Phase 10: Quality Assurance Testing

Objective

Ensure all Salesforce Omni-Channel Support features work as expected by preparing and executing detailed test cases. This guarantees functionality, reliability, and user satisfaction before final deployment.

Guidelines for Testing

- Prepare test cases for **every implemented feature**:

    o Case creation (Email, WhatsApp, Chat, Social Media)

    o Omni-Channel Routing

    o SLA & Milestones

    o Approval Processes

    o Automatic Task Creation

    o Validation Rules & Flows

    o Apex Triggers & Custom Logic

- Each test case must include:

    o **Input Details** – What data or action is being tested

    o **Expected Output** – The result Salesforce should produce

    o **Actual Output** – The result observed during testing

    o **Screenshots** – Mandatory for both input and output

Test Case Format Example

Use Case / Scenario	Test Steps (Input)	Expected Result	Actual Result (with Screenshot)
Create WhatsApp Case	Send a test WhatsApp message to support number	Salesforce auto-creates a Case in WhatsApp queue	Case created successfully → Screenshot of Case
Omni-Channel Routing	Assign Case priority as "High"	Case routed to Senior Support Queue	Routed correctly → Screenshot of Omni-Channel widget
SLA Timer	Create a new Case with 2-hour first response SLA	SLA countdown shows remaining time	Countdown working → Screenshot of SLA field
Negative Sentiment Detection	Send a negative customer message	Sentiment = Negative, flagged automatically	Flag applied → Screenshot of Sentiment Log
Approval Process	Submit refund request case	Case status = "Pending Approval", routed to manager	Approval triggered → Screenshot of Approval Process
Flow Automation	Close Case via agent screen flow	Case status updated, task auto-created, customer notified	Flow executed correctly → Screenshot of updated Case
Validation Rule	Try entering invalid email in Contact	Salesforce blocks save with error message	Validation triggered → Screenshot of error
Apex Trigger	Create new Case with urgent priority	...ger updates Resolution_SLA_Time automatically	SLA time calculated → Screenshot of Case field

Implementation Notes

- Execute **one test case at a time** and document results immediately.

- Use **screenshots** from Salesforce UI for both **input action** and **output result**.

- Test across **all channels** (Email, WhatsApp, Chat, Social) to ensure **end-to-end functionality**.

- Record **any issues or bugs** for resolution before final deployment.

Expected Outcome

- All Cases auto-create correctly from each channel.

- Omni-Channel routes Cases based on priority, workload, and queue settings.

- SLA timers count accurately; escalations trigger if breached.

- Negative sentiment Cases are flagged automatically.

- Approval Processes and Flows execute as designed.

- Validation Rules prevent invalid data entry.

- Apex Triggers and automation logic work seamlessly.

- Managers can rely on dashboards and reports for real-time insights.

Conclusion

The Salesforce Omni-Channel Support Project demonstrates a **complete end-to-end customer support solution** by integrating multiple channels into a single platform. Key achievements include:

- 🚀 **Centralized Multi-Channel Support** – Customers can reach the organization via Email, WhatsApp, Chat, or Social Media, all managed from one place.

- ⚡ **Automation & SLA Management** – Automatic case creation, routing, SLA tracking, and escalations reduce response time and human error.

- 📊 **Manager Insights & Dashboards** – Real-time dashboards provide actionable insights into case volume, agent performance, SLA compliance, and customer sentiment.

- 🔐 **Robust Security** – Profiles, Permission Sets, Field-Level Security, Role Hierarchy, and Sharing Rules ensure secure access and data protection.

- 💡 **Developer Enhancements** – Apex triggers, Flows, and Lightning Web Components add custom automation, sentiment detection, and notification features.

- 🎯 **Business Impact** – Faster case resolution, improved agent productivity, and enhanced customer satisfaction, making the support system scalable, reliable, and efficient.