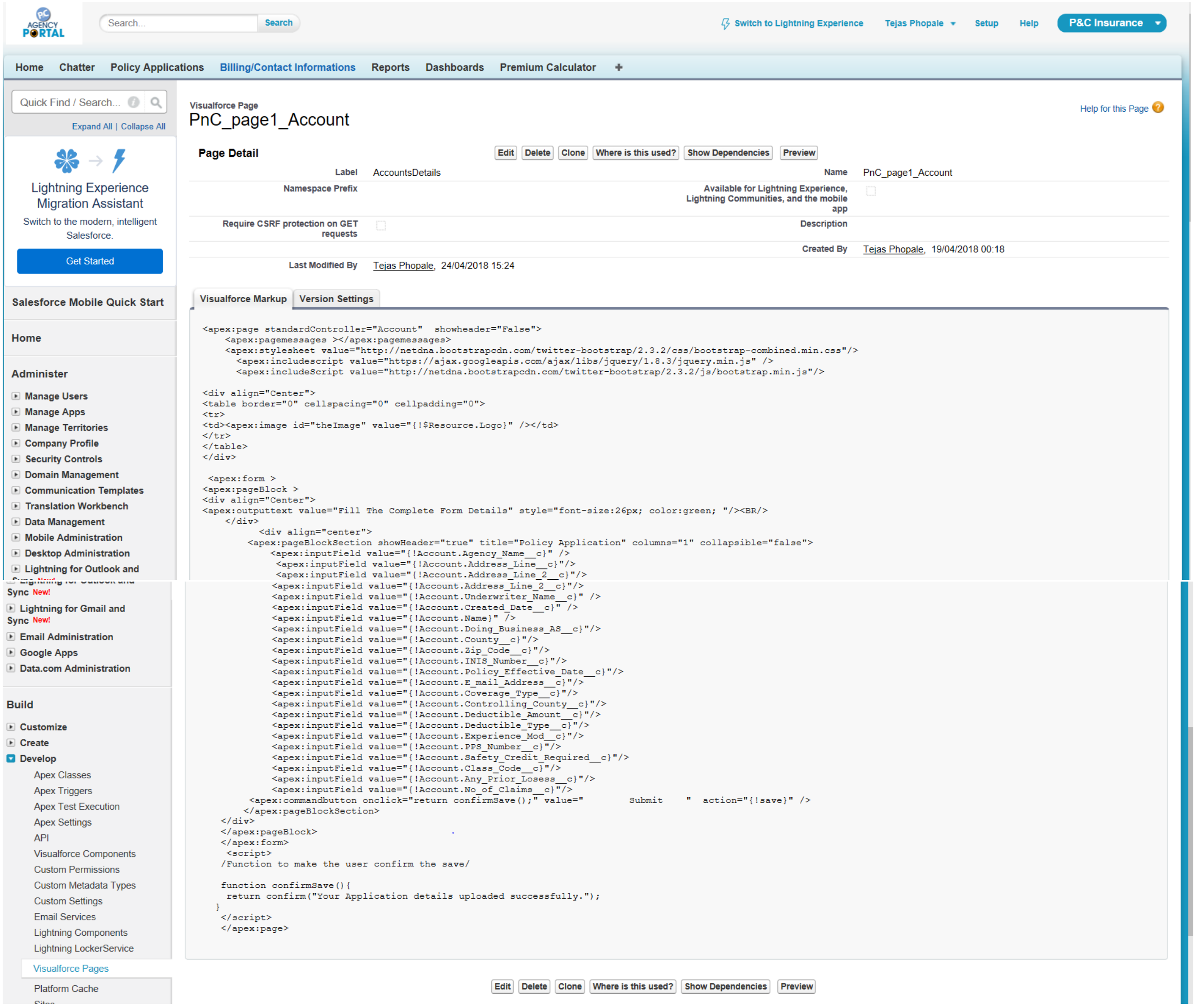




The Broker has privileges to provide service at client's desk. So, to enable this functionality we have created VisualForce page and hosted site using inbuild Salesforce functionality.

