

Salesforce Project

Name	Pranav Warade
Project Name	PolicyStream

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
<input type="checkbox"/> Edit	Adamson, George	oadam	george.adamson12@msamlin.com		<input type="checkbox"/>	MS-Amlin Managers
<input type="checkbox"/> Edit	Amlin, MS	MAmli	admin@msamlin.co		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Burton, Emily	eburt	emily.burton12@msamlin.com		<input type="checkbox"/>	MS-Amlin Managers
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5f00000daltzeat.d4m3lr5acve@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	User, Integration	intleg	integration@00d5f00000daltzeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> 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...

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.

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

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

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

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

MS Amlin

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

Sales Officer

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

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

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

Sales Officer-

1. Account Object (PolicyStream 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. The Account Name field is highlighted with a red border, indicating the source of the error.

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"/>

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

Regional Sales Managers:

WELCOME TO POLYCYSTREAM PORTAL

A place where you can easily find solutions and ask questions

[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 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 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

Set the permissions and page layouts for this profile.

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

Name:

User License:

Description:

Custom Profile: ☒

Sales Officer:

Profile Edit: Sales Officer - Sales Officer

Set the permissions and page layouts for this profile.

	Basic Access			Data Administration	
	Read	Create	Edit	Delete	View All
Accounts	<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"/>
Appointment Categories	<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"/>
Appointment Topic Time Slots	<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:

Save Save & New Cancel

msamlin-6c-dev-ed.develop.my.site.com/insuranceagency/s/

MS Amlin

Search...

HOME TOPICS CONTACTS

WELCOME TO POLICystREAM PORTAL

A place where you can easily find solutions and ask questions

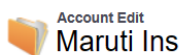
FEATURED DISCUSSIONS MY FEED

ASK A QUESTION?

Don't see what you're looking for?

ASK A QUESTION CUSTOMER SUPPORT

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.marutiIns.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. Use this page to create and maintain record types for your organization. You can display differ

Select Contact Record Type

Record Type of new record

Regional Sales Manager

Regional Sales Manager

Sales Officer

Continue

Cancel

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

From Fields & Relationships		
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	
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  }

```

