Test Plan

A test plan is a detailed document that outlines the strategy, objectives, resources, schedule, and scope of testing activities for a software project. It serves as a roadmap for the testing process, ensuring that all aspects of the software are thoroughly tested and that any issues are identified and addressed before the software is released.

Here is a sample of a test plan below:

Salesforce Sales Cloud Test Plan

08/01/2024

By QA Team (insert name(s))

1. Introduction

Purpose: The purpose of this test plan is to define the testing strategy, objectives, scope, schedule, and resources required for the Salesforce Sales Cloud implementation. This document will guide the testing process to ensure the solution meets business requirements and functions as expected.

Scope: This test plan covers the Salesforce Sales Cloud functionalities, including lead and opportunity management, account and contact management, sales forecasting, and reporting. It also includes integration points with existing systems and data migration.

2. Objectives

- Validate that the Salesforce Sales Cloud implementation meets the business requirements.
- Ensure all functionalities work as expected without defects.
- Verify data integrity and successful data migration.
- Confirm integration with existing systems functions correctly.
- Identify and resolve defects before the production release.

3. Test Items

- Lead Management
- Opportunity Management
- Account and Contact Management
- Sales Forecasting
- Reporting and Dashboards
- Data Migration
- System Integration

4. Features to be Tested

- Lead conversion to opportunity
- Opportunity stages and probability tracking
- Account and contact creation, modification, and deletion
- Sales forecasting accuracy and reporting
- Custom reports and dashboards
- Data migration accuracy and integrity
- Integration with ERP and marketing automation tools

5. Features Not to be Tested

- Salesforce Service Cloud functionalities
- Custom applications outside the scope of Sales Cloud

6. Test Approach

Testing Types:

- Manual Testing: For exploratory and usability testing.
- Automated Testing: For regression and repetitive tasks.
- Performance Testing: To ensure the system handles expected load.
- Security Testing: To ensure data protection and access control.

Testing Levels:

- Unit Testing: By developers.
- Integration Testing: To verify interfaces between components.
- System Testing: To validate the complete system functionality.
- User Acceptance Testing (UAT): By business users to ensure it meets requirements.

7. Test Criteria

Acceptance Criteria:

- All critical and high-priority test cases must pass.
- No critical or high-severity defects remain open.
- UAT sign-off from business stakeholders.

Suspension Criteria:

- Major system failures that block testing.
- Significant number of critical defects.

Resumption Criteria:

- Resolution of major system failures.
- Reduction of critical defects to an acceptable level.

8. Deliverables

- Test Plan Document
- Test Cases and Test Scripts
- Test Data
- Defect Reports
- Test Summary Report
- Business Requirements

9. Testing Tasks

- Prepare test environment.
- Develop test cases and scripts.
- Execute test cases.
- Log and track defects.
- Retest and verify defect fixes.
- Prepare test summary report.

10. Environment

- Salesforce Sales Cloud environment (sandbox and production)
- Test data aligned with real-world scenarios
- Integration endpoints for ERP and marketing automation tools

11. Schedule

- Test Planning: [Start Date] to [End Date]
- Test Case Development: [Start Date] to [End Date]
- Test Execution: [Start Date] to [End Date]
- UAT: [Start Date] to [End Date]
- Test Closure: [End Date]

12. Resources

- Test Manager: Homer Simpson
- Test Engineers: Bart Simpson
- Business Analysts: Lisa Simpson
- Developers: Marge Simpson
- Tools: JIRA, Playwright, TestRail

13. Roles and Responsibilities

- Test Manager: Oversee the testing process, manage resources, and report status.
- Test Engineers: Develop and execute test cases, log defects.
- Business Analysts: Provide requirements and assist with UAT.
- Developers: Fix defects and support testing.

14. Risks and Contingencies

Risks:

- Delays in environment setup.
- Incomplete or ambiguous requirements.
- High defect rates in critical functionalities.

Contingencies:

- Allocate buffer time in the schedule.
- Conduct requirement review sessions.
- Prioritize defect resolution based on severity.

15. Approval

This test plan is approved by the following stakeholders:

- **Client Representative:** _____ Date: _____
- **Project Manager:** _____ Date: _____
- **Test Manager:** _____ Date: _____