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





Visualforce Page

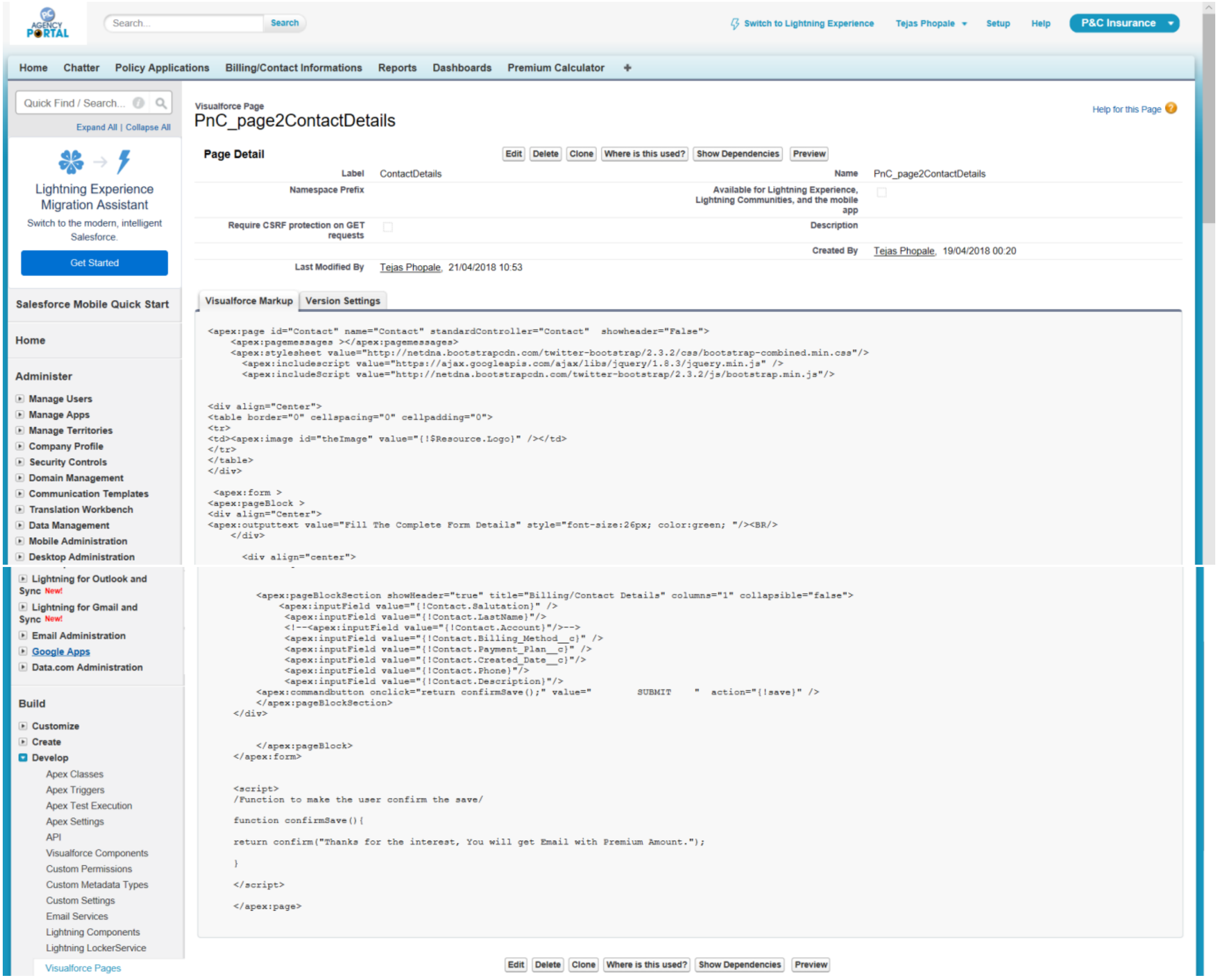
PnC_page1_Account

Page Detail

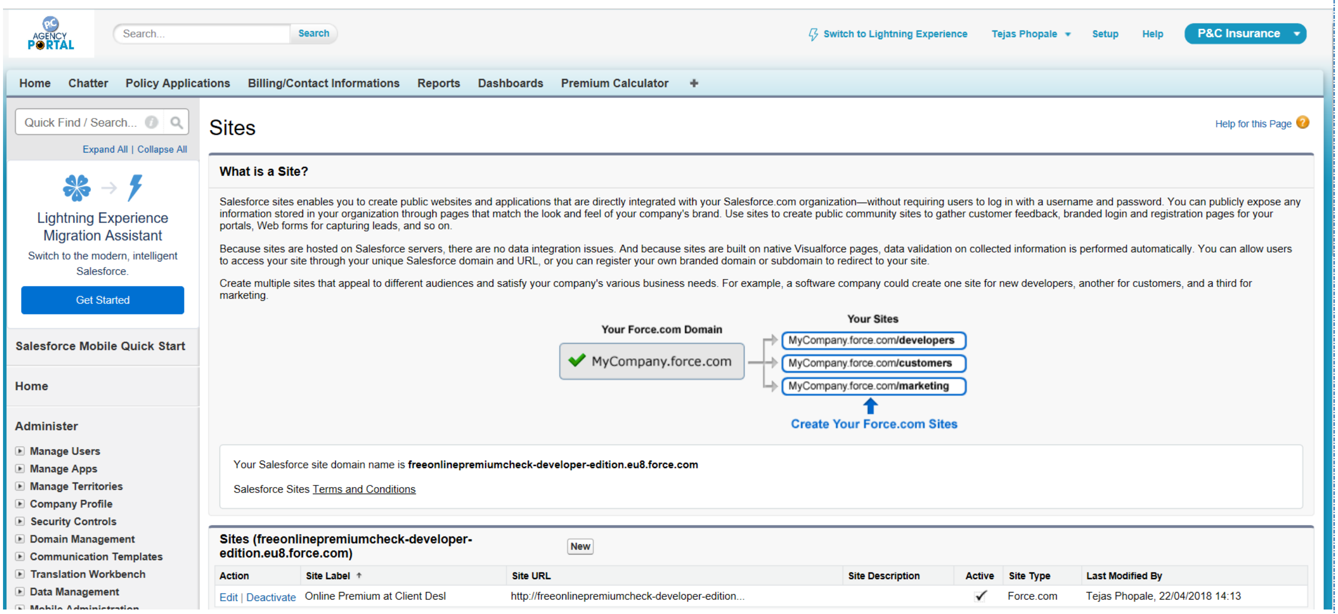
Label	AccountsDetails	Name	PnC_page1_Account
Namespace Prefix		Available for Lightning Experience, Lightning Communities, and the mobile app	
Require CSRF protection on GET requests		Description	
		Created By	Tejas Phopale, 19/04/2018 00:18
Last Modified By	Tejas Phopale, 24/04/2018 15:24		

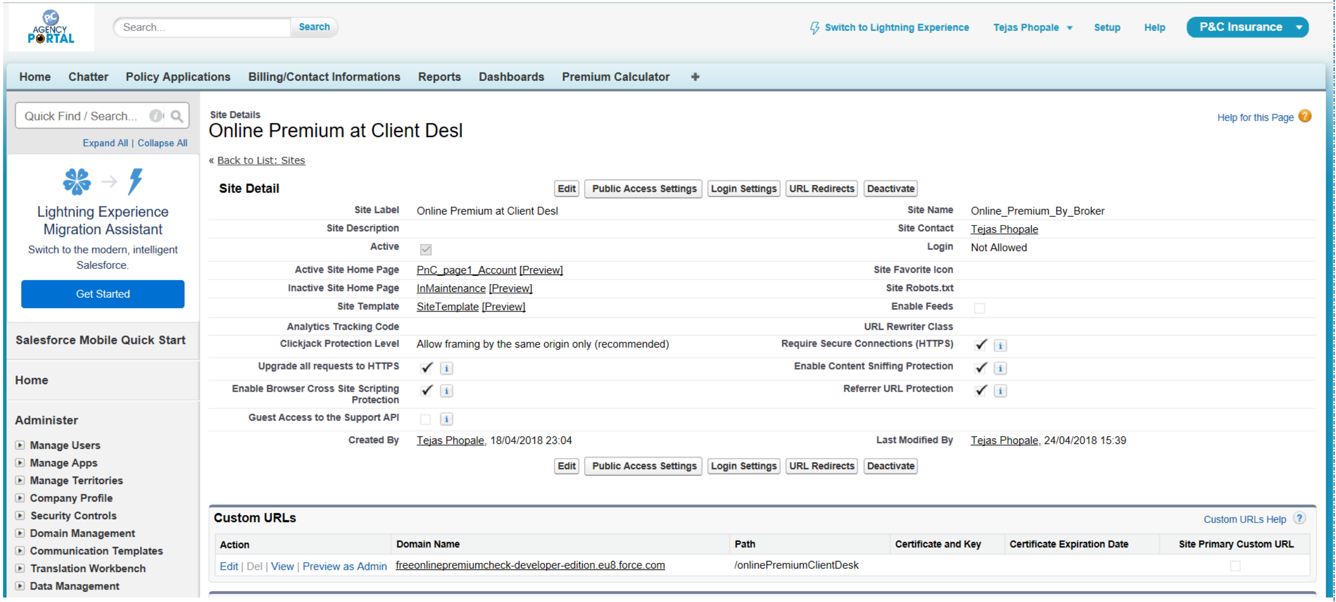
Visualforce Markup | Version Settings

```
<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" 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="Policy Application" columns="1" collapsible="false">
            <apex:inputField value="{!Account.Agency_Name__c}" />
             <apex:inputField value="{!Account.Address_Line__c}"/>
             <apex:inputField value="{!Account.Address_Line_2__c}"/>
            <apex:inputField value="{!Account.Address_Line_2__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.Zip_Code__c}"/>
            <apex:inputField value="{!Account.INIS_Number__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.Experience_Mod__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_Losess__c}"/>
            <apex:inputField value="{!Account.No_of_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("Your Application details uploaded successfully.");
  }
   </script>
   </apex:page>
```

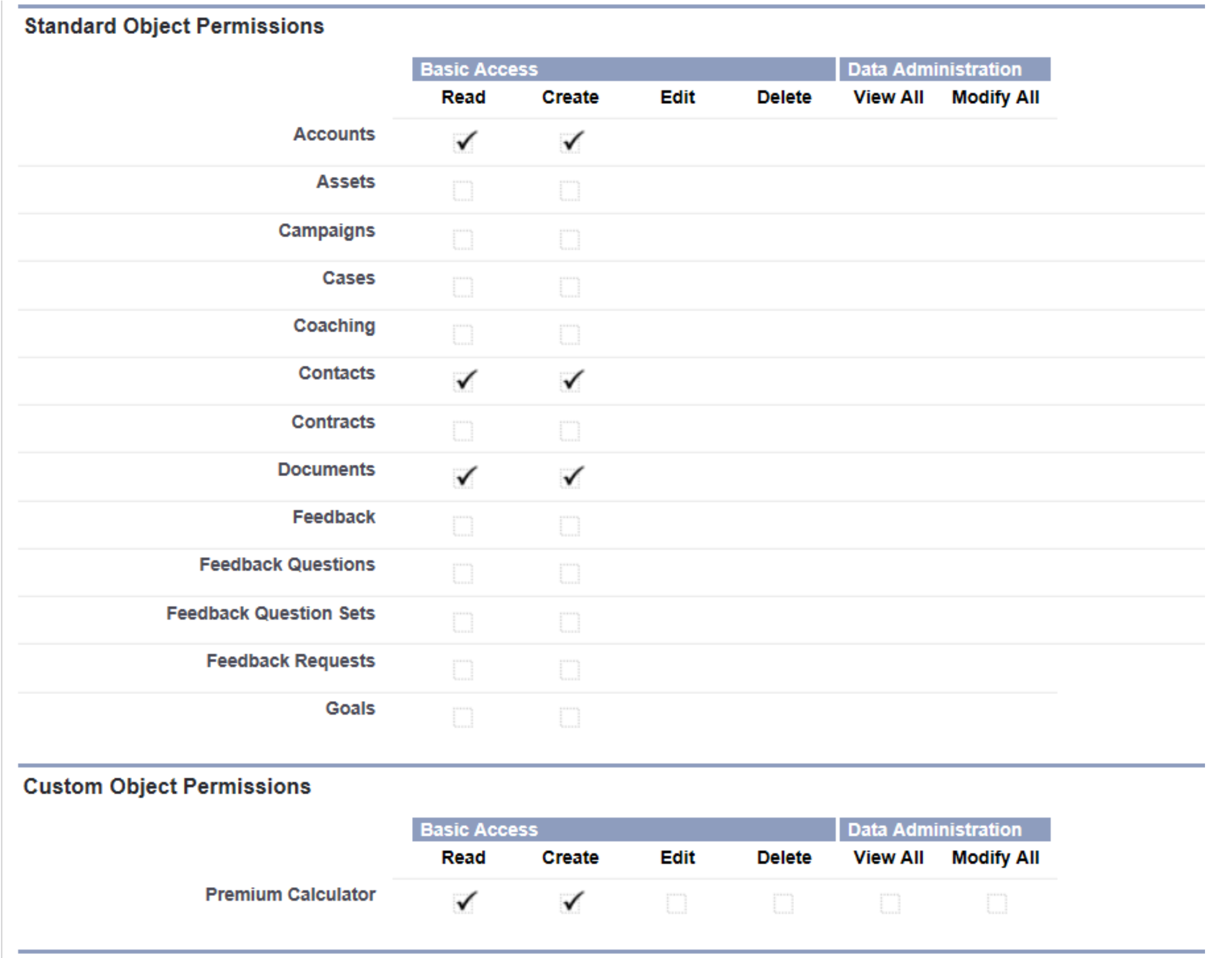


The Site we have hosted is label as "Online Premium at Client Desk".

