Requirements

This application is used to manage and analyse customer interactions and data throughout the customer lifecycle.

URL - <http://leaftaps.com/opentaps/control/login>

Product features

Clicking on **“Leads”,** Table named **“Shortcuts”** containing **“Create Lead, My Leads, Find Leads, Merge Leads”** should be displayed.

**1. Create Lead**

* 1. Clicking on **“Create Lead”**, “**Create Lead” Form** page should be displayed on the right side of the page.
     1. Small clipart image should be displayed on the left side of the header **“Create Lead”.**
        1. Clipart image size should be lower than 2kb.
     2. Main header **“Create Lead”** andsubheadings **“Contact Information”** and **“Primary Address”** should be highlighted in **green** colour.
        1. Main header **“Create Lead”** font size should be 14pt.
        2. subheadings **“Contact Information”** and **“Primary Address”** font size should be 12px.
        3. subheadings **“Contact Information”** and **“Primary Address”** font size should be 12px.
        4. Main header **“Create Lead** “andsubheadings **“Contact Information”** and **“Primary Address”** font should be **white** colour.
     3. **“Create Lead” Form** page should be able to scroll up and down.
     4. Error messages should be highlighted in **red** colour.
  2. **“Company Name**” should be displayed in the **“Create Lead” Form** Page under the main heading on left side with the following features:
     1. Text field should be provided corresponding to the right side of the text **“Company Name”.**
     2. Text field should accept 80 characters.
     3. **“Company Name”** should be highlighted in **red** colour.
     4. **“Company Name”** should be mandatory.
     5. Asterisk symbol “**\***” should be provided to represent mandatory.
     6. **“Company Name”** text field should accept alphabets.
     7. **“Company Name”** should follow uppercase letters only.
  3. **“Forename**” text field should be displayed in the “**Create Lead” Form** Page under the main heading on left side with the following features:
     1. Text field should be provided corresponding to the right side of the text **“Forename**”.
     2. **“Forename**” should accept 20 characters.
     3. **“Forename**” should accept only alphabets.
     4. **“Forename**” should be highlighted in **red** colour.
     5. **“Forename**” should be mandatory.
     6. Asterisk symbol “**\***” should be provided to represent mandatory.
     7. **“Forename**” text field should accept alphanumeric and special characters.
  4. “**Source”** field should be displayed in the **“Create Lead”** Form page under the main heading on left side with following features:
     1. “**Source”** field should be able to drop down.
     2. Text field should be provided on the right side corresponding to the text **“Source”** field.
     3. Dropdown lists should contain:
        1. **“Cold call”**
        2. **“Conference”**
        3. **“Direct Mail”**
        4. **“Employee”**
        5. **“Existing Customer”**
        6. **“Other”**
        7. **“Partner”**
        8. **“Public Relations”**
        9. **“Self Generated”**
        10. **“Trade show”**
        11. **“Website”**
        12. **“Word of Mouth”**
     4. Drop down lists should be in an alphabetical order.
  5. “**First Name (Local)”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with following features:
     1. Text field should be provided corresponding to the right side of the text “**First Name (Local)”**
     2. “**First Name (Local)”** should accept only alphabets.
     3. Text field should accept 20 characters.
     4. **“First Name (Local)”** should follow sentence case.
  6. **“Salutation”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with following features:
     1. **“Salutation”** should have dropdown which contains:
        1. “Dear
        2. “Hello”
  7. **“Title”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with the following features:
     1. Text field should be provided corresponding to the right side of the text **“Title”.**
     2. **“Title”** should have dropdown which contains:
        1. **“Mr”**
        2. **“Mrs”**
        3. **“Miss”**
  8. **“Annual Revenue”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with the following features:
     1. Text field should be provided corresponding to the right side of the text **“Annual Revenue”.**
     2. **“Annual Revenue”** should only accept numerical values.
  9. **“Industry”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with the following features:
     1. Text field should be provided corresponding to the right side of the text **“Industry”.**
     2. **“Industry”** should have dropdown which contains:
        1. **“Aerospace”**
        2. **“Computer Hardware”**
        3. **“Computer Software”**
        4. **“Distribution”**
        5. **“Finance”**
        6. **“General Services”**
        7. **“Health Care”**
        8. **“Insurance”**
        9. **“Manufacturing”**
        10. **“Media”**
        11. **“Non-profit”**
        12. **“Real Estate”**
        13. **“Retail”**
        14. **“E-tailer”**
        15. **“Telecommunications”**
        16. **“Press”**
     3. Dropdownsshould be in alphabetical order.
  10. **“Ownership”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Ownership”.**
      2. **“Ownership”** should have dropdowns which contains:
         1. **“Sole proprietorship”**
         2. **“Partnership”**
         3. **“LLC/LLP”**
         4. **“S-corporation”**
         5. **“Corporation”**
         6. **“Public Corporation”**
      3. Dropdowns should be in alphabetical order.
  11. **“SIC Code”** should be displayed in the **“Create Lead”** Form page under the main heading on left side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“SIC Code”.**
      2. **“SIC Code”** should only accept alphabets and numerical values.
  12. **“Description”** should be provided in the **“Create Lead”** Form page under the main heading on left side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Description”.**
      2. **“Description”** should accept up to 50 characters.
  13. **“Important Note”** should provide in the **“Create Lead”** Form page under the main heading on left side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Important Note”.**
      2. **“Important Note”** should accept up to 50 characters.
  14. **“Parent Account”** should provide in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Parent Account”.**
      2. On the right side adjacent to the text field ,there should be a small clipart image.
