

Phase 10 – Quality Assurance Testing Documentation

Project: Visitor CheckIn System for Offices

The Visitor Check-In System replaces manual registers with a Salesforce app that enables quick digital logging, automatic host notifications, and secure visitor records. It provides real-time dashboards for management insights while ensuring compliance for HR/security teams. Unlike costly AppExchange apps, this solution is simple, lightweight, and cost-effective for offices.

Company Profile Setup

Company information added:Name, Address, Default Currency, Default Language, Default Locale

Company profile verified in Setup → Company Information

SETUP

Company Information

Company Information

MITS

The organization's profile is below.

User Licenses (102)

Permission Set Licenses (102)

Feature Licenses (11)

Usage-based Entitlements (102)

Organization Detail

Edit

Organization Name	MITS	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	Hindi (India)
Address	Madanapalle 517326 Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Punjabi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	468 KB (9%) View
Newsletter	<input type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BMLyr
		Organization Edition	Developer Edition
		Instance	CAN96

Business Hours & Holidays

Business hours defined for the company.

Public holidays added for accurate case and visit time calculations.

SETUP

Business Hours

Organization Business Hours

Help

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

Edit

Business Hours Name	Office Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div><div>Sunday</div><div>No Hours</div></div> <div><div>Monday</div><div>9:00 AM to 4:00 PM</div></div> <div><div>Tuesday</div><div>9:00 AM to 4:00 PM</div></div> <div><div>Wednesday</div><div>9:00 AM to 4:00 PM</div></div> <div><div>Thursday</div><div>9:00 AM to 4:00 PM</div></div> <div><div>Friday</div><div>9:00 AM to 4:00 PM</div></div> <div><div>Saturday</div><div>No Hours</div></div>	Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>		
Created By	OrgFarm EPIC 9/11/2025, 12:51 PM	Last Modified By	HARATHI ASWARTHAGARI 9/15/2025, 6:51 AM

Edit

Fiscal Year Settings

Standard Fiscal Year (January – December) selected.

Fiscal year settings verified.

SETUP
Fiscal Year

Setup
Organization Fiscal Year Edit: MITS

To specify the fiscal year type for your organization, choose one of the options below.

☒ **Standard Fiscal Year** ⓘ
☐ **Custom Fiscal Year** ⓘ

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the start month or the ending month.
Setup: Organization Fiscal Year Edit: MITS ~ Salesforce - Developer Edition

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. Changing the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing changes.

Change Fiscal Year Period Save Cancel

Name	MITS
Fiscal Year Start Month	January ▼
Fiscal Year is Based On	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

Save Cancel

User Setup & Licenses

Users created with appropriate Salesforce Licenses.

Example: HARATHI ASWARTHAGARI – System Administrator.

Email, role, and profile assigned.

Profiles

System Administrator Profile verified with access to all objects.

Field-level security configured for sensitive fields like Visitor Email, ID Proof Number.

Roles

Role hierarchy created:

System Administrator → Manager → Employee

Users assigned to appropriate roles for record access.

SETUP

Roles

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

[Collapse All](#)
[Expand All](#)

- ☐ **MIT S**
 - ☐ **Add Role**
 - ☐ **CEO** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **Receptionist** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **Security Guard** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **Monitor Visitor Details** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **SVP, Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **SVP, Human Resources** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **SVP, Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **Visitor Manager** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **Creating Updating Reporting details** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**
 - ☐ **Recording details** [Edit](#) | [Del](#) | [Assign](#)
 - ☐ **Add Role**

Permission Sets

Permission set Visitor Object Access created.

Assigned to System Administrator to allow full access to Visitor Object.

Organization-Wide Defaults (OWD)

Visitor object default sharing set to Private.

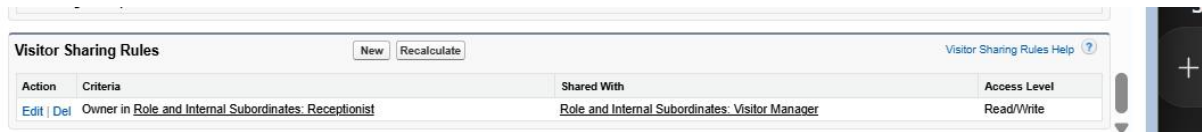
Verified record visibility for assigned users.

Visit	Public Read/Write	Private	✓
Visitor	Public Read/Write	Private	✓

Sharing Rules

Created sharing rules to allow managers and relevant users access to visitor records.

Verified that rules reflect intended record visibility.



The screenshot shows the 'Visitor Sharing Rules' interface. At the top, there are 'New' and 'Recalculate' buttons, and a 'Visitor Sharing Rules Help' link. Below is a table with four columns: Action, Criteria, Shared With, and Access Level. The table contains one row with the following data:

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role and Internal Subordinates: Receptionist	Role and Internal Subordinates: Visitor Manager	Read/Write

Login Access Policies

Login access policies enabled to allow admin login for support and troubleshooting.

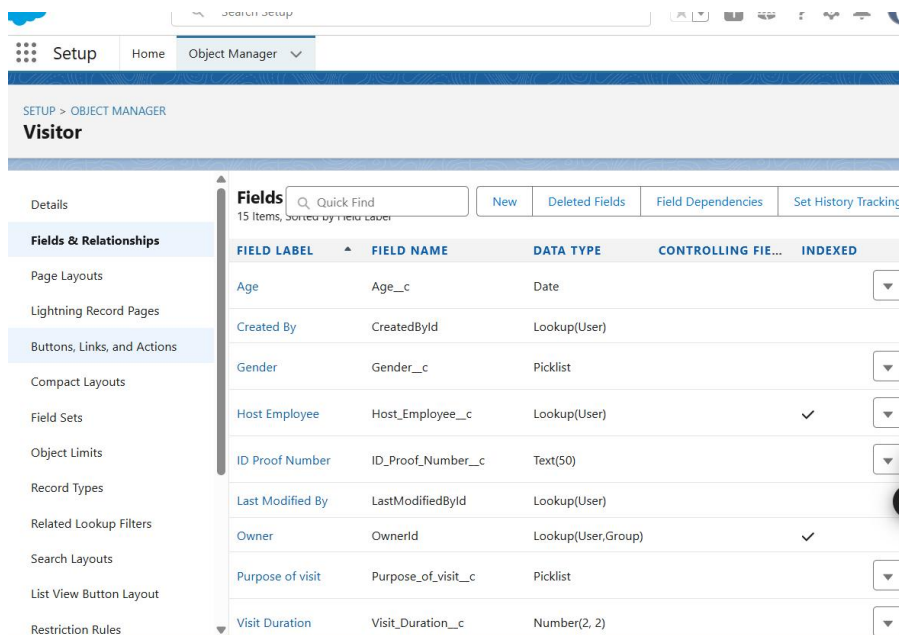
Visitor Object Configuration

Visitor object created and fields added:

Visitor Name, Email, Phone Number, ID Proof Number, Gender, Age, Check-In/Check-Out Time, Host Employee, Purpose of Visit, Visit Duration

Visitor tab created for easy access.

