

Salesforce Project

Name	Pranav Warade
Batch	23
Project Name	MS-Amlin Insurance Agency

1) Profile Name and Internal Users:

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) [Edit | Create New View](#)

New User Reset Password(s) Add Multiple Users						
Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Adamson, George	oadam	george.adamson12@msamlin.com		<input type="checkbox"/>	MS-Amlin Managers
Edit	Amlin, MS	MAmln	admin@msamlin.co		<input checked="" type="checkbox"/>	System Administrator
Edit	Burton, Emily	eburt	emily.burton12@msamlin.com		<input type="checkbox"/>	MS-Amlin Managers
Edit	Chatter Expert	Chatter	chatter.00d5f00000daltzeat.d4m3lrf5acve@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	User Integration	integ	integration@00d5f00000daltzeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d5f00000daltzeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
New User Reset Password(s) Add Multiple Users						

2) Community Portal Users:

Regional Sales Managers-

MS Amlin

Search...

Search

Switch to Lightning Experience MS Amlin Setup Help Insurance Agency

Home Accounts Contacts Assets

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More Check Readiness

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Regional Sales Manager

On this page you can create, view, and manage users.

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View: [Regional Sales Manager](#) [Edit | Create New View](#)

New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Harris, Tracy	tharris	tracy.harris@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Regional Sales Manager
Edit	Robinson, Miller	mrobin	miller.rob@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Regional Sales Manager
Edit	Stevens, Wilson	wstew	wilson.stevens@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Regional Sales Manager

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other | All

Sales Officer-

MS Amlin

Search...

Search

Switch to Lightning Experience MS Amlin Setup Help Insurance Agency

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Sales Officer

On this page you can create, view, and manage users.

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View: [Sales Officer](#) [Edit | Create New View](#)

New User | Reset Password(s) | Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Baker, Tremblay	tbake	tremblay.baker@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Sales Officer
Edit	Lewis, Evans	elewi	evans.lewis@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Sales Officer
Edit	Queen, Morton	mqueen	morton.queen@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Sales Officer
Edit	Walker, Lam	lwalk	lam.walker@msamlin.com	MAml Customer Person Account	<input type="checkbox"/>	Sales Officer

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other | All

1. Account Object (Insurance Agency Details):

Create Custom fields→

Account Custom Fields & Relationships						
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del Replace	Active	Active__c	Picklist			MS Amlin, 21/09/2023, 10:38 pm
Edit Del Replace	Customer Priority	CustomerPriority__c	Picklist			MS Amlin, 21/09/2023, 10:38 pm
Edit Del	Number of Locations	NumberofLocations__c	Number(3, 0)			MS Amlin, 21/09/2023, 10:38 pm
Edit Del	Select Regional Sales Manager	Select_Regional_Sales_Manager__c	Lookup(Contact)	✓		MS Amlin, 23/09/2023, 12:58 am
Edit Del Replace	SLA	SLA__c	Picklist			MS Amlin, 21/09/2023, 10:38 pm
Edit Del	SLA Expiration Date	SLAExpirationDate__c	Date			MS Amlin, 21/09/2023, 10:38 pm
Edit Del	SLA Serial Number	SLASerialNumber__c	Text(10)			MS Amlin, 21/09/2023, 10:38 pm
Edit Del	Total Contacts of 3-5 Rating	Total_Contacts_of_3_5_Rating__c	Number(10, 0)			MS Amlin, 23/09/2023, 1:05 am
Edit Del Replace	Upsell Opportunity	UpsellOpportunity__c	Picklist			MS Amlin, 21/09/2023, 10:38 pm

Requirements:

A] Prevent Special symbol in Acc Name.

The screenshot shows the MS Amlin Account Edit interface. The account name is 'ayus\$%'. A red error message box is displayed, stating: 'Error: Invalid Data. Review all error messages below to correct your data. Special Symbol is not allowed in Name'. The form includes fields for Account Owner, Account Name, Parent Account, and Account Number.

Account Validation Rule

[Back to Account Validation Rules](#)

Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	Prevent_Special_Sym_in_Acc_Name	Active	✓
Error Condition Formula	NOT(REGEX(Name , "^[A-z]*\$"))		
Error Message	Special Symbol is not allowed in Name	Error Location	Top of Page
Description	No any special symbol in the account name		
Created By	MS Amlin, 25/09/2023, 5:19 pm	Modified By	MS Amlin, 25/09

[Edit](#) [Clone](#)

B] MS-Amlin profile user can only create, edit, update on the Account object.

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All Insight Reasons	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All Record Insights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Account Detail

Account Owner: [George Adamson \(Change\)](#)
 Account Name: [Albert Dicosta \(View Hierarchy\)](#)
 Parent Account:
 Account Number:
 Select Regional Sales Manager:
 Account Site:
 Type:
 Industry:
 Annual Revenue:
 Total Contacts of 3-5 Rating:
 Billing Address:

Rating: Cold
 Phone:
 Fax:
 Website:
 Ticker Symbol:
 Ownership:
 Employees:
 SIC Code:
 Shipping Address:

C] Regional Sales Managers and Sales Officers should not create, edit, update the Account.

Regional Sales Managers:

WELCOME TO INSURANCE AGENCY PORTAL

A place where you can easily find solutions and ask questions

FEATURED | DISCUSSIONS | MY FEED

ASK A QUESTION ?

Don't see what you're looking for?

ASK A QUESTION | CUSTOMER SUPPORT

Standard Object Permissions

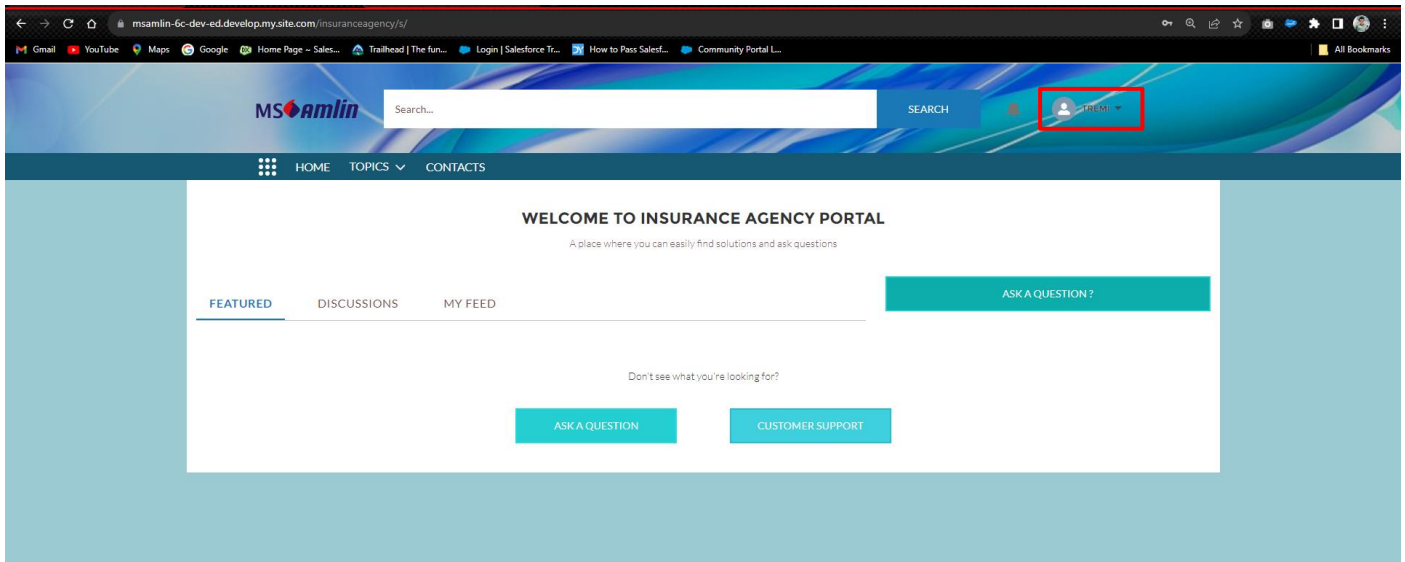
The permissions defined here control access for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Invitations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Profile Edit

