**ADMIN PROJECT**

**Insurance Project:**

Customer details are in customer object and insurance details are in insurance custom object.

Fields in insurance object are given below

|  |  |  |
| --- | --- | --- |
| Field Label | Types | Values |
| Insurance No | Picklist | INS-{000},0001 |
| Insurance Types | Picklist | Life Insurance, Motor Insurance |
| Sub-Types | Picklist | Term plan, Unit linked insurance plan, Third party insurance and Fire |
| Insurance Period | Picklist | 10,20,30,3 & 2 years |
| Yearly Premium | Formula | If Term plan => 100USD  If Unit Linked Insurance plan=>130USD  If Third party Insurance =>75USD  If Fire=>50USD |
| Status | Picklist | In force, Claimed, Surrendered |
| Maturity Date | Formula | Today + Insurance Period |
| Insurance Value | Formula | Yearly Premium \* Insurance Period |
| Date of Surrendered | Date |  |
| Insurer | Master-Detail Relationship | To contact Object |

1. Create a custom app called Insurance
2. Create Field dependency between Insurance types and Sub-Types as follows

|  |  |
| --- | --- |
| Insurance Types | Sub-Types |
| Life insurance | Term Plan |
| Life insurance | Unit linked insurance plan |
| Motor insurance | Third Party insurance |
| Motor insurance | Fire |

|  |  |
| --- | --- |
| INSURANCE TYPES | INSURANCE PERIOD |
| Term Plan | 10,15,20 |
| Unit Linked insurance plan | 10,15 |
| Third Party insurance | 3,2 |
| Fire | 2 |

1. Add necessary tabs under insurance apps.
2. Customize page layout- Mark the status as required.
3. Add at least 20 contacts and 5 insurance records for each contact using import wizard.
4. Roll-up total number of policies under each contact.
5. Roll-up total number of life insurance and total number of motor insurances for each contact.
6. Roll-up how many insurances are in force and surrendered.
7. Do not allow the users to edit if the policy is surrendered.
8. Custom Profile – Insurance

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

1. Create Roles

Insurance VP(First) Insurance Manager (Second) to Insurance Agent (Third).

1. Create below users and assign the profile and roles as given.

|  |  |  |  |
| --- | --- | --- | --- |
| Name of User | User License | Profile | Role |
| Sam Jacob | Salesforce Platform | Insurance | Insurance VP |
| Ram Kumar | Salesforce Platform | Insurance | Insurance Manager |
| Suresh Reddy | Salesforce Platform | Insurance | Insurance Agent |

1. Email to insurance manager whenever the insurance is surrendered.

1} Create a public group and include the users in the role insurance manager and insurance VP

2} Create an Email template and include the below message

Dear Managers,

The below insurance has been surrendered,

Details

Insurance Name:

Insurance Value:

Date Surrendered:

1. Update date of surrendered with current date when status is changed to surrendered.
2. Implement validation to avoid users editing the status from surrendered to any other values and also restrict changing the field insurance types.
3. Provide extra permissions to only users Sam Jacob and Ram Kumar to edit the insurance records.
4. Provide extra permission only to the user Sam to edit the contact records.