Page layout verified with all fields visible and arranged logically.



The screenshot shows the Salesforce Object Manager for the 'Visitor' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area displays the 'Fields' section with a search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below is a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Age	Age__c	Date		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Gender	Gender__c	Picklist		<input type="checkbox"/>
Host Employee	Host_Employee__c	Lookup(User)	✓	<input type="checkbox"/>
ID Proof Number	ID_Proof_Number__c	Text(50)		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)	✓	<input type="checkbox"/>
Purpose of visit	Purpose_of_visit__c	Picklist		<input type="checkbox"/>
Visit Duration	Visit_Duration__c	Number(2, 2)		<input type="checkbox"/>

General Guidelines

- Custom Objects created : Visitor (to store visitor information such as name, phone, email, check-in/out times, etc.), to track specific meetings associated with visitors.

SETUP > OBJECT MANAGER

Visitor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Link Mass Actions Layout

Details

Description

This object stores all details of office visitors, including their personal info, check-in/check-out time, and host employee.

API Name

Visitor__c

Custom

✓

Singular Label

Visitor

Plural Label

Visitors

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard [salesforce.com Help Window](#)

- Visitor Name (Text)
- Visitor Email (Email)
- Visitor Phone Number (Phone)
- Visitor Check-In Time (Date/Time)
- Visitor Check-Out Time (Date/Time)
- Visitor Duration (Formula - Number; calculates visit length in hours)
- Purpose of Visit (Picklist)
- Gender (Picklist)
- Age (Date field to store DOB)
- ID Proof Number (Text)

Host Employee (Lookup to User object)

Fields & Relationships

18 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTF
Age	Age__c	Date	
Created By	CreatedById	Lookup(User)	
Gender	Gender__c	Picklist	
Host Employee	Host_Employee__c	Lookup(User)	
ID Proof Number	ID_Proof_Number__c	Text(50)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Purpose of visit	Purpose_of_visit__c	Picklist	
Record Type	RecordTypeId	Record Type	
Status	Status__c	Picklist	
Visitor Check-In Time	Visitor_Check_In_Time__c	Date/Time	
Visitor Check-Out Time	Visitor_Check_Out_Time__c	Date/Time	
Visitor Duration	Visitor_Duration__c	Formula (Number)	
Visitor Email	Visitor_Email__c	Email	
Visitor Name	Visitor_Name__c	Text(100)	

- Edited Visitor page layout to organize fields (Visitor Name, Email, Phone, Check-In, Check-Out, Purpose of Visit, Host Employee, etc.).

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

Gender

Owner

Visitor Details

Visitor Email

Blank space

Host Employee

Purpose of visit

Visitor Check-In

Visitor Name

Age

ID Proof Number

Record Type

Visitor Check-Out

Visitor Name

Created By

Last Modified By

Status

Visitor Duration

Visitor Phone Number

PostFileNew EventNew TaskNew ContactLog a CallNew OpportunityNew LeadLinkPollQuestionEmailNew CaseCloneEditSharing HierarchyChange OwnerPrintable

Change Record TypeEdit LabelsSend SurveySharing

Visitor Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchySubmit for ApprovalEdit Labels

Custom Buttons

Information (Header visible on edit only)

Visitor NameSample Text

OwnerSample Text

Visitor Emailsarah.sample@company.com

Visitor Phone1-415-555-1212

Visitor Check-In Time8/25/2025, 10:35 PM

Visitor Check-Out Time8/25/2025, 10:35 PM

Host EmployeeSample Text

Purpose of visitSample Text

ID Proof NumberSample Text

GenderSample Text

Age8/25/2025

Visitor Duration335:41

StatusSample Text

System Information (Header visible on edit only)

Visitor NameSample Text

Last Modified BySample Text

Created BySample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

New Visitor: Guest Visit

* = Required Information

Information

*Visitor Name ⓘ

⊗

Complete this field.

*Visitor Email ⓘ

*Visitor Phone Number ⓘ

Visitor Check-In Time ⓘ

*Date

*Time

Visitor Check-Out Time ⓘ

Date

Time

Host Employee ⓘ

Search People...

*Purpose of visit ⓘ

--None--

ID Proof Number ⓘ

Gender ⓘ

--None--

Age ⓘ

Owner

HARATHI ASWARTHAGARI

Status

Cancel

Save & New

Save

- Defined a “Visitor Compact Layout” to show key details in highlights panel:
- Visitor Name
- Visitor Phone Number
- Purpose of Visit
- Host Employee

- Record types were noted but not yet deeply configured (can be extended later for differentiating visit types like (Interview, Guest, Contractor)).

New Visitor

Select a record type

☒

Guest Visit

☐

Delivery Visit

☐

Employee Visit

☐


Interview Visit

Cancel

Next

- Business Hours

SETUP

 Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays

Business Hours Detail

Edit

Business Hours Name	Office Hours		Time Zone
Business Hours			(GMT+05:30) India Standard Time (Asia/Kolkata)
	Sunday	No Hours	
	Monday	9:00 AM to 4:00 PM	Default Business Hours ✓
	Tuesday	9:00 AM to 4:00 PM	
	Wednesday	9:00 AM to 4:00 PM	
	Thursday	9:00 AM to 4:00 PM	
	Friday	9:00 AM to 4:00 PM	
	Saturday	No Hours	

Active

✓

Created By

OrgAdmin EPIC 9/11/2025, 12:51 PM

Last Modified By

HARATHI ASHWINTHA GAOI 9/15/2025, 9:51 AM

Edit

Holidays

Add/Remove

No records to display

[Back To Top](#)

Always show me fewer [▲](#) / [▼](#) more records per related list

- Holiday

Example:

SETUP

Holidays

Holiday Detail

olidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours. Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours (0)