Name:
 User License: Customer Community Plus Login
 Description:
 Custom Profile: ☒

Sales Officer:



Profile Edit: Sales Officer

Set the permissions and page layouts for this profile.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Brands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Invitations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Topic Time Slots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Profile Edit

Name: Sales Officer

User License: Customer Community Plus Login

Description:

Custom Profile: ☒

Buttons: Save, Save & New, Cancel

D] Prevent Duplicate Account Name with Website and Phone



Account Edit

Save Save & New Cancel

Error: Invalid Data.
Review all error messages below to correct your data.
Maruti Ins this name is already exists with same website and phone

Account Information

Account Owner: MS Amlin

Account Name: Maruti Ins

Parent Account:

Account Number:

Select Regional Sales Manager:

Account Site:

Type: --None--

Rating: --None--

Phone: 9855754454

Fax:

Website: http://www.marutins.com

Ticker Symbol:

Ownership: --None--

Employees:

```

1 trigger AccountDupTrigger on Account (after insert, after update, after delete){
2   SET<String> accNameSet = new SET<String>();
3   SET<String> accWebSet = new SET<String>();
4   SET<String> accPhSet = new SET<String>();
5   if(trigger.isInsert || trigger.isUpdate || trigger.isDelete){
6     for(Account objAcc : trigger.new){
7       accNameSet.add(objAcc.Name);
8       accWebSet.add(objAcc.Website);
9       accPhSet.add(objAcc.Phone);
10    }
11  }
12  Map<String,Account> accNameMap = new Map<String,Account>();
13  Map<String,Account> accWebMap = new Map<String,Account>();
14  Map<String,Account> accPhMap = new Map<String,Account>();
15  for(Account objAcc : [Select id, Name, Website, Phone from Account where Name IN: accNameSet and Website IN: accWebSet and Phone IN: accPhSet]){
16    accNameMap.put(objAcc.Name, objAcc);
17    accWebMap.put(objAcc.Website, objAcc);
18    accPhMap.put(objAcc.Phone, objAcc);
19  }
20  if(trigger.isInsert || trigger.isUpdate || trigger.isDelete){
21    for(Account objAcc : trigger.new){
22      if(accNameMap.containsKey(objAcc.Name)&&accWebMap.containsKey(objAcc.Website)&&accPhMap.containsKey(objAcc.Phone)){
23        objAcc.addError(objAcc.Name+' this name is already exists with same website and phone');
24      }
25    }
26  }
27 }
  
```

```
trigger AccountDupTrigger on Account (after insert, after update, after undelete){
  SET<String> accNameSet = new SET<String>();
  SET<String> accWebSet = new SET<String>();
  SET<String> accPhSet = new SET<String>();
  if(trigger.isInsert || trigger.isUpdate || trigger.isUndelete){
    for(Account objAcc : trigger.new){
      accNameSet.add(objAcc.Name);
      accWebSet.add(objAcc.Website);
      accPhSet.add(objAcc.Phone);
    }
  }
  Map<String,Account> accNameMap = new Map<String,Account>();
  Map<String,Account> accWebMap = new Map<String,Account>();
  Map<String,Account> accPhMap = new Map<String,Account>();
  for(Account objAcc : [Select id, Name, Website, Phone from Account where Name IN: accNameSet and Website IN: accWebSet and Phone IN: accPhSet]){
    accNameMap.put(objAcc.Name, objAcc);
    accWebMap.put(objAcc.Website, objAcc);
    accPhMap.put(objAcc.Phone, objAcc);
  }

  if(trigger.isInsert || trigger.isUpdate || trigger.isUndelete){
    for(Account objAcc : trigger.new){
      if(accNameMap.containsKey(objAcc.Name)&&accWebMap.containsKey(objAcc.Website)&&accPhMap.containsKey(objAcc.Phone)){
        objAcc.addError(objAcc.Name+' this name is already exists with same website and phone');
      }
    }
  }
}
```

2. Contact Object:

Create Record Type→

New Contact

Select Contact Record Type

Contact Record Type

Select a record type for the new contact. To skip this page in the future, change your record type settings on your personal setup page.

Select Contact Record Type

Record Type of new record

Regional Sales Manager

Regional Sales Manager

Sales Officer

Continue

Cancel

Use this page to create and maintain record types for your organization. You can display different record types on your page layouts.

To use record types, add the Record Type field to your page layouts.

Contact Record Type	
Action	Record Type Label
Edit Del	Regional Sales Manager
Edit Del	Sales Officer

Available Contact Record Types

Record Type Name	Description
Regional Sales Manager	
Sales Officer	

Create contact custom field→ Cross formula field:

Account Detail

EditDeleteSharingInclude

Account OwnerMS Amlin [Change]

Account NamesForce [View Hierarchy]

Parent Account

Account Number

Select Regional Sales ManagerTracy Harris

Account Site

Type

Industry

Annual Revenue

Total Contacts of 3-5 Rating

Regional Sales ManagerTracy Harris

Billing AddressSan Francisco
CA
US

Customer Priority

SLA Expiration Date

Number of Locations

Active

Created ByMS Amlin, 21/09/2023, 10:38 pm

Custom Fields & Relationships		
NewField Dependencies		
Field Label	API Name	Data Type
Active	Active__c	Picklist
Customer Priority	CustomerPriority__c	Picklist
Number of Locations	NumberOfLocations__c	Number(3, 0)
Regional Sales Manager	Regional_Sales_Manager__c	Formula (Text)
Select Regional Sales Manager	Select_Regional_Sales_Manager__c	Lookup(Contact)
SLA	SLA__c	Picklist

Requirements:

A] Prevent Invalid Email id.

Contact Edit

Save

Save & New

Cancel

Error: Invalid Data.

Review all error messages below to correct your data.

Contact Information

Contact Owner

MS Amlin

Salutation

--None--

First Name

Raju

Last Name

Rastogi

Account Name

Title

Department

Birthdate

Phone

Home Phone

Mobile

Other Phone

Fax

Email

raju%\$\$\$@gmail.com

Assistant

Asst. Phone

Contact Validation Rule

[Back to Contact Validation Rules](#)

Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	Prevent_Invalid_Email_Id	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX(Email , '([a-zA-Z0-9_\\-\\.]+)@((\\[a-z]{1,3}\\.[a-z]{1,3}\\.[a-z]{1,3}) ((\\[a-zA-Z0-9\\-]+)\\.([a-zA-Z]{2,4}){0-9}{1,3}))'))		
Error Message	Email ID is invalid	Error Location	Email
Description			

B] Prevent Duplicate Contact with same Email Id from same Account.

Contact Edit

[New Contact](#)

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit

Save

Save & New

Cancel

Error: Invalid Data.

Review all error messages below to correct your data.

This Email Id qwenmorton@gmail.com and same accountId Sales is already exists

Contact Information

Contact Owner

MS Amlin

Salutation

Mr.

