

Manual Testing Guide

Encore Loyalty AI Feedback System

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Estimated Time: 8 hours (1 day)

Testers Required: 1-2 people

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1. Prerequisites & Setup

Access Requirements

- Browser: Chrome, Firefox, or Edge (latest version)
- Network access to the application servers
- Test credentials (provided below)

Application URLs

```
Frontend: http://34.192.147.181:3000  
Backend API: http://34.192.147.181:8000  
API Documentation: http://34.192.147.181:8000/docs
```

Note: These URLs use the EC2 public IP address. Ensure ports 3000 and 8000 are open in the EC2 security group.

Before Starting

1. Clear browser cache and cookies
2. Open browser developer tools (F12) → Console tab
3. Keep a notes document open for recording issues
4. Take screenshots of any unexpected behavior

2. Test Credentials

Global Admin Account (Primary)

```
Email: tjrottet@encoreloyalty.net  
Password: password222  
Role: Global Admin  
Access: Full system access
```

Global Admin Account (Secondary)

Email: admin@encore.com
Password: password123
Role: Global Admin
Access: Full system access

Venue Admin Account

Email: venuemanager@opus.com
Password: venue123
Role: Venue Admin
Venue: Opus Ocean Grille (ID: 57)
Access: Venue-scoped only

3. Testing Schedule

Time Block	Section	Duration
9:00 - 9:45	A. Authentication	45 min
9:45 - 10:30	B. Global Admin Dashboard	45 min
10:30 - 11:00	C. Global Admin Analytics	30 min
11:00 - 11:45	D. Global Admin Settings	45 min
11:45 - 12:45	E. User Management	60 min
12:45 - 13:30	LUNCH BREAK	45 min
13:30 - 15:00	F. AI Feedback Processing	90 min
15:00 - 15:30	G. Venue Impersonation	30 min
15:30 - 16:15	H. Venue Admin Dashboard	45 min
16:15 - 16:45	I. Venue Admin Settings	30 min
16:45 - 17:15	J. Venue Admin Analytics	30 min
17:15 - 18:00	K. Email & L. Error Handling	45 min

4. Test Cases

A. Authentication Tests (45 min)

A1. Valid Login - Global Admin

Step	Action	Expected Result
1	Navigate to http://34.192.147.181:3000	Login form displayed
2	Enter email: tjrottet@encoreloyalty.net	Email field accepts input
3	Enter password: password222	Password field shows dots
4	Click "Sign In" button	Loading indicator appears
5	Wait for redirect	Redirected to Admin Dashboard
6	Check top-right corner	User name/email displayed
7	Check sidebar menu	Admin menu items visible

Result Pass Fail

Notes: _____

A2. Valid Login - Venue Admin

Step	Action	Expected Result
1	Logout if logged in	Redirected to login page
2	Enter email: venuemanager@opus.com	Email field accepts input
3	Enter password: venue123	Password field shows dots
4	Click "Sign In" button	Loading indicator appears
5	Wait for redirect	Redirected to Venue Dashboard
6	Check sidebar menu	Venue-specific menu items only

Step	Action	Expected Result
7	Verify no admin menu items	No "System Monitoring", "User Management", etc.

Result Pass [] Fail

Notes: _____

A3. Invalid Login - Wrong Password

Step	Action	Expected Result
1	Navigate to http://34.192.147.181:3000	Login form displayed
2	Enter email: tjrottet@encoreloyalty.net	Email accepted
3	Enter password: wrongpassword	Password accepted
4	Click "Sign In" button	Loading indicator appears
5	Wait for response	Error message: "Invalid credentials" or similar
6	Check URL	Remains on login page

Result Pass [] Fail

Notes: _____

A4. Invalid Login - Non-existent User

Step	Action	Expected Result
1	Navigate to http://34.192.147.181:3000	Login form displayed
2	Enter email: nonexistent@test.com	Email accepted
3	Enter password: any password	Password accepted
4	Click "Sign In" button	Error message displayed