Holiday Detail

Edit

Delete

Holiday Name

INDEPENDENCE DAY

Description

Public holiday

Date and Time

8/15/2025 All Day

Recurring Holiday

Occurs every August 15 effective 8/15/2025

Created By

HARATHI ASWARTHAGARI 9/15/2025, 9:58 AM

Last Modified By

HARATHI ASWARTHAGARI 9/15/2025, 9:58 AM

Business Hours

Add/Remove

No records to display

Back To Top

Always show me fewer / more records per related list

- Role hierarchy

SETUP

Roles

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

Collapse All

Expand All

5

MIT S

Add Role

CEO

Edit

Del

Assign

Add Role

Receptionist

Edit

Del

Assign

Add Role

Security Guard

Edit

Del

Assign

Add Role

Monitor Visitor Details

Edit

Del

Assign

Add Role

SVP, Customer Service & Support

Edit

Del

Assign

Add Role

SVP, Human Resources

Edit

Del

Assign

Add Role

SVP, Sales & Marketing

Edit

Del

Assign

Add Role

Visitor Manager

Edit

Del

Assign

Add Role

Creating/Updating Reporting details

Edit

Del

Assign

Add Role

Recording details

Edit

Del

Assign

- Organization-Wide Defaults (OWD) :owners (receptionists) and higher roles can see them.

Visit	Public Read/Write	Private	✓
Visitor	Public Read/Write	Private	✓

- Sharing Rules :Sharing Rules open up record visibility beyond OWD. For example, share all Visitor__c records with the Security Team. Apex Triggers for detecting Duplicate Emails and for handling the data

Visitor Sharing Rules

New

Recalculate

Visitor Sharing Rules Help

Action

Criteria

Shared With

Access Level

Edit

Del

Owner in Role and Internal Subordinates: Receptionist

Role and Internal Subordinates: Visitor Manager

Read/Write

AGER

ps

ges

Actions

rs

out

Apex Trigger

VisitorHandlerTrigger

< Back to List

Apex Trigger Detail

Edit

Delete

Download

Show Dependencies

Name	VisitorHandlerTrigger
Code Coverage	0% (0/13)
Created By	HARATHI ASWARTHAGARI
	9/24/2025, 9:47 AM
Namespace Prefix	

Apex Trigger

Version Settings

Trace Flags

```
1 trigger VisitorHandlerTrigger on Visitor__c (before insert, before update) {
2   // Example: Prevent duplicate emails
3   if (Trigger.isBefore && Trigger.isInsert) {
4     Set<String> emails = new Set<String>();
5     for (Visitor__c v : Trigger.new) {
6       if (v.Visitor_Email__c != null) emails.add(v.Visitor_Email__c);
7     }
8   }
9   if (!emails.isEmpty()) {
10    Map<String, Visitor__c> existing = new Map<String, Visitor__c>();
11    for (Visitor__c e : [
12      SELECT Visitor_Email__c FROM Visitor__c WHERE Visitor_Email__c IN :emails
13    ]) {
14      existing.put(e.Visitor_Email__c, e);
15    }
16    for (Visitor__c v : Trigger.new) {
17      if (existing.containsKey(v.Visitor_Email__c)) {
18        v.addError('Duplicate email found: ' + v.Visitor_Email__c);
19      }
20    }
21  }
22 }
23 }
24 }
```

Edit

Delete

Download

Show Dependencies

Output:

Visitor Name	Email	Phone	CheckIn Time	Purpose of Visit	ERROR
Rani Devi	rani@example.com	9.877E+09	2025-09-25	Meeting	Duplicate email found: rani@example.com
Karthik Sharma	karthik@example.com	9.877E+09	2025-09-25	Interview	Duplicate email found: karthik@example.com
Meena Kumar	meena@example.com	9.877E+09	2025-09-25	Delivery	Duplicate email found: meena@example.com
Suresh Reddy	suresh@example.com	9.877E+09	2025-09-25	Other	Duplicate email found: suresh@example.com
Anjali Verma	anjali@example.com	9.877E+09	2025-09-25	Meeting	Duplicate email found: anjali@example.com
Vikram Singh	vikram@example.com	9.877E+09	2025-09-25	Interview	Duplicate email found: vikram@example.com
Priya Nair	priya@example.com	9.877E+09	2025-09-25	Delivery	Duplicate email found: priya@example.com
Arjun Das	arjun@example.com	9.877E+09	2025-09-25	Other	Duplicate email found: arjun@example.com
Neha Gupta	neha@example.com	9.877E+09	2025-09-25	Meeting	Duplicate email found: neha@example.com
Rahul Mehta	rahul@example.com	9.877E+09	2025-09-25	Interview	Duplicate email found: rahul@example.com

- Trigger for Visitor checkIn

SETUP > OBJECT MANAGER

Visitor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Apex Trigger

VisitorTrigger

< Back to List

Apex Trigger Detail

Name

VisitorTrigger

Edit

Delete

Download

Show Dependencies

Code Coverage

0% (0/2)

Created By

HARATHI ASWARTHAGARI

9/24/2025, 8:50 AM

Namespace Prefix

Apex Trigger

Version Settings

Trace Flags

```
1 trigger VisitorTrigger on Visitor__c (after insert, after update) {
2
3   // Loop through all Visitor records that triggered this event
4   for(Visitor__c v : Trigger.new){
5
6     // Check if the status is "Checked In"
7     if(v.Status__c == 'Checked In'){
8       // This is where you can run your logic
9       System.debug('Visitor Checked In: ' + v.Visitor_Name__c);
10
11       // Example: send email or enqueue queueable job here
12     }
13   }
14 }
```

Salesforce - Developer Edition

Edit

Delete

Download

Show Dependencies

Output:

Visitor Rani Devi has Checked In

Unverified

?

HARATHI ASWARTHAGARI

To You, + 1

10:52 am

Hello ,

Your visitor has successfully **Checked In**.

Thank you,

Reception Team

Thank you for your confirmation.

Thank you

- Flow Triggers: For Sending mails Automatically whenever a visitor is checkedIn,CheckOut,Pending Approval,Approval Cancelled.

