Phase 9: Deployment, Testing & Project Completion

Visitor Management System – Salesforce CRM Project

9.1 Objective

The purpose of the final phase is to:

✔ Validate the system end-to-end
✔ Deploy final configuration
✔ Ensure no errors exist
✔ Prepare the project for submission
✔ Complete final documentation

This phase confirms that your entire Visitor Management CRM is working smoothly.

9.2 Final End-to-End Testing

You will test the entire Visitor Management workflow from start to end.

9.2.1 Test Case 1 – Create New Visitor

Steps:

1. Open Visitor tab
2. Click New
3. Enter visitor details
4. Save

Expected Result:

- Record gets created
- Check-In Time is automatically updated by Flow

9.2.2 Test Case 2 – Check-Out Visitor

Steps:

1. Open existing visitor record
2. Change Status → Checked Out
3. Save

Expected Result:

- Check-Out Time updates automatically
- Status becomes *Checked Out*

9.2.3 Test Case 3 – Dashboard Refresh

Expected Result:

- Total visitors today should update
- Purpose of visit chart displays correct data
- Checked In vs Checked Out reflects correct values

9.2.4 Test Case 4 – Field-Level Security Check

Expected Result:

- Visitor User Profile can:
  - Create visitors
  - Edit check-in/out
  - View dashboard
- Cannot delete or change admin settings

9.3 Deployment and Migration Steps

Although this is a Developer Org project, follow these guidelines for deployment:

9.3.1 Steps to Prepare for Deployment

✔ Ensure all flows are Activated

✔ Ensure all fields are visible and added to page layout

✔ Ensure validation rules (if any) are tested

✔ Ensure the Visitor App is added to App Launcher

9.3.2 Optional: Deploy Using Change Set

If you want to simulate deployment:

1. Go to Setup → Outbound Change Sets
2. Create new Change Set
3. Add:
   - Visitor Object
   - Fields
   - Flows
   - App
   - Report Types
4. Upload to another sandbox (optional)

9.4 Final Documentation Preparation

You will prepare:

✔ Phase-wise documentation (Phase 1 to Phase 9)
✔ Screenshots
✔ Final PDF
✔ GitHub Upload

9.5 Project Completion Summary

By Phase 9, you have successfully completed all components of your Visitor Management CRM:

✓ Custom Objects Created

- Visitor
- Host lookup
- All custom fields

✓ App Setup

- Custom app
- Tabs
- Navigation items

✓ Automation

- Auto Check-In Time
- Auto Check-Out Time

✓ Security Model

- Custom Profile
- Permission Sets
- Field-Level Security

✓ UI Customization

- Page layouts
- Record types

✓ Reporting & Dashboard

- Daily Visitor Report
- Visitor Purpose Report

- Check-In/Out Summary
- Dashboard with 3 components

✓ Deployment & Documentation

- Testing completed
- Documentation prepared
- GitHub ready

Your Salesforce Visitor Management CRM is now fully functional, tested, documented, and deployment-ready.