First Name

Lussi

Last Name

Mathew

Account Name

Sales

Title

Department

Birthdate

Reports To

Phone

Home Phone

Mobile

Other Phone

Fax

Email

qwenmorton@gmail.com

Assistant

Asst. Phone

```

DuplicateContactAccTrigger.apex
Code Coverage: None  API Version: 58
1 trigger DuplicateContactAccTrigger on Contact (before insert, before update, after undelete){
2   SET<ID> accIdSet = new SET<ID>();
3   if( (trigger.isInsert || trigger.isUpdate || trigger.isUndelete) ){
4     for(Contact objCon : trigger.new){
5       if(trigger.isInsert || trigger.isUndelete){
6         accIdSet.add(objCon.AccountId);
7       }
8       if(trigger.isUpdate){
9         if(objCon.AccountId != trigger.oldMap.get(objCon.Id).AccountId){
10          accIdSet.add(objCon.AccountId);
11        }
12      }
13    }
14  }
15  Map<Id,Account> accMap = new Map<Id, Account>();
16  if(!accIdSet.isEmpty()){
17    for(Account objAcc : [select Id, Name, (select Id, Name, Email, AccountId from Contacts) from Account where ID IN : accIdSet]){
18      accMap.put(objAcc.Id,objAcc);
19    }
20  }
21  if( (trigger.isInsert || trigger.isUpdate || trigger.isUndelete) ){
22    for(Contact objCon : trigger.new){
23      if(accMap.containsKey(objCon.AccountId)){
24        List<Contact> ExistConList = accMap.get(objCon.AccountId).Contacts;
25        for(Contact objExistingCon : ExistConList){
26          if(objCon.Email == objExistingCon.Email && objCon.AccountId == objExistingCon.AccountId){
27            objCon.addError('This Email Id '+objCon.Email+' and same accountId '+accMap.get(objCon.AccountId).Name+' is already exists');
28            break;
29          }
30        }
31      }
32    }
33  }
34 }
  
```

Create Applicant Details custom field→

Requirements:

A] Prevent Number and Symbol in First Name, Middle Name and Last Name.

Applicants Details

+

Applicant Details Edit

New Applicant Details

licant Details Edit

Save

Save & New

Cancel

Error: Invalid Data.

Review all error messages below to correct your data.

Number and Special Symbol is not allowed in first name, middle name, last name

Information

First Name

Misheal^82

Middle Name

John\$44

Last Name

kilton#&1

Date of Birth

[28/09/2023]

Mobile Number

Email Id

Driving Licence Number

Mobile Number Status

☐

Active Applicant

☐

Owner

MS Amlin

Applicant Details Validation Rule

[Back to Applicant Details](#)

Validation Rule Detail		Edit	Clone
Rule Name	Prevent_Num_and_Sym_in_FN_LN_MN	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(NOT(REGEX(First_Name__c , "^[a-zA-Z]*\$")), NOT(REGEX(Last_Name__c , "^[a-zA-Z]*\$")), NOT(REGEX(Middle_Name__c , "^[a-zA-Z]*\$")))		
Error Message	Number and Special Symbol is not allowed in first name, middle name, last name	Error Location	Top of Page
Description			
Created By	MS Amlin, 28/09/2023, 1:46 am	Modified By	MS Amlin, 28/09/2023, 2:42 am

B] First Name and Last Name are not same.

ts **Applicants Details** +

Applicant Details Edit

New Applicant Details

Applicant Details Edit

[Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.
Review all error messages below to correct your data.
First Name and Last Name should not be same

formation

First Name

Middle Name

Last Name

Applicant Details Validation Rule

[Back to Applicant Details](#)

Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	First_Name_and_Last_Name_not_same	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(First_Name__c <> Last_Name__c)		
Error Message	First Name and Last Name should not be same	Error Location	Top c
Description			
Created By	MS Amlin, 28/09/2023, 12:03 pm	Modified By	MS A

C] Prevent Invalid Email Id.

s **Applicants Details** +

Applicant Details Edit

New Applicant Details

Applicant Details Edit

[Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.
Review all error messages below to correct your data.

formation

First Name

Middle Name

Last Name

Date of Birth [28/09/2023]

Mobile Number

Email Id
Error: This is an invalid Email ID.

Driving Licence Number

Applicant Details Validation Rule

[Back to Applicant Details](#)

Validation Rule Detail			
		Edit	Clone
Rule Name	Prevent_Invalid_Email_Id	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX(Email_Id__c , '([a-zA-Z0-9 _\-\.\,)]+)(([a-z]{1,3}\.[a-z]{1,3}\.[a-z]{1,3})\.[a-zA-Z0-9\-\.\,)]+)([a-zA-Z]{2,4})[0-9]{1,3}'))		
Error Message	This is an invalid Email ID	Error Location	Email Id
Description			
Created By	MS Amlin, 28/09/2023, 2:06 am	Modified By	MS Amlin, 28/09/2023, 12:23 pm

4. Document Details Object:

Custom Object
Document Details

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[0\]](#) | [Validation Rules \[0\]](#)
[Record Types \[0\]](#) | [Apex Shares \[0\]](#)

Custom Object Definition Detail		Edit	Delete
Singular Label	Document Details		
Plural Label	Documents Details		
Object Name	Document_Details		
API Name	Document_Details__c		

Custom Fields & Relationships			
		New	Field Dependencies
		Set History Tracking	
Action	Field Label	API Name	Data Type
Edit Del	<u>Id Number</u>	Id_Number__c	Text(20)
Edit Del	<u>Select Application</u>	Select_Application__c	Master-Detail(Applicant Details)
Edit Del Replace	<u>Select Identity Proof Document</u>	Select_Identity_Proof_Document__c	Picklist

Requirements:

A] Prevent Duplicate Document Details record for an Applicant as per Identity Proof Document.

Document Details Edit
New Document Details

Document Details Edit

[Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.
Review all error messages below to correct your data.

This Driving Licence record is already exist with the same APPID-0003 applicant

Information

Select Application

APPID-0003

Select Identity Proof Document

Driving Licence

Id Number

34535

```

1 trigger PreventDupDocForAppTrigger on Document_Details__c (before insert, before update, after undelete){
2   SET<Id> docSetId = new SET<Id>();
3   if(trigger.isInsert || trigger.isUpdate || trigger.isUndelete){
4     for(Document_Details__c objDoc:trigger.new){
5       if(trigger.isInsert || trigger.isUpdate){
6         docSetId.add(objDoc.Select_Application__c);
7       }
8       if(trigger.isUpdate){
9         if(objDoc.Select_Application__c!=trigger.oldMap.get(objDoc.Id).Select_Application__c){
10          docSetId.add(objDoc.Select_Application__c);
11        }
12      }
13    }
14  }
15  Map<Id,Applicant_Details__c> appDetMap = new Map<Id,Applicant_Details__c>();
16  if(!docSetId.isEmpty()){
17    for(Applicant_Details__c objAppDet :[select id, Name, (select id, Select_Identity_Proof_Document__c, Select_Application__c from Documents_Details__r) from Applicant_Details__c where ID IN : docSetId]){
18      appDetMap.put(objAppDet.id, objAppDet);
19    }
20  }
21  if(trigger.isInsert || trigger.isUpdate || trigger.isUndelete){
22    for(Document_Details__c objDoc:trigger.new){
23      if(!appDetMap.isEmpty()){
24        if(appDetMap.containsKey(objDoc.Select_Application__c)){
25          List<Document_Details__c> existDocList = appDetMap.get(objDoc.Select_Application__c).Documents_Details__r;
26          for(Document_Details__c objExistDoc : existDocList){
27            if(objDoc.Select_Identity_Proof_Document__c=='Driving Licence' && objDoc.Select_Application__c==objExistDoc.Select_Application__c){
28              objDoc.addError('This '+objDoc.Select_Identity_Proof_Document__c+' record is already exist with the same '+appDetMap.get(objDoc.Select_Application__c).Name+' applicant');
29            }
30          }
31        }
32      }
33    }
34  }
35 }