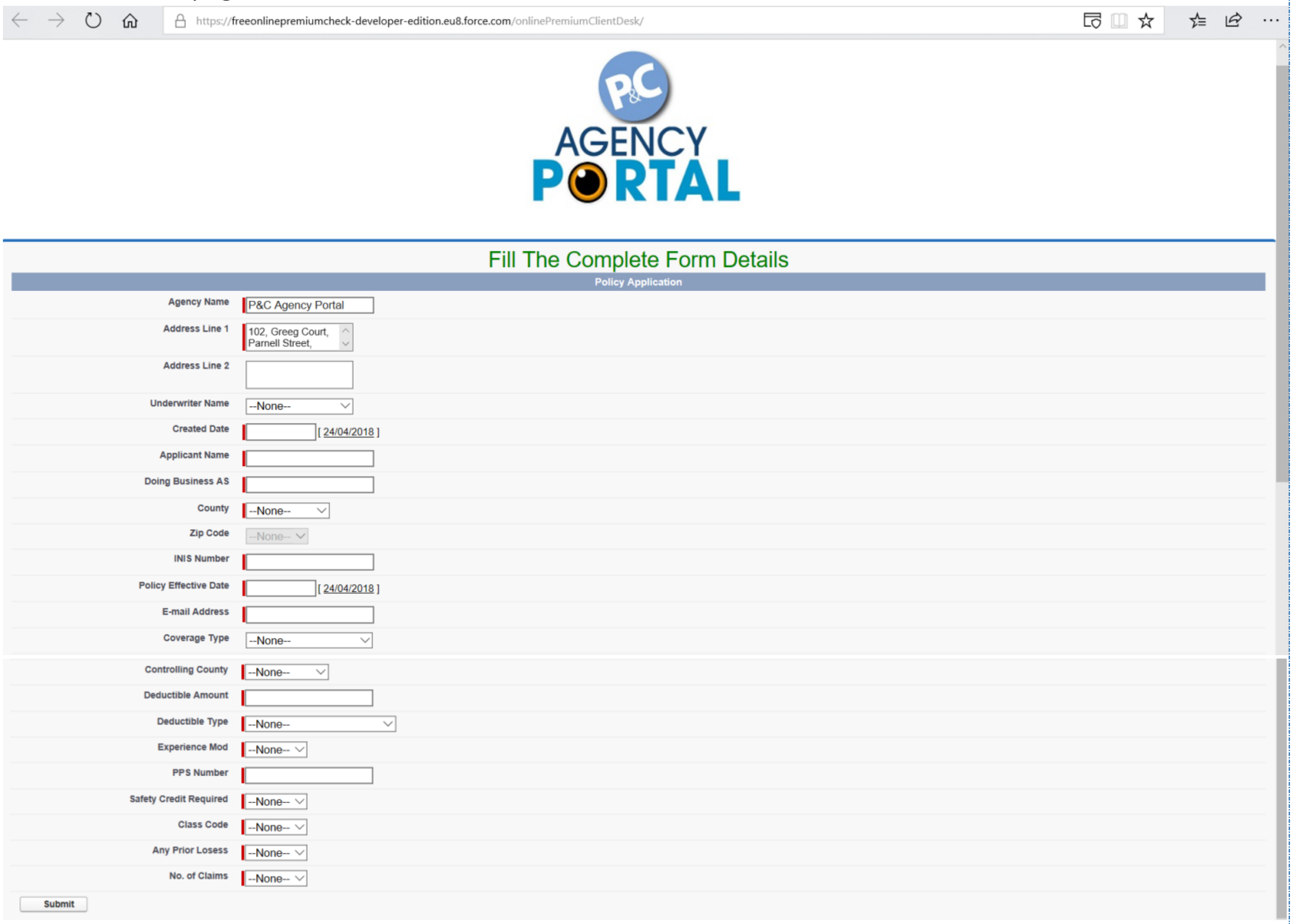




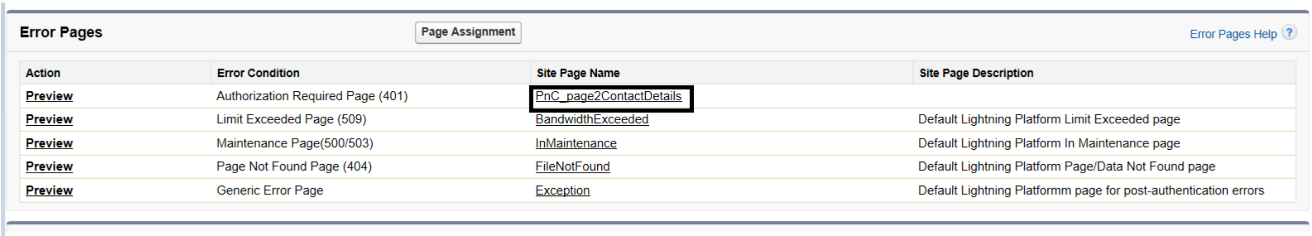
In Public Access Settings, we have given permission to the objects.



The VisualForce page looks like this:



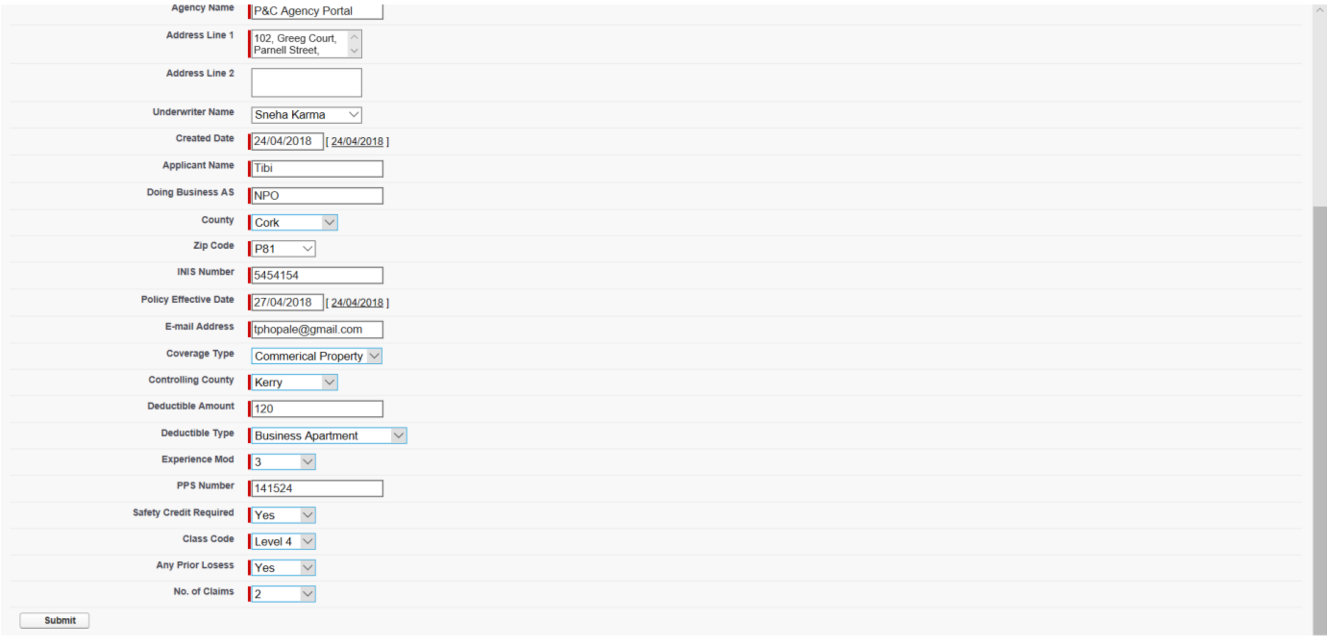
After filling all important details, the page will get redirected to contact details. This functionality is managed at page assignment highlighted below.

