

TESTING

Date	05 November 2025
Team Id	NM2025TMID01192
Project Name	CRM Application for Jewel Management

Testing

Testing was conducted to verify the functional accuracy, performance efficiency, and data security of the Jewel Management CRM.

A combination of unit testing, system testing, and user acceptance testing (UAT) was performed.

Apex Trigger Testing

Apex Triggers were validated through Salesforce's built-in test framework to ensure automation accuracy.

Example Scenarios:

- When an Order is created → related Payment record auto-generates.
- When a Payment is marked as “Paid” → Order Status updates to “Completed”.
- When Stock Quantity becomes zero → Jewelry Item Status automatically changes to “Out of Stock”.

Each test verified expected results using Salesforce test classes and assertions, ensuring no business rule violations occurred.

Flow and Automation Testing

The system's Flows were thoroughly tested to confirm automation accuracy and stability.

Flow Test Scenarios:

- **Order Flow:** Verified automatic payment record generation and email confirmation upon order creation.
- **Stock Flow:** Confirmed inventory quantity updates after each sale.
- **Payment Reminder Flow:** Tested scheduled flow to ensure reminders were sent to customers with pending payments.

All automation was verified using Salesforce's Flow Debug Mode and system audit logs.

Email Template Testing

Automated email templates were created and tested to confirm message accuracy and workflow integration.

Email Scenarios Tested:

- Order Confirmation Email → Sent after a successful jewelry order.
- Payment Receipt Email → Sent after payment completion.
- Low Stock Alert → Sent to Admin when jewelry stock is below the threshold.

Each email was customized using Salesforce's Merge Fields and HTML Template Editor for personalized, professional communication.

Approval Process Testing

Approval processes were implemented for specific workflows, such as high-value orders requiring managerial approval.

Testing Steps:

- Created an order above the approval threshold amount.
- Submitted for approval via Salesforce Flow Action.
- Verified approval routing to Manager user.
- Confirmed email notification upon approval or rejection.

This process ensures managerial control over large or special orders, maintaining accountability and reducing financial risks.

Dashboard and Report Validation

Dashboards were validated for real-time data accuracy and proper visualization.

Validation Checks:

- Dashboard data refresh schedules function correctly.
- Graphs display accurate sales totals and payment breakdowns.
- Filters and drill-down reports show data consistency across all records.

This step confirmed that reports and dashboards provided accurate business insights for decision-making.