Result Pass [] Fail

Notes: _____

A5. Logout

Step	Action	Expected Result
1	Login with valid credentials	Dashboard displayed
2	Click user menu (top-right)	Dropdown menu appears
3	Click "Logout"	Redirected to login page
4	Try to access dashboard URL directly	Redirected back to login

Result Pass [] Fail

Notes: _____

A6. Session Persistence

Step	Action	Expected Result
1	Login with valid credentials	Dashboard displayed
2	Note the current page	Remember URL
3	Close browser tab (not window)	Tab closed
4	Open new tab, navigate to same URL	Still logged in (session maintained)
5	Refresh the page	Remains logged in

Result Pass [] Fail

Notes: _____

B. Global Admin Dashboard Tests (45 min)

Prerequisite: Login as Global Admin (tjrottet@encoreloyalty.net)

B1. Dashboard Loads with Real Data

Step	Action	Expected Result
1	Navigate to Dashboard (should be default)	Dashboard page loads
2	Check "Total Venues" card	Shows number (should be ~18)
3	Check "AI Enabled" card	Shows number (should be ~1)
4	Check "Total Feedback" card	Shows large number (~61,000+)

Step	Action	Expected Result
5	Check "Avg Rating" card	Shows rating (should be ~4.75)
6	Verify no "Loading..." stuck states	All cards show data

Result Pass [] Fail

Notes: _____

B2. Response Volume Chart

Step	Action	Expected Result
1	Locate "Response Volume" chart	Chart is visible
2	Check chart has data	Line/bar chart with data points
3	Hover over data points	Tooltip shows values
4	Check date labels on X-axis	Readable date labels

Result Pass [] Fail

Notes: _____

B3. Quick Actions

Step	Action	Expected Result
1	Locate "Quick Actions" section	Section visible
2	Click "View All Venues" (if exists)	Navigates to venues list
3	Click "View Feedback" (if exists)	Navigates to feedback page
4	Navigate back to Dashboard	Dashboard reloads correctly

Result Pass [] Fail

Notes: _____

B4. Dashboard Refresh

Step	Action	Expected Result
1	Note current metric values	Record values
2	Click refresh button (if available)	Loading indicator appears

Step	Action	Expected Result
3	Wait for refresh to complete	Data reloads
4	Verify metrics still display correctly	Same or updated values

Result Pass [] Fail

Notes: _____

C. Global Admin Analytics Tests (30 min)

Prerequisite: Login as Global Admin

C1. Global Analytics Page Loads

Step	Action	Expected Result
1	Click "Analytics" in sidebar menu	Analytics page loads
2	Check for "System Analytics" header	Header visible
3	Verify page shows real data	Numbers displayed (not "Loading...")

Result Pass [] Fail

Notes: _____

C2. Venue Statistics

Step	Action	Expected Result
1	Locate venue statistics section	Section visible
2	Check "Onboarded Venues" count	Shows number with percentage
3	Check "Not Onboarded" count	Shows remaining venues
4	Verify totals add up correctly	Math is correct

Result Pass [] Fail

Notes: _____

C3. Top Venues List

Step	Action	Expected Result
1	Locate "Top Venues" or similar section	Section visible
2	Check venue names are displayed	Real venue names shown
3	Check feedback counts	Numbers displayed
4	Verify list is sorted (highest first)	Proper ordering

Result Pass [] Fail

Notes: _____

D. Global Admin Settings Tests (45 min)

Prerequisite: Login as Global Admin

D1. Global Settings Page Loads

Step	Action	Expected Result
1	Click "Global Settings" in sidebar	Settings page loads
2	Check for settings sections	AI Settings, Email Settings, etc.
3	Verify current values are displayed	Fields show current config

Result Pass [] Fail

Notes: _____

D2. View AI Settings

Step	Action	Expected Result
1	Locate AI Settings section	Section visible
2	Check AI model display	Shows Claude model name
3	Check enabled/disabled status	Toggle or indicator visible

