CRM campaign QA scenarios and result log

A verification template that checks the audience, events, exits and links against actual results

A practical IXC resource for adoption decisions and delivery

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Using this resource

Connects the normal and exception conditions of a campaign design to test data and records receipt, navigation and exit results.

CRM operators, QA staff and data integration developers

Contents

01 Turn design conditions into testable questions 3

02 Prepare samples that differ in account, consent and workspace 4

03 Look at cases where event order and retries vary 5

04 Test the message and the next screen together 6

05 Record expected outcomes beside observed facts 7

06 Carry remaining failures into the send decision and handover 8

How to complete and reuse it

Read the criteria in this PDF, then fill the blank fields with your actual conditions and anything still unconfirmed. The Excel file for the same practice area has a worksheet for each resource. Keep the worked examples separate from real customer cases and confirmed quotes.

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Turn design conditions into testable questions

Before checking off items on the send approval sheet, decide what to confirm and with which users and events. The campaign ID and configuration version are where the test record starts.

The common example, IXC-DEMO-01, is a design for a fictional B2B collaboration service that prompts users to complete shared work after accepting a team invitation. It uses the case in which usr_demo_01 has accepted inv_demo_01 in ws_demo_01 but has not finished the shared work. The tables that follow give the design example and its expected outcomes; record the results of runs on your actual account in the blank fields. The example channel is web push, and each user has one active invitation. The same piece of work is linked through campaign_id, user_id, workspace_id and invitation_id.

Verification boundary	Question	Evidence to keep
Audience	Are the current account and workspace the right ones?	Identifiers and audience sample
Timing	Are late completion events also reflected?	Occurrence, receipt and evaluation times
Exit	Do messages stop after the user completes or leaves?	Exit condition and execution record
Navigation	Does the recipient land on a screen they have access to?	Device, login and link results

Entry event and target behavior

The invitation_accepted event creates entry candidates, and shared_task_completed is the target behavior. Write down the linking criteria so that, even for the same user, completion in another workspace does not end the current message.

Prepare samples that differ in account, consent and workspace

A single person's normal account alone makes sends to the wrong audience hard to find. For each test, separate the one condition to change from the conditions to keep.

Test ID	Preparation condition	Input and action	Expected outcome
QA-01	Not completed, subscribed	Wait condition met after accepting the invitation	Message candidate on the designed channel
QA-02	Completed	Invitation event received after completion	No message to users who completed
QA-03	Same device, account switch	Account A logs out, then B logs in	A's messages and data not exposed to B
QA-04	Opted out of the channel	Subscription state changes while waiting	Excluded from sends on that channel
QA-05	Completion in another workspace	Completion with another workspace_id received	Not mistaken for completion of the current work

Keep test accounts separate from real customers and limit the send scope to the test audience. In the account switch test, check the server's user ID and its OneSignal User/Subscription link together with the login state on the device. Marketing consent and app login are separate states, so record each one.

Look at cases where event order and retries vary

Treat the assumption that each event arrives once and in order as a test item. Check the periods in which the product's actual state differs from the state the Journey has observed.

Test ID	Changed condition	Input and action	Expected outcome
QA-06	Duplicate events for the same work	Same business event resent	Meets the rule preventing duplicate messages and counts
QA-07	Delayed completion event	Arrives after completion, before the send is evaluated	Excluded after checking the current state
QA-08	Completion received before entry	Order: completion → invitation accepted	No reminder restarted from stale entry data
QA-09	Required linking ID missing	Input without workspace_id	Set aside as an error; audience not guessed
QA-10	Member left or access revoked	Membership deleted while waiting	Messages and screen access blocked once access is lost

> **When state cannot be confirmed during a delay**
>
> If completion cannot be confirmed when the send is evaluated, set the tolerated delay, the hold/recheck path and the owner. Do not assume the Journey's event conditions alone can infer a business state that has not yet been received.

Test the message and the next screen together

A successful send request is a different result from actual receipt and navigation. If you capture only the message screen and end the test, you can miss access errors at the destination. Receipt and link tests for mobile apps apply when you use that channel.

Test ID	Preparation condition	Behavior to check	Expected outcome
QA-11	Missing or long substitution values	Title, body and lock screen	Meets the rules for fallback text, readability and information shown
QA-12	App closed or logged out	Opening the link and logging back in	Goes to the correct work after an access check
QA-13	Work deleted or access expired	Reopening a saved link	Goes to a notice screen; no other data exposed
QA-14	Retest after a configuration change	Checking the changed audience, copy and timing	Reviewed version matches the version actually scheduled

Execution environment record

Item	Value to record	Actual value
Campaign and version	IXC-DEMO-01 / configuration version	
Channel and device	Channel / OS / app and SDK version	
Time and evidence	Occurrence and receipt times / log location	

Request acceptance, provider transmission, device receipt, open/click and work completion each differ in what can be collected. Leave stages you could not observe as unconfirmed, and do not mark receipt as complete on API success alone.

Record expected outcomes beside observed facts

Rather than calculating a pass rate first, keep the basis for each scenario. Distinguish tests that were not run from tests that were run but not observed.

Scenario execution record

Test and input ID	Expected outcome	Observed facts and evidence	Status and owner
QA-01 / data version			
QA-03 / data version			
QA-07 / data version			

Record status as PASS, FAIL, BLOCKED or NOT RUN. For BLOCKED, write down the condition that prevented execution or observation. After fixing a failure, do not erase the original result; link the retest ID and configuration version to it. If failures involving accounts, access or consent remain, pass their impact on to the subsequent send decision.

> **Worked example: opening the link after access is revoked**
>
> The expected outcome for QA-10 is both message exclusion and blocked screen access. If you confirmed only the send exclusion and did not run the link's access check, record the two results separately. Do not merge unconfirmed screen access into a PASS.

Carry remaining failures into the send decision and handover

Separate issues a configuration change will resolve from those that need data or app fixes. Whoever decides whether to proceed with the send must receive the remaining impact and its basis.

Fix and retest handover

Issue and test ID	Fix scope and owner	Retest and evidence	Send decision
Audience and identity issues			
Exit and duplicate issues			
Receipt and link issues			

Link the campaign ID, configuration version, audience and channels tested, untested scope, impact of failures and retest records to the final approval. Decide on READY, READY WITH CONDITIONS or HOLD in the existing campaign send checklist, and record the conditions and owners. Use the scenarios in this resource as input for checking the boundary between product state and the messaging system.

> **Verification scope to set with IXC**
>
> Starting from the campaign design specification and failure records, decide which work is needed: data integration, real-device verification, Journey exit/re-entry verification and operational handover.

IXC

Publication and use

Based on your current Journey design, test accounts and recent failure records, we set the scope of work for data integration, campaign verification and operations.

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www.ixc.co.kr/en/assets/crm-campaign-qa

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https://documentation.onesignal.com/docs/en/users

OneSignal: Event-driven Journeys

https://documentation.onesignal.com/docs/en/event-driven-journeys

OneSignal: Push overview

https://documentation.onesignal.com/docs/en/push

IXC Pre-send checklist and journey operating rules

https://www.ixc.co.kr/en/assets/campaign-send-checklist