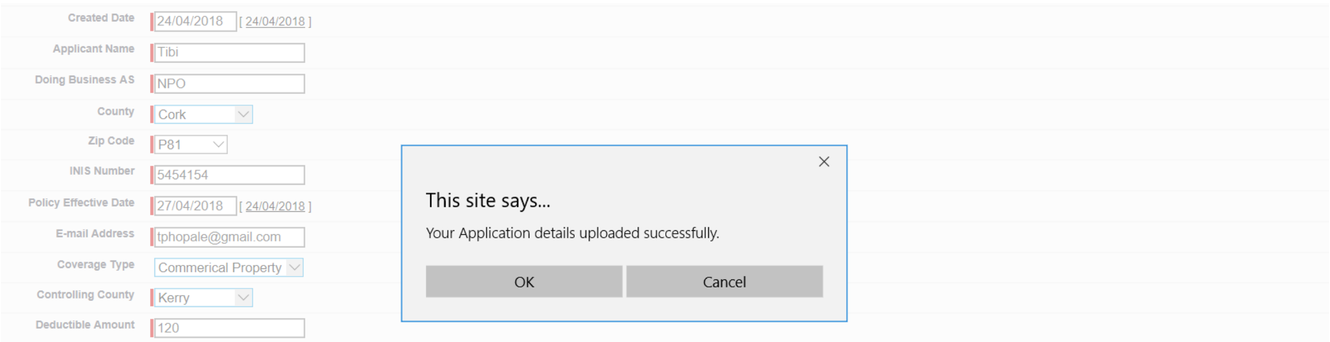


Error Pages Page Assignment Error Pages Help

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)	FileNotFound	Default Lightning Platform Page/Data Not Found page
Preview	Generic Error Page	Exception	Default Lightning Platformm page for post-authentication errors

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

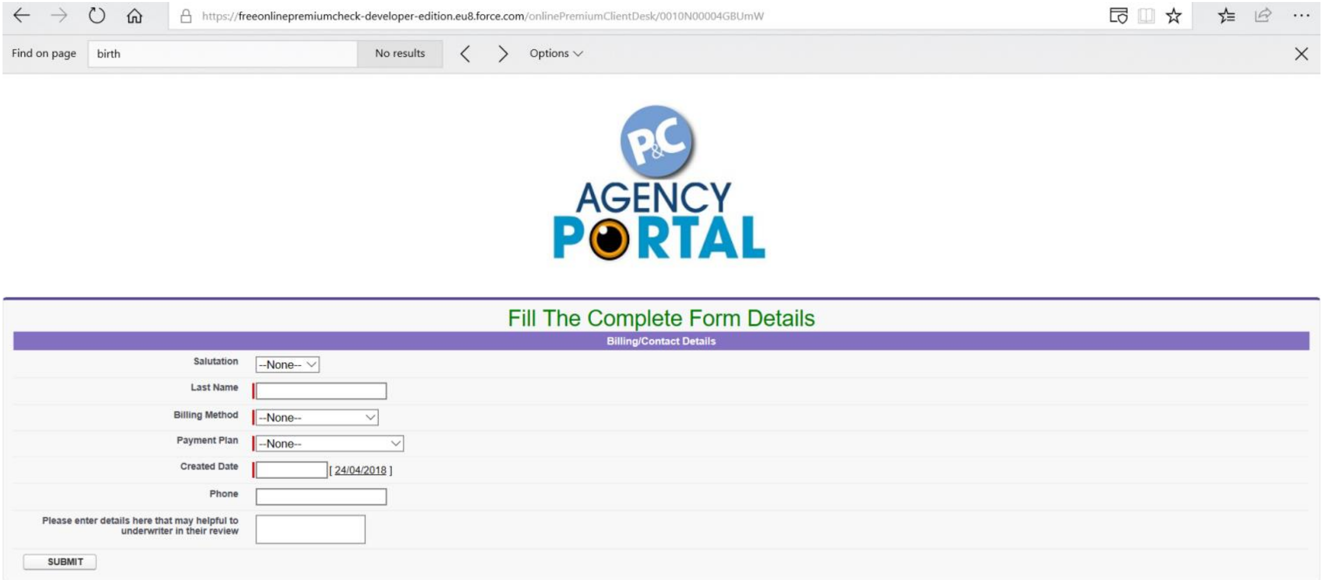




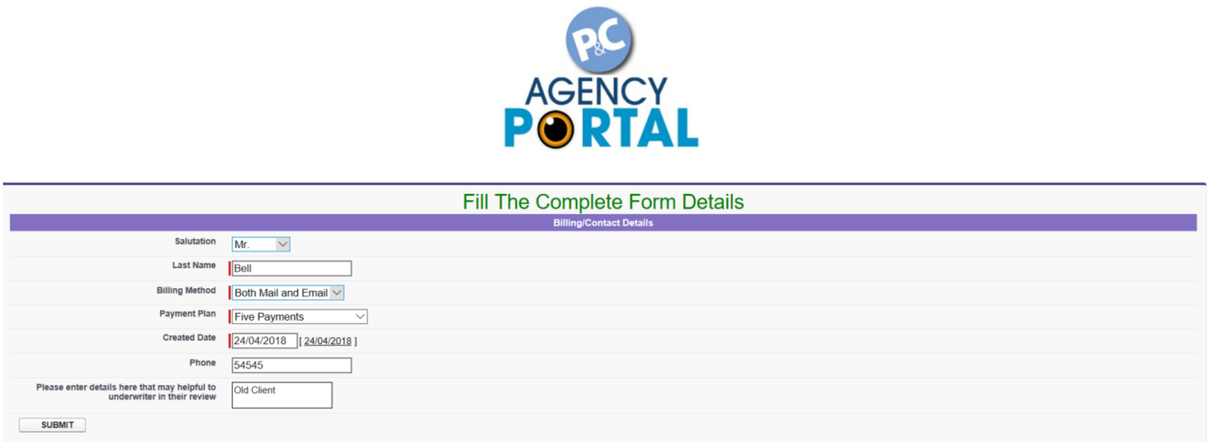
The Contact VisualForce Page is shown below:

