



# Migration of On-Premise Insurance Application to Salesforce

Migrating on-premise insurance application to Salesforce with a mobile-responsive customer portal and enhanced FSC features.

## Project Overview

We migrated the client's on-premise insurance application to a Salesforce platform and developed a mobile-responsive customer portal that aligns with the client's brand. Additionally, using the Financial Services Cloud (FSC), we implemented various features for seamless account, policy, and claims management.

## Client Profile

The client specializes in automobile insurance for its partners, underwriting general insurance products under its own brand as well as for leading automobile insurance brands.

## Business Requirement

The insurance company faced several challenges with its existing customer portal, particularly in syncing policies, handling bi-directional updates, and incorporating various features seamlessly. The primary issues included payload size restrictions, limited syncing capabilities, bug fixes, and UI design improvements. Additionally, they wanted to improve account tracking and mobile responsiveness of the portal.

## QBurst Solution

We developed a multi-functional platform that helps the client to manage insurance processes with ease.

## Policy Sync Enhancement

- Synchronizing customer policy data helped overcome payload size limitations by utilizing Salesforce Content Documents, allowing up to 2 GB of data size.
- Implemented native REST APIs for sync services, enabling seamless policy synchronization.

## Bi-Directional Sync

- Upgraded APIs and Apex web services to support bi-directional sync for specific fields such as home phone, mobile phone, email, and marketing consent flag.

## Claims Records and Documents

- Developed new APIs to retrieve claims records from Claims Express, using Lightning Web Components (LWC) for rendering in the customer portal without storing them in the Salesforce database.
- Enabled the client to directly download policy schedule documents from Policy Express.

## Account Linking and Delinking

- Implemented a custom solution using Apex, triggers, custom objects, and tabs to track the history of account linking and delinking.

## Bug Fixes and UI Improvements

- Addressed existing bugs and incorporated UI designs as per the specifications in Figma.
- Upgraded CSS and developed LWC components to enhance the user interface.

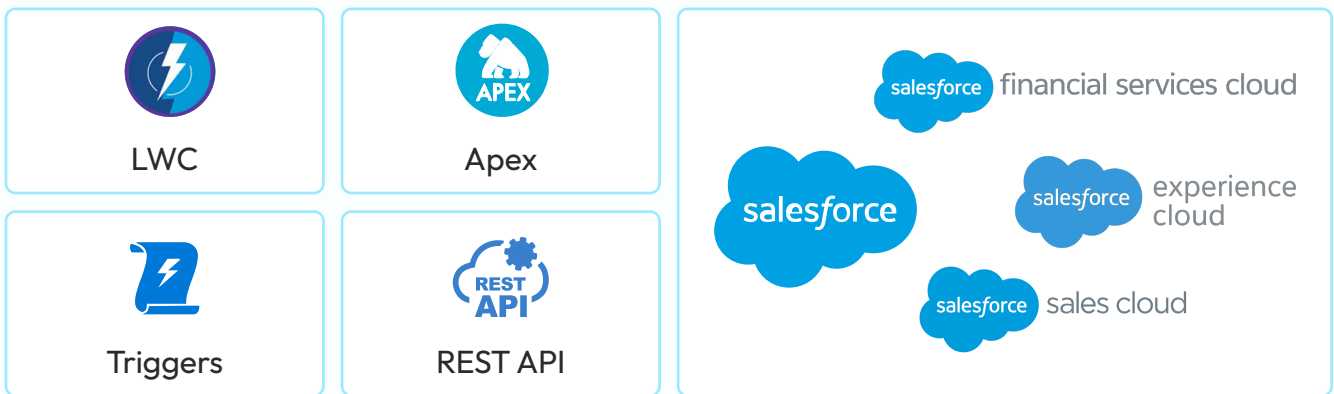
## Mobile Responsiveness

- Ensured mobile responsiveness for Android and iOS platforms, making the portal accessible and user-friendly on various devices.