```
trigger DuplicateContactAccTrigger on Contact (before insert, before update, after undelete){
    SET<ID> accIdSet = new SET<ID>();
    if( (trigger.isInsert || trigger.isUpdate || trigger.isUndelete) ){
        for(Contact objCon : trigger.new){
            if(trigger.isInsert || trigger.isUndelete){
                accIdSet.add(objCon.AccountId);
            }
            if(trigger.isUpdate){
                if(objCon.AccountId != trigger.oldMap.get(objCon.Id).AccountId){
                    accIdSet.add(objCon.AccountId);
                }
            }
        }
    }
    Map<Id,Account> accMap = new Map<Id, Account>();
    if(!accIdSet.isEmpty()){
        for(Account objAcc : [select Id, Name, (select Id, Name, Email, AccountId from Contacts) from Account where ID IN : accIdSet]){
            accMap.put(objAcc.Id,objAcc);
        }
    }
    if( (trigger.isInsert || trigger.isUpdate || trigger.isUndelete) ){
        for(Contact objCon : trigger.new){
            if(accMap.containsKey(objCon.AccountId)){
                List<Contact> ExistConList = accMap.get(objCon.AccountId).Contacts;
                for(Contact objExistingCon : ExistConList){
                    if(objCon.Email == objExistingCon.Email && objCon.AccountId == objExistingCon.AccountId){
                        objCon.addError('This Email Id '+objCon.Email+' and same accountId '+accMap.get(objCon.AccountId).Name+' is already exists');
                        break;
                    }
                }
            }
        }
    }
}
```

3. Applicant Details Object:

Create Applicant Details custom field→

Custom Fields & Relationships						
New Field Dependencies Set History Tracking						
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Active Applicant	Active_Applicant__c	Checkbox			MS Amlin, 27/09/2023, 1:50 pm
Edit Del	Date of Birth	Date_of_Birth__c	Date			MS Amlin, 27/09/2023, 1:35 pm
Edit Del	Driving Licence Number	Driving_Licence_Number__c	Text(20)			MS Amlin, 27/09/2023, 1:43 pm
Edit Del	Email Id	Email_Id__c	Email			MS Amlin, 27/09/2023, 1:40 pm
Edit Del	First Name	First_Name__c	Text(18)			MS Amlin, 27/09/2023, 1:19 pm
Edit Del	Last Name	Last_Name__c	Text(18)			MS Amlin, 27/09/2023, 1:31 pm
Edit Del	Middle Name	Middle_Name__c	Text(18)			MS Amlin, 27/09/2023, 1:20 pm
Edit Del	Mobile Number	Mobile_Number__c	Phone			MS Amlin, 27/09/2023, 1:37 pm
Edit Del	Mobile Number Status	Mobile_Number_Status__c	Checkbox			MS Amlin, 27/09/2023, 1:48 pm

Requirements:

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

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.

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

Ramu

Middle Name

Last Name

Ramu

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 of Page
Description			
Created By	MS Amlin , 28/09/2023, 12:03 pm	Modified By	MS A

C] Prevent Invalid Email Id.

Applicants Details

Applicant Details Edit

New Applicant Details

Applicant Details Edit

SaveSave & NewCancel

Error: Invalid Data.

Review all error messages below to correct your data.

Information

First Name

Manoj

Middle Name

Raghu

Last Name

Sharma

Date of Birth

28/09/2023

[28/09/2023]

Mobile Number

Email Id

manoj#%@gmail.com

Error: This is an invalid Email ID

Driving Licence Number

Applicant Details Validation Rule

[Back to Applicant Details](#)

Validation Rule Detail			
	<div>EditClone</div>		
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 Share

Custom Object Definition Detail	
	<div>EditDelete</div>
Singular Label	Document Details
Plural Label	Documents Details
Object Name	Document_Details
API Name	Document_Details__c

Custom Fields & Relationships			
		<div>NewField DependenciesSet History Tracking</div>	
Action	Field Label	API Name	Data Type
<div>Edit Del</div>	<div>Id Number</div>	Id_Number__c	Text(20)
<div>Edit Del</div>	<div>Select Application</div>	Select_Application__c	Master-Detail(Applicant Details)
<div>Edit Del Replace</div>	<div>Select Identity Proof Document</div>	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);
    }
  }
}

```


Create Assets custom field→


Create Assets custom field→

Custom Fields & Relationships			
<div> New Field Dependencies Set History Tracking </div>			
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:

Field Information	
Field Label	Applicant Name
Field Name	Applicant_Name
API Name	Applicant_Name__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	MS Amlin, 28/09/2023, 11:42 pm

Formula Options	
Data Type	Formula 
Select_Application__r.First_Name__c '+' Select_Application__r.Middle_Name__c '+' Select_Application__r.Last_Name__c	


Applications-Assets

APP_ASSID-0001

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

Applications-Assets Detail

Applications-Assets ID	APP_ASSID-0001
Select Application	<u>APPID-0003</u>
Applicant Name	Rajiv Annaji Patil
Select Assets (Insurance)	<u>Life Insurance</u>
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 '+' and '+' Select_Assets_Insurance__r.SerialNumber	

```
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             if(trigger.isUpdate){
9                 if(objAppAss.Select_Assets_Insurance__c!=trigger.oldMap.get(objAppAss.Id).Select_Assets_Insurance__c){
10                     assIdSet.add(objAppAss.Select_Assets_Insurance__c);
11                 }
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);
    }
}
if(trigger.isInsert || trigger.isUpdate){
    for(Applications_Assets__c objAppAss : trigger.new){
        if(!assMap.isEmpty()){
            if(assMap.containsKey(objAppAss.Select_Assets_Insurance__c)){
                objAppAss.Price__c = assMap.get(objAppAss.Select_Assets_Insurance__c).Price;
            }
        }
    }
}
```

D] Down Payment Should not greater than Price of Assets.