```

```

trigger PreventDupDocForAppTrigger on Document_Details__c (before insert, before update, after undelete){
    SET<Id> docSetId = new SET<Id>();
    if(trigger.isInsert || trigger.isUpdate || trigger.isUndelete){
        for(Document_Details__c objDoc:trigger.new){
            if(trigger.isInsert || trigger.isUpdate){
                docSetId.add(objDoc.Select_Application__c);
            }
            if(trigger.isUpdate){
                if(objDoc.Select_Application__c!=trigger.oldMap.get(objDoc.Id).Select_Application__c){
                    docSetId.add(objDoc.Select_Application__c);
                }
            }
        }
    }
    Map<Id,Applicant_Details__c> appDetMap = new Map<Id,Applicant_Details__c>();
    if(!docSetId.isEmpty()){
        for(Applicant_Details__c objAppDet :[select id, Name, (select id, Select_Identity_Proof_Document__c, Select_Application__c from Documents_Details__r)
from Applicant_Details__c where ID IN : docSetId]){
            appDetMap.put(objAppDet.id, objAppDet);
        }
    }
    if(trigger.isInsert || trigger.isUpdate || trigger.isUndelete){
        for(Document_Details__c objDoc:trigger.new){
            if(!appDetMap.isEmpty()){
                if(appDetMap.containsKey(objDoc.Select_Application__c)){
                    List<Document_Details__c> existDocList = appDetMap.get(objDoc.Select_Application__c).Documents_Details__r;
                    for(Document_Details__c objExistDoc : existDocList){
                        if(objDoc.Select_Identity_Proof_Document__c=='Driving Licence' && objDoc.Select_Application__c==objExistDoc.Select_Application__c){
                            objDoc.addError('This '+objDoc.Select_Identity_Proof_Document__c+' record is already exist with the same
'+appDetMap.get(objDoc.Select_Application__c).Name+' applicant');
                        }
                    }
                }
            }
        }
    }
}

```

5. **Assets Object:**

Create Assets custom field→

Asset Custom Fields & Relationships					
		New	Field Dependencies		
Action	Field Label	API Name	Data Type	Indexed	Controlling Field
Edit Del Replace	Insurance Type	Insurance_Type__c	Picklist		

6. **Applicants-Assets Object:**

Create Assets custom field→

Custom Object	
Applications-Assets	
Standard Fields (4) Custom Fields & Relationships (0) Validation Rules (0) Page Layouts (0)	
Custom Object Definition Detail	
Singular Label	Applications-Assets
Plural Label	Applications-Assets
Object Name	Applications_Assets
API Name	Applications_Assets__c

Custom Fields & Relationships			
		New	Field Dependencies Set History Tracking
Action	Field Label	API Name	Data Type
Edit Del	Down Payment	Down_Payment__c	Currency(18, 0)
Edit Del	Finance Amount	Finance_Amount__c	Formula (Currency)
Edit Del	Price	Price__c	Currency(18, 0)
Edit Del	Select Application	Select_Application__c	Master-Detail(Applicant Details)
Edit Del	Select Assets (Insurance)	Select_Assets_Insurance__c	Master-Detail(Asset)
Edit Del	Tenure in Months	Tenure_in_Months__c	Number(18, 0)

Requirements:

A] Show Applicant Name in junction object.


Assets	Applicants Details	Documents Details	Applications-Assets
Field Information			
Applications-Assets		Field Label	Applicant Name
APP_ASSID-0001		Field Name	Applicant_Name
« Back to List: Custom Object Definitions		API Name	Applicant_Name__c
Open Activities (0) Activity History		Description	
Applications-Assets Detail		Help Text	
Applications-Assets ID		Data Owner	
Select Application		Field Usage	
Applicant Name		Data Sensitivity Level	
Life Insurance		Compliance Categorization	
Tenure in Months		Created By	MS Amlin, 28/09/2023, 11:42 pm
Price		Formula Options	
₹40,000		Data Type	Formula
Down Payment		Select_Application__r.First_Name__c + ' ' + Select_Application__r.Middle_Name__c + ' ' + Select_Application__r.Last_Name__c	
₹10,000			

B] Show Assets Name and Serial Number in junction object.

Applications-Assets	
APP_ASSID-0001	
« Back to List: Custom Object Definitions	
Applications-Assets Detail	
Applications-Assets ID	APP_ASSID-0001
Select Application	APPID-0003
Applicant Name	Rajiv Annaji Patil
Select Assets (Insurance)	Life Insurance
Assets Name and Serial no	Life Insurance and INS2564
Tenure in Months	
Price	₹40,000
Down Payment	₹10,000
Finance Amount	₹30,000.0

Applications-Assets Custom Field	
Assets Name and Serial no	
Back to Applications-Assets	
Custom Field Definition Detail	
Field Information	
Field Label	Assets Name and Serial no
Field Name	Assets_Name_and_Serial_no
API Name	Assets_Name_and_Serial_no__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	MS Amlin, 29/09/2023, 12:30 am
Formula Options	
Data Type	Formula
Select_Assets_Insurance__r.Name + ' ' + Select_Assets_Insurance__r.SerialNumber	

C] Copy Asset Price field to the Application-Asset Price field.


Applications-Assets

APP_ASSID-0002


[« Back to List: Custom Object Definitions](#)

Applications-Assets Detail

Edit

Delete

Applications-Assets ID	APP_ASSID-0002
Select Application	APPID-0003
Applicant Name	Rajiv Annaji Patil
Select Assets (Insurance)	Car Insurance
Assets Name and Serial no	Car Insurance and INS9352
Tenure in Months	
Price	₹5,00,000
Down Payment	₹50,000
Finance Amount	₹4,50,000.0
Created By	MS Amlin, 29/09/2023, 9:49 pm


Asset

Car Insurance

[Click to add topics:](#)

[« Back to List: Custom Object Definitions](#)

[Cases \[0\]](#) | [Open Activities \[0\]](#) | [Ac](#)

Asset Detail

Edit

Delete

Asset Name	Car Insurance
Product	
Product Code	
Serial Number	INS9352
Install Date	
Status	Purchased
Quantity	1.00
Price	₹5,00,000.00
Insurance Type	Car
Created By	MS Amlin, 29/09/2023, 9:48 pm

```

AppAssToAssCopyPriceTrigger.apxt
Code Coverage: None | API Version: 58
1 trigger AppAssToAssCopyPriceTrigger on Applications_Assets__c (before insert,before update){
2   SET<id> assIdSet = new SET<id>();
3   if(trigger.isInsert || trigger.isUpdate){
4     for(Applications_Assets__c objAppAss : trigger.new){
5       if(objAppAss.Select_Assets_Insurance__c!=null){
6         assIdSet.add(objAppAss.Select_Assets_Insurance__c);
7       }
8     }
9     if(trigger.isUpdate){
10      if(objAppAss.Select_Assets_Insurance__c!=trigger.oldMap.get(objAppAss.Id).Select_Assets_Insurance__c){
11        assIdSet.add(objAppAss.Select_Assets_Insurance__c);
12      }
13    }
14  }
15  Map<id,Asset> assMap = new Map<id,Asset>();
16  if(!assIdSet.isEmpty()){
17    for(Asset objAss :[select id, Name, Price from Asset where ID IN : assIdSet]){
18      assMap.put(objAss.id, objAss);
19    }
20  }
21  if(trigger.isInsert || trigger.isUpdate){
22    for(Applications_Assets__c objAppAss : trigger.new){
23      if(!assMap.isEmpty()){
24        if(assMap.containsKey(objAppAss.Select_Assets_Insurance__c)){
25          objAppAss.Price__c = assMap.get(objAppAss.Select_Assets_Insurance__c).Price;
26        }
27      }
28    }
29  }
30 }

