

SALESFORCE PLATFORM DELIVERY TEAM:

KNOWLEDGE ARTICLE:

Informational Document

Title	Salesforce Release Testing
URL Name	

Summary
The purpose of this document is to describe <i>the best practice</i> used for documenting, evaluating, and testing new release builds from Salesforce. This process involves the evaluation of any potential change or modification that may impact the continued delivery of the Salesforce Platform. This review is in addition to the established validation processes already managed by nCino, Cadalys, and FPI.

Details

There are three types of validation:

1. HAPPY PATH TESTING

“Core Functionality” of features and operations used in either Cadalys or nCino and will be tested for consistency, stability, and accuracy.

Note – nCino testing “Area of Focus” has defined sub-categories as follows: Home, Lead, Account, Product Package, Doc Man.

2. IMPACT POTENTIAL

“Release Update” These are items that have been scheduled to be “enforced” by Salesforce and may have potential impact to our operation.

3. FEATURED ITEMS

“Enhancement” These are new items or features that will be available through the next release and can benefit the use of Salesforce within Northwest.

There are three types of releases:

1. Patch Bug fixes and simple changes. Simple changes include reports, dashboards, list views, and email templates.

2. Minor Changes with limited impact, such as a new workflow rule or trigger impacting a single business process. These releases typically require testing, but only limited training and change management. Typically, a team delivers the changes for a minor release within a few weeks.
3. Major Changes with significant impact, including changes with one or more dependencies. Because these releases can greatly affect the user experience and data quality, they require thorough testing, training, and careful change management. Major releases are typically delivered once a quarter (Salesforce does it three times a year).

All release updates MUST be tested through the release review process. This applies to Cadalys, nCino and Salesforce releases.

All testing must be documented on the following sheets:

[Salesforce Release Review TEMPLATE.xlsx](#)

[Cadalys Release Review TEMPLATE.xlsx](#)

Make a copy of the Template and place it in the corresponding year before testing.