Checkpoints:

Url launch checkpoint

After login dashboard checkpoint

In app launcher have to check Business Development is selected or not.

In that Business Development Leads is selected or not.

After click on NEW --> New Screen page navigation check point on New lead:Standard

on this sceen we have to do Data Input Checkpoints for the area's(First name

Last name

Finra crn

Dob

Business name

Branch name

Assigned Wealth Management Firm

Assigned External Recruiter Name

Assigned Internal Recruiter Name

Personal Mobile Number

Personal Email

Recruiting Lead Source

Current Type of Practice)

Lead "TestAutoDemo Autdemo" was created. Toaster checkpoint

Lead Header Name checkpoint

Final checkpoint for Data's Corectly reflects(First name

Last name

Finra crn

Dob

Business name

Branch name

Assigned Wealth Management Firm

Assigned External Recruiter Name

Assigned Internal Recruiter Name

Personal Mobile Number

Personal Email

Recruiting Lead Source

Current Type of Practice)

convert Screen header checkpoint

Your lead has been converted popup checkpoint (Account, contact, opportunity)

after opening Contact and opportunity in new tabs make sure to have a check point on Header of COntact and Opportunity

Invite TO EO POrtal button checkpoint

Confirmation Popup checkpoint