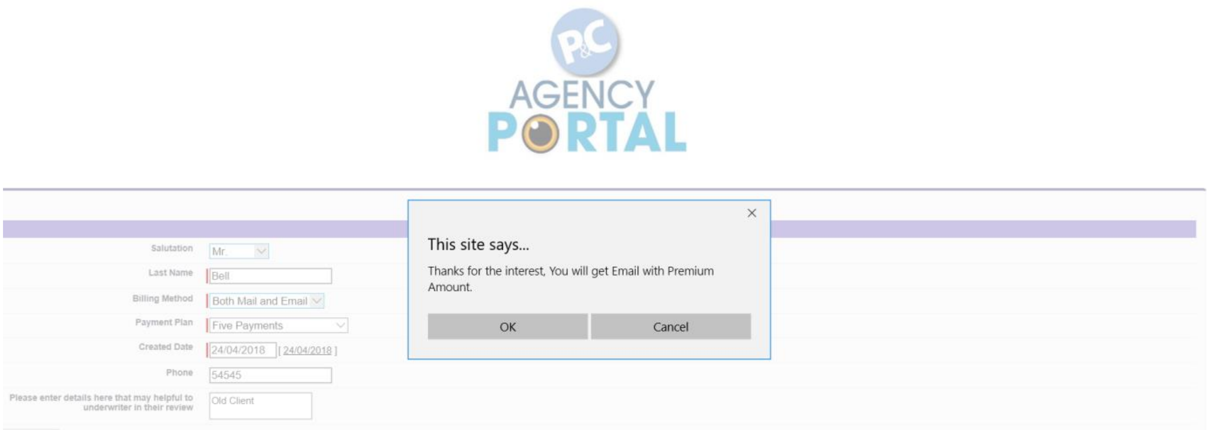
Visualforce Markup | Version Settings

```
<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”.

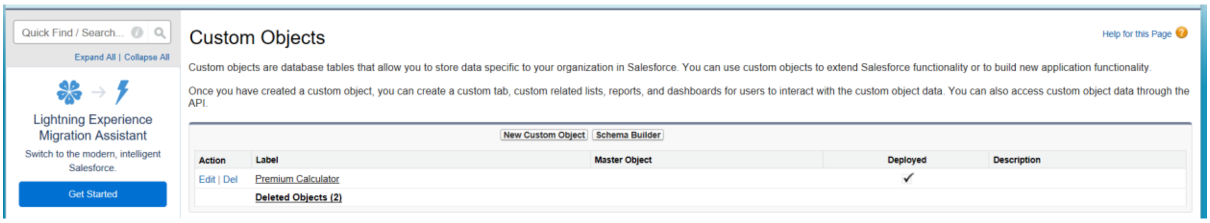


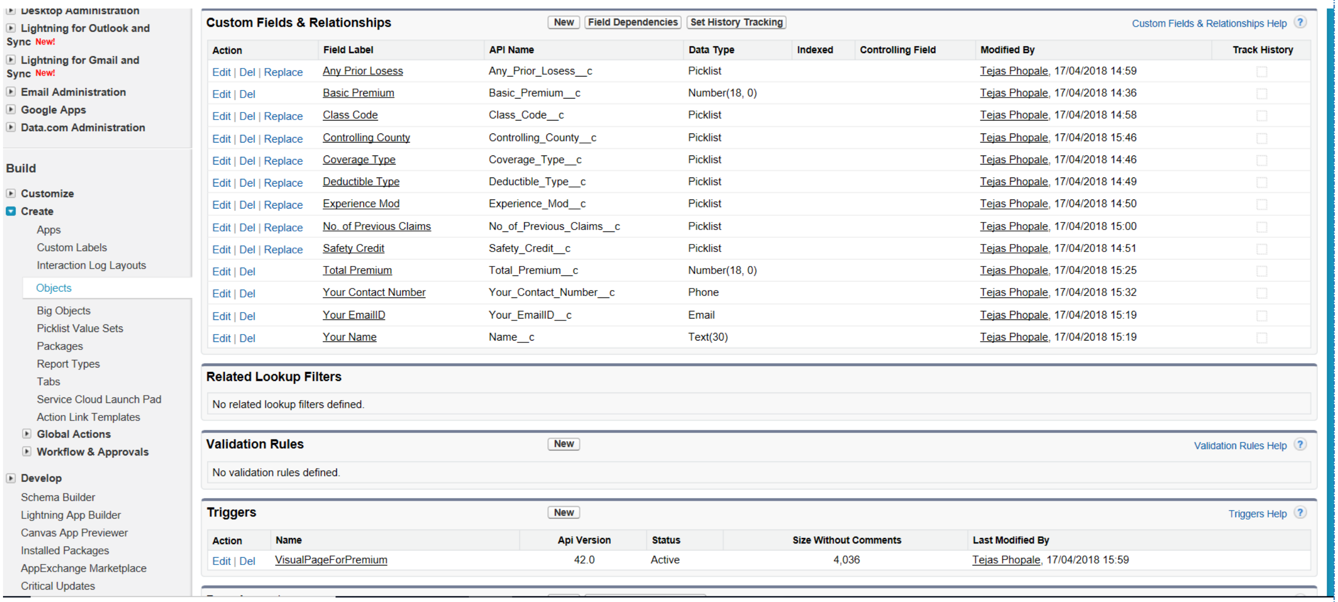


Premium Calculator:

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.

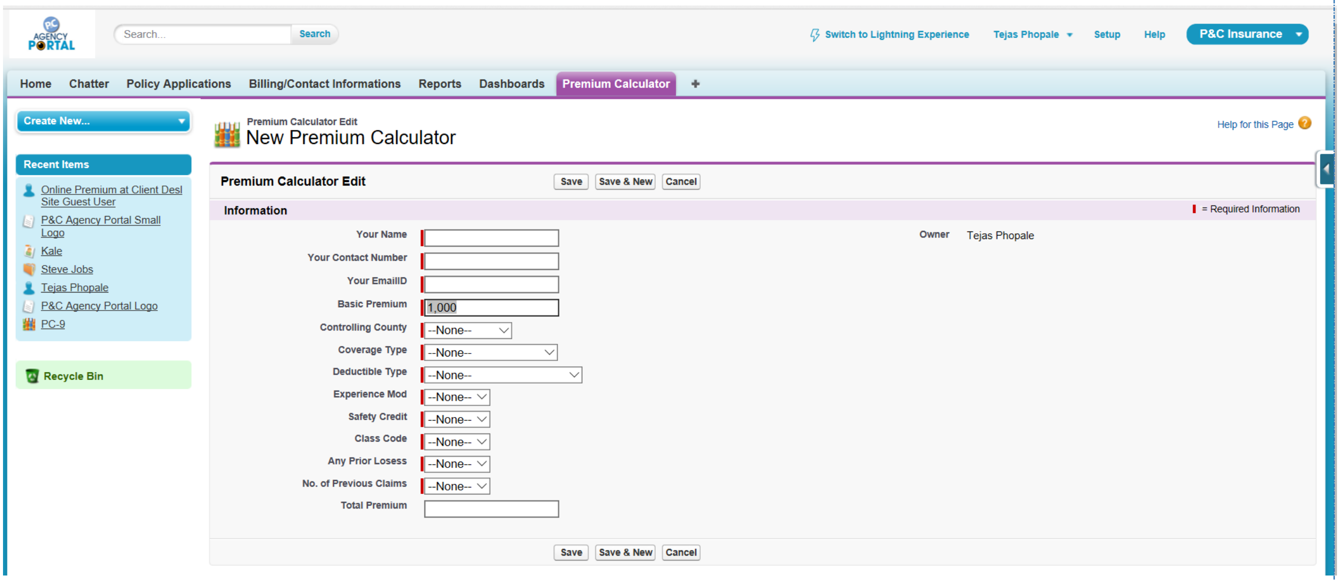
The premium Calculator has only important fields which has Enquirer Details and Premium Check list.





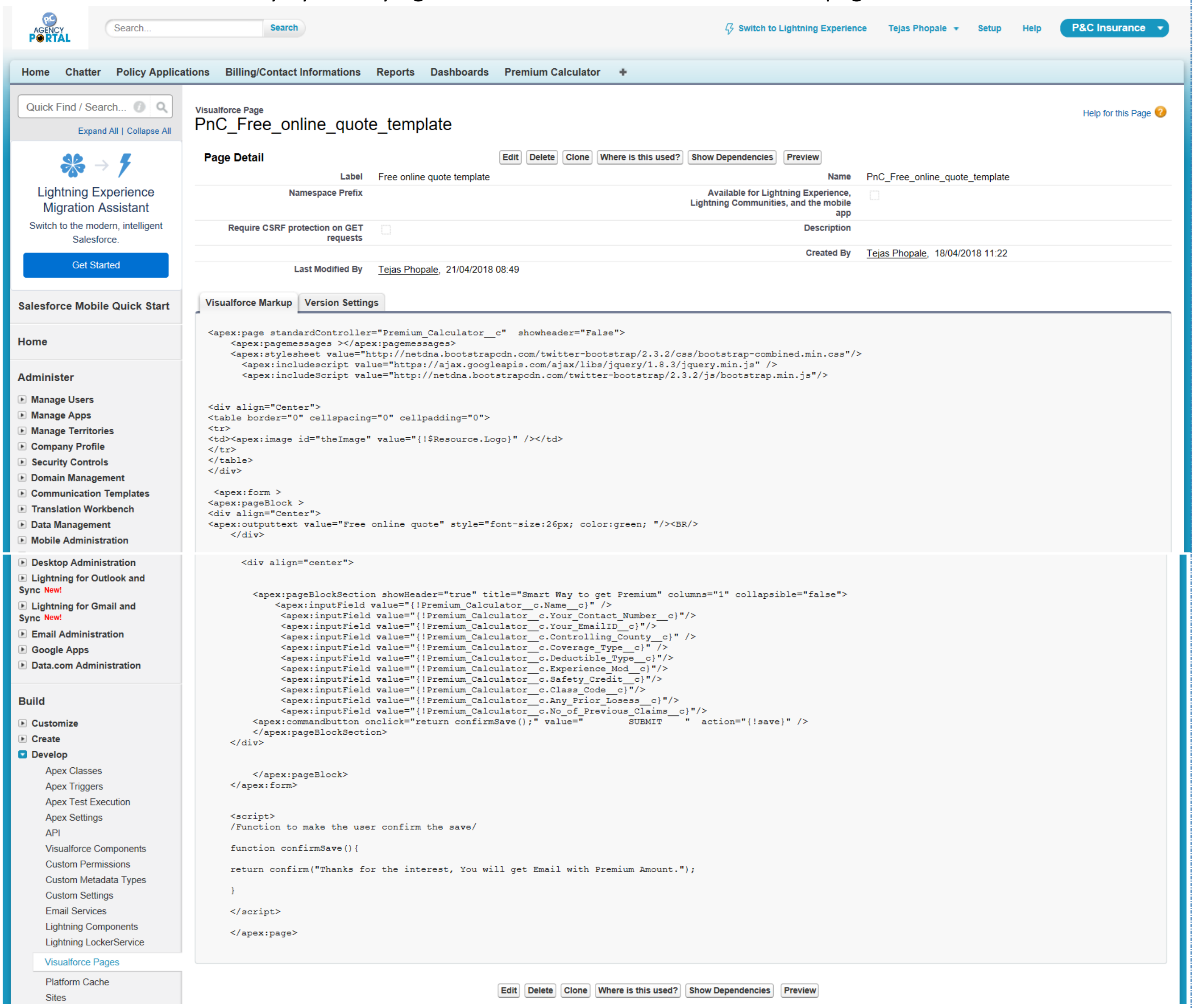
We have written a trigger called "VisualPageForPremium" shown in above screenshot which calculate the premium value and sends the amount to email Template.

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.



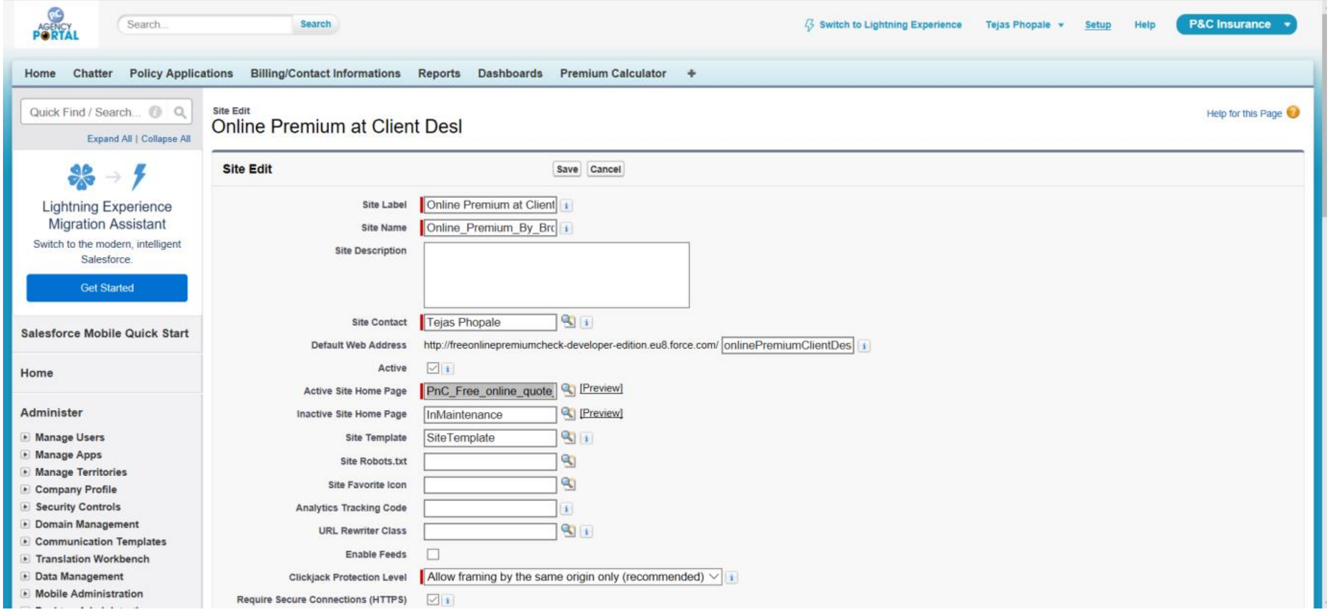

