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

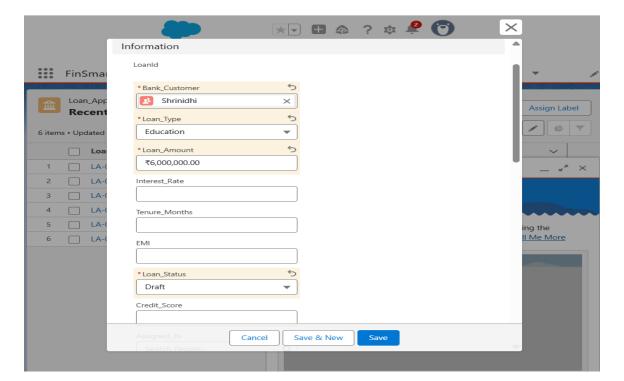
Use Case / Scenario: Loan Application Record Creation

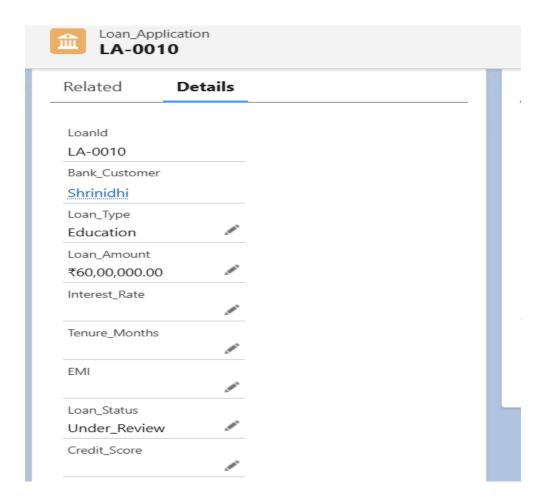
Test Steps (Input):

- 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.





Test Case 2 — Validation Rule on Loan Amount

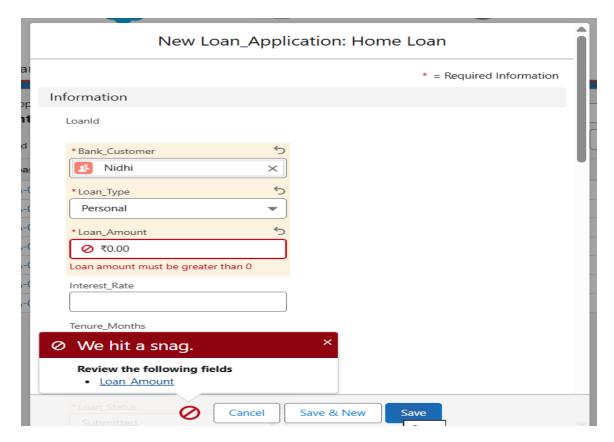
Use Case / Scenario: Validation Rule on Loan Amount

Test Steps (Input):

• Create new Loan Application with Loan Amount = 0.

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

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



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 $c \rightarrow Under$ 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 (>=650 → 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 → 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 → 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.