

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.

The screenshot displays the Salesforce Visitor Management CRM interface. At the top, there's a navigation bar with links for 'Visitors', 'Visit Logs', 'QR Passes', 'Hosts', 'Blacklists', 'Home', 'Reports', and 'Dashboards'. A search bar is also present. Below the navigation, a sidebar shows a profile picture of 'Kairanshi' and tabs for 'Related' and 'Details'. The 'Details' tab is selected, showing sections for 'Visitor Information' (Visitor Name: Kairanshi, Purpose of Visit: Meeting with HR), 'Contact Details' (Phone Number: (949) 226-8369, Email: kaiyankalyani067@gmail.com), 'ID Proof Details' (ID Proof Type: Aadhaar, ID Proof Number: 4532897814563), and 'Check-In / Check-Out Info' (Check-In Time: 12/9/2025, 12:00 PM). On the right side, there's an 'Activity' section with a header for 'Upcoming & Overdue'. It includes a toolbar for filtering activities by type (Email, Task, Call, etc.) and a message stating 'No activities to show. Get started by sending an email, scheduling a task, and more.' A button labeled 'Show All Activities' is also visible.