```
trigger VisualPageForPremium on Premium_Calculator__c (before insert) {

for (Premium_Calculator__c pc : Trigger.New)
  {

  integer base_premium=Integer.valueof(pc.Basic_Premium__c);
  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 (pc.Controlling_County__c !=NULL)
      {
      /*Considering Waterford as best weather status county in Ireland */
      if(pc.Controlling_County__c.equals('Waterford'))
         {
         county_measure=20;
         }

         if(pc.Controlling_County__c.equals('Dublin'))
         {
         county_measure=50;
         }
         if(pc.Controlling_County__c.equals('Cork'))
         {
         county_measure=80;
         }
         else {
         county_measure=70;
```

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:

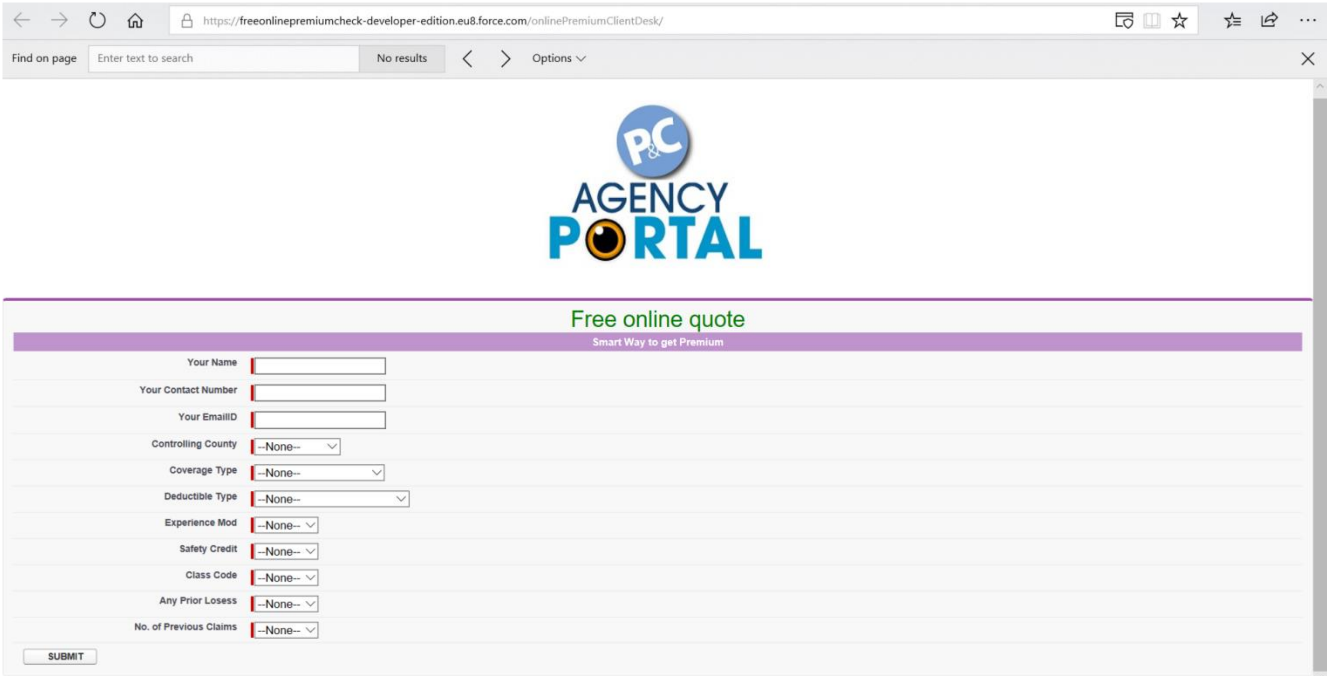



```
<apex:page standardController="Premium_Calculator__c"  showheader="False">
    <apex:pagemessages ></apex:pagemessages>
    <apex:stylesheet value="http://netdna.bootstrapcdn.com/twitter-bootstrap/2.3.2/css/bootstrap-combined.min.css"/>
      <apex:includescript value="https://ajax.googleapis.com/ajax/libs/jquery/1.8.3/jquery.min.js"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

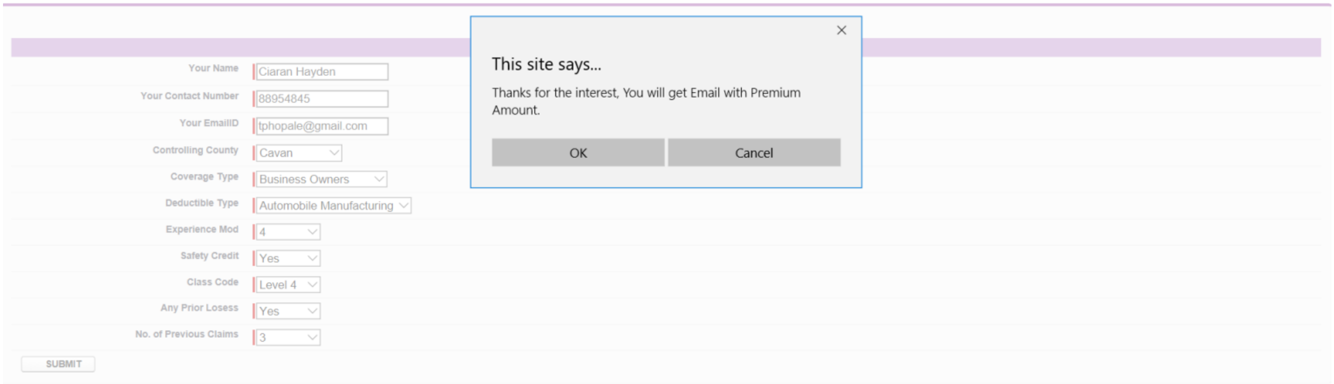
The “Active Home page” has been modified with above VisualForce page(Screenshot below).

