**Test Specification for Zoho CRM Lead Module**

**Project Name: Zoho CRM Lead Module Testing**

**Module: Lead Management**

**1. Test Overview**

This test specification outlines the approach and results for testing the **Lead Management Module** in **Zoho CRM**, specifically covering the functionalities of **Create Lead, Modify Lead, Filter Lead, and Delete Lead**. The purpose is to ensure that the lead management functionalities work as expected and to identify any defects or issues that may impact the user experience.

**2. Test Scope**

* **In Scope**:
  + Lead creation via the CRM interface.
  + Modifying lead details after creation.
  + Filtering leads based on various attributes.
  + Deleting leads from the system.
* **Out of Scope**:
  + Integration with external tools.
  + Lead conversion to contacts or opportunities.
  + Lead import/export functionalities.

**3. Test Environment**

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| --- | --- |
| Environment | Details |
| Zoho CRM Version | [Version Number] |
| Operating System | Windows 10 / macOS [Version] |
| Web Browser | Google Chrome v[Version], Firefox v[Version] |
| Database Used | [If Applicable] |
| Test Data | Predefined lead data for testing |

**4. Test Case Summary**

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| --- | --- | --- | --- |
| Test Case ID | Test Case Title | Functionality | Status |
| TC001 | Create New Lead | Create Lead | Pass |
| TC002 | Modify Existing Lead | Modify Lead | Pass |
| TC003 | Filter Leads by Criteria | Filter Lead | Pass |
| TC004 | Delete Lead | Delete Lead | Pass |

**5. Test Cases and Results**

**Test Case 1: Create New Lead**

* **Test Case ID**: TC001
* **Objective**: Verify that a new lead can be created successfully with valid data.
* **Preconditions**:
  + User must be logged into Zoho CRM with sufficient permissions to create a lead.
  + The required fields for lead creation (e.g., name, email) are known.

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| --- | --- | --- | --- | --- |
| Step No. | Action | Expected Result | Actual Result | Status |
| 1 | Navigate to "Leads" module in Zoho CRM | Leads module is displayed | As Expected | Pass |
| 2 | Click on "Create Lead" button | Lead creation form is displayed | As Expected | Pass |
| 3 | Enter valid data in required fields | Fields accept valid data | As Expected | Pass |
| 4 | Click on "Save" | Lead is saved, and a success message appears | As Expected | Pass |
| 5 | Verify lead appears in lead list | Lead is listed in the module | As Expected | Pass |

* **Test Result**: Pass

**Test Case 2: Modify Existing Lead**

* **Test Case ID**: TC002
* **Objective**: Ensure that an existing lead can be modified successfully.
* **Preconditions**:
  + A valid lead exists in the CRM system.

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| --- | --- | --- | --- | --- |
| Step No. | Action | Expected Result | Actual Result | Status |
| 1 | Search for an existing lead in the lead list | Lead is displayed in the search results | As Expected | Pass |
| 2 | Click on the lead's name to open its details | Lead details page is displayed | As Expected | Pass |
| 3 | Click on "Edit" and modify the lead's details | Changes are accepted and the "Save" button is enabled | As Expected | Pass |
| 4 | Click "Save" | Changes are saved, and a confirmation message appears | As Expected | Pass |
| 5 | Verify changes in the lead list | The modified data is displayed in the lead list | As Expected | Pass |

* **Test Result**: Pass

**Test Case 3: Filter Leads by Criteria**

* **Test Case ID**: TC003
* **Objective**: Test the ability to filter leads based on specific criteria (e.g., location, status, lead source).
* **Preconditions**:
  + Multiple leads are present in the system with varying data attributes (e.g., status, source).

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| Step No. | Action | Expected Result | Actual Result | Status |
| 1 | Navigate to the "Leads" module | Leads module is displayed | As Expected | Pass |
| 2 | Click on the "Filter" option | Filter panel is displayed | As Expected | Pass |
| 3 | Apply filters (e.g., "Status = New") | Only leads that meet the filter criteria are displayed | As Expected | Pass |
| 4 | Modify filter criteria (e.g., "Source = Web") | Filtered results update according to the new criteria | As Expected | Pass |
| 5 | Clear filters | Full list of leads is displayed again | As Expected | Pass |

* **Test Result**: Pass

**Test Case 4: Delete Lead**

* **Test Case ID**: TC004
* **Objective**: Verify that a lead can be deleted successfully and is removed from the lead list.
* **Preconditions**:
  + A valid lead exists in the system that can be deleted.

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| --- | --- | --- | --- | --- |
| Step No. | Action | Expected Result | Actual Result | Status |
| 1 | Search for the lead to be deleted | Lead is displayed in the search results | As Expected | Pass |
| 2 | Select the lead and click on "Delete" | A confirmation prompt is displayed | As Expected | Pass |
| 3 | Confirm the deletion | Lead is deleted, and a success message appears | As Expected | Pass |
| 4 | Verify the lead no longer appears in the list | The deleted lead is no longer visible in the lead list | As Expected | Pass |

* **Test Result**: Pass

**6. Defects Identified**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Defect ID | Test Case ID | Description | Severity | Status |
| N/A | N/A | No defects found | N/A | N/A |

**7. Summary of Test Results**

* **Total Test Cases Executed**: 4
* **Total Passed**: 4
* **Total Failed**: 0
* **Blocked Test Cases**: 0
* **Defects Logged**: 0

**8. Conclusion**

All functionalities tested within the **Zoho CRM Lead Module** (Create Lead, Modify Lead, Filter Lead, and Delete Lead) performed as expected. The module is functioning correctly, and no critical defects were identified during this testing phase. Further testing of integrations and edge cases may be required based on additional use cases.

**9. Recommendations**

* Conduct further testing on **lead integrations** with third-party platforms (e.g., lead capture from web forms).
* Perform **stress testing** by creating, modifying, and filtering a large volume of leads.
* Ensure comprehensive **user role testing** to validate permissions and access control for lead data.