         1. While clicking on clipart image , user should be redirected to [Find Accounts (leaftaps.com)](http://leaftaps.com/crmsfa/control/LookupAccounts;jsessionid=8D757CF67B0BB4A2A690F3867D2B87FD.jvm1?id=)
         2. Clipart image should be of height 14 and width 15.
         3. File size should not exceed above 130 B.
  15. **“Surname”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Surname”.**
      2. **“Surname”** should be highlighted in **red** colour.
      3. **“Surname”** is mandatory.
      4. Asterisk symbol **“\*”** should be provided to represent mandatory.
      5. Text field should accept 10 characters.
  16. **” Marketing Campaign”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Marketing Campaign”.**
      2. **“Marketing Campaign”** should have dropdowns which contains**:**
         1. **“Affiliate Sites”**
         2. **“Automobile”**
         3. **“Car and Driver”**
         4. **“Catalog Generating Marketing Campaigns”**
         5. **“Demo Marketing Campaign”**
         6. **“eCommerce Site Internal Campaign”**
         7. **“Pay Per Click Advertising”**
         8. **“Road and Track”**
      3. Dropdowns should be in an alphabetical order.
  17. “**Last Name (Local)”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text “**Last Name (Local)”**
      2. “**Last Name (Local)”** should accept only alphabets.
      3. Text field should accept 80 characters.
      4. “**Last Name (Local)”** should follow sentence case which is followed by **“First Name(Local)”.**
  18. **“Date of birth”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Date of birth”.**
      2. On the right side adjacent to the text field, there should be a small clipart image to adjust date , month and year.
         1. Check the calendar control is as per dd/mm/yy format.
         2. Date, month and year should be displayed in the picker in "Create Lead” form page
         3. Check if February 30 or 31 is accepted in the date format
         4. Date, Month and Year should be separated by ‘/’ only.
         5. Height and width of the clipart image should be 16 and 16px respectively.
  19. **“Department”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Department”.**
  20. **“Preferred Currency”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Preferred Currency”.**
      2. Text field should be drop down where all the global currencies should be listed.
  21. **“Number Of Employees”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Number Of Employees”.**
      2. **“Number Of Employees”** should only accept numerical values.
  22. **“Ticker Symbol”** should be displayed in the **“Create Lead”** Form page under the main heading on right side with the following features:
      1. Text field should be provided corresponding to the right side of the text **“Ticker Symbol”.**
      2. **“Ticker Symbol”** should acceptalphabets as wells as special characters.
  23. Subheading **“Contact Information”** should be displayed in the **“Create Lead”** Form page under the details mentioned above (middle layer of the **“Create Lead”** Form page)
      1. Under subheading, **“Country Code”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Country Code”.**
         2. **“Country Code”** should only accept numerical values.
      2. Under subheading, **“Area Code”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Area Code”.**
         2. **“Area Code”** should only accept numerical values.
      3. Under subheading, **“Extension”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Extension”.**
      4. Under subheading, **“E-Mail Address”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“E-Mail Address”.**
         2. Text field should accept special characters, numbers and alphabets.
      5. Under subheading, **“Phone Number”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Phone Number”.**
         2. **“Phone Number”** text field should only accept numerical values.
      6. Under subheading, **“Person to Ask For”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Person to Ask For”.**
         2. **“Person to Ask For”** should only accept alphabets.
      7. Under subheading, **“Web Url”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text “**Web Url”.**
         2. **“Web Url”** should accept alphabets , numerical values and special characters.
  24. Subheading “**Primary Address”** should be displayed in the **“Create Lead”** Form page under the **“Contact Information”** (lower layer of the **“Create Lead”** Form page)
      1. Under subheading, **“To Name”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“To Name”.**
         2. Text field should accept 20 characters.
         3. Text field should only accept alphabets.
      2. Under subheading, **“Address Line 1”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Address Line 1”.**
         2. Text field should accept up to 25 characters.
      3. Under subheading, **“City”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“City”.**
      4. Under subheading, **“Postal Code”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Postal Code”.**
         2. Text field should accept only numerical values.
      5. Under subheading, text **“Zip/Postal Code Extension”** should be displayed on left side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Zip/Postal Code Extension”.**
      6. Under subheading, **“Attention Name”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Attention Name”.**
         2. Text field should accept 20 characters.
         3. Text field should only accept alphabets.
      7. Under subheading, **“Address Line 2”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Address Line 2”.**
         2. Text field should accept up to 25characters.
      8. Under subheading, **“State/Province”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text **“State/Province”.**
         2. Text field **“State/Province”** should have dropdowns.
         3. Dropdowns should follow which we follows based on **“Country”** below**.**
      9. Under subheading, **“Country”** should be displayed on right side of the page.
         1. Text field should be provided corresponding to the right side of the text **“Country”.**
         2. Text field **“Country”** should have dropdowns.
         3. Dropdowns should follow all global countries
  25. Small option box which displays “Create Lead” should be displayed in the left lowermost side of the **“Create Lead”** Form page.
  26. After entering the data’s which we provided in the **Create Form** page, clicking **“Create Lead”** should be clickable and it should redirect to the next page.