```

```

trigger AppAssToAssCopyPriceTrigger on Applications_Assets__c (before insert,before update){
  SET<id> assIdSet = new SET<id>();
  if(trigger.isInsert || trigger.isUpdate){
    for(Applications_Assets__c objAppAss : trigger.new){
      if(objAppAss.Select_Assets_Insurance__c!=null){
        assIdSet.add(objAppAss.Select_Assets_Insurance__c);
      }
    }
    if(trigger.isUpdate){
      if(objAppAss.Select_Assets_Insurance__c!=trigger.oldMap.get(objAppAss.Id).Select_Assets_Insurance__c){
        assIdSet.add(objAppAss.Select_Assets_Insurance__c);
      }
    }
  }
}

Map<id,Asset> assMap = new Map<id,Asset>();
if(!assIdSet.isEmpty()){
  for(Asset objAss :[select id, Name, Price from Asset where ID IN : assIdSet]){
    assMap.put(objAss.id, objAss);
  }
}

```

Applications-Assets Edit
APP_ASSID-0001

Applications-Assets Validation Rule

Validation Rule Detail

Rule Name	Down_Payment_not_greater_than_price
Error Condition Formula	Down_Payment__c > Select_Assets_Insurance__r.Price
Error Message	Down Payment should not be greater than the Price of Assets
Description	
Created By	MS Amlin, 29/09/2023, 1:39 am

LWC Component:

Customer Community Portal

LWC Component

Name of Agent:

From Date

To Date

Search

Popup Modal:

Customer Community Portal

Close

Popup Modal

	<input type="checkbox"/> Application ID	First Name	Last Name	Email Id	DOB	Created Date	Mobile Number
1	<input type="checkbox"/> APPID-0003	Rajiv	Patil	rajiv@gmail.com	1997-09-11	2023-09-28T15:05...	9023601710
2	<input type="checkbox"/> APPID-0004	Vijay	Chauhan		2006-10-11	2023-10-01T09:02...	7092317546
3	<input type="checkbox"/> APPID-0005	Mughda	Kumari		1990-10-30	2023-10-01T09:04...	
4	<input type="checkbox"/> APPID-0006	Surya	kumar		1969-08-04	2023-10-01T09:20...	9823634321
5	<input type="checkbox"/> APPID-0008	Raju	lanee		1998-05-05	2023-10-01T11:06...	8600115222
6	<input type="checkbox"/> APPID-0009	Spandan	Qureshi			2023-10-01T13:26...	7085632155

Close

Community Portal:

MS Amlin

Search...

SEARCH

HOME

TOPICS

ACCOUNTS

CONTACTS

APPLICANTS DETAILS

DOCUMENT DETAILS

APPLICATIONS-ASSETS

WELCOME TO INSURANCE AGENCY PORTAL

A place where you can easily find solutions and ask questions

FEATURED

DISCUSSIONS

MY FEED

ASK A QUESTION ?

Customer Community Portal

LWC Component

Name of Agent:

From Date

To Date

Search

ASK A QUESTION

CUSTOMER SUPPORT

[illegible]

```
import { LightningElement, track } from 'lwc';
import searchAppAssRecords from '@salesforce/apex/ApplicationProvider.searchAppAssRecords';

export default class ApplicationPopupModal extends LightningElement {

    objApp = { 'sObjectType': 'Applicant_Details__c' };
    appList;
    start_date;
    end_date;

    showAppFlag = false;
    @track start_date;
    @track end_date;
```



```

draftValues = [];

startDateHandler(event) {
  console.log(event.target.value);
  this.start_date = event.target.value;
}

endDateHandler(event) {
  console.log(event.target.value);
  this.end_date = event.target.value;
}

appColumns = [
  { label: 'Application ID', fieldName: 'Name', editable: true },
  { label: 'First Name', fieldName: 'First_Name__c', editable: true },
  { label: 'Last Name', fieldName: 'Last_Name__c', editable: true },
  { label: 'Email Id', fieldName: 'Email_Id__c', editable: true },
  { label: 'DOB', fieldName: 'Date_of_Birth__c', editable: true },
  { label: 'Created Date', fieldName: 'CreatedDate', editable: true },
  { label: 'Mobile Number', fieldName: 'Mobile_Number__c', editable: true },
];

closeButtonHandler(){
  this.showAppFlag = false;
}

buttonHandler() {
  searchAppAssRecords({ 'startDate': this.start_date , 'endDate' : this.end_date })
    .then(result => {
      console.log(result);
      console.log(this.applist);
      this.applist = result;
      this.showAppFlag = true;
    })
    .catch(error => {
      console.log(error);
      this.showAppFlag = false;
    })
}
}

```

CSS file →

```

.slds-modal__container {
  max-width: 80rem !important;
  width: 80% !important;
}

```

Meta-xml →

```

<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>58.0</apiVersion>
  <isExposed>true</isExposed>
  <targets>
    <target>lightningCommunity__Page</target>
  </targets>
</LightningComponentBundle>

```

Apex Controller →

```

public with sharing class ApplicationProvider {

  @AuraEnabled
  public static List<Applicant_Details__c> searchAppAssRecords(Date startDate, Date endDate){
    System.debug('# Received Dates '+startDate+', '+endDate);
    try{
      return [select id, Name, First_Name__c, Last_Name__c, Email_Id__c, Mobile_Number__c, Date_of_Birth__c, CreatedDate
from Applicant_Details__c where CreatedDate >=:startDate and CreatedDate <=:endDate];
    }
    catch(Exception e) {

```

```

    return null;
  }
}

```



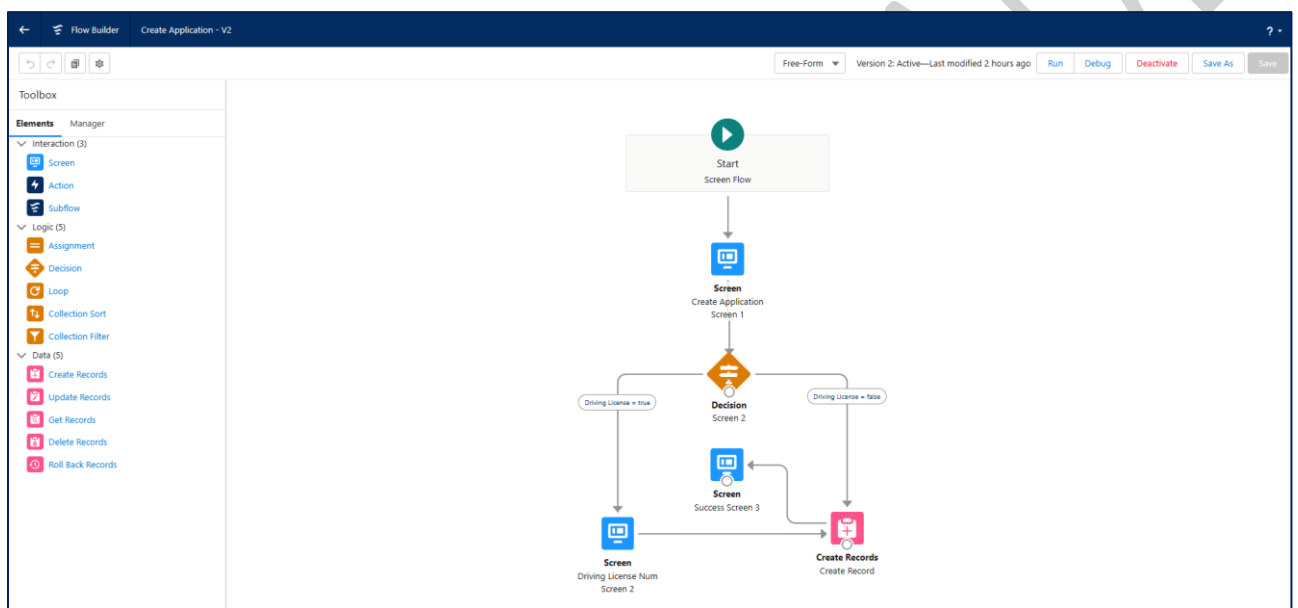
LWC Pop-up
modal.mp4

This is a video to see the output of LWC Component of Popup-Modal. (Double Click on icon)

8. Flow Builder:

JIRA TICKET: MSAMLIN-101

Create Application Record.



