USER ACCEPTANCE TESTING (UAT)

Date	20th June 2025
Team ID	LTVIP2025TMID29987
Project Name	CRM Application for Jewelry Management – (Developer)
Maximum Marks	*(To be filled by evaluator)*

1. Project Overview

Parameter	Description
Project Name	CRM for Jewel Management
Project Description	A Salesforce-based CRM application to automate customer, item, billing, and order management for a jewelry business.
Project Version	v1.0
Testing Period	19 June 2025 – 20 June 2025

2. Testing Scope

Functionalities to be Tested:

- Customer record creation and editing

- Order placement and association with item

- Automated billing and payment tracking

- Trigger-based email notification

- Role-based access (Admin, Worker, Goldsmith)

- Dashboard and report visualization

User Stories to be Verified:

- USN-01: As a user, I can register a customer and view order history

- USN-02: As an admin, I receive billing confirmation via email

- USN-03: As a worker, I can view item records but not billing details

- USN-04: As a goldsmith, I can access item details and pending orders

3. Testing Environment

Parameter	Value
URL/Platform	https://login.salesforce.com
Testing Org	Salesforce Developer Edition (Custom CRM Build)
Login Credentials	Username: **ketanadinesh.22.it402@agentforce.com** Password: **Dinesh@151**

4. Test Cases Table

Test Case ID	Test Scenario	Test Steps	Expected Result	Actual Result	Pass/Fail
TC-001	Create a new customer record	1. Login 2. Navigate to Jewel Customer 3. Click "New" and fill details	Customer record saved successfully	Record created	Pass
TC-002	Place an order for an item	1. Select Customer 2. Select Item 3. Create Customer Order	Order record linked to item and customer	Works as expected	Pass
TC-003	Generate Billing and auto-calculate payment	1. Create Billing record 2. Enter Paying Amount	Paid_Amount__c auto-updated	Auto-updated on save	Pass
TC-004	Trigger email after billing	1. Save billing record with Paid_Amount__c 2. Check email	Confirmation email sent to customer	Email received	Pass
TC-005	Validation rule on payment	1. Enter Paid Amount > Total Amount	Error message shown	Error validation triggered	Pass

5. Bug Tracking Table

Bug ID	Bug Description	Steps to Reproduce	Severity	Status	Additional Feedback
BG-001	Email not triggered on 1st attempt	1. Create billing2. Save record	Medium	Resolved	Retry through Flow fixed the issue
BG-002	Paid_Amount field not refreshing	1. Update Paying_Amount2. Check Paid_Amount	Low	Closed	Trigger fixed after Apex debug
BG-003	Validation Rule ignored in some cases	1. Save Paid > Total manually	High	Fixed	Rule adjusted to handle blank fields

6. Feedback & Observations

- The CRM flow is smooth and intuitive.

- Email delivery is consistent post-billing.

- Reports provide clear insight into customer and billing records.

- The trigger and validation setup reduce manual errors.

- Performance is stable under normal data load.

Notes & Best Practices

- Cover both positive and negative test cases for each major function.

- Track bugs thoroughly with severity and current status.

- Screenshot each tested step to validate success/failure.

- Gather feedback from users with different roles (Admin, Worker, Goldsmith).

- Ensure all features match user stories before deployment.