1. **My Leads**
   1. Clicking on **“My Leads”**, “**My leads” page** should be displayed on the right side of the page.
      1. Main header **“My Leads”** andsubheadings **“Lead List”** should be highlighted in **green** colour.
         1. Main header **“My Leads”** font size should be 14pt.
         2. subheadings **“Lead List”** font size should be 11px.
         3. Main header **“My Leads** “andsubheading **“Lead List”** font should be **white** colour.
         4. Small clipart image should be displayed on the left side of the header **“My Leads”.**
         5. Clipart image size should be lower than 2kb.
   2. Below the subheading **“Lead List”,** Table should be displayed in which it contains these components respectively:
      1. **“Lead ID | First Name | Last Name | Company Name | City | State/Province | Phone Number | E-mail Address”.**
      2. Each category should have each dropdown.
      3. Subheading **“Lead List”** should have a dropdown (an arrow option to appear the table and to disappear the table) on the right side of the subheading.
      4. An clickable option should be displayed if we created more than one page.
         1. There should be **symbols** provided for **previous** and **next** to navigate when we created more than leads.
      5. An option **“Export To Excel”** should be displayed on lowermost side of the table.
         1. Clicking option **“Export To Excel”, table** datasheet should be converted to excel format.
2. **Find Leads**
   1. Clicking on **“Find Leads”**, “**Find Leads” page** should be displayed on the right side of the page.
      1. Main header **“Find Leads”** andsubheadings **“Find by”** and **“Lead List”** should be highlighted in **green** colour.
         1. Main header **“Find Leads”** font size should be 14pt.
         2. subheadings **“Lead List”** font size should be 11px.
         3. Main header **“Find Leads** “andsubheadings **“Find by”** and “**Lead List”** font should be **white** colour.
         4. Small clipart image should be displayed on the left side of the header **“Find Leads”.**
         5. Clipart image size should be lower than 2kb.
      2. Subheadings should be displayed as dropdowns:
         1. Clicking on **“Find by”,** Table should contain below categories respectively:
            1. **“Name and ID | Phone | Email | Advanced”**

Clicking on **“Name and ID”**, table should contain below categories respectively:

**“Lead ID”**

Text field should be provided corresponding to the right side of the text **“Lead ID”.**

**“Lead ID”** should only accept numerical values.

**“First Name”**

Text field should be provided corresponding to the right side of the text **“First Name”.**

**“First Name”** should follow sentence case**(which is followed by “Create Leads”).**

**“Last Name”**

Text field should be provided corresponding to the right side of the text **“Last Name”.**

