

Salesforce Omnistudio Testing for Insurance Company

Testing and quality assurance (QA) development for a Salesforce-based insurance platform, designed to support operations for a leading global specialty insurer.



Client*

A global specialty insurance provider offering innovative risk management solutions, serving commercial clients and underwriting partners across multiple industries.

*Due to NDA restrictions, specific client details and case study insights cannot be disclosed.

DURATION
2025 - Present

TEAM
3 specialists

The team involved in the project

INDUSTRY
Insurance

REGION
USA and Canada

SOLUTION
CRM, BPA

TECHNOLOGIES
Testing: End-to-end (E2E) tests for policy creation processes built on Salesforce Omnistudio
Backend: .NET 8 backend services unit testing
Frontend: Angular 17, DevExtreme, Jasmine, Karma

SERVICES
Quality Assurance, Regression Testing

Specialty Lease Salesforce Solution

1 Delivery Manager
3 Backend Developers
2 PM/BA Hybrid Roles
1 QA Engineer

Legal Ease Platform

2 Salesforce Developers
2 Full-Stack Developers (.NET + Angular for web components)
1 Project Manager
3 x Android Developers
1 x QA Automation Engineer

Challenge

The project encountered several key challenges:



Ensuring seamless integration of new side apps within Salesforce



Regression testing of Omnistudio package upgrades



Testing new insurance products and document templates for multiple countries

Solution & Functionality

To address these challenges, the team implemented a comprehensive testing strategy.

Smoke testing

Smoke testing was conducted for new Salesforce app integrations to ensure basic functionality and stability.

Regression testing

Regression testing was performed for Omnistudio package upgrades to confirm that no existing features were disrupted. New insurance products and document templates for Canada and other countries were rigorously tested to validate their logic and compliance with business requirements. basic functionality and stability.

Salesforce objects and processes

The team also validated new Salesforce objects, fields, and approval routing logic to support the automation of licensing processes. Email notification triggers and wording were tested within end-to-end insurance processes to ensure accuracy and consistency.

Compliance management

Ensured adherence to multi-country document standards, including tailored testing for regional markets

Bug resolution

Fixed critical Omnistudio-related issues, restoring core functionality and improving system reliability



End-to-End Testing

Executed smoke, regression, and integration testing for new Salesforce apps and Omnistudio upgrades

Process automation

Enhanced efficiency through automated licensing workflows, validated via new Salesforce objects and approval routing logic

Results and business value

The efforts of the team delivered significant business value. The quality and reliability of the insurance management system were greatly improved, ensuring smoother operations.



Process automation

Automation of licensing processes through new Salesforce objects and fields enhanced efficiency and reduced manual effort.



Compliance management

Compliance with document templates and wordings for various countries was ensured, minimizing the risk of errors and inconsistencies.



Bug resolution

Production bugs related to Omniscritps were resolved, restoring core functionality and improving user experience.

Do you have a similar project idea?