

FinSmart CRM Project – Phase 10

Quality Assurance Testing

Objective

The goal of this phase is to validate every feature built in FinSmart CRM (Phases 1–9) by preparing and executing test cases. Testing ensures the system meets business requirements, functions correctly, and is user-friendly.

Test Cases

Test Case 1 — Loan Application Record Creation

Use Case / Scenario: Loan Application Record Creation

Test Steps (Input):

- Navigate to Loan Applications tab.
- Create new Loan Application with Loan Amount = 600,000.

Expected Result: Loan_Status__c should auto-set to Under_Review (trigger logic).

Actual Result: Loan saved successfully, Loan_Status__c = Under_Review.

The screenshot shows the 'Information' modal in the FinSmart CRM interface. The modal is titled 'Information' and contains the following fields:

- LoanId**: A text field.
- * Bank_Customer**: A dropdown menu with 'Shrinidhi' selected.
- * Loan_Type**: A dropdown menu with 'Education' selected.
- * Loan_Amount**: A text field with '₹6,000,000.00' entered.
- Interest_Rate**: A text field.
- Tenure_Months**: A text field.
- EMI**: A text field.
- * Loan_Status**: A dropdown menu with 'Draft' selected.
- Credit_Score**: A text field.
- Assigned_To**: A text field.

At the bottom of the modal, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted in blue.



Loan_Application
LA-0010

Related

Details

LoanId

LA-0010

Bank_Customer

[Shrinidhi](#)

Loan_Type

Education



Loan_Amount

₹60,00,000.00



Interest_Rate



Tenure_Months



EMI



Loan_Status

Under_Review



Credit_Score



Test Case 2 — Validation Rule on Loan Amount

Use Case / Scenario: Validation Rule on Loan Amount

Test Steps (Input):

- Create new Loan Application with Loan Amount = 0.

Expected Result: Error message → 'Loan amount must be greater than 0.'

Actual Result: Validation rule fired correctly. (Screenshot placeholder)

New Loan_Application: Home Loan

* = Required Information

Information

LoanId

* Bank_Customer ↶
 ✕

* Loan_Type ↶

* Loan_Amount ↶

 Loan amount must be greater than 0

Interest_Rate

Tenure_Months

✕ **We hit a snag.**

Review the following fields

- [Loan Amount](#)

* Loan_Status ✕

Test Case 3 — Approval Process for High-Value Loan

Use Case / Scenario: Approval Process for High-Value Loan

Test Steps (Input):

- Create Loan Application with Loan Amount = 1,200,000.
- Submit for Approval.

Expected Result: Loan_Status__c → Under_Review. Approval request sent to Manager.

Actual Result: Approval request received. Loan_Status__c updated to Approved.

Test Case 4 — EMI Reminder Scheduled Flow

Use Case / Scenario: EMI Reminder Scheduled Flow

Test Steps (Input):

- Create Repayment record with Due_Date = Today.
- Run scheduled flow.

Expected Result: Customer receives reminder email.

Actual Result: Test email triggered successfully.

Test Case 5 — EMI Calculation (Apex Helper Class)

Use Case / Scenario: EMI Calculation (Apex Helper Class)

Test Steps (Input):

- Run `LoanHelper.calculateEMI(100000, 12, 12)`.

Expected Result: $EMI > 0$.

Actual Result: EMI calculated successfully = 8,885.

Test Case 6 — Credit Bureau Integration

Use Case / Scenario: Credit Bureau Integration

Test Steps (Input):

- Insert Loan Application with status Submitted.
- Run `CreditBureauService.getCreditScore(loan.Id)`.

Expected Result: `Credit_Score__c` updated ($\geq 650 \rightarrow$ Under_Review, else Rejected).

Actual Result: Mock API returned 720. Loan updated to Under_Review.

Test Case 7 — Data Import & Duplicate Rule

Use Case / Scenario: Data Import & Duplicate Rule

Test Steps (Input):

- Use Data Import Wizard to import Customer.csv (duplicate Email).

Expected Result: Duplicate Rule blocks insertion and shows warning.

Actual Result: Duplicate error triggered correctly.

Test Case 8 — Reports

Use Case / Scenario: Reports

Test Steps (Input):

- Navigate to Reports \rightarrow Loan Funnel Report.

Expected Result: Loans grouped by `Loan_Status__c` displayed.

Actual Result: Report generated successfully.

Test Case 9 — Dashboard

Use Case / Scenario: Dashboard

Test Steps (Input):

- Navigate to Dashboards \rightarrow Loan Management Dashboard.

Expected Result: KPI Tiles and charts (Loans by Type, Overdue Trend, etc.) should appear.

Actual Result: Dashboard displayed as designed.

Conclusion

The FinSmart CRM Project has successfully implemented Salesforce features covering data modeling, workflows, validation, automation, integration, reporting, and dashboards.

Final Outcome: FinSmart CRM provides a complete Loan & Customer Management solution with automation, compliance, real-time reporting, and seamless user experience for Bank Officers, Risk Analysts, Managers, and Customers.