

End-to-end test cases

- Managing an API-created deal: value adjustment, note addition and status modification
 - CDML-1: Create a new deal via API in the existing funnel
 - CDML-2: Deal created via API is visible in UI
 - CDML-3: Modify the deal in UI
 - CDML-4: The deal's updates are visible in API
 - CDML-5: Check the note's text in API
 - CDML-6: Create a new note via API
 - CDML-7: Modify the deal via API
 - CDML-8: The deal's updates are visible in UI

Managing an API-created deal: value adjustment, note addition and status modification

Description of the user flow: A new deal is created by a third party via API in the *Offers DaryaT5* funnel with an approximate value of \$1,000 with the “In progress” status. The user opens the deal, changes the value to \$10,000, and adds an appropriate note explaining the reasons for the increase in estimated deal value. The total potential value on the dashboard is updated accordingly and reflects these changes accurately. Later, the third party reviews the updated deal data, reads the note, and changes the status to "Lost," adding another note with the comments.

Test case ID	CDML-1: Create a new deal via API in the existing funnel
Description	It is possible to create a new deal via API in the existing funnel
Precondition	<i>Offers DaryaT5</i> funnel is already created, valid user Ids are present in the system. User is authorized.
Test data	<pre>{ "assignee__user": "1625047362532x398219546419355650", "company_name_text": "DaryaT5", "deal_value_estimation_number": 1000, "description_text": "Great offer", "funnel_custom_funnel1": "1726061401858x313545452277989400", "name_text": "Offer DaryaT5", "order_number": 1, "stage_custom_stage": "1726061403612x448100003185685200", "status_option_status": "In progress", "visible_to_list_user": ["1625047362532x398219546419355650"] }</pre>

Test steps	<ol style="list-style-type: none"> 1. Send POST {baseUrl}/obj/deal 2. Save the deal Id for future use
Expected result	<ul style="list-style-type: none"> • Successful code: 201 Created
Result	Passed
Test case ID	CDML-2: Deal created via API is visible in UI
Description	The deal created in previous step is visible in CRM system
Precondition	Test case CDML-1 was executed successfully
Test data	-
Test steps	<ol style="list-style-type: none"> 1. Open Deals page 2. In Filter by funnel dropdown menu below the “New deal” button, select the "Offers DaryaT5" funnel 3. Verify that the newly created deal is present 4. Press the pencil icon to enter the Edit mode to check the deal’s details
Expected result	<p>Step 1: Deals page is opened</p> <p>Step 2: The "Offers DaryaT5" funnel is present in Filter by funnel dropdown menu</p> <p>Step 4: Information shown on UI is matching with the one, entered in CDML-1 test case</p>
Result	Passed
Test case ID	CDML-3: Modify the deal in UI
Description	It is possible to update the deal's value and add a note in UI
Precondition	Test case CDML-2 was executed successfully
Test data	Note: “The client is willing to provide additional funding for the project”
Test steps	<ol style="list-style-type: none"> 1. On the “Modify deal” page, in the section “ABOUT DEAL” update the Approximate value to \$10,000 2. Scroll down to the "ATTACHMENTS" section and enter the text for the note 3. Click the "Save" button located in the bottom right corner

Expected result	<ul style="list-style-type: none"> The deal is successfully updated
Result	Passed
Test case ID	CDML-4: The deal's updates are visible in API
Description	The deal's estimated value update and new note created for the deal is visible in the API
Precondition	Test case CDML-3 was executed successfully, User is authorized
Test data	UniqueID of the deal created in CDML-1
Test steps	<ol style="list-style-type: none"> 1. Send GET: {{baseUrl}}/obj/deal/:UniqueID request 2. Save the note Id ("note_list_custom_note") for future use
Expected result	<ul style="list-style-type: none"> Successful code: 200 OK Information shown is matching with the one, entered in CDML-3 test case
Result	Passed
Test case ID	CDML-5: Check the note's text in API
Description	Check the text of the note created via CRM app in CDML-3
Precondition	Test cases CDML-3 and CDML-4 were executed successfully, User is authorized
Test data	UniqueID of the note saved after executing CDML-3
Test steps	<ol style="list-style-type: none"> 1. Send GET: {{baseUrl}}/obj/note/:UniqueID request
Expected result	<ul style="list-style-type: none"> Successful code: 200 OK The text of the note is visible in the content_text field: "content_text": "The client is willing to provide additional funding for the project"
Result	Passed
Test case ID	CDML-6: Create a new note via API

Description	It is possible to create a new note via API
Precondition	User is authorized
Test data	{ "content_text": "The client decided to cancel the deal" }
Test steps	<ol style="list-style-type: none"> 1. Send POST {baseUrl}/obj/note 2. Save the note Id for future use
Expected result	<ul style="list-style-type: none"> • Successful code: 201 Created
Result	Passed
Test case ID	CDML-7: Modify the deal via API
Description	It is possible to modify the status of the deal and add a new note via API
Precondition	Test cases CDML-2 , CDML-4 and CDML-6 were executed successfully, User is authorized
Test data	<p>UniqueID of the deal created in CDML-1,</p> <p>UniqueIDs of the notes created in CDML-6 and saved in Step 2 of CDML-4</p> <pre>{ "status_option_status": "Lost", "note_list_custom_note": ["1726063993744x315549103983165440", "1726132163199x187497186108835900"] }</pre>
Test steps	<ol style="list-style-type: none"> 1. Send PATCH{baseUrl}/obj/deal/:UniqueID
Expected result	<ul style="list-style-type: none"> • Successful code: 204 No Content
Result	Passed
Test case ID	CDML-8: The deal's updates are visible in UI
Description	The deal's status update and new note created via API are visible in UI
Precondition	Test case CDML-7 was executed successfully
Test data	-

Test steps	<ol style="list-style-type: none"> 1. Open History page 2. In Filter by funnel dropdown menu select the "Offers DaryaT5" funnel 3. In Filter by status dropdown menu select "Lost" 4. Verify the necessary deal is shown in the list 5. Click the pencil icon to enter the Edit mode 6. Verify the second note created via API in CDML-7 is present
Expected result	<p>Step 1: Deals History page is opened</p> <p>Step 2: The "Offers DaryaT5" funnel is present in Filter by funnel dropdown menu</p> <p>Step 4: The deal is present in the list with an appropriate status ("Lost")</p> <p>Step 6: The note created via API in CDML-7 is shown</p>
Result	Passed