Insurance Agency Li...

Home

Accounts

Contacts

Assets

Applicants Details

Documents Details

Applications-Assets

Search...

Star

Grid

Refresh

Help

Settings

Notifications

Applicant Details

APPID-0006

New Opportunity

Edit

New Case

Related

Details

Documents Details (0)

Applications-Assets (0)

Create Application

First Name

Last Name

Gender

DOB

Is Driving License Available?

Next

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Requirements:

If driving license is available in screen 1 the only show screen 2.

Create Application

First Name

Rajul

Last Name

lanee

Gender

Male

DOB

05-May-1998

☒ Is Driving License Available?

Next

Screen 1

Create Application

Driving License Number

Back

Create Record

Screen 2

Create Application

New Application has been created successfully...

Fetch

Screen 3

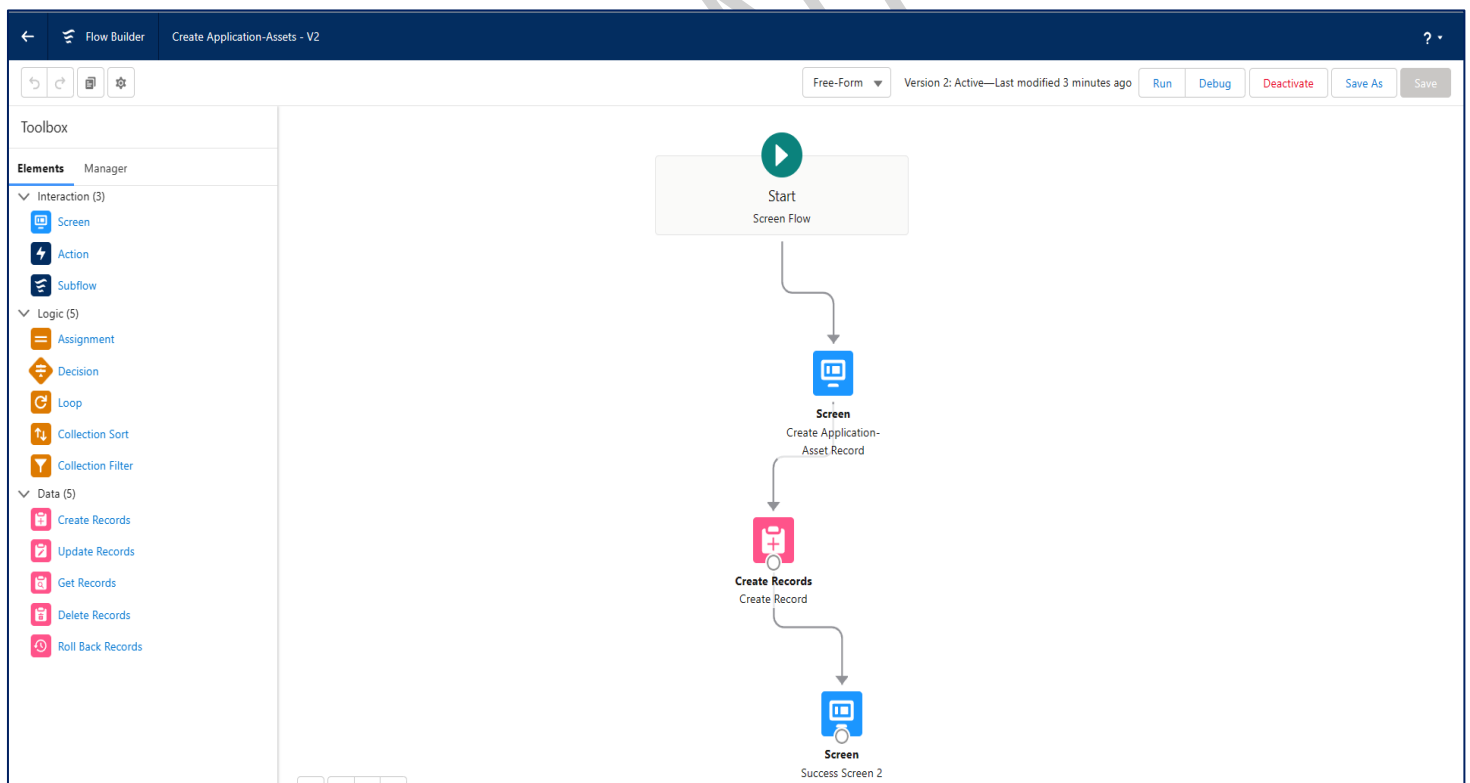


Screen flow
JIRA-101.mp4

This is a video to see the output of Application Record flow. (Double Click on icon)

JIRA TICKET: MSAMLIN-102

Create Application-Assets Record



Applications-Assets
APP_ASSID-0004

New Opportunity Edit New Case

Related Details

No related lists to display

Activity

Calendar, List, Mail, Chat, Email, Phone

Filters: All time • All activities • All types
Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.

Create Application-Assets

Select Application

Search Applicants Details...

Select Assets

Search Assets...

Down Payment

Tenure in Months

Create Record

Create Application-Assets

Select Application

APPID-0008

Select Assets

Life Insurance

Down Payment

₹1,16,000

Tenure in Months

3

Create Record

Create Application-Assets

New Application-Assets record has been created successfully...



Finish

Screen 1

Screen 2



Screen Flow
JIRA-102.mp4

This is a video to see the output of Application-Assets Record flow. (Double Click on icon)

9. Integration Requirement:

Mobile Number verification in Application Details Object by Veriphone.

You Have Lightning Components Debug Mode Enabled. Salesforce is slower in debug mode. Ask your admin how to disable it, or see [Enable Debug Mode for Lightning Components](#).

MS Amlin Insurance Agency Li... Home Accounts Contacts Assets Applicants Details Documents Details Applications-Assets

Search...

EPT: 1.45s 4145.58 KB

Verify Mobile Number New Case New Lead

Applicant Details
APPID-0004

Related Details

Applicant Details ID: APPID-0004
First Name: Vijay
Middle Name:
Last Name: Chauhan
Gender: Male
Date of Birth: 11/10/2006
Mobile Number: 7092317546
Email ID:
Driving Licence Number: MH1391234078
Mobile Number Status:
Active Applicant:
Created By: MS Amlin: 01/10/2023, 2:32 pm
Last Modified By: MS Amlin: 02/10/2023, 5:48 pm

