

## Functional Requirements

### 1. New Lead

#### Field Specifications:

**Salutation** : Dropdown field with values None, Mr, Ms, Mrs, Dr and Prof (Non Mandatory)  
**First Name** : 1-40 char (Non Mandatory)  
**Last Name** : 1-60 char (Mandatory)  
**Email** : 1-60 char (Non Mandatory)  
**Phone** : 1-40 char (Non Mandatory)  
**Company** : 1-60 char (Mandatory)  
**Title** : 1-60 char (Non Mandatory)  
**Save** : Button (Enabled by default)

#### Functionality Checks

1. Valid error message for missing required fields

e.g.: “These required fields must be completed: Company, Last Name” error message for missing both the required fields

2. Valid error message for invalid Email id

e.g.: “Email: invalid email address: test” for the input test

3. Validate the toaster message when the lead created successfully

e.g.: “Lead FirstNameLastName was created”

### 2. New Opportunity

#### Field Specifications:

**Opportunity Name** : 1-60 char (Mandatory)

**Account Name** : Auto Populate dropdown with existing Account Names (Non Mandatory)

**Close Date** : input field to select date from calendar icon (default value: current date+30  
; accepts any date; Mandatory)

**Stage** : Dropdown with None, Prospecting, Qualification, Need Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price Quote, Negotiation / Review, Closed Lost, Closed Won (Default Value as None; Mandatory)

**Amount** : 1-16 digits numbers (whole number), unlimited precision for decimal (Non Mandatory)

**Next Step** : 1-60 char (Non Mandatory)

**Save** : Button (Enabled by default)

### **Functionality Checks**

1. Valid error message for missing required field. Close Date and Stage will be having default values. No miss for Close Date and Stage
- e.g.: “These required fields must be completed: Opportunity Name”  
error message for missing Opportunity Name
2. Validate the toaster message when the Opportunity created successfully
- e.g.: “Opportunity <OpportunityName> was created”

### 3. Edit Opportunity

#### Field Specifications:

**Close Date:** Input field to select date from calendar icon (default value: current date+30, accept any date: Mandatory)

**Stage:** Dropdown with None, Prospecting, Qualification, Need Analysis Value

Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price

Quote, Negotiation / Review, Closed Lost, Closed Won (Default Value as None; Mandatory)

**Description:** Non Mandatory

**Delivery Status:** Dropdown with None, In Progress, Yet to Begin, Completed (Note: Choose as InProgress; Not Mandatory)

**Save:** Button (Enabled by default)

#### Functionality Checks

1. Valid error message for missing required field. Close Date and Stage will be having default values. No miss for Close Date and Stage

- Eg: “These required fields must be completed: Close date and stage”  
error message for missing Opportunity Name
  - Validate the toaster message when the Opportunity Edited successfully

Eg: “Opportunity < Opportunity Name > was Edited”

### 4. Delete Opportunity

#### Field Specifications:

Search the Opportunity 'Salesforce Automation by \*Your Name\*'

Dropdown with Edit, Delete, and Change owner (Note: Click on the Delete).

**Functionality Checks:**

1. Validate the toaster message when the Opportunity deleted successfully  
E.g.: “Opportunity <OpportunityName> was Deleted”
2. Validate and Check whether the Opportunity is deleted or not.