End-to-end test cases, Mirando

Ceation and management of funnel - won (Mirando)

Description of the user flow: A funnel with a deal offer for a new potential customer is created in application UI by administrator and it becomes visible to funnel member in a third-party application via API. User can now change the stage of assigned offer as the negotiations proceed and price is agreed until the contract is signed and changes are reflected via API on admin side in CRM platform UI. Admin can now mark the deal offer as "Won".

Test case ID	CMFW-1 Create a funnel in UI
Description	Check it is possible to create a new funnel in UI
Precondition	Logged in CRM as administrator
Test data	• Funnel name: "MK Offers Funnel" • Stage 1 name: "Potential customer", color : **blue** • Stage 2 name: "Ongoing negotiations", color: **yellow** • Stage 3 name: "Contract signed", color: **green**
Test steps	1. Open Funnels tab and click on "+ Add funnel" 2. Fill funnel name field with test data and press "Enter" 3. Click on "Stage name" and add 1st stage from test data 4. Repeat the previous step with data for stages 2 and 3 5. Click on "ADD MEMBERS->" and select "Add members (optional)" dropdown 6. Select "Kevin Kelly" and "SAVE FUNNEL"
Expected result	Step 6: Freshly created funnel appears in the list of all funnels
Result	PASSED

Test case ID	CMFW-2 Create a deal offer in UI
Description	It should be possible to create a new deal offer in UI and connect it to a funnel created in **CMFW-1**
Precondition	Test case **CMFW-1** executed successfully
Test data	-
Test steps	1. Select Deals tab and click "+ New deal" 2. Click on assignee and select Kevin Kelly

	3. Click on Sales funnel and select "MK Offers Funnel"
	4. Click on Funnel stage and select "Potential customer"
	5. Click on Approximate value and enter "1000"
	6. Fill all remaining fields with random but valid data
	7. Click "Create deal"
Expected result	Step 7: Freshly created deal appears in the "MK Offers Funnel" under stage 1: "Potential customer"
Result	PASSED

Test case ID	CMFW-3: Check the data of created funnel and stage via API
Description	Check via API that the data is visible to assigned user in a third-party application
Precondition	Test case **CMFW-2** was executed successfully
Test data	• "members_list_user": " `1625051658962x581289845978797800` " • "stage_custom_stage": " `1718222811874x310944786705318300` "
Test steps	1. Send **GET** request: `{{baseUrl}}/obj/funnel? constraints=[{"key": "name_text", "constraint_type": "equals", "value": "MK Offers Funnel" }]` 2. Use the "members_list_user" id and send **GET** request: `{{baseUrl}}/obj/user/:UniqueId` 3. Use "stage_custom_stage" id and send **GET** request: `{{baseUrl}}/obj/stage/:UniqueId`
Expected result	Step 1: Successful code 200 OK, funnel with matching name and member id is displayed Step 2: Successful code 200 OK, assigned user matches the user entered in test case **CMFW-1**, Kevin Kelly Step 3: Successful code 200 OK, stage matches the one entered in test case **CMFW-2,** "Potential customer" and color is "Blue"
Result	PASSED

Test case ID	CMFW-4 Change the value of an offer via API
Description	Check it is possible for the user to change the value of an offer in third-party application via API

Precondition	Test case **CMFW-3** was executed successfully

Test data	"UniqueID": "`1718226361065x841125211875573800`" <pre>1 {
	2 "deal_value_estimation_number": 950
	3 }</pre>

Test steps	1. Send **PATCH** request: `{{baseUrl}}/obj/deal/:UniqueID`
Expected result	Step 1: Successful code 204 No Content. Deal value data is updated
Result	PASSED

Test case ID	**CMFW-5 Change the stage of an offer via API**
Description	Check it is possible for the user to change the stage of an offer in third-party application via API
Precondition	Test case **CMFW-4** was executed successfully

Test data	- Stage "UniqueID": "`1718222812118x188602459935725000`" <pre>1 {
	2 "deals_list_custom_deal1": [
	3 "1718226361065x841125211875573800"
	4]
	5 }</pre>

Test steps	1. Send **PATCH** request: `{{baseUrl}}/obj/stage/:UniqueID`
Expected result	Step 1: Successful code 204 No Content. Deal stage is updated
Result	PASSED

Test case ID	**CMFW-6: Check if the changes made by user via API are visible to admin**
Description	Check that admin is able to see the changes in the CRM UI done by user via API
Precondition	Test case **CMFW-5** was executed successfully
Test data	-
Test steps	1. Open CRM UI as admin and click on Deals 2. Click on Funnels dropdown on the right and select "MK Offers Funnel"

	3. Inspect the deal's stage and value
Expected result	Step 3: Deal is in the 3rd stage of MK Offers Funnel - "Contract signed" with an updated value 950 €
Result	PASSED

Test case ID	CMFW-7: Admin can mark the deal offer as "Won"
Description	Check it is possible for the admin to mark deal offer as "Won"
Precondition	Test case **CMFW-6** was executed successfully
Test data	-
Test steps	1. Click on the deal 2. Select "Won"
Expected result	Step 1: Deal opens with selectable options "Lost" and "Won" Step 2: Deal is marked as "Won" and it disappears from the "MK Offers Funnel" in CRM UI
Result	PASSED

Test case ID	CMFW-8: Check that updated deal status is reflected to user via API
Description	Check that user is seeing the deal marked as "Won" in a third-party application via API
Precondition	Test case **CMFW-7** was executed successfully
Test data	• "UniqueID": `"1718226361065x841125211875573800"`
Test steps	1. Send **GET** request: `{{baseUrl}}/obj/deal/:UniqueID`
Expected result	1. Successful code 200 OK with deal data `"status_option_status": "Won"`
Result	PASSED