 Applications-Assets Edit
APP_ASSID-0001

Applications-Assets Edit

Save Save & New Cancel

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

Information

Applications-Assets ID

APP_ASSID-0001

Select Application

APPID-0003

Select Assets (Insurance)

Life Insurance

Tenure in Months

Price

40,000

Down Payment

80,000

Error: Down Payment should not be greater than the Price of Assets

Save Save & New Cancel

Applications-Assets Validation Rule

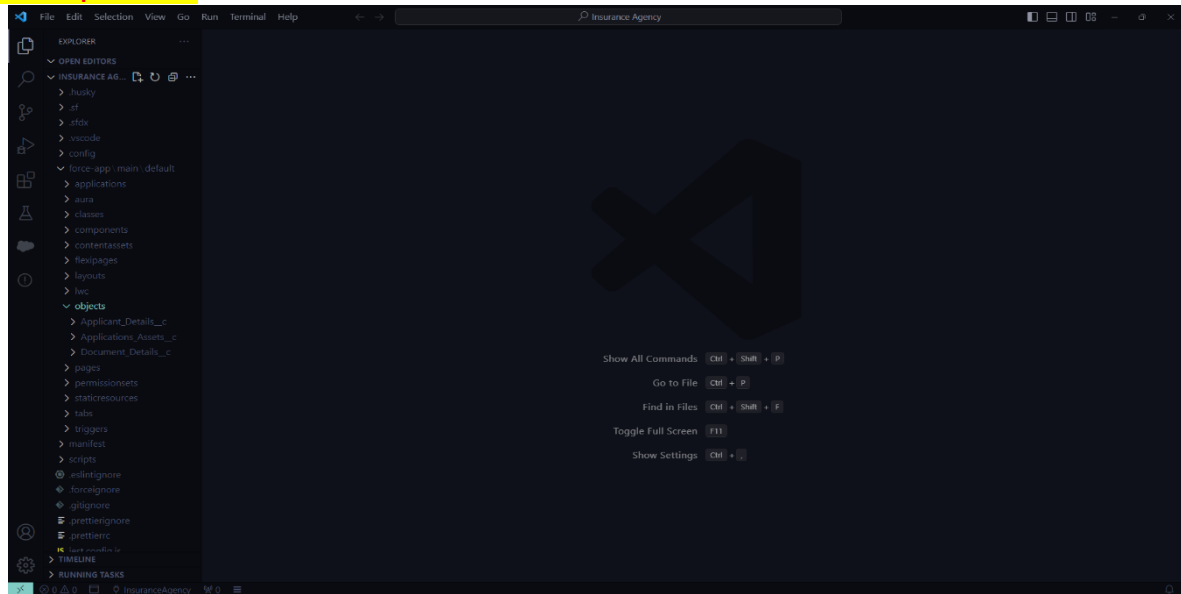
[Back to Applications-Assets](#)

Validation Rule Detail

Edit Clone

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

7. LWC Requirement:



LWC Component:

Customer Community Portal

LWC Component

Name of Agent:

From Date

To Date

Q Search

Popup Modal:

Customer Community Portal

Popup Modal

	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	lane		1998-05-05	2023-10-01T11:06...	8600115222
6	<input type="checkbox"/> APPID-0009	Spandan	Qureshi			2023-10-01T13:26...	7085632155