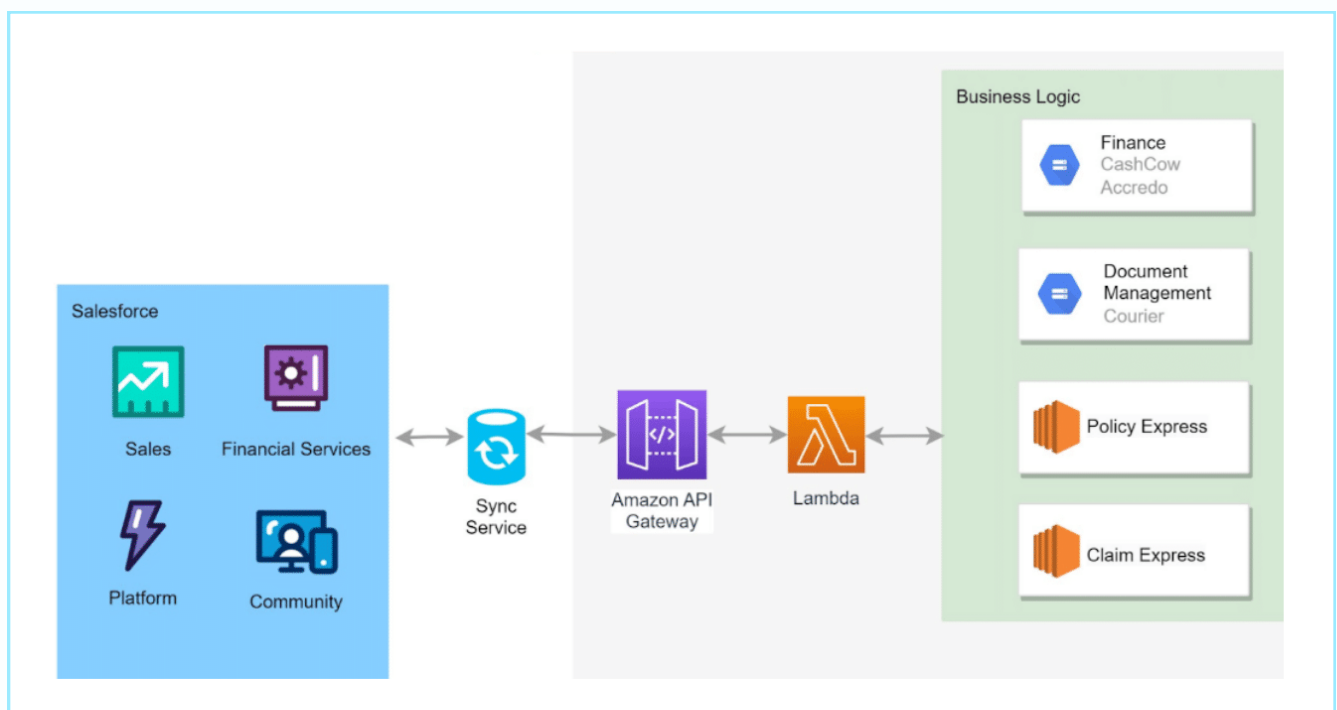
## Key Features or Highlights

- Responsive customer portal with dynamic LWC pages for policy and claims management
- REST API integration with Ruby on Rails applications
- Utilization of FSC data model and capabilities for insurance data handling
- Just-in-time user provisioning and SAML SSO with Active AD

## Technologies Used



## Architecture Diagram



## Business Benefits

**Improved Efficiency:** Better payload handling ensured efficient management of large data volumes, enhancing operational efficiency and customer service.

**Eliminated Communication Silos:** Bi-directional sync enabled seamless communication, improving customer service and compliance with marketing preferences.

**Enhanced Customer Experience:** LWC components as well as Rest APIs provide quick access to claims records and help improve customer experience. It also ensures up-to-date information and reduces data redundancy.

**Better Insights and Streamlined Operations:** The simplified custom account management and tracking solution improved data integrity and ensured clear audit trails, leading to better customer insights and streamlined operations.



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