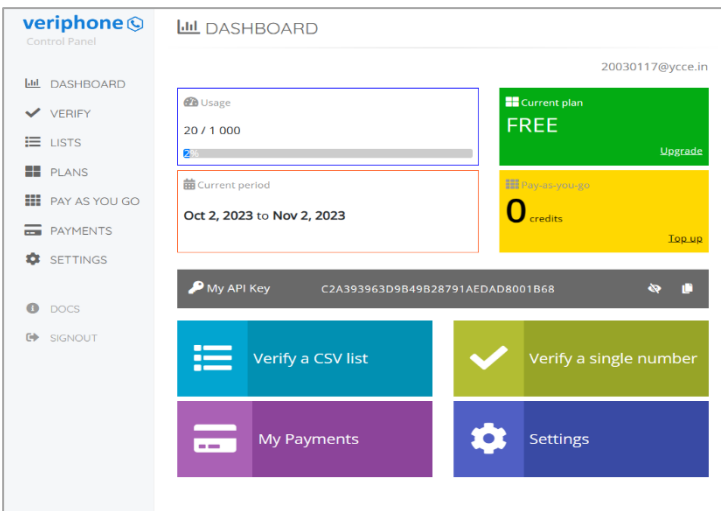
Verify Mobile
Verify Mobile Number

Activity

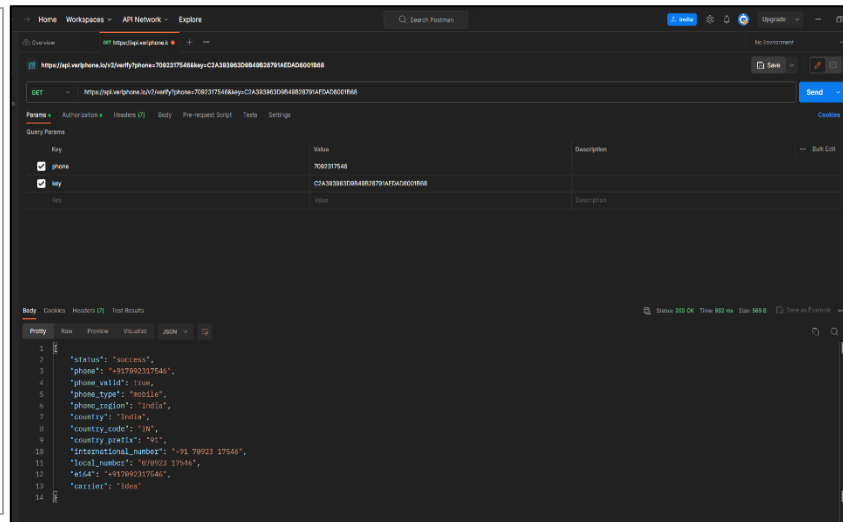
Filters: All time • All activities • All types
Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.



Veriphone.io



Postman

LWC Code for Mobile Number Verification: -

HTML ➡

```
<template>
  <lightning-card title="Verify Mobile">
    <lightning-button variant="success" label="Verify Mobile Number"
onclick={verifyMobHandler}></lightning-button>
  </lightning-card>
</template>
```

JavaScript ➡

```
import { LightningElement, api } from 'lwc';
import { CloseActionScreenEvent } from 'lightning/actions';
import verifyMob from '@salesforce/apex/ApplicationRequestAPI.verifyMob';

export default class ApplicationMobileVerify extends LightningElement {
  @api recordId;

  verifyMobHandler() {
    this.dispatchEvent(new CloseActionScreenEvent());
    window.location.reload();
    console.log(this.recordId);

    verifyMob({'appliRecordId' : this.recordId})
      .this(result=>{
        console.log(result);
        this.dispatchEvent(new CloseActionScreenEvent());
      })
      .catch(error=>{
        console.log(error);
        this.dispatchEvent(new CloseActionScreenEvent());
      })
  }
}
```

XML file ➔

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>58.0</apiVersion>
  <isExposed>true</isExposed>
  <targets>
    <target>lightning__RecordAction</target>
  </targets>
</LightningComponentBundle>
```

Request API class ➔

```
public with sharing class ApplicationRequestAPI {

    @AuraEnabled
    public static void verifyMob(ID appliRecordId){
        System.debug('Receivied Application Id '+appliRecordId);

        String mobileNumber = [select id, Mobile_Number__c from Applicant_Details__c where ID =:
appliRecordId].Mobile_Number__c;

        if(String.isNotBlank(mobileNumber)){
            System.debug('mobile '+mobileNumber);

            Http http = new Http();
            HttpRequest request = new HttpRequest();
            request.setEndpoint('https://api.veriphone.io/v2/verify?phone='+mobileNumber+'&key=C2A393963D9B49B28791AEDAD8001B6
8');
            request.setMethod('GET');

            HttpResponse response = http.send(request);
            System.debug('%%Status_Code = '+response.getStatusCode());

            if(response.getStatusCode() == 200){
                System.debug('@@received body = '+response.getBody());

                ApplicationRequestAPIWrapper objWrap = (ApplicationRequestAPIWrapper) JSON.deserialize(response.getBody(),
ApplicationRequestAPIWrapper.class);

                Applicant_Details__c objAppl = new Applicant_Details__c(Id=appliRecordId);

                if(objWrap.phone_valid){
                    objAppl.Mobile_Number_Status__c = true;
                }
                else{
                    objAppl.Mobile_Number_Status__c = false;
                }

                update objAppl;
            }
        }
    }

    public class ApplicationRequestAPIWrapper{
        public Boolean phone_valid;
    }
}
```



LWC mobile
verify.mp4

This is a video to see the output of Application Detail Record flow. (Double Click on icon)

11. Batch Class Requirement:

- Create a Batch class to update all the Applications status Checkbox to Inactive

ApplicationStatusBatchClass.apxc | Applicant_Details__c@12:47 AM

select id, Name, First_Name__c, Last_Name__c, CreatedDate, Active_Applicant__c, Asset_Products__c from Applicant_Details__c where CreatedDate = LAST_MONTH

Query Results - Total Rows: 1

Id	Name	First_Name__c	Last_Name__c	CreatedDate	Active_Applicant__c	Asset_Products__c
a005j00000P5RYBAA3	APPID-0003	Rajiv	Patil	2023-09-28T15:05:41.00...	true	Updated

ApplicationStatusBatchClass.apxc | Log executeAnonymous @3/10/2023, 12:50:21 am | Applicant_Details__c@12:50 AM

select id, Name, First_Name__c, Last_Name__c, CreatedDate, Active_Applicant__c, Asset_Products__c from Applicant_Details__c where CreatedDate = LAST_MONTH

Query Results - Total Rows: 1

Id	Name	First_Name__c	Last_Name__c	CreatedDate	Active_Applicant__c	Asset_Products__c
a005j00000P5RYBAA3	APPID-0003	Rajiv	Patil	2023-09-28T15:05:41.00...	false	

Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: All Create New View

Action	Submitted Date +	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	03/10/2023, 12:50 am	Batch Apex	Completed		1	1	0	Amlin_MS	03/10/2023, 12:50 am	ApplicationStatusBatchClass		7075j00005Ubi5E

Code Coverage: None | API Version: 58

```

1 global class ApplicationStatusBatchClass implements Database.Batchable<Object>{
2
3     global Database.QueryLocator start(Database.BatchableContext BC){
4         return Database.getQueryLocator('select id, Name, First_Name__c, Last_Name__c, CreatedDate, Active_Applicant__c, Asset_Products__c from Applicant_Details__c where CreatedDate = LAST_MONTH and Active_Applicant__c = true');
5     }
6     global void execute(Database.BatchableContext BC, List<Applicant_Details__c> applist){
7         if(applist.isEmpty()){
8             return;
9         }
10        for(Applicant_Details__c objApp : applist){
11            if(String.isBlank(objApp.Asset_Products__c)){
12                objApp.Active_Applicant__c = false;
13            }
14        }
15        Database.update(applist, false);
16    }
17    global void finish(Database.BatchableContext BC){
18    }
19 }

```

Enter Apex Code

```

1 Database.executeBatch(new ApplicationStatusBatchClass(), 50);

```

Open Log Execute Execute Highlighted

- Run above batch class day 1 on every month.

ApplicationStatusBatchClass.apxc | ScheduleApplicationStatusBatchClass.apxc

Code Coverage: None | API Version: 58