Close

LWC Code for Popup-Modal: -

```
<template>  
    <lightning-card title="Customer Community Portal">  
        <p>&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&LWC Component</p>  
        <br />  
        &nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&Name of Agent:  
        <br />  
        <lightning-record-edit-form object-api-name="Applicant_Details_c">  
            <lightning-input type="Date" Label="&nbsp;&nbsp;&nbsp;&From Date" value={start_date} name="startdate"  
                onchange={startDateHandler}></lightning-input>  
            <lightning-input type="Date" Label="&nbsp;&nbsp;&nbsp;&To Date" value={end_date} name="enddate"  
                onchange={endDateHandler}></lightning-input>  
            <br />  
            &nbsp;&nbsp;&nbsp;&nbsp;&<lightning-button variant="brand" Label="Search" icon-name="utility:search"  
                onclick={buttonHandler}></lightning-button>  
  
        <template lwc:if={showAppFlag}>  
            <!--POP UP MODAL STARTS-->  
            <section role="dialog" tabindex="-1" aria-modal="true" aria-labelledby="modal-heading-01"  
                class="slds-modal slds-fade-in-open">  
                <div class="slds-modal__container">  
                    <button class="slds-button slds-button_icon slds-modal__close slds-button_icon-inverse"  
                        title="Close" onclick={closeButtonHandler}>  
                        <lightning-icon icon-name="utility:close" size="small" alternative-text="close"  
                            variant="inverse"></lightning-icon>  
                    <span class="slds-assistive-text">Cancel and close</span>  
                </button>  
                <div class="slds-modal__header">  
                    <h1 id="modal-heading-01" class="slds-modal__title slds-hyphenate">Popup Modal</h1>  
                </div>  
                <div class="slds-modal__content slds-p-around medium" id="modal-content-id-1">
```

```

        <!-- DATA TABLE STARTS -->
        <lightning-datatable
            key-field="Id"
            data={applist}
            columns={appColumns}
            draft-values={draftValues}
        >
        </lightning-datatable>
        <!-- DATA TABLE END -->

    </div>
    <div class="slds-modal__footer">

        <button class="slds-button slds-button_brand" onclick={closeButtonHandler}
            aria-label="Cancel and close">Close</button>

    </div>
</div>
</section>
<div class="slds-backdrop slds-backdrop_open"></div>
<!--POP UP MODAL END-->
</template>
</lightning-record-edit-form>
</lightning-card>
</template>

```

JS➡

```

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;
        }
    }
}