SETUP > OBJECT MANAGER

Visitor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

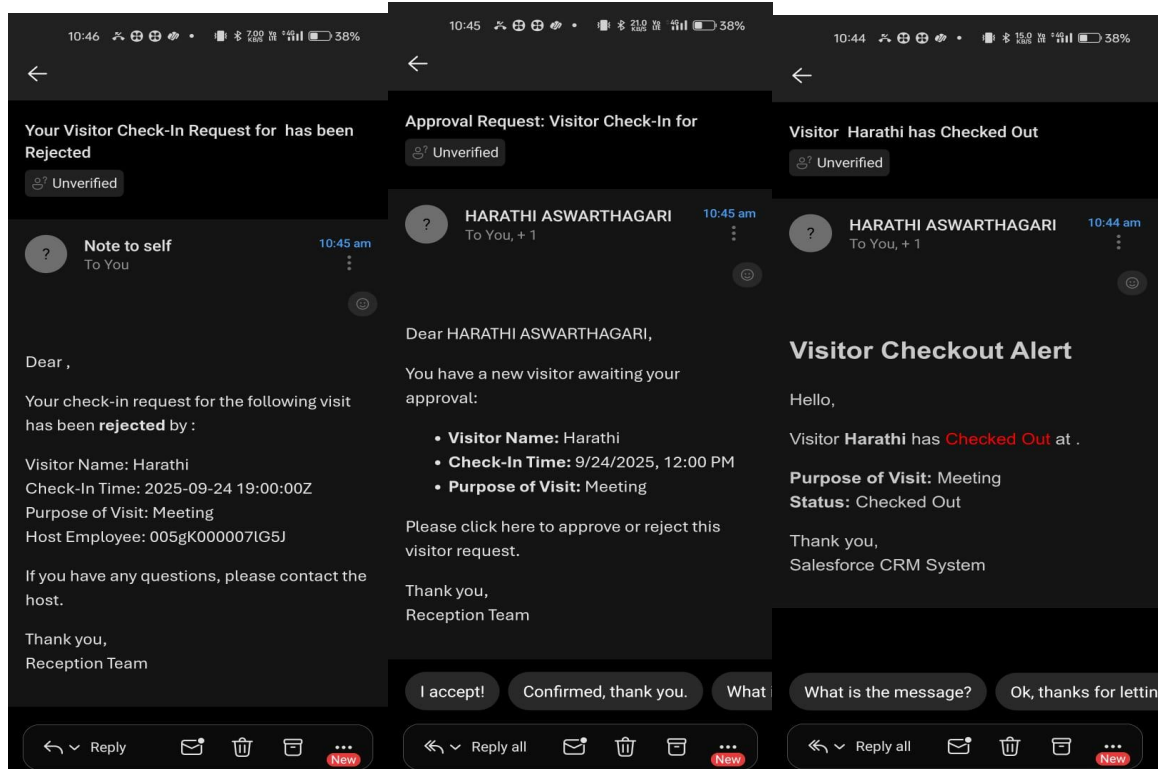
Search Layouts

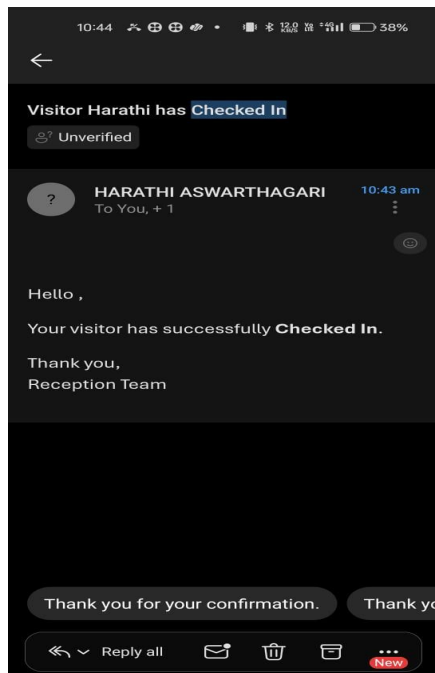
Flow Triggers

4 Items • Sorted by Flow Label

Flow Label	Process Type	Trigger	Active	Last Modified By	Last Modified Date
Pending Approval mail	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 07:02 PM
Visitor Approval Cancelled	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 07:06 PM
Visitor Checkin	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 06:43 PM
Visitor CheckOut	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 06:50 PM

Output:





- Visitor Can't check out without Checking In.

* = Required Information

Information

* Visitor Name

* Visitor Email

* Visitor Phone Number

Visitor Check-In Time

* Date

* Time

Complete this field with format 12/31/2024.

Visitor Check-Out Time

Date

Owner

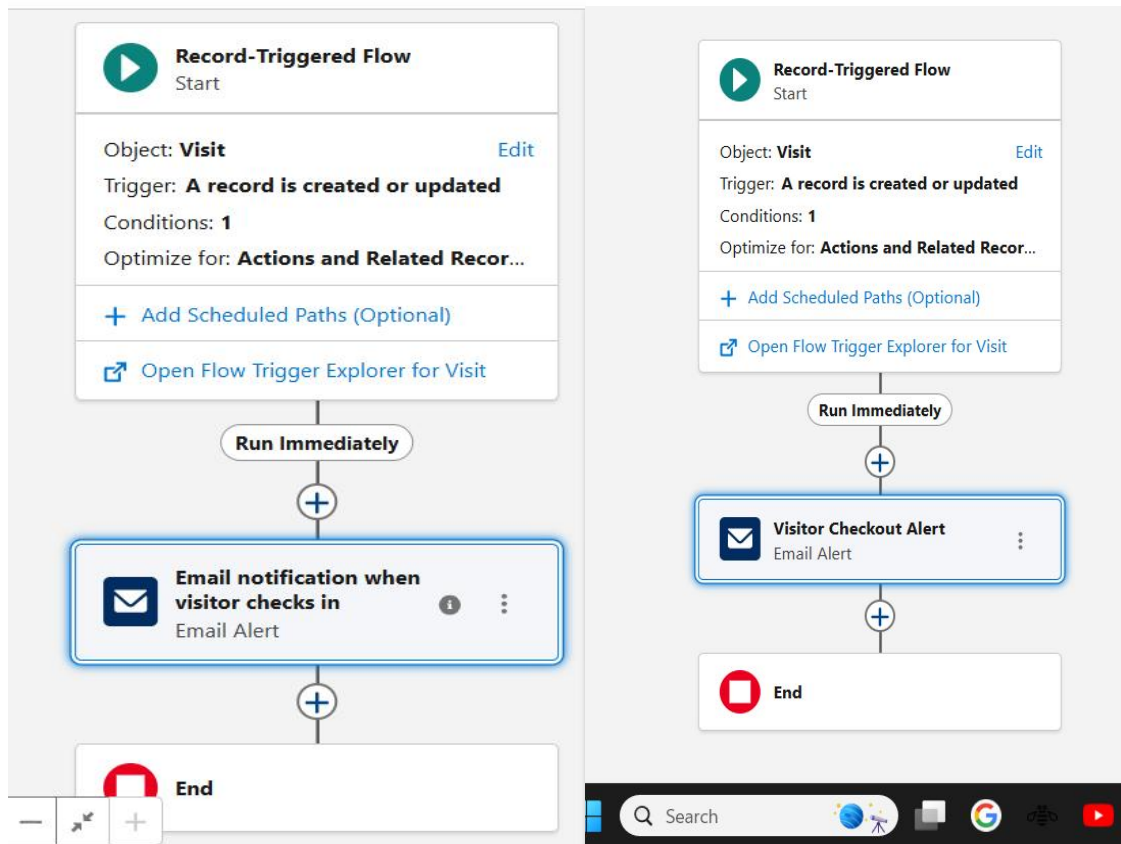
HARATHI ASWARTHAGARI

We hit a snag.

