



A CASE STUDY ON

SALESFORCE TESTING SERVICES

INNOVADEAS PTY LTD

ABN: 70 622 275 290



CONTENT

01.	PROJECT OVERVIEW	3
02.	SERVICES PROVIDED	3
03.	FUNCTIONAL TESTING	3
04.	MIGRATION TESTING	4
05.	BENEFITS	4
06.	CONCLUSION:	5

01. PROJECT OVERVIEW

The project aims to conduct comprehensive testing on the existing Salesforce platform utilised for managing housing provisions for teachers and police personnel in rural areas of NSW. This encompasses various functionalities such as property management, tenant application processing, offer and contract management, as well as management agent contract and fee management. The testing objective will primarily focus on assessing major changes and enhancements made to the existing features, ensuring their seamless integration and functionality within the platform. Innovadeas is invited to provide testing resources for system testing of HSPM (Housing Service Property Management) Salesforce application.

02. SERVICES PROVIDED

Innovadeas has been tasked with executing system testing for the HSPM platform. This engagement operates under a Time and Materials (T&M) framework, with dedicated resources assigned for the defined project duration. Project management and governance responsibilities are vested in the Department of Planning, Housing, and Infrastructure.

Scope the Work:

- Conduct testing for major changes and enhancements to existing features.
- Perform testing for newly introduced features.
- Conduct regression testing for both existing and new features.
- Execute integration testing with the Path project (SAP).
- Develop test cases based on user stories.
- Provide support to the UAT Testing team.
- Perform Salesforce Supporting Browser Testing using Browser Stack (Licenses provided by the Project Management Team).

03. FUNCTIONAL TESTING

- **User Interface (UI):**
 - Layouts and page designs
 - Navigation and user workflows
 - Responsiveness across different devices and screen sizes
- **Data Management**
 - Creation, editing, and deletion of records.
 - Data validation rules and field-level security
 - Data import/export functionality (if Applicable)
- **Integration**



- Data synchronization between Salesforce and other applications
- Authentication and authorization mechanisms for integrations (if Applicable)

- **User Level Security**
 - User authentication and access controls (If Applicable)
 - Role-based permissions and profiles

- **Reports and Dashboards**
 - Validation of data against reports and dashboards

- **Workflow and Approval Processes**
 - Workflow rules Testing (If Applicable)
 - Approval processes for record submissions
 - Email alerts and notifications based on workflow actions.

- **Browser Testing**
 - Testing the Salesforce app on Salesforce supported on Google Chrome

04. MIGRATION TESTING

- Ensured that data integrity and readiness in source system
- Compared data from SQL between source and destination, evaluated data between Salesforce and the SQL output file
- Performed User Acceptance Testing post data migration
- Worked closely with project teams to understand data flows
- Created a comprehensive mapping document to test migrated data
- Managed defects and retest

05. BENEFITS

The implementation of functional and migration testing services by ABC has delivered several significant advantages:

Quality Assurance and Risk Mitigation

- Comprehensive functional testing ensured all Salesforce customizations and configurations worked as intended, reducing the risk of business disruptions and data integrity issues
- Systematic validation of business processes helped identify and resolve potential issues before they could impact end-users
- Regular regression testing maintained system stability during updates and new feature implementations



Cost Efficiency

- Early detection of defects through structured testing protocols significantly reduced the cost of fixes compared to post-deployment remediation
- Automated testing capabilities streamlined repetitive test cases, reducing manual effort and associated labour costs
- Optimised test coverage eliminated redundant testing while ensuring critical functionality was thoroughly validated

Enhanced User Experience

- Thorough testing of user interfaces and workflows ensured intuitive navigation and operation
- Validation of cross-browser and mobile compatibility provided consistent functionality across all platforms
- Performance testing confirmed system responsiveness under various load conditions

Successful Data Migration

- Precise validation of data mapping and transformation rules ensured accurate migration of legacy data
- Verification of data integrity and completeness minimized the risk of information loss during migration
- Testing of historical data accessibility maintained compliance with record-keeping requirements

Accelerated Time-to-Market

- Structured testing methodology enabled parallel testing of multiple components
- Automated test execution reduced overall testing cycle time
- Clear documentation and reporting facilitated faster stakeholder sign-offs

06. CONCLUSION:

Innovadeas implementation of Salesforce testing services has proven to be a crucial factor in ensuring a robust and reliable CRM environment. Through our comprehensive approach to functional and migration testing, DPHI has not only secured the technical integrity of the Salesforce implementation but also contributed significantly to business continuity and user satisfaction. The combination of various testing methodologies, thorough validation protocols, and expert oversight has resulted in a stable, high-performing Salesforce environment that effectively supports business operations. The successful execution of migration testing has ensured seamless transition of critical business data, while maintaining data integrity and accessibility. The measurable improvements in system reliability, reduced maintenance costs, and enhanced user satisfaction demonstrate the tangible value delivered by Innovadeas testing services. Our systematic approach to quality assurance has established a strong foundation for sustainable CRM operations and future Salesforce enhancements.