Result Pass [] Fail

Notes: _____

D3. View Email Settings

Step	Action	Expected Result
1	Locate Email Settings section	Section visible
2	Check sender email display	Email address shown
3	Check override email (if configured)	Override email visible

Result Pass [] Fail

Notes: _____

D4. Data Synchronization Section

Step	Action	Expected Result
1	Locate "Data Synchronization" section	Section visible
2	Check sync status for venues	Status indicators shown
3	Check last sync timestamp	Date/time displayed

Result Pass [] Fail

Notes: _____

D5. Trigger Manual Sync (CAREFUL)

Step	Action	Expected Result
1	Locate sync button for a venue	Button visible
2	Click "Sync" button	Loading indicator appears
3	Wait for sync to complete	Success message displayed
4	Check updated sync timestamp	Timestamp updated

Result Pass [] Fail

Notes: _____

E. User Management Tests (60 min)

Prerequisite: Login as Global Admin

E1. User Management Page Loads

Step	Action	Expected Result
1	Click "User Management" in sidebar	Page loads
2	Check user list is displayed	Table with users visible
3	Check user count	Shows total users (3-4 expected)
4	Verify columns: Name, Email, Role, Status	All columns present

Result Pass [] Fail

Notes: _____

E2. View User Statistics

Step	Action	Expected Result
1	Locate user statistics section	Stats cards visible
2	Check "Total Users" count	Number displayed
3	Check "Global Admins" count	Number displayed (~3)
4	Check "Venue Admins" count	Number displayed (~1)

Result Pass [] Fail

Notes: _____

E3. Create New Global Admin User

Step	Action	Expected Result
1	Click "Create User" button	Modal/form opens
2	Enter Name: Test Admin	Field accepts input
3	Enter Email: testadmin@test.com	Field accepts input
4	Enter Password: TestPass123!	Field accepts input
5	Select Role: Global Admin	Role selected
6	Click "Create" or "Save"	Loading indicator

Step	Action	Expected Result
7	Wait for response	Success message, modal closes
8	Check user appears in list	New user visible

Result Pass Fail

Notes: _____

E4. Create New Venue Admin User

Step	Action	Expected Result
1	Click "Create User" button	Modal/form opens
2	Enter Name: Test Venue Manager	Field accepts input
3	Enter Email: testvenueadmin@test.com	Field accepts input
4	Enter Password: VenuePass123!	Field accepts input
5	Select Role: Venue Admin	Role selected
6	Check for Venue ID field	Venue ID field appears
7	Enter Venue ID: 57	Field accepts input
8	Enter Venue Name: Test Venue	Field accepts input
9	Click "Create" or "Save"	Success message
10	Check user appears in list	New user visible with venue info

Result Pass Fail

Notes: _____

E5. Test Login with Newly Created User

Step	Action	Expected Result
1	Logout current session	Redirected to login
2	Login with: testadmin@test.com / TestPass123!	Login successful
3	Verify admin access	Admin dashboard visible
4	Logout	Logged out

Step	Action	Expected Result
5	Login with: testvenueadmin@test.com / VenuePass123!	Login successful
6	Verify venue access only	Venue dashboard, no admin menu

Result Pass [] Fail

Notes: _____

E6. Edit User (if available)

Step	Action	Expected Result
1	Login as Global Admin	Admin access
2	Go to User Management	Page loads
3	Click Edit on a test user	Edit form opens
4	Change the name	Field updates
5	Save changes	Success message
6	Verify change persists	Updated name shown

Result Pass [] Fail

Notes: _____

E7. Delete/Deactivate User (if available)

Step	Action	Expected Result
1	Find test user to delete	User in list
2	Click Delete/Deactivate button	Confirmation prompt
3	Confirm deletion	Success message
4	Verify user removed from list	User no longer visible
5	Try to login as deleted user	Login fails

Result Pass [] Fail

Notes: _____

F. AI Feedback Processing Tests (90 min)

Prerequisite: Login as Global Admin

F1. AI Feedback Page Loads

Step	Action	Expected Result
1	Click "AI Feedback" in sidebar	Page loads
2	Check feedback list appears	Table with feedback items
3	Check pagination	Page numbers or "Load More"
4	Check filters are available	Date filter, status filter