```



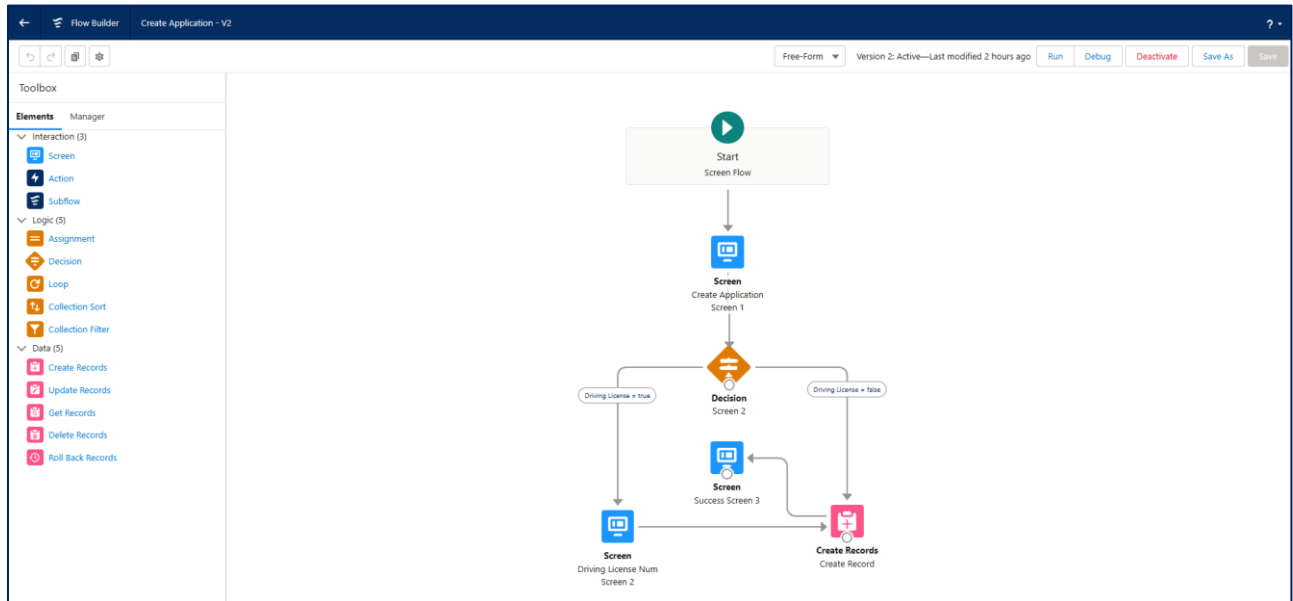
LWC Pop-up
modal.mp4

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

8. Flow Builder:

TICKET: MSAMLIN-101

Create Application Record.



MS Amlin

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

Applicant Details APPID-0006

Related Details

Documents Details (0) New

Applications-Assets (0) New

Create Application

First Name

Last Name

Gender --None--

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 Raj

Last Name Iamee

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...

