

Subscription / Personal Services Tracker CRM

Phase 10: Quality Assurance Testing (QA Testing)

Objective:

To validate all CRM features built in previous phases through rigorous testing.

This ensures the system functions correctly, securely, and delivers a smooth user experience before final deployment or demonstration.

Key Testing Areas:

Area	Purpose
Functional Testing	Verify basic operations: Create, Read, Update, Delete (CRUD)
Trigger & Automation	Ensure flows, emails, and Apex triggers work
Validation Rules	Check field-level validations and required fields
UI Testing	Confirm correct layout and related lists
Reports & Dashboards	Validate accurate data visualization
Security Testing	Check field/object access based on profile

Area	Purpose
Bug Tracking	Log and resolve issues before delivery

Step-by-Step Test Cases

Functional Testing

TC1: Create Subscription

- Input: Valid data
- Expected: Record gets created
- Result: Passed

TC2: Update Subscription

- Action: Change Renewal Status to Cancelled
- Expected: Field updated successfully
- Result: Passed

TC3: Delete Subscription

- Expected: Record removed from list
 - Result: Passed
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Trigger & Automation Testing

TC4: Expiry Trigger

- Action: Create subscription with past End Date
- Expected: Renewal_Status__c auto-set to Expired
- Result: Passed

TC5: Reminder Email Flow

- Action: End date = 7 days from today
- Expected: Reminder email triggered
- Result: Passed

TC6: Payment Overdue Trigger

- Input: Payment record with Payment_Status__c = Overdue
- Expected: Apex alert log or email fired
- Result: Passed

◆ Validation Testing

TC7: Required Fields

- Action: Leave End Date blank
- Expected: Error message
- Result: Passed

TC8: Invalid Amount Entry

- Input: Amount = -500
- Expected: Validation error
- Result: Passed / Bug Logged (if allowed)

◆ UI Testing

TC9: Subscription Record Page

- Expected: Fields displayed properly, related lists visible
- Result: Passed

TC10: Contact → Related Subscriptions

- Expected: Correct relationships shown
- Result: Passed

◆ Reports & Dashboards Testing

TC11: Active Subscriptions Report

- Expected: Filters and groupings are working
- Result: Passed

TC12: Revenue Line Chart

- Expected: Data correct and aligned with report
- Result: Passed

TC13: Dashboard Visibility

- Expected: All components render correctly
 - Result: Passed
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Security Testing

TC14: Standard User Access

- Expected: Read-only access to Service Type
- Result: Passed

TC15: Field-Level Visibility

- Expected: Sensitive fields hidden for basic profiles
- Result: Passed

Bug Tracking Table (Sample)

Bug ID Description		Severity	Status
B001	Negative amount allowed in Payment	Medium	Fixed
B002	Reminder email not triggered	High	Fixed
B003	Dashboard slow to load	Low	Accepted

Final Output Summary:

Feature Tested	Status
CRUD operations	✔ Passed
Apex & Flows	✔ Passed

Feature Tested	Status
Field validations	<input checked="" type="checkbox"/> Passed
UI/UX Layouts	<input checked="" type="checkbox"/> Verified
Reports & Dashboards	<input checked="" type="checkbox"/> Verified
Security Controls	<input checked="" type="checkbox"/> Passed
Bugs Identified & Resolved	<input checked="" type="checkbox"/> Done