

Manual Test Case Report

Customer Relationship Management (CRM) System

1. Introduction

A **Customer Relationship Management (CRM)** system is used by organizations to manage customer data, track interactions, handle sales, and improve customer service.

This report covers the **manual testing** performed on the CRM application to ensure all major functionalities work correctly.

2. Objectives of Testing

The main objectives of this testing are:

- To verify core CRM functionalities
- To identify defects in the system
- To ensure data accuracy and security
- To validate user experience
- To check system reliability

3. Scope of Testing

The following modules were tested:

1. Login & Authentication
2. Customer Management
3. Lead Management
4. Contact Management
5. Search & Filter
6. Reports & Dashboard
7. Logout Functionality

4. Test Environment

Item	Details
Application	CRM Web Application
Browser	Google Chrome
OS	Windows 10
Testing Type	Manual Testing
Tester	Subrat Gupta
Test Data	Dummy customer data

5. Test Case Format Used

Field	Description
Test Case ID	Unique ID
Module	CRM Module
Scenario	What is being tested
Steps	Actions to perform
Test Data	Input values
Expected Result	Desired outcome
Actual Result	System output
Status	Pass/Fail

6. Test Cases

Module 1: Login

TC_01 – Valid Login

Field	Value
Test Case ID	TC_LOGIN_01
Scenario	Login with valid credentials
Steps	<ol style="list-style-type: none">1. Open Login Page2. Enter valid username & password3. Click Login
Test Data	admin / admin123
Expected Result	User should login successfully
Actual Result	Login successful
Status	Pass

TC_02 – Invalid Password

TC_02 – Login with Invalid Password

Field	Description
Test Case ID	TC_LOGIN_02
Module	Login
Test Scenario	Verify login with wrong password
Precondition	User must be registered
Test Steps	<ol style="list-style-type: none">1. Open CRM login page2. Enter valid username3. Enter wrong password4. Click Login
Test Data	Username: admin Password: wrong123
Expected Result	Error message should be displayed
Actual Result	Error message displayed
Status	Pass

Priority	High
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Module 2: Customer Management

TC_03 – Add New Customer

Field	Description
Test Case ID	TC_CUST_01
Module	Customer Management
Test Scenario	Add a new customer
Precondition	User must be logged in
Test Steps	<ol style="list-style-type: none"> 1. Go to Customer module 2. Click Add Customer 3. Fill details 4. Click Save
Test Data	Name: Rahul Email: rahul@gmail.com
Expected Result	Customer should be added successfully
Actual Result	Customer added successfully
Status	Pass
Priority	High

TC_04 – Delete Customer

Field	Description
Test Case ID	TC_CUST_02
Module	Customer Management
Test Scenario	Delete existing customer
Precondition	Customer must exist
Test Steps	<ol style="list-style-type: none"> 1. Select customer 2. Click Delete 3. Confirm
Test Data	Customer ID: 102

Expected Result	Customer should be removed
Actual Result	Customer removed
Status	Pass
Priority	Medium

Module 3: Lead Management

TC_05 – Create Lead

Field	Description
Test Case ID	TC_LEAD_01
Module	Lead Management
Test Scenario	Create new lead
Precondition	User must be logged in
Test Steps	1. Go to Lead module 2. Click Add Lead 3. Fill details 4. Save
Test Data	Name: Amit Phone: 9876543210
Expected Result	Lead should be created
Actual Result	Lead created
Status	Pass
Priority	High

TC_06 – Convert Lead to Customer

Field	Description
Test Case ID	TC_LEAD_02
Module	Lead Management
Test Scenario	Convert lead to customer

Precondition	Lead must exist
Test Steps	1. Open lead 2. Click Convert
Test Data	Lead ID: 205
Expected Result	Lead converted to customer
Actual Result	Lead converted
Status	Pass
Priority	High

Module 4: Search & Filter

TC_07 – Search Customer by Name

Field	Description
Test Case ID	TC_SEARCH_01
Module	Search
Test Scenario	Search customer by name
Precondition	Customer must exist
Test Steps	1. Enter customer name 2. Click Search
Test Data	Name: Rahul
Expected Result	Correct customer should be shown
Actual Result	Correct customer displayed
Status	Pass
Priority	Medium

Module 5: Logout

TC_08 – Logout

Field	Description
Test Case ID	TC_LOGOUT_01
Module	Logout
Test Scenario	Verify logout functionality
Precondition	User must be logged in
Test Steps	1. Click Logout button
Test Data	N/A
Expected Result	User redirected to login page
Actual Result	Redirected to login page
Status	Pass
Priority	Low

7. Defects Found

Defect ID	Module	Description	Severity
D_01	Login	No error message for empty fields	Medium
D_02	Customer	Duplicate email allowed	High

8. Test Summary

Total Test Cases	Passed	Failed
8	6	2

9. Conclusion

The CRM system performs well for basic operations like login, customer management, and lead handling. However, improvements are required in:

- Input validation

- Duplicate data prevention
- Error message handling

After fixing the reported issues, the system will be more reliable and user-friendly.

10. Tester Details

Name: Subrat Gupta

Role: Automation with Selenium

Date: 08 January 2026