Review the following fields

- Visitor Check-In Time

- Record Triggered Flow: These flows helps to send email alerts automatically based on the status of the visit.



- Record Update Automation: After providing the checkIn and checkout automatically calculating the visit duration as 1.25 i.e. 1 hour 25 minutes.

Visitor Check-Out Time ⓘ	9/18/2025, 1:15 PM	
Host Employee ⓘ	HARATHI ASWARTHAGARI	
Purpose of visit ⓘ	Delivery	
ID Proof Number ⓘ		
Gender ⓘ	Female	
Age ⓘ	9/25/2025	
Visitor Duration	1.25	
Visitor Name ⓘ	trisha kaal	
Created By	HARATHI ASWARTHAGARI , 9/18/2025, 9:37 AM	
Last Modified By	HARATHI ASWARTHAGARI , 9/18/2025, 10:09 AM	

- Apex Classes: Handling, Inserting, Updating the Visitor Details using Apex classes

Apex Class

VisitorScheduled

Apex Class Detail

Edit Delete Download Security Show Dependencies

Name VisitorScheduled
Namespace Prefix
Created By HARATHI ASWARTHAGARI , 9/24/2025, 10:07 AM

Class Body Class Summary Version Settings Trace Flags

```
1 global class VisitorScheduled implements Schedulable {  
2  
3     global void execute(SchedulableContext sc) {  
4         // Find visitors still marked as Checked In  
5         List<Visitor__c> visitors = [  
6             SELECT Id, Name, Status__c  
7             FROM Visitor__c  
8             WHERE Status__c = 'Checked In'  
9         ];  
10  
11         for (Visitor__c v : visitors) {  
12             System.debug('Scheduled job found checked-in visitor: ' + v.Name);  
13         }  
14     }  
15 }
```

Apex Class

Visitor

Apex Class Detail

Edit Delete Download Security Show Dependencies

Name Visitor
Namespace Prefix
Created By HARATHI ASWARTHAGARI , 9/24/2025, 2:40 AM

Class Body Class Summary Version Settings Trace Flags

```
1 public class Visitor {  
2  
3     // Method to create a new Visitor record  
4     public static Visitor__c createVisitor(  
5         String name,  
6         String email,  
7         String phone,  
8         String purpose,  
9         String gender,  
10        Date age  
11    ) {  
12        Visitor__c v = new Visitor__c();  
13        v.Visitor_Name__c = name;  
14        v.Visitor_Email__c = email;  
15        v.Visitor_Phone_Number__c = phone;  
16        v.Purpose_of_visit__c = purpose; // Picklist: Meeting, Interview, Delivery, Other  
17        v.Status__c = 'Checked In';  
18        v.Gender__c = gender; // Picklist: Male, Female, Other  
19        v.Age__c = age;  
20        v.Visitor_Check_In_Time__c = System.now();  
21  
22        insert v; // Save record in Salesforce  
23        System.debug('Visitor created with Id: ' + v.Id);  
24        return v;  
25    }  
26  
27 }
```

Salesforce - Developer Edition

Apex Class

VisitorBatch

Apex Class Detail

Edit Delete Download Security Show Dependencies

Name	VisitorBatch
Namespace Prefix	
Created By	HARATHI ASWARTHAGARI , 9/24/2025, 8:41 AM

Class Body Class Summary Version Settings Trace Flags

```
1 global class VisitorBatch implements Database.Batchable<SObject> {
2
3     global Database.QueryLocator start(Database.BatchableContext BC){
4         // Select all checked-in visitors
5         return Database.getQueryLocator(
6             "SELECT Id, Visitor_Name__c, Status__c, Visitor_Email__c FROM Visitor__c WHERE Status__c = 'Checked In'"
7         );
8     }
9
10    global void execute(Database.BatchableContext BC, List<Visitor__c> scope){
11        for(Visitor__c v : scope){
12            System.debug('Batch processing: ' + v.Visitor_Name__c);
13        }
14    }
15
16    global void finish(Database.BatchableContext BC){
17        System.debug('Batch Job Finished.');
```

Edit Delete Download Security Show Dependencies

Apex Class

VisitorController

Apex Class Detail

Edit Delete Download Security Show Dependencies

Name	VisitorController	Status	Active
Namespace Prefix		Code Coverage	0% (0/10)
Created By	HARATHI ASWARTHAGARI , 9/24/2025, 11:17 AM	Last Modified By	HARATHI ASWARTHAGARI , 9/24/2025, 11:17 AM

Class Body Class Summary Version Settings Trace Flags

```
1 public with sharing class VisitorController {
2
3     @AuraEnabled
4     public static void insertVisitor(String name, String email, String purpose) {
5         Visitor__c v = new Visitor__c();
6         v.Visitor_Name__c = name;
7         v.Visitor_Email__c = email;
8         v.Purpose_of_visit__c = purpose;
9         v.Status__c = 'Checked In';
10        v.Visitor_Check_In_Time__c = System.now();
11        insert v;
12    }
13
14    @AuraEnabled(cacheable=true)
15    public static List<Visitor__c> getCheckedInVisitors() {
16        return (SELECT Id, Visitor_Name__c, Visitor_Email__c, Purpose_of_visit__c, Status__c, Visitor_Check_In_Time__c
17            FROM Visitor__c
18            WHERE Status__c = 'Checked In'
19            ORDER BY Visitor_Check_In_Time__c DESC);
20    }
21 }
```