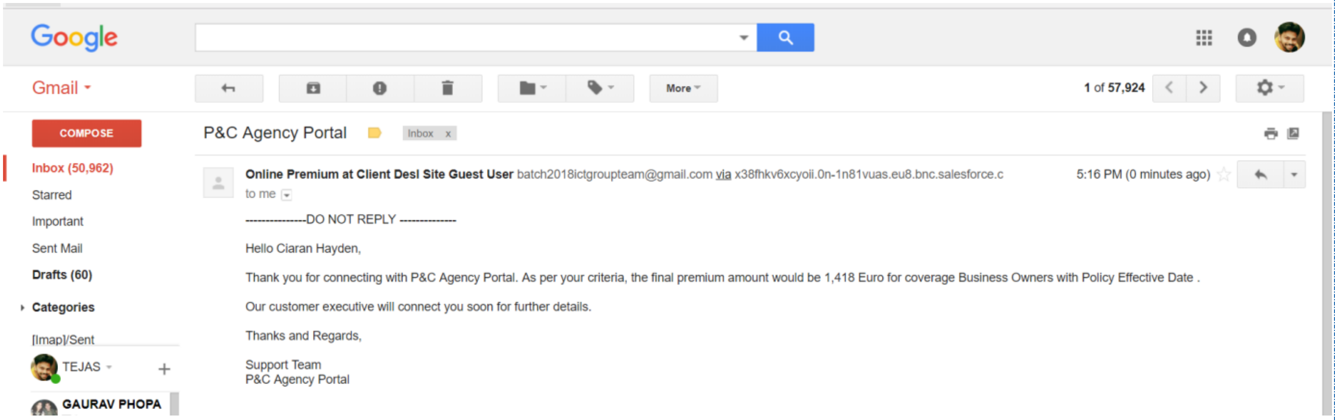


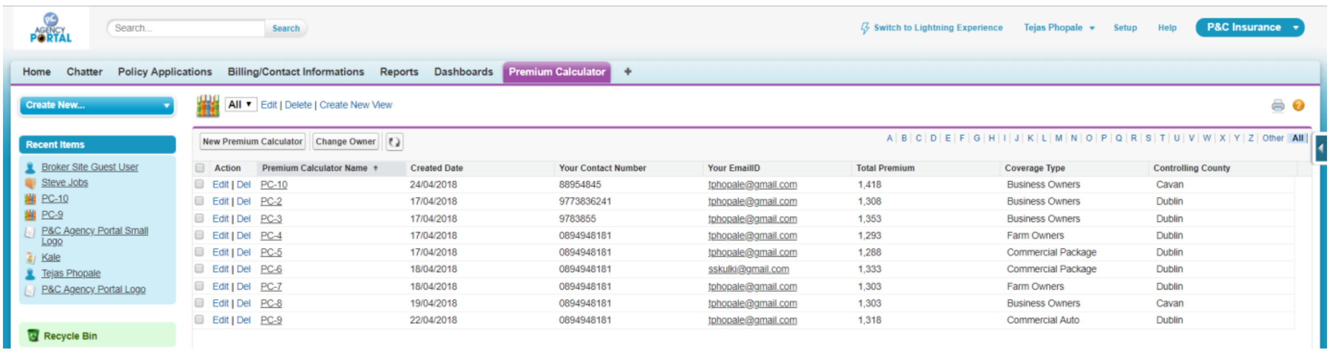
After hitting on site URL, we will get our webpage and person will get email notification after fiiling online form. Our customer executive or Agent will look for all the details which eventually present in database and connect them for future assistance (Screenshot below).

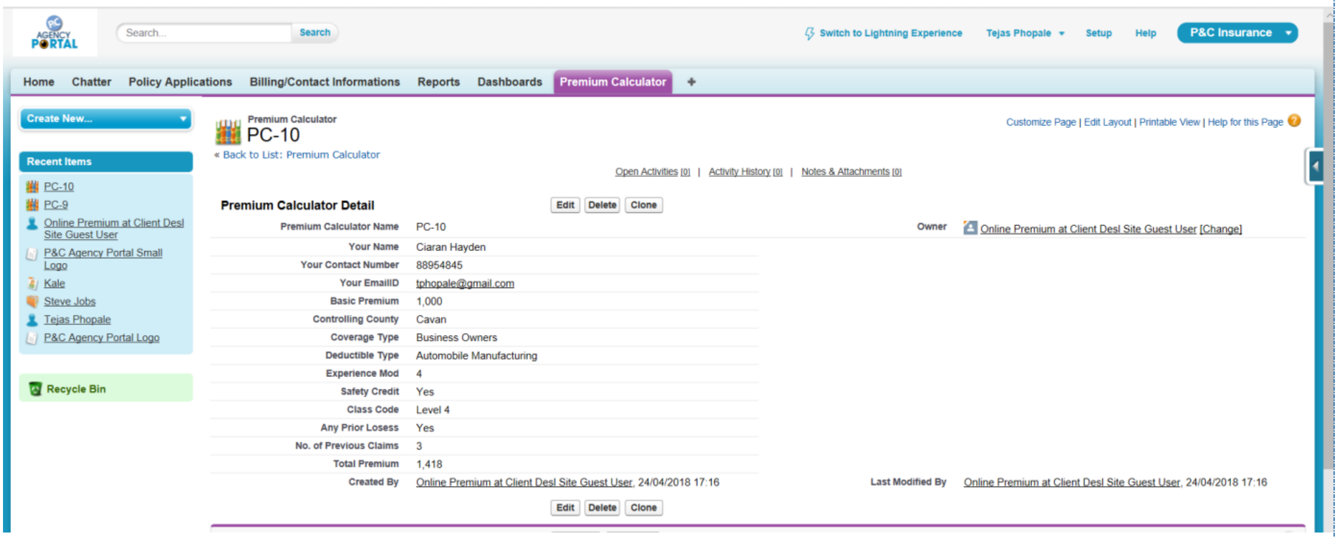


P&C AGENCY PORTAL







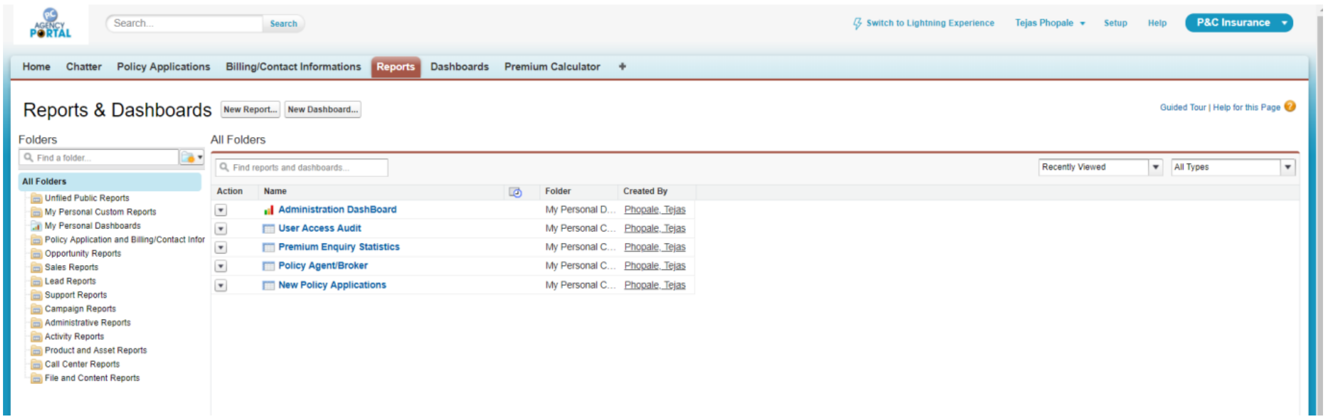


VI. Management Reports & Dashboards:

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 creted which can be used for analysis.



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: Created Date ▼ | Operator: starts with ▼ | Applicant Name Filter: | Created Since: 15/04/2018

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

Grouped By: Created Date
Sorted By: Created Date ↑ ▼

Applicant Name	Producer Name	Application Owner Alias	Last Modified Date	Application ID
Created Date: 15/04/2018 **(4 records)**				
Anna Hathway	Tejas Phopale	Tphop	17/04/2018	0010N00004FUJvl
Emma Watson	Tejas Phopale	Tphop	17/04/2018	0010N00004FUJvq
Harry Potter	Tejas Phopale	Tphop	17/04/2018	0010N00004FUJyu
Ron Whisley	Tejas Phopale	Tphop	17/04/2018	0010N00004FUK3W
Created Date: 18/04/2018 **(1 record)**				
Gauri Kale	Tejas Phopale	Tphop	18/04/2018	0010N00004FWGtF
Created Date: 21/04/2018 **(4 records)**				
Tejas Jr.	Tejas Phopale	Tphop	21/04/2018	0010N00004G9t5I
Joe Belly	Ashvin Ramteke	aramt	21/04/2018	0010N00004G9uwg
Aaradhya	Ashvin Ramteke	aramt	21/04/2018	0010N00004GA1ub
Steve Jobs	Ashvin Ramteke	aramt	21/04/2018	0010N00004GA1ul
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
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 qualitfiy grading accordingly.