Finish

Screen 3

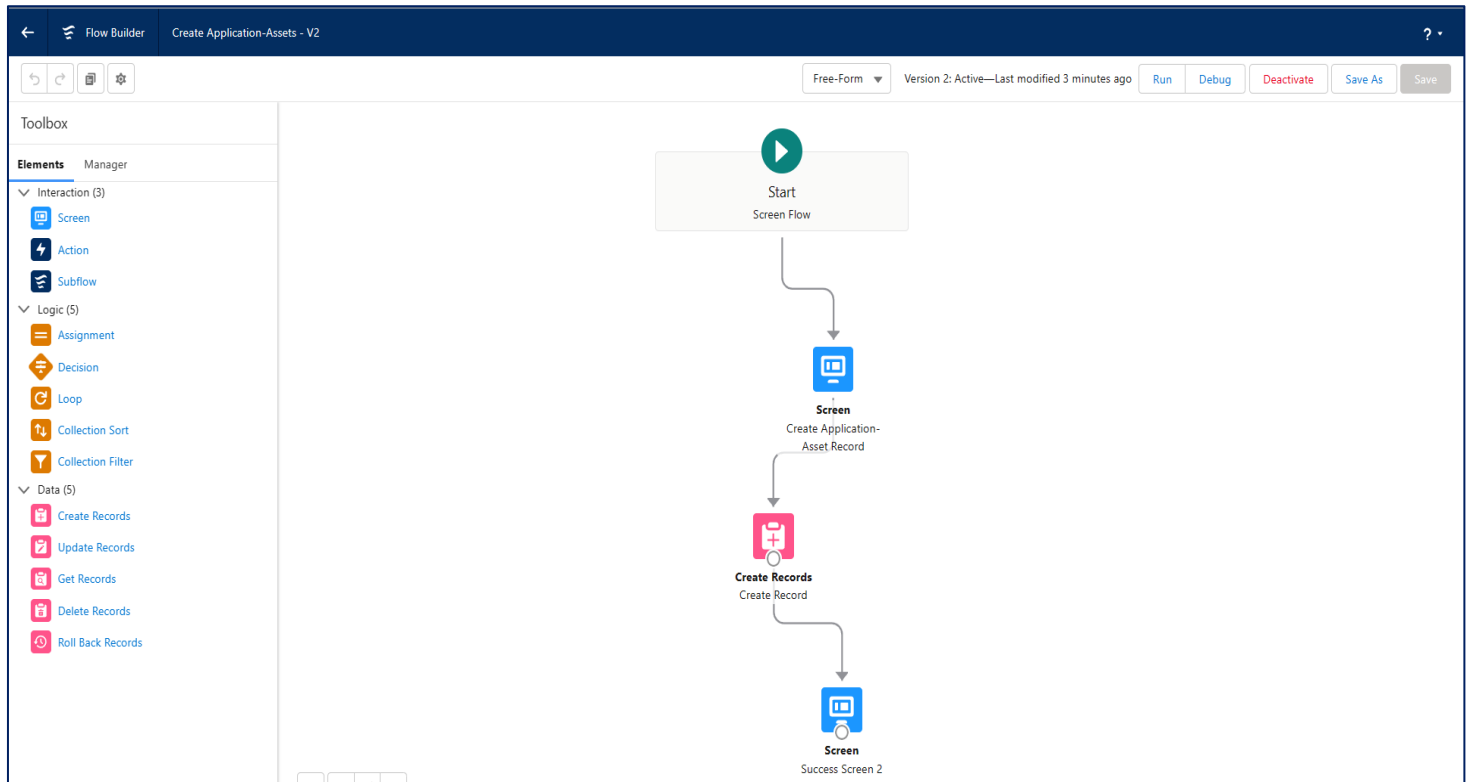


Screen flow
JIRA-101.mp4

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

TICKET: MSAMLIN-102

Create Application-Assets Record



Create Application-Assets

Select Application

Select Assets

Down Payment

Tenure in Months

[Create Record](#)

Screen 1

Create Application-Assets

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

[Finish](#)

Screen 2

The screenshot shows the MS Amlin Insurance Agency UI. The top navigation bar includes 'Home', 'Accounts', 'Contacts', 'Assets', 'Applicants Details', 'Documents Details', and 'Applications-Assets'. The 'Applications-Assets' section is active, showing a list of 'Applications-Assets' with the entry 'APP_ASSID-0004'. The 'Create Application-Assets' form is highlighted with a red box. The form includes fields for 'Select Application' (with a search bar), 'Select Assets' (with a search bar), 'Down Payment', and 'Tenure in Months'. A 'Create Record' button is at the bottom right of the form. The 'Activity' panel on the right shows 'No activities to show.' and 'No past activity. Past meetings and tasks marked as done show up here.'

