

E2E test #1: Tracking deals on user dashboard

1. Tracking deals on user dashboard

Description of the user flow: The new deal is created via API in the “Offer” funnel with Approximate value of 10 000\$. The user opens the deal and changes the value to 5000\$. The total potential value on the dashboard is updated and reflecting the changes properly (the value must be reduced by 5000\$).

Test Case ID	TDUD-1. Create a deal via API
Description	It is possible to create a new deal in the “Offer” funnel via API.
Precondition	
Test Data	<pre>{ "assignee__user": "1625047362532x398219546419355650", "name_text": "New Offer Deal", "deal_value_estimation_number": 10000, "funnel_custom_funnel1": "Offers funnel", "status_option_status": "In progress" }</pre>
Test Steps	1. Send POST <code>{baseUrl}/obj/deal</code> with the provided test data in the request body.
Expected Result	<ul style="list-style-type: none">● Code: 201 Created.● A new deal is created successfully with a value of 10,000\$.
Result	Passed

Test Case ID	TDUD-2. Deal created via API is visible in UI
Description	The created deal is visible in the CRM system's dashboard under the "Offers funnel" funnel.
Precondition	Test case TDUD-1 was executed successfully.

Test Data	
Test Steps	<ol style="list-style-type: none"> 1. Open the "Deals" page in the CRM UI. 2. Filter by the funnel "Offers funnel". 3. Locate the deal titled "New Offer Deal".
Expected Result	<ul style="list-style-type: none"> • The deal is visible in the "Offers funnel" funnel on the dashboard.
Result	Failed

Test Case ID	TDUD-3. Update the deal value via UI
Description	It is possible to update the value of the created deal via the CRM UI.
Precondition	Test case TDUD-2 was executed successfully.
Test Data	<ul style="list-style-type: none"> • New Value: 5000\$
Test Steps	<ol style="list-style-type: none"> 1. Open the "New Offer Deal" in the CRM UI. 2. Click on the "Edit" button. 3. Update the "Approximate Value" field to 5000\$. 4. Save the changes.
Expected Result	<ul style="list-style-type: none"> • The deal value is updated to 5000\$. • The updated value is reflected in the deal's details page.
Result	BLOCKED

Test Case ID	TDUD-4. Dashboard reflects updated potential value
Description	The total potential value on the dashboard is updated to reflect the changes.
Precondition	Test case TDUD-3 was executed successfully.
Test Data	<ul style="list-style-type: none"> • Original Total Potential Value: 20,000\$ • Reduction: 5,000\$
Test Steps	<ol style="list-style-type: none"> 1. Refresh the "Dashboard" page in the CRM UI. 2. Verify the "Total Potential Value" displayed.

Expected Result	<ul style="list-style-type: none"> The total potential value is reduced by 5000\$ (e.g., 20,000\$ -> 15,000\$).
Result	BLOCKED

Test Case ID	TDUD-5. Verify updated deal value via API
Description	It is possible to verify the updated deal value via the API.
Precondition	Test case TDUD-3 was executed successfully.
Test Data	<ul style="list-style-type: none"> Deal ID obtained from TDUD-1.
Test Steps	<ol style="list-style-type: none"> Send GET <code>{baseUrl}/obj/deal/:UniqueID</code> with the correct UniqueID.
Expected Result	<ul style="list-style-type: none"> Code: 200 OK The deal data includes: <pre>{ "deal_value_estimation_number": 5000 }</pre>
Result	BLOCKED

E2E test #2: Managing deals created via API

2. Managing deals created via API

Description of the user flow: The new deal is created via API in the “Lead acquisition” funnel. The employee opens it via UI, and moves to the Hot leads stage. The employee adds some comments. The deal is moved from “Lead acquisition” funnel to “Offers” funnel stage “New request” using API. The employee moves it to “Offer sent to client” and adds note and file to the deal.

Test Case ID	MDAP-1. Create a deal via API
Description	It is possible to create a new deal in the "Lead acquisition" funnel via API.
Precondition	
Test Data	<pre>{ "assignee__user": "1696659261091x541239446325940200", "name_text": "Hot Lead Deal", "deal_value_estimation_number": 2000, "funnel_custom_funnel1": "Lead acquisition", "status_option_status": "In progress" }</pre>
Test Steps	1. Send POST <code>{baseUrl}/obj/deal</code> with the test data as the request body.
Expected Result	<ul style="list-style-type: none"> • Response Code: 201 Created. • A new deal is created in the "Lead acquisition" funnel successfully.
Result	Passed

Test Case ID	MDAP-2. Open deal via UI and move to "Hot leads"
Description	The deal created in the "Lead acquisition" funnel can be opened in the CRM UI and moved to the "Hot leads" stage.
Precondition	Test case MDAP-1 was executed successfully.
Test Data	
Test Steps	<ol style="list-style-type: none"> 1. Open the "Deals" page in the CRM UI. 2. Locate the deal titled "Hot Lead Deal". 3. Drag and drop the deal to the "Hot leads" stage.
Expected Result	<ul style="list-style-type: none"> • The deal is moved to the "Hot leads" stage successfully.
Result	BLOCKED (Passed)

Test Case ID	MDAP-3. Add comments to the deal
Description	It is possible to add comments to the deal in the

	"Hot leads" stage.
Precondition	Test case MDAP-2 was executed successfully.
Test Data	<ul style="list-style-type: none"> ● Comment Text: "This lead shows strong potential."
Test Steps	<ol style="list-style-type: none"> 1. Open the "Hot Lead Deal" in the CRM UI. 2. Add a comment: "This lead shows strong potential." 3. Save the comment.
Expected Result	<ul style="list-style-type: none"> ● The comment is added and visible under the deal's activity log.
Result	BLOCKED (Passed)

Test Case ID	MDAP-4. Move the deal to the "Offers" funnel via API
Description	It is possible to move the deal from "Lead acquisition" funnel to "Offers" funnel stage "New request" via API.
Precondition	Test case MDAP-3 was executed successfully.
Test Data	<pre>{ "funnel_custom_funnel1": "Offers", "stage_custom_stage": "New request" }</pre>
Test Steps	<ol style="list-style-type: none"> 1. Send PATCH <code>{baseUrl}/obj/deal/:UniqueID</code> with the updated funnel and stage information in the request body.
Expected Result	<ul style="list-style-type: none"> ● Response Code: 204 No Content. ● The deal is moved to the "Offers" funnel stage "New request".
Result	BLOCKED

Test Case ID	MDAP-5. Move deal to "Offer sent to client" and add note and file
Description	The deal can be moved to "Offer sent to client" via UI, and additional note and file can be added

Precondition	Test case MDAP-4 was executed successfully.
Test Data	<ul style="list-style-type: none"> ● Note Text: "Offer has been sent to the client for approval." ● File: "Offer_Details.pdf".
Test Steps	<ol style="list-style-type: none"> 1. Open the "Hot Lead Deal" in the CRM UI. 2. Move the deal to the "Offer sent to client" stage. 3. Add a note: "Offer has been sent to the client for approval." 4. Upload the file "Offer_Details.pdf" to the deal.
Expected Result	<ul style="list-style-type: none"> ● The deal is moved to the "Offer sent to client" stage successfully. ● The note and file are added and visible under the deal's activity log.
Result	BLOCKED