**“Last Name”** should follow sentence case which is followed by **“First Name” (which is followed by “Create Leads”).**

**“Company Name”**

Text field should be provided corresponding to the right side of the text **“Company Name”.**

**“Company Name”** should follow uppercase letters only.

Clicking on **“Phone”**, table should contain below categories respectively:

**“Phone number”** text should be displayed in the left side of the table followed by **“Country Code”, “Area Code”, “Phone number”** **text fields.**

Clicking on **“Email”**, table should contain below text field

**“Email ”** text should be displayed into the top side of table followed by text field on the downside side

Clicking on **“Advanced”**, table should contain below categories respectively:

**“Classification”**

Text field should be displayed on the right side of the text **“Classification”.**

Text field should be dropdowns which contains:

**“Amazon.com customers”**

**“Do Not Ship Customers”**

**“Due upon 10th of month”**

**“Good Customers”**

**“Net 30 day billing”**

**“Net 60 day billing”**

**“New Customers”**

**“Privileged Customers”**

Dropdowns should be in an alphabetical order.

User should be able to type text to ease up the task which is present in dropdown itself.

**“To Name”**

Text field should be provided corresponding to the right side of the text **“To Name”.**

field should accept 20 characters.

Text field should only accept alphabets.

**“Attention Name”**

Text field should be provided corresponding to the right side of the text **“Attention Name”.**

Text field should accept 80 characters.

Text field should only accept alphabets.

**“Address Line 1”**

Text field should be provided corresponding to the right side of the text **“Address Line 1”.**

Text field should accept up to 25 characters.

**“City”**

Text field should be provided corresponding to the right side of the text **“City”.**

**“Country”**

Text field should be provided corresponding to the right side of the text **“Country”.**

**“Country”** field should only accept alphabets.

**“Country”** text field should contain dropdowns which include all countries.

User should be able to type text to ease up the dropdowns in **“Country”.**

Text field should only accept alphabets.

**“State/Province”**

Text field should be provided corresponding to the right side of the text **“State/Province”.**

User should be able to type text to ease up the dropdowns in **“State/Province”.**

Text field should only accept alphabets.

**“Postal Code”**

Text field should be provided corresponding to the right side of the text **“Postal Code”**

* + - 1. Clicking on **“Lead List”,** Table should contain below categories respectively:
         1. **“Lead ID | First Name | Last Name | Company Name | City | State/Province | Phone Number | E-mail Address”.**

Each category should have each dropdown.

Subheading **“Lead List”** should have a dropdown (an arrow option to appear the table and to disappear the table) on the right side of the subheading.

A clickable button should be displayed if we created more than one page.

Small button which contains text **“Find Leads”** should be provided to the lower portion of the table.

Button **“Find Leads”** should be clickable where user should be redirected.

1. **Merge Leads**
   1. Clicking on **“Merge Leads”**, **Merge Lead** form page should open.
      1. There should be only a main header” Merge **Leads”.**
         1. Small clipart image should be displayed on the left side of the header **“Merge Leads”.**
         2. Clipart image size should be lower than 2kb.
   2. Under the main heading **“Merge Leads”**, there should be a table which contains the following components:
      1. **“From Lead”** text should be displayed below the main heading.
         1. Text field should be provided corresponding to the right side of the text **“From Lead”**.
         2. Clipart image should be displayed on the right side of text field.
            1. Clipart image should be of height and weight 15 and 14 px respectively.
            2. Clipart image size should not exceed 120 b.
            3. Clicking on clipart image, user should redirected to this respective URL (<http://leaftaps.com/crmsfa/control/LookupLeads?id=&parm0=LookupLeads> )
      2. **“To Lead”** text should be displayed below the **“From Lead”.**
         1. Text field should be provided corresponding to the right side of the text **“To Lead”**.
         2. Clipart image should be displayed on the right side of text field.
            1. Clipart image should be of height and weight 15 and 14 px respectively.
            2. Clipart image size should not exceed 120 b.
      3. Clicking on clipart image, user should be redirected to this respective URL (<http://leaftaps.com/crmsfa/control/LookupLeads?id=&parm0=LookupLeads> )
      4. Button “Merge” should be displayed in the “Merge Lead” form page.
         1. Button should be clickable.
            1. Clicking on “Merge”, User should redirect to “**View Contact**” form page.
2. **"2023 - Test Leaf. All rights reserved"** should be displayed on the lowest portion on all the four functionalities.