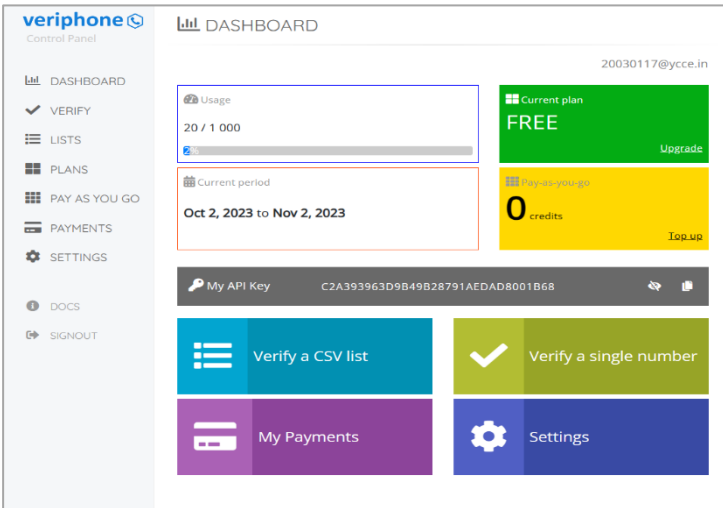


Screen Flow
JIRA-102.mp4

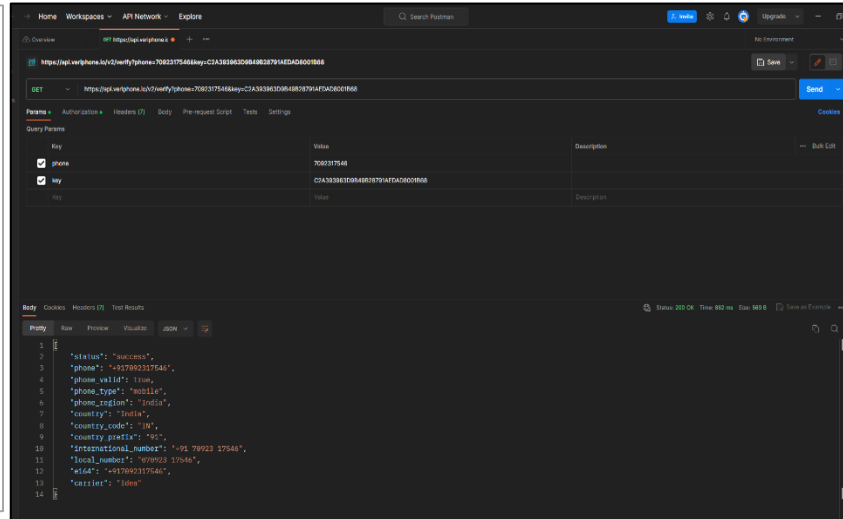
This is a video to see the output of Application-Assets Record flow. (Double Click on icon)

9. Integration Requirement:

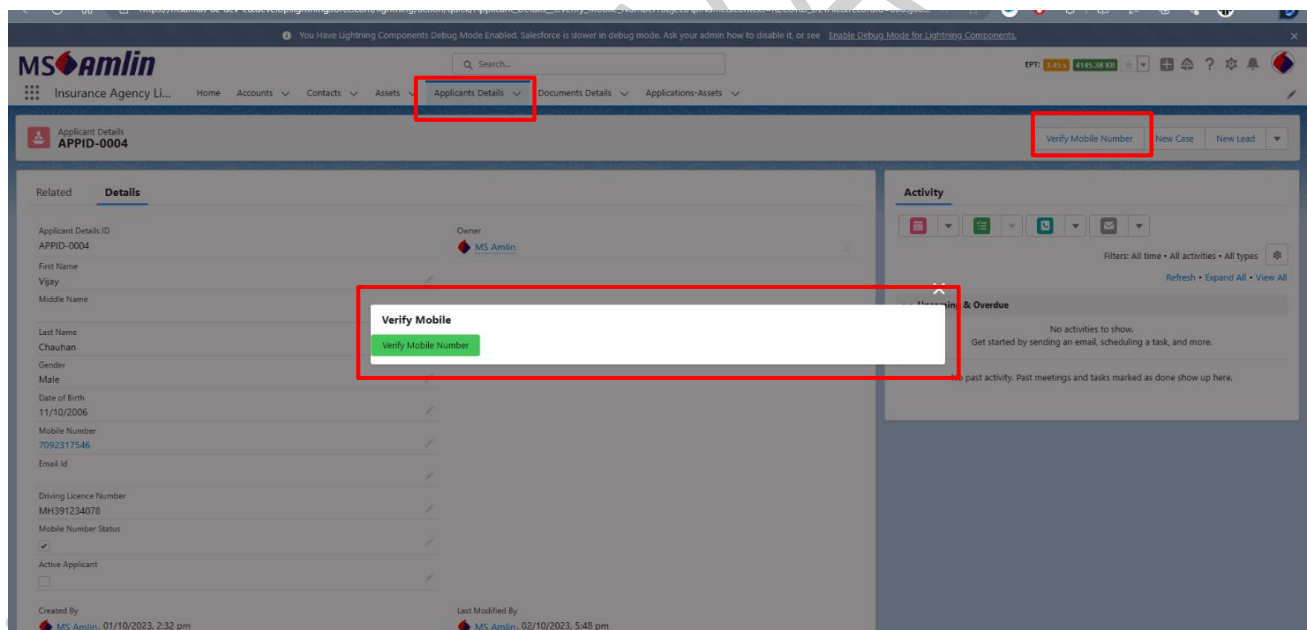
Mobile Number verification in Application Details Object by Veriphone.