Result Pass [] Fail

Notes: _____

F2. View Feedback List

Step	Action	Expected Result
1	Review feedback items in list	Items display venue name, date, rating
2	Check for customer comments	Comment text visible
3	Check for status badges	"New", "Analyzed", etc.
4	Verify rating stars/numbers	Ratings displayed correctly

Result Pass [] Fail

Notes: _____

F3. Filter by Time Period

Step	Action	Expected Result
1	Locate time filter	Dropdown or tabs visible
2	Select "Last 7 Days"	List refreshes
3	Verify date range updated	Recent items only
4	Select "Last 30 Days"	List refreshes with more items

Step	Action	Expected Result
5	Select "All Time" (if available)	Shows all items

Result Pass [] Fail

Notes: _____

F4. Pagination

Step	Action	Expected Result
1	Check items per page	Default count visible (e.g., 20)
2	Click "Next Page" or page 2	New items load
3	Click "Previous Page" or page 1	Returns to first page
4	Click last page (if visible)	Loads last page

Result Pass [] Fail

Notes: _____

F5. AI Analysis - Analyze Single Feedback

Step	Action	Expected Result
1	Find a feedback item with status "New"	Item found
2	Click on the item to expand/view	Details shown
3	Click "Analyze" or "AI Analyze" button	Loading indicator
4	Wait for analysis (may take 5-15 seconds)	Analysis complete
5	Check analysis results appear	Sentiment, urgency, topics shown
6	Check status changed to "Analyzed"	Status badge updated

Result Pass [] Fail

Notes: _____

F6. AI Analysis - Review Analysis Details

Step	Action	Expected Result
1	View an analyzed feedback item	Analysis section visible

Step	Action	Expected Result
2	Check Sentiment field	"Positive", "Neutral", or "Negative"
3	Check Urgency field	"Low", "Medium", or "High"
4	Check Key Topics	List of relevant topics
5	Check Alert Required indicator	Yes/No or color indicator

Result Pass Fail

Notes: _____

F7. Generate AI Response Draft

Step	Action	Expected Result
1	Find an analyzed feedback item	"Analyzed" status
2	Click "Generate Response" or similar	Loading indicator
3	Wait for draft generation (5-15 seconds)	Draft appears
4	Check draft content	Personalized response text
5	Check status changed to "Draft Pending"	Status updated

Result Pass Fail

Notes: _____

F8. Edit Draft Response

Step	Action	Expected Result
1	View a feedback item with draft	Draft visible
2	Click "Edit" or click into draft text	Edit mode enabled
3	Make changes to the text	Text is editable
4	Save changes	Success message
5	Verify changes persisted	Edited text shown

Result Pass Fail

Notes: _____

F9. Regenerate Draft Response

Step	Action	Expected Result
1	View a feedback item with draft	Draft visible
2	Click "Regenerate" button	Loading indicator
3	Wait for new draft	New content generated
4	Compare to previous draft	Content is different

Result Pass Fail

Notes: _____

G. Venue Impersonation Tests (30 min)

Prerequisite: Login as Global Admin

G1. Access Impersonation Feature

Step	Action	Expected Result
1	Look for venue selector or impersonation menu	Control visible
2	Click to open venue selection	List of venues appears
3	Verify multiple venues listed	Venue names visible

Result Pass Fail

Notes: _____

G2. Impersonate Venue Admin

Step	Action	Expected Result
1	Select "Opus Ocean Grille" (or any venue)	Impersonation starts
2	Check UI changes to venue view	Venue-specific dashboard
3	Check sidebar shows venue menu	No admin-only items
4	Verify venue name displayed	"Opus Ocean Grille" visible

Result Pass [] Fail

Notes: _____

G3. Navigate While Impersonating

Step	Action	Expected Result
1	While impersonating, click Dashboard	Venue dashboard loads
2	Click Feedback	Venue feedback loads
3	Click Analytics	Venue analytics loads
4	Click Settings	Venue settings loads