Policy Agent/Broker

Report Generation Status: Complete

Report Options:

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

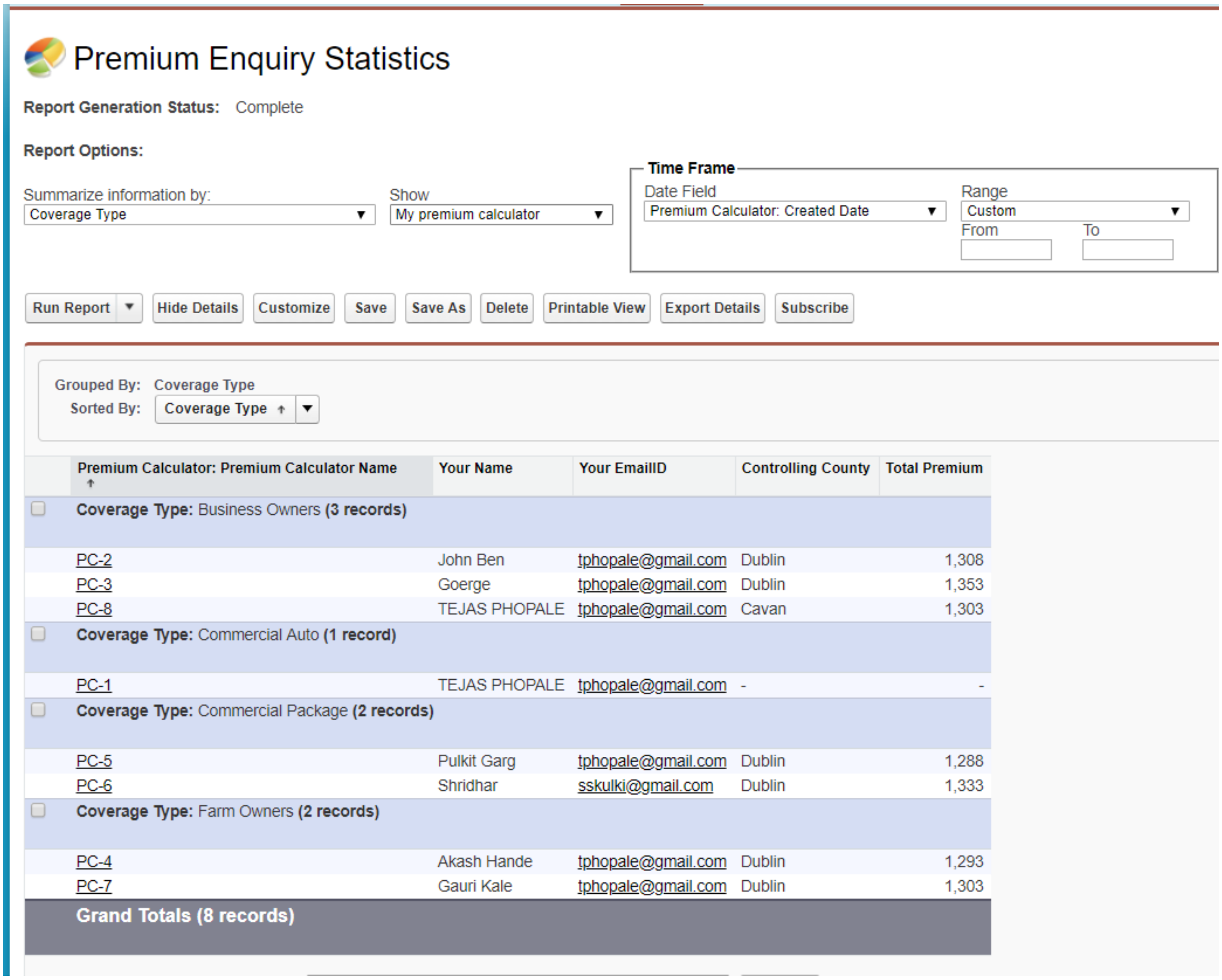
Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

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
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	0010N00004GBTWV
aramt	batch2018ictgroupteam@gmail.com	-	Joe Belly	-	21/04/2018	21/04/2018	0010N00004G9uwg
aramt	batch2018ictgroupteam@gmail.com	-	Aaradhya	-	21/04/2018	21/04/2018	0010N00004GA1ub
aramt	batch2018ictgroupteam@gmail.com	-	Steve Jobs	-	21/04/2018	21/04/2018	0010N00004GA1ul
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
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 opportinities 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

Grouped By: Coverage Type

Sorted By: Coverage Type

Premium Calculator: Premium Calculator Name	Your Name	Your EmailID	Controlling County	Total Premium
Coverage Type: Business Owners (**3 records**)				
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: Commercial Auto (**1 record**)				
PC-1	TEJAS PHOPALE	tphopale@gmail.com	-	-
Coverage Type: Commercial Package (**2 records**)				
PC-5	Pulkit Garg	tphopale@gmail.com	Dublin	1,288
PC-6	Shridhar	sskulki@gmail.com	Dublin	1,333
Coverage Type: Farm Owners (**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 Acess 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

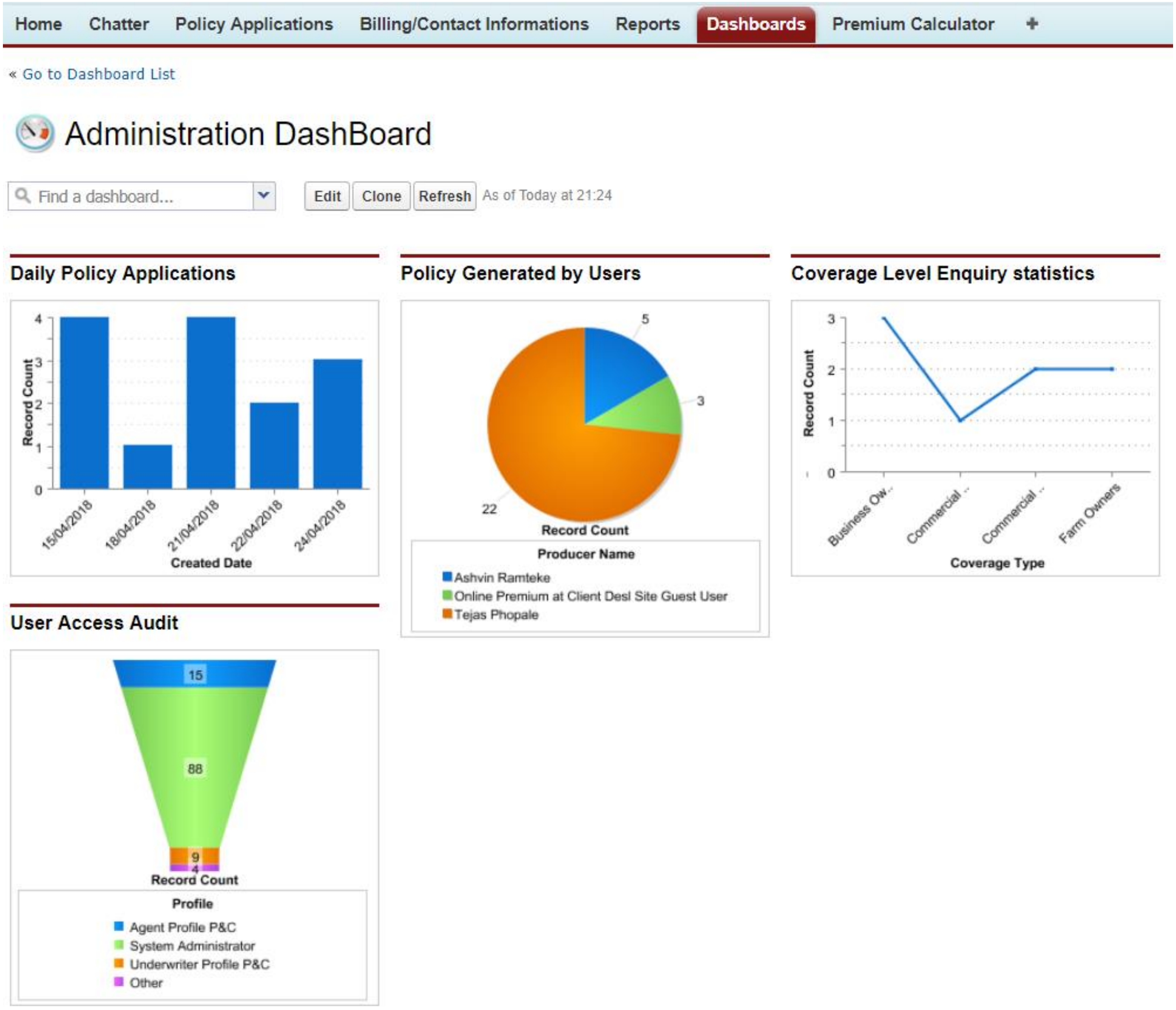
Sorted By: Profile

First Name	Last Name	Login Date/Time	Alias	Active	Last Login
Profile: Agent Profile P&C (15 records)					
Ashvin	Ramteke	22/03/2018 10:34	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	22/03/2018 12:27	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	22/03/2018 12:27	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 22:31	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 22:31	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 22:54	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 23:10	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 23:20	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	21/04/2018 23:20	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 10:47	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 10:47	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 13:12	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 13:12	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 13:12	aramt	✓	24/04/2018 14:19
Ashvin	Ramteke	24/04/2018 14:19	aramt	✓	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	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	06/02/2018 14:27	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	06/02/2018 14:29	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	11/02/2018 14:17	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:48	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:48	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:49	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	19/02/2018 22:49	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	20/02/2018 08:58	Tphop	✓	24/04/2018 21:06
Tejas	Phopale	20/02/2018 08:58	Tphop	✓	24/04/2018 21:06

 # Dashboard:

The Dashboard provides realtime summarisation in graphcal 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.