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('Receved 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.apxcLog executeAnonymous @3/10/2023, 12:50:21 amApplicant_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	

```

1 global class ApplicationStatusBatchClass implements Database.Batchable<SObject>{
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             for(Applicant_Details__c objApp : applist){
9                 if(String.isBlank(objApp.Asset_Products__c)){
10                     objApp.Active_Applicant__c = false;
11                 }
12                 Database.update(objApp, false);
13             }
14         }
15     }
16     global void finish(Database.BatchableContext BC){
17     }
18 }

```

Enter Apex Code

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

[Open Log](#) [Execute](#) [Execute Highlighted](#)

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

- Run above batch class day 1 on every month.

```

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 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

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, 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');
    }
}

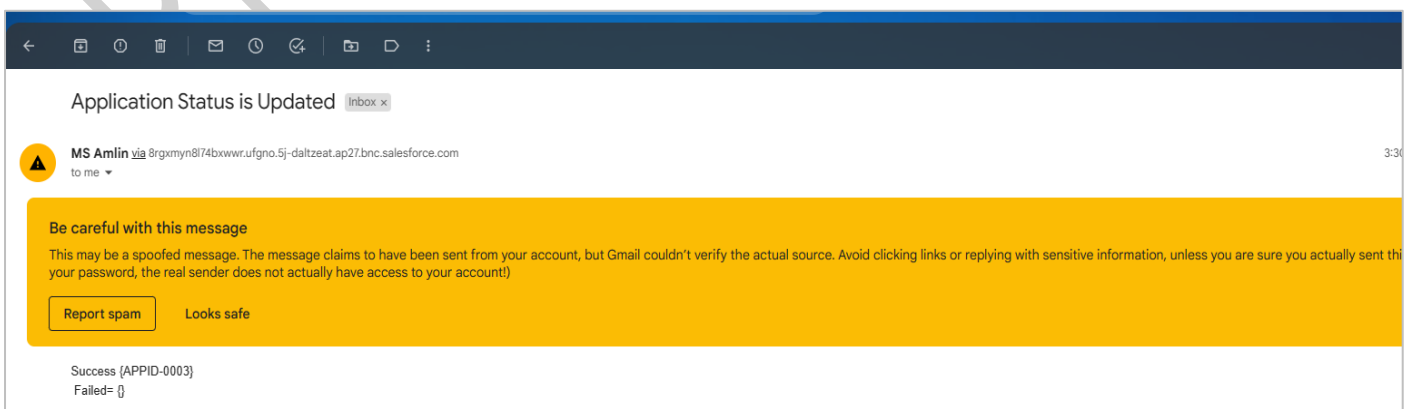
```

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

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

    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                       7075j00005VS6DM
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 global void execute(Database.BatchableContext BC, List<Applicant_Details__c> objApp : appList){
7     if(!appList.isEmpty()){
8         for(Applicant_Details__c objApp : appList){
9             if(String.isBlank(objApp.Asset_Products__c)){
10                 objApp.Active_Applicant__c = false;
11             }
12         }
13         Database.update(appList, false);
14     }
15 }
16 global void finish(Database.BatchableContext BC){
17 }
  
```

Developer Console Coverage

12. Show Dashboard:

Show Dashboard (Pie Chart) on home page.

MS Amlin

Search...

Switch to Lightning Experience MS Amlin Setup Help Insurance Agency

Home Accounts Contacts Assets Applicants Details Documents Details Applications-Assets Reports Dashboards

Create New...

Recent Items

No records to display

Recycle Bin

MS Amlin

Wednesday 4 October 2023

Hide Feed

Post File New Event More

Share an update, @mention someone...

Share

Search Sort By Latest Posts

There are no updates.

Recommendations

Download Salesforce

Run your business from your phone with Salesforce

Skip

Integration User

Joined in the last month

Follow

Security User

Joined in the last month

Follow

Sales

Owned by you

Follow

Mr. Morton Owen

Owned by you

Follow

Dashboard

As of 04/10/2023, 12:19 am. Displaying data as MS Amlin.

My Pie Chart

Application Vs Application-Assets

Record Count

Flow API Name

Create_Application Create_Application_Assets