Result Pass [] Fail

Notes: _____

G4. Exit Impersonation

Step	Action	Expected Result
1	Find "Exit" or "Stop Impersonating" button	Button visible
2	Click to exit	Returns to admin view
3	Verify admin menu restored	Full admin sidebar
4	Verify admin dashboard shown	Admin dashboard data

Result Pass [] Fail

Notes: _____

H. Venue Admin Dashboard Tests (45 min)

Prerequisite: Login as Venue Admin (venuemanager@opus.com)

H1. Venue Dashboard Loads

Step	Action	Expected Result
1	After login, check dashboard loads	Venue dashboard visible

Step	Action	Expected Result
2	Check venue name displayed	"Opus Ocean Grille" or assigned venue
3	Check metrics are venue-specific	Numbers relate to single venue

Result Pass [] Fail

Notes: _____

H2. Venue Metrics Display

Step	Action	Expected Result
1	Check "Today's Feedback" card	Number displayed
2	Check "Pending Responses" card	Number displayed
3	Check "Average Rating" card	Rating displayed
4	Check "Total Feedback" card	Total count for venue

Result Pass [] Fail

Notes: _____

H3. Venue Dashboard Charts

Step	Action	Expected Result
1	Locate any charts on dashboard	Charts visible
2	Hover over data points	Tooltips appear
3	Verify data relates to venue	Venue-specific data

Result Pass [] Fail

Notes: _____

H4. No Admin Access

Step	Action	Expected Result
1	Check sidebar menu	No "User Management"

Step	Action	Expected Result
2	Check for "System Monitoring"	Not visible
3	Try URL: http://34.192.147.181:3000/admin/users directly	Access denied or redirect
4	Try URL: http://34.192.147.181:3000/admin/system directly	Access denied or redirect

Result Pass [] Fail

Notes: _____

I. Venue Admin Settings Tests (30 min)

Prerequisite: Login as Venue Admin

I1. Venue Settings Page Loads

Step	Action	Expected Result
1	Click "Settings" in sidebar	Settings page loads
2	Check settings are venue-specific	Venue name shown
3	Verify AI settings visible	AI toggle/configuration

Result Pass [] Fail

Notes: _____

I2. View AI Settings

Step	Action	Expected Result
1	Locate AI enabled toggle	Toggle visible
2	Check current status	On or Off indicated
3	View response tone settings (if available)	Tone options visible

Result Pass [] Fail

Notes: _____

I3. Modify AI Settings (CAREFUL - May Affect Production)

Step	Action	Expected Result
1	Toggle AI enabled setting	Setting changes
2	Click Save	Success message
3	Refresh page	Setting persisted
4	Toggle back to original state	Restored

Result Pass [] Fail

Notes: _____

J. Venue Admin Analytics Tests (30 min)

Prerequisite: Login as Venue Admin

J1. Venue Analytics Page Loads

Step	Action	Expected Result
1	Click "Analytics" in sidebar	Analytics page loads
2	Check data is venue-specific	Venue analytics displayed
3	Verify page title indicates venue	Venue name visible

Result Pass [] Fail

Notes: _____

J2. Rating Distribution

Step	Action	Expected Result
1	Locate rating distribution section	Chart or bars visible
2	Check ratings 1-5 displayed	All rating levels shown

Step	Action	Expected Result
3	Check counts for each rating	Numbers displayed

Result Pass [] Fail

Notes: _____

J3. Status Breakdown

Step	Action	Expected Result
1	Locate status breakdown section	Section visible
2	Check for "New" count	Number displayed
3	Check for "Analyzed" count	Number displayed
4	Check for "Draft" count	Number displayed
5	Check for "Sent" count	Number displayed

Result Pass [] Fail

Notes: _____

J4. Time Period Filter (if available)

Step	Action	Expected Result
1	Locate time period selector	Control visible
2	Change period (7 days → 30 days)	Data updates
3	Verify metrics change	Numbers updated

Result Pass [] Fail

Notes: _____

K. Email Functionality Tests (45 min)

⚠️ IMPORTANT: In development mode, all emails are redirected to marian@dumitrascu.net. No customer emails will actually be sent.