Salesforce - Developer Edition

Edit Delete Download Security Show Dependencies

SETUP

Apex Classes

Apex Class

VisitorNotificationQueueable

Apex Class Detail

Edit Delete Download Security Show Dependencies

Name	VisitorNotificationQueueable	Status	Active
Namespace Prefix		Code Coverage	0% (0/3)
Created By	HARATHI ASWARTHAGARI , 9/24/2025, 8:30 AM	Last Modified By	HARATHI ASWARTHAGARI , 9/24/2025, 8:30 AM

Class Body Class Summary Version Settings Trace Flags

```
1 public class VisitorNotificationQueueable implements Queueable {
2
3     public void execute(QueueableContext context){
4         // Query all visitors who are checked in
5         List<Visitor__c> checkedInVisitors = [
6             SELECT Id, Visitor_Name__c, Visitor_Email__c
7             FROM Visitor__c
8             WHERE Status__c = 'Checked In'
9         ];
10
11         // Example: Debug log (replace with actual email logic if needed)
12         for(Visitor__c v : checkedInVisitors){
13             System.debug('Send notification to: ' + v.Visitor_Email__c);
14         }
15     }
16 }
```

Edit Delete Download Security Show Dependencies



- Apex with LWC / Aura :Apex classes were used to handle data insertion and retrieval for the Visitor Management system.

Implementation:

- VisitorController Apex Class: insertVisitor → Inserts a new Visitor record.○ getCheckedInVisitors → Fetches all visitors with Status = Checked In.
- Integrated these methods with Aura components to make **imperative calls**.

Code:visitorCheckInForm.cmp

```
<aura:component controller="VisitorController"
implements="flexipage:availableForRecordHome,force:hasRecordId" access="global">
<aura:attribute name="visitorName" type="String"/>
<aura:attribute name="visitorEmail" type="String"/>
<aura:attribute name="purpose" type="String"/>
<aura:attribute name="purposeOptions" type="List" default="[
{'label':'Meeting','value':'Meeting'},
{'label':'Interview','value':'Interview'},
{'label':'Delivery','value':'Delivery'},
{'label':'Other','value':'Other'}
]"/>
<lightning:card title="Visitor Check-In">
<div class="slds-p-around_medium">
<lightning:input label="Visitor Name" value="{!v.visitorName}"/>
<lightning:input label="Visitor Email" value="{!v.visitorEmail}"/>
<lightning:select label="Purpose of Visit" value="{!v.purpose}">
<aura:iteration items="{!v.purposeOptions}" var="opt">
<option value="{!opt.value}">{!opt.label}</option>
</aura:iteration>
</lightning:select>
<lightning:button variant="brand" label="Check In" onclick="{!c.handleCheckIn}" class="slds-m-top_small"/>
</div>
</lightning:card>
</aura:component>
```

visitorCheckInFormController.js

```
{!handleCheckIn : function(component, event, helper) {
var action = component.get("c.insertVisitor");
action.setParams({
name: component.get("v.visitorName"),
email: component.get("v.visitorEmail"),
purpose: component.get("v.purpose")
});
action.setCallback(this, function(response){
```

```

var state = response.getState();
if(state === "SUCCESS"){
    alert('Visitor checked in successfully!');
    component.set("v.visitorName", "");
    component.set("v.visitorEmail", "");
    component.set("v.purpose", "");
} else {
    var errors = response.getError();
    alert('Error: ' + errors[0].message);
}
});
$A.enqueueAction(action);
}
})

```

Apex Controller (VisitorController)

```

public with sharing class VisitorController {
    @AuraEnabled
    public static void insertVisitor(String name, String email, String purpose) {
        Visitor__c v = new Visitor__c();
        v.Visitor_Name__c = name;
        v.Visitor_Email__c = email;
        v.Purpose_of_visit__c = purpose; v.Status__c = 'Checked In';
        v.Visitor_Check_In_Time__c = System.now();
        insert v;
    }
}

```

- Record Pages: Customized the Visitor record page to show all essential) and integrate the check-in workflow directly on the page.

Visitor Check-In

Visitor Name	<input type="text" value="adeline"/>
Visitor Email	<input type="text" value="adeline@gmail.com"/>
Purpose of Visit	<input type="text" value="Meeting"/>
<input type="button" value="Check In"/>	

- Retrieving the data using SOQL

Developer Console - Google Chrome

orgfarm-ee54ddc5-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage?action=selectExtent&extent=apexclass

File Edit Debug Test Workspace Help < >

Log executeAnonymous @9/24/2025, 7:21:31 PM Log executeAnonymous @9/24/2025, 7:24:50 PM Visitor__c@10:24 PM

SELECT Id, Name, Visitor_Email__c, Status__c, Purpose_of_visit__c FROM Visitor__c LIMIT 10

Query Results - Total Rows: 10

Id	Name	Visitor_Email__c	Status__c	Purpose_of_visit__c
a00gK00000KcbuQAD	Gunti Jahnvi	jahnvi@gmail.com		Delivery
a00gK00000K6eFQA1	preethi	preethi@mits.ac.in		Interview
a00gK00000Kb1sQAB	trisha	trish@www.in	Cancelled	Delivery
a00gK00000LdKXRQA3	John Doe	john@gmail.com	pending approval	Meeting
a00gK00000LdQY2QAN	anitha	anitha@kk.ac.in	pending approval	Delivery
a00gK00000LpBLkQAN	a00gK00000LpBLk	harathi@example.com		Meeting
a00gK00000Lpr9UQAR	Jahnvi Gudapati	jahnvi@example.com	Checked Out	Interview
a00gK00000Lq147QAB	a00gK00000Lq147	harathi@example.com	Checked Out	Meeting
a00gK00000Lq9cbQAB	a00gK00000Lq9cb	jahnvi@example.com	Checked Out	Interview
a00gK00000Lq9pVQAR	a00gK00000Lq9pV	jahnvi@example.com	Checked Out	Interview

Query Grid: Save Rows Insert Row Delete Row Refresh Grid

Logs Tests Checkpoints Query Editor View State Progress Problems

SELECT Id, Name, Visitor_Email__c, Status__c, Purpose_of_visit__c
FROM Visitor__c
LIMIT 10

Open

Entity Type	Entities	Related
Entity Type	Name Namespace	Name Extent Dire
Classes	Visitor	
Triggers	VisitorBatch	
Pages	VisitorNotificationQueu...	
Page Components	VisitorSchedule	
Objects	VisitorFuture	
Static Resources		
Packages		

- Events in LWC / Aura : Aura event handling was implemented to update the visitor list dynamically after a new check-in.

