

AUTOMOTIVE CRM INTEGRATION TESTING CHECKLIST

Use made up customer names with your own phone number and an inbox you control. Write the expected result before you run each case, then record the actual result and pass or fail. Run the delivery, parsing and ownership cases for every lead source, and the failure and recovery cases once per CRM. When a test is done, mark the test lead Lost with the Test Lead reason. Retest every quarter and after any change on the provider's side.

TEST CASES

Area	Test	How to run it	A pass looks like	Actual result	Pass or fail
☐ Delivery	Intake email	Send a lead email to the source's intake address.	A new lead within a minute or two, with the source label on the row.		
☐ Delivery	Form intake link	Submit the website form that posts to the source's form intake link.	Name, phone, email, vehicle and comments each in the right field.		
☐ Delivery	JSON post	Ask the vendor to post one test lead as JSON.	The same fields mapped as a form post.		
☐ Delivery	Tracking number	Call the source's tracking number from your phone.	The call carries the same source as the form leads.		
☐ Delivery	Activity Log	Open the source's Activity Log after each test.	A Success line with the time, the sender and the lead ID.		
☐ Delivery	Counters	Read Total Leads Received and Last Lead Received.	Both reflect the test.		
☐ Delivery	Alert	Watch the assigned salesperson's phone.	The alert arrives with the lead.		
☐ Delivery	First message	Watch your own phone and inbox.	The first text and email arrive under the salesperson's name.		
☐ Delivery	Manager copy	Check the manager's inbox.	A copy of the lead when the manager is on the source.		

Area	Test	How to run it	A pass looks like	Actual result	Pass or fail
☐ ADF	Clean ADF	Send a clean ADF document from each provider.	Customer, phone, email, vehicle, VIN and comments in their own fields.		
☐ ADF	ADF attached	Send the ADF as an attachment instead of in the body.	The same complete lead.		
☐ ADF	Plain or HTML email	Send a lead email with no XML.	It still becomes a lead.		
☐ ADF	Free text vehicle	Send a vehicle string that starts with Certified Pre-Owned or New.	Make never reads New; the year is the model year.		
☐ ADF	No vehicle	Send a lead with no vehicle.	Vehicle fields empty, not guessed.		
☐ ADF	Trade-in	Send a document with a trade.	Your team knows where the trade details land.		
☐ ADF	Long comment	Send a comment with line breaks and special characters.	Readable on the lead.		
☐ Ownership	Returning customer	On a rotating source, send a lead for a test customer who already has a salesperson.	Back to that salesperson, matched by phone or email.		
☐ Ownership	Two sources	Send the same test customer through two rotating sources ten minutes apart.	Both leads with the same salesperson.		
☐ Ownership	Rotation order	Send three leads in a row to a round robin source.	Each goes to the next person in the rotation.		
☐ Ownership	Single owner	Send a lead to a source assigned to one person.	It lands on that person every time.		
☐ Ownership	Merge	Run Merge Duplicate Records on two test records for one customer.	Newest record kept, history folded in.		
☐ Ownership	Co-buyer	Add a co-buyer to the test customer.	One shared Customer Profile.		

Area	Test	How to run it	A pass looks like	Actual result	Pass or fail
☐ Media	Photo by text	Text a photo from your test phone to the store's number.	An MMS with the picture in the SMS inbox and on the timeline.		
☐ Media	Several photos	Send two photos in one message.	Each one opens.		
☐ Media	Deal Jacket	Start New Deal from the test lead and add a photo with the QR intake.	The photo appears in the Deal Jacket.		
☐ Media	Vehicle insert	Send a unit with the vehicle insert button.	The text arrives with the photo and price.		
☐ Media	Delivery status	Check each outgoing test text.	The bubble reads delivered.		
☐ Recovery	Paused source	Untick Active on a test source and send a lead.	Feed inactive in the Activity Log. Tick Active again.		
☐ Recovery	Wrong address	Send a lead to an intake address with one character changed.	Intake unknown in the Activity Log.		
☐ Recovery	Unreadable email	Send an email with no lead in it.	Parse failed in the Activity Log.		
☐ Recovery	Provider quiet	Compare Last Lead Received with the provider's count.	Any gap gets the ready request from What happens next.		
☐ Recovery	Deleted lead	Delete a test lead, then restore it.	In the Trash Bin with the reason, and restored.		
☐ Recovery	Opted out number	Add your number to the DNC Blacklist and schedule a text to it.	Will not send on the scheduled message.		
☐ Recovery	Second CRM	Turn on Instant push to CRM email and send a test lead.	Exactly one record in the other CRM, with ADF attached.		
☐ Cleanup	Test leads	Mark every test lead Lost with the Test Lead reason.	Test leads out of the results that matter.		

SIGN OFF

Lead source	Tested by	All cases passed	Open issues	Retest trigger
☐				Every quarter
☐				Provider change
☐				Website form change
☐				Last Lead Received looks wrong
☐				
☐				

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