Prerequisite: Login as Global Admin

K1. Send Email from Draft

Step	Action	Expected Result
1	Navigate to AI Feedback page	Page loads
2	Find feedback with draft response	"Draft Pending" status
3	Click "Send Email" or "Approve & Send"	Confirmation dialog
4	Confirm sending	Loading indicator
5	Wait for completion	Success message
6	Check status changed to "Email Sent"	Status updated

Result Pass [] Fail

Notes: _____

K2. Verify Email Timestamp

Step	Action	Expected Result
1	View feedback where email was sent	Item visible
2	Check for sent timestamp	Date/time displayed
3	Check for recipient info	Email address shown

Result Pass [] Fail

Notes: _____

K3. Alert Email (if applicable)

Step	Action	Expected Result
1	Find negative/high-urgency feedback	Item with alert indicator
2	Analyze if not already done	Analysis shows high urgency
3	Check if manager alert sent	Alert status indicated

Result Pass [] Fail

Notes: _____

L. Error Handling Tests (30 min)

L1. Network Error Simulation

Step	Action	Expected Result
1	Open browser DevTools (F12)	DevTools open
2	Go to Network tab	Network tab visible
3	Enable "Offline" mode	Browser goes offline
4	Try to load a page/perform action	Error message displayed
5	Disable "Offline" mode	Back online
6	Retry action	Action succeeds

Result Pass [] Fail

Notes: _____

L2. Form Validation

Step	Action	Expected Result
1	Go to Create User form	Form opens
2	Leave all fields empty	Fields empty
3	Click Submit	Validation errors shown
4	Enter invalid email format	Field accepts input
5	Click Submit	Email validation error
6	Enter very short password	Field accepts input
7	Click Submit	Password validation error

Result Pass [] Fail

Notes: _____

L3. Session Timeout (Long Test)

Step	Action	Expected Result
1	Login and note the time	Time recorded
2	Wait 15+ minutes without activity	Waiting
3	Try to perform an action	May require re-login
4	Check for session timeout message	Message displayed (if applicable)

Result Pass [] Fail

Notes: _____

L4. Console Errors Check

Step	Action	Expected Result
1	Open browser DevTools (F12)	DevTools open
2	Go to Console tab	Console visible
3	Navigate through all main pages	Pages load
4	Check for red errors	Document any errors
5	Check for yellow warnings	Document any warnings

Result Pass [] Fail

Notes: _____

5. Bug Report Template

When you find an issue, document it using this template:

BUG REPORT
=====
BUG-XXX: [Short Title]
Severity: [] Critical [] High [] Medium [] Low
Section: [A-L] Test Case: [#]
Steps to Reproduce:
1.
2.

3.

Expected Result:
[What should happen]

Actual Result:
[What actually happened]

Screenshot: [Attach if possible]

Browser: [Chrome/Firefox/Edge] Version: [XX]
Time: [HH:MM]

Additional Notes:
[Any other relevant information]

6. Test Results Summary

Complete this section at the end of testing:

Overall Results

Section	Pass	Fail	Not Tested
A. Authentication	/6		
B. Dashboard	/4		
C. Analytics	/3		
D. Settings	/5		
E. User Management	/7		
F. AI Feedback	/9		
G. Impersonation	/4		
H. Venue Dashboard	/4		
I. Venue Settings	/3		
J. Venue Analytics	/4		
K. Email	/3		
L. Error Handling	/4		

Section	Pass	Fail	Not Tested
TOTAL	/56		

Critical Issues Found

- 1.
- 2.
- 3.

High Priority Issues Found

- 1.
- 2.
- 3.

General Observations

-
-
-

Tester Information

Name:	_____
Date:	_____
Start Time:	_____
End Time:	_____
Total Time:	_____

End of Manual Testing Guide