Visitors

Recently Viewed ▾

17 items • Updated a few seconds ago

<input type="checkbox"/>	Visitor Name
1 <input type="checkbox"/>	Test Visitor A
2 <input type="checkbox"/>	John Doe
3 <input type="checkbox"/>	Harathi
4 <input type="checkbox"/>	adeline
5 <input type="checkbox"/>	priya
6 <input type="checkbox"/>	trisha
7 <input type="checkbox"/>	Visitor unique
8 <input type="checkbox"/>	Jahnvi Gudapati
9 <input type="checkbox"/>	Test Visitor B
10 <input type="checkbox"/>	Visitor dupe
11 <input type="checkbox"/>	a00gK00000Lq9pV
12 <input type="checkbox"/>	a00gK00000Lq9cb
13 <input type="checkbox"/>	a00gK00000Lq147
14 <input type="checkbox"/>	a00gK00000LpBLk
15 <input type="checkbox"/>	preethi
16 <input type="checkbox"/>	anitha
17 <input type="checkbox"/>	Gunti Jahnvi

Visitor Name	Jahnavi Gudapati
Visitor Email	jahnavi@example.com
Visitor Phone Number	(987) 654-3211
Visitor Check-In Time	9/24/2025, 6:51 AM
Visitor Check-Out Time	9/24/2025, 9:40 AM
Host Employee	
Purpose of visit	Interview
ID Proof Number	
Gender	Female
Age	8/15/2003
Visitor Duration	2.81
Status	Checked In
Visitor Name	Jahnavi Gudapati
Created By	HARATHI ASWARTHAGARI, 9/24/2025, 6:51 AM

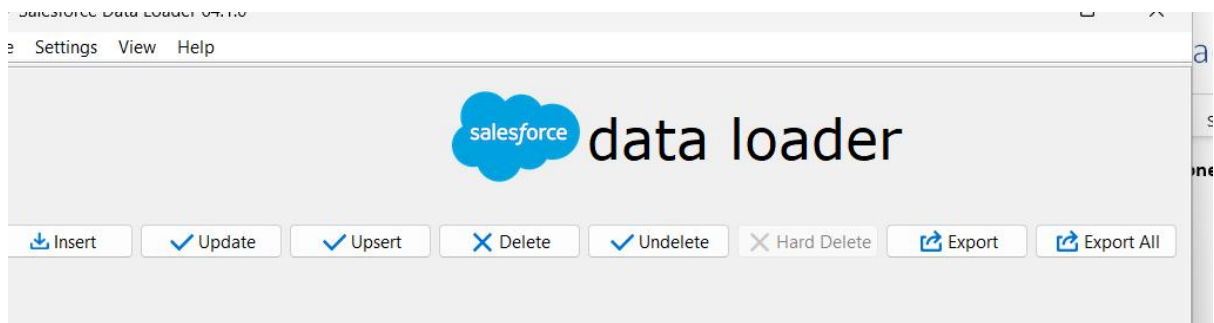
Visitors

Recently Viewed

17 items • Updated a few seconds ago

	Visitor Name
1	Jahnavi Gudapati
2	Test Visitor A
3	John Doe
4	Harathi
5	adeline
6	priya
7	trisha
8	Visitor unique
9	Test Visitor B
10	Visitor dupe
11	a00gk00000Lq9pV
12	a00gk00000Lq9cb
13	a00gk00000Lq147

- Data Loader: Uploading the data using data loader using csv file



If you provide the same data or duplicate emails or values it might show error while uploading the data like

Visitor Name	Email	Phone	CheckIn Time	Purpose of Visit	ERROR
Rani Devi	rani@example.com	9.877E+09	2025-09-25	Meeting	Duplicate email found: rani@example.com
Karthik Sharma	karthik@example.com	9.877E+09	2025-09-25	Interview	Duplicate email found: karthik@example.com
Meena Kumari	meena@example.com	9.877E+09	2025-09-25	Delivery	Duplicate email found: meena@example.com
Suresh Reddy	suresh@example.com	9.877E+09	2025-09-25	Other	Duplicate email found: suresh@example.com
Anjali Verma	anjali@example.com	9.877E+09	2025-09-25	Meeting	Duplicate email found: anjali@example.com
Vikram Singh	vikram@example.com	9.877E+09	2025-09-25	Interview	Duplicate email found: vikram@example.com
Priya Nair	priya@example.com	9.877E+09	2025-09-25	Delivery	Duplicate email found: priya@example.com
Arjun Das	arjun@example.com	9.877E+09	2025-09-25	Other	Duplicate email found: arjun@example.com
Neha Gupta	neha@example.com	9.877E+09	2025-09-25	Meeting	Duplicate email found: neha@example.com
Rahul Mehta	rahul@example.com	9.877E+09	2025-09-25	Interview	Duplicate email found: rahul@example.com

Else

adhaar

Step

Import

Progress

Load

Load Inserts

Operation Finished

The operation has fully completed. There were 10 successful inserts and 0 errors.

View Successes

View Errors

OK

Processed 10 of 10 records in 0 minutes, 1 seconds with 10 successes and 0 errors.

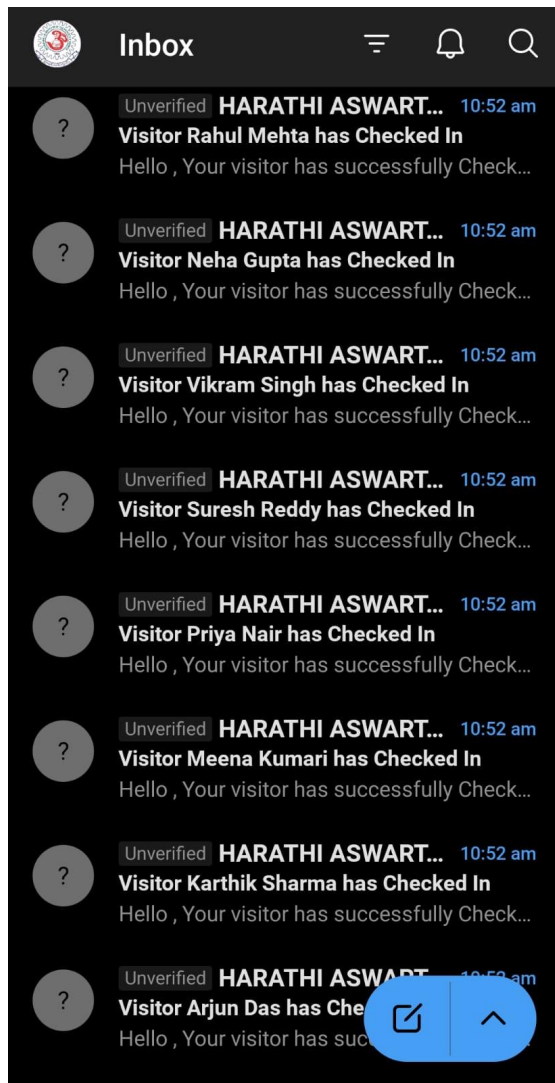
Rate: 36,000 records per hour. Estimated remaining time to complete: 0 minutes and 0 seconds.