```

1 public class ScheduleApplicationStatusBatchClass implements Schedulable{
2     public void execute(SchedulableContext SC){
3         Database.executeBatch(new ApplicationStatusBatchClass(), 50);
4     }
5 }

```

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Cancel Delete

Job Name: ScheduleApplicationStatusB

Apex Class: ScheduleApplicationStatusBatchClass

Schedule Apex Execution

Frequency: ☐ Weekly ☒ Monthly

On day 1 of every month ☐ On the 1st Sunday of every month

Start: 03/10/2023 [03/10/2023]

End: 03/11/2023 [03/10/2023]

Preferred Start Time: 8:00 am

Exact start time will depend on job queue activity.

Cancel Delete

- Send success and failed record id.

Apex Jobs

Help for this Page

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View:

All

Create New View

<Previous Page Next Page												
Action	Submitted Date +	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	03/10/2023, 3:30 pm	Batch Apex	Completed		1	1	0	Amlin_MS	03/10/2023, 3:30 pm	AppliStatusBatchClass		7075j00005VRSBy

Code➡

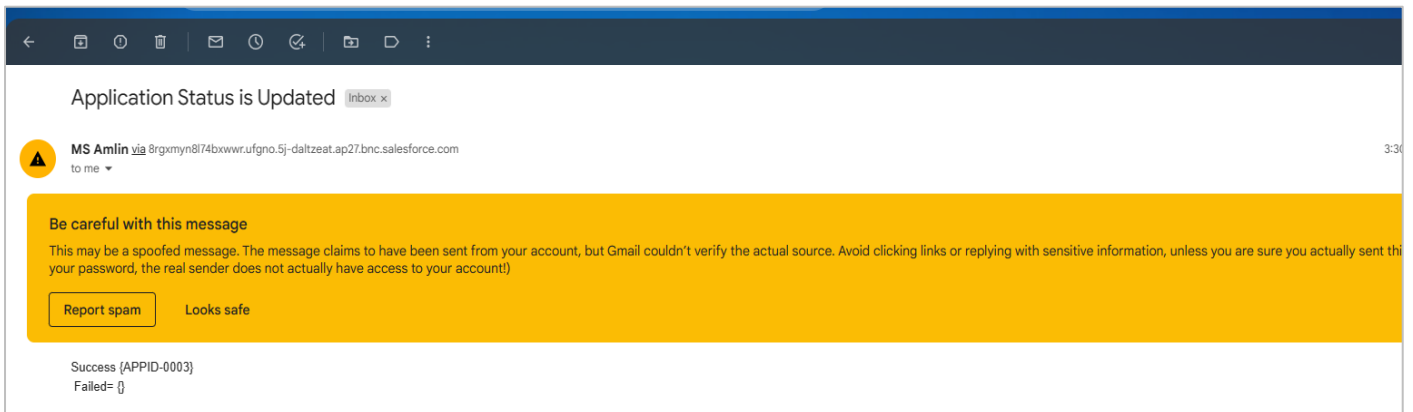
```
global class AppliStatusBatchClass implements Database.Batchable<SObject>, Database.Stateful{
    SET<String> successIdSet = new SET<String>();
    SET<String> failedIdSet = new SET<String>();
    global Database.QueryLocator start(Database.BatchableContext BC){
        return Database.getQueryLocator('select id, Name, First_Name__c, Last_Name__c, CreatedDate,
Active_Applicant__c, Asset_Products__c from Applicant_Details__c where CreatedDate = LAST_MONTH and
Active_Applicant__c = true');
    }

    global void execute(Database.BatchableContext BC, List<Applicant_Details__c> applList){
        if(!applList.isEmpty()){
            for(Applicant_Details__c objApp : applList){
                if(String.isBlank(objApp.Asset_Products__c)){
                    objApp.Active_Applicant__c = false;
                }
                Database.SaveResult[] result = Database.update(applList, false);
                Integer index=0;

                for(Database.SaveResult sr: result){
                    if(sr.isSuccess()){
                        System.debug('Success = '+applList[index].Name);
                        successIdSet.add(applList[index].Name);
                        index++;
                    }
                    else{
                        System.debug('Failed = '+applList[index].Name);
                        failedIdSet.add(applList[index].Name);
                        index++;
                    }
                }
                System.debug('Success= '+successIdSet);
                System.debug('Failed = '+failedIdSet);
            }
        }
    }

    global void finish(Database.BatchableContext BC){
        Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
        mail.setToAddresses(new String[] { 'waradepranav99@gmail.com' });
        mail.setSenderDisplayName('MS Amlin');
        mail.setSubject('Application Status is Updated');
        mail.setPlainTextBody('Success '+successIdSet+'\n Failed= '+failedIdSet);
        Messaging.sendEmail(new Messaging.SingleEmailMessage[] { mail });
    }
}
```

- Email send System Admin.



- Write Test Class.

Batch Class →

```
global class BatchClassAppStatus implements Database.Batchable<Object>{

    global Database.QueryLocator start(Database.BatchableContext BC){
        return Database.getQueryLocator('select id, First_Name__c, Last_Name__c, Asset_Products__c,
Active_Applicant__c from Applicant_Details__c where Active_Applicant__c = true');
    }
    global void execute(Database.BatchableContext BC, List<Applicant_Details__c> appList){
        if(!appList.isEmpty()){
            for(Applicant_Details__c objApp : appList){
                if(String.isBlank(objApp.Asset_Products__c)){
                    objApp.Active_Applicant__c = false;
                }
            }
            Database.update(appList, false);
        }
    }
    global void finish(Database.BatchableContext BC){

    }
}
```

Test Class →

```
@isTest(seeAllData=false)
public class TestClassOfAppStatus{

    @isTest
    public static void testAppBatchMethod(){

        List<Applicant_Details__c> appList = new List<Applicant_Details__c>();
        for(Integer i=1; i<=200; i++){
            Applicant_Details__c objApp = new Applicant_Details__c(First_Name__c='Shankar'+i,
Last_Name__c='Pratap'+i, Asset_Products__c= null, Active_Applicant__c = true);
            appList.add(objApp);
        }
        if(!appList.isEmpty()){
            Database.insert(appList, false);
        }
        Test.startTest();
        Database.executeBatch(new BatchClassAppStatus(), 200);
        Test.stopTest();

        List<Applicant_Details__c> actualAppList =[select id, First_Name__c, Last_Name__c, Active_Applicant__c,
Asset_Products__c from Applicant_Details__c where Active_Applicant__c=false];
        System.assertEquals(200, actualAppList.size());
    }
}
```

Apex Test Execution

Click Select Tests to choose one or more Apex unit tests and run them. To see the current code coverage for an individual class or your organization, go to the [Apex Classes](#) page.

Select Tests... Developer Console Options... View Test History

Abort		
Status	Class	Result
Test Run: 2023-10-03 23:08:34, admin@msamlin.co, (1 test class run)		
✓	[View] TestClassOfAppStatus	(1/1) Test Methods Passed

```

=== Test Summary
NAME      VALUE
-----
Outcome   Passed
Tests Ran 1
Pass Rate 100%
Fail Rate  0%
Skip Rate  0%
Test Run Id 7075j00005V56DM
Test Execution Time 1280 ms
Org Id      00D5j00000DAltZEAT
Username    admin@msamlin.co

=== Test Results
TEST NAME      OUTCOME  MESSAGE  RUNTIME (MS)
-----
TestClassOfAppStatus.testAppBatchMethod  Pass      1280

23:08:40.267 ended SFDX: Run Apex Tests
  
```

Vs Code Output and Coverage

```

File Edit Debug Test Workspace Help < >
BatchClassAppStatus.apxc TestClassOfAppStatus.apxc
Code Coverage: All Tests 100% API Version: 58
None
All Tests 100%
TestClassOfAppStatus.testAppBatchMethod 100%
5
6
7
8
9
10
11
12
13
14
15
16
17
  
```

Developer Console Coverage

12. Show Dashboard:

Show Dashboard (Pie Chart) on home page.

The dashboard shows a pie chart titled "My Pie Chart" with the subtitle "Application Vs Application-Assets". The chart displays two segments: a blue segment representing "Create_Application" with a record count of 22, and a green segment representing "Create_Application_Assets" with a record count of 8. The x-axis is labeled "Flow API Name" and the y-axis is labeled "Record Count".