Cancel

You will be given a downloaded file that shows updation/insertion of details



	A	B	C	D	E	F	G	H
D	Visitor Name	Email	Phone	CheckIn Time	Purpose of Visit	STATUS		
300gK00000	Rani Devi	rani+1@example.com	9.877E+09	2025-09-25	Meeting	Item Created		
300gK00000	Karthik Sharma	karthik+2@example.com	9.877E+09	2025-09-25	Interview	Item Created		
300gK00000	Meena Kumari	meena+3@example.com	9.877E+09	2025-09-25	Delivery	Item Created		
300gK00000	Suresh Reddy	suresh+4@example.com	9.877E+09	2025-09-25	Other	Item Created		
300gK00000	Anjali Verma	anjali+5@example.com	9.877E+09	2025-09-25	Meeting	Item Created		
300gK00000	Vikram Singh	vikram+6@example.com	9.877E+09	2025-09-25	Interview	Item Created		
300gK00000	Priya Nair	priya+7@example.com	9.877E+09	2025-09-25	Delivery	Item Created		
300gK00000	Arjun Das	arjun+8@example.com	9.877E+09	2025-09-25	Other	Item Created		
300gK00000	Neha Gupta	neha+9@example.com	9.877E+09	2025-09-25	Meeting	Item Created		
300gK00000	Rahul Mehta	rahul+10@example.com	9.877E+09	2025-09-25	Interview	Item Created		

That triggers and mails are sent as entering checkIn time results status as checkIn and results:





- Reports & DashBoards

Report given based on adding filters


 Sales Home Opportunities Leads Tasks Files A	
 Joined Report new Interview list	
Visitors Visitors block 1	
Visitor: Visitor Name	
1	Jahn timer Gudapater
2	Test Visitor B
3	Count: 2

Data based on required criteria in the dashboard

 <div> Search... </div>																	
 Dashboard new dashboard																	
As of Sep 25, 2025, 2:53 AM - Viewing as HARATHI ASWARTHAGARI																	
<div> <div> New Meeting Report </div> <table> <tr> <th>Visitor: Visitor Name ↑</th><th>Purpose of visit</th></tr> <tr> <td>a00gK00000LpBLk</td><td>Meeting</td></tr> <tr> <td>a00gK00000Lq147</td><td>Meeting</td></tr> <tr> <td>a00gK00000Lq9cb</td><td>Interview</td></tr> <tr> <td>a00gK00000Lq9pV</td><td>Interview</td></tr> <tr> <td>Anjali Verma</td><td>Meeting</td></tr> <tr> <td>Harathi</td><td>Meeting</td></tr> <tr> <td>Jahn timer Gudapater</td><td>Interview</td></tr> </table> <div> View Report (New Meeting Report) As of Sep 25, 2025, 2:53 AM </div> </div>		Visitor: Visitor Name ↑	Purpose of visit	a00gK00000LpBLk	Meeting	a00gK00000Lq147	Meeting	a00gK00000Lq9cb	Interview	a00gK00000Lq9pV	Interview	Anjali Verma	Meeting	Harathi	Meeting	Jahn timer Gudapater	Interview
Visitor: Visitor Name ↑	Purpose of visit																
a00gK00000LpBLk	Meeting																
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a00gK00000Lq9cb	Interview																
a00gK00000Lq9pV	Interview																
Anjali Verma	Meeting																
Harathi	Meeting																
Jahn timer Gudapater	Interview																

- Login IP ranges is not specified as it is optional to test now and session settings is for 1 hour

- **Audit Trail:** Audit Trail tracks configuration changes. Useful for monitoring admin changes in Visitor Management.

<div>  <div> <div>SETUP</div> <div>View Setup Audit Trail</div> </div> </div>			
AM PDT	22691a0566732@agentforce.com	Changed Use POST requests for cross-domain sessions attribute from on to on	Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Changed clickjack protection for customer Visualforce pages with standard headers attribute from off to on	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Changed Require HttpOnly attribute from off to on	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Changed Terminate all of a user's sessions when an admin resets that user's password from off to on	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Organization setup action: killUISessionsOnPwdResetOffOn has changed.	
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Passwordless Login was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Lightning Login was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Activation was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Delegated Authentication was set to Standard	Session Settings
9/25/2025, 3:35:38 AM PDT	22691a0566732@agentforce.com	Session Security Level for Username Password was set to Standard	Session Settings
9/25/2025, 3:28:50 AM PDT	22691a0566732@agentforce.com	Changed profile Employee Profile: field-level security for Visitor: ID Proof Number was changed from Read/Write to No Access	Manage Users
9/25/2025, 3:27:02 AM PDT	22691a0566732@agentforce.com	Completed Owner Rule: Visitor recalculation: Employee Access	Sharing Rules
9/25/2025, 3:27:01 AM PDT	22691a0566732@agentforce.com	Created Visitor Owner Sharing Rule Employee Access	Sharing Rules
9/25/2025, 3:27:01 AM PDT	22691a0566732@agentforce.com	Initiated Owner Rule: Visitor recalculation: Employee Access	Sharing Rules
9/25/2025, 3:22:34 AM PDT	22691a0566732@agentforce.com	Created new role Creating Updating Reporting details	Manage Users
9/25/2025, 3:21:14 AM PDT	22691a0566732@agentforce.com	Created new role Monitor Visitor Details	Manage Users
9/25/2025, 3:20:56 AM PDT	22691a0566732@agentforce.com	Deleted role Monitor Visitor Details	Manage Users
9/25/2025, 3:20:15 AM PDT	22691a0566732@agentforce.com	Created new role Monitor Visitor Details	Manage Users
9/25/2025, 3:19:27 AM PDT	22691a0566732@agentforce.com	Deleted role CFO	Manage Users
Download setup audit trail for last six months (Excel .csv file)			