

Project Management - Leads

Team

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Description

The module is designed to collect potential client information for follow-ups and sales.

This document includes project details, repository links, team conventions, sprint workflows, user stories, task distribution, and testing documentation.

Managed using agile methodologies, with JIRA for tracking and Qase.io for testing and documentation, the project follows a structured sprint process to ensure efficient development and continuous improvement.

Tools

1. GitHub
2. Jira
3. Qase.io

Links

Project:

 [GitHub](#)

Work Environments:

 [Jira](#)
 [Qase.io](#)

As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later.

[LP-46] Automatically log submission time for each lead.

Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later.		

Type:	Subtask	Priority:	Medium
Reporter:	shaindel	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0ji0008v:
Sprint:	LP Sprint 3

As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later.

[LP-45] Implement and run SQL to create the leads table.


Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later.

Type:	Subtask	Priority:	Medium
Reporter:	shaindel	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0008n:
Sprint:	LP Sprint 3

As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later. (LP-43)

 [LP-44] Design the database table to store leads (name, email, phone, contact method, submission date). Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None

Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later.

Type:	Subtask	Priority:	Medium
Reporter:	shaindel	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0008f:
Sprint:	LP Sprint 3

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Pre-Lead Submission (LP-3)


 [LP-43] As a lead manager, I want to provide a database for leads to submit their contact information, So that they can leave their details and we can reach out to them later. Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	Pre-Lead Submission

Type:	Story	Priority:	Medium
Reporter:	shaindel	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-44	Design the database table to store le...	Subtask	To Do	
	LP-45	Implement and run SQL to create the l...	Subtask	To Do	
	LP-46	Automatically log submission time for...	Subtask	To Do	
Rank:	0 i00087:				
Sprint:	LP Sprint 3				

Description
<p>This feature will enable the system to store contact information submitted by potential clients through an online form. The database will hold relevant lead information such as full name, phone number, email address, preferred contact method, and the date of submission. The data will be stored securely and made accessible to the sales or marketing team for follow-up purposes. The solution must ensure data integrity, allow retrieval and filtering of leads, and comply with privacy and security standards.</p>

As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. (LP-13)
<div>  <div> <div>[LP-42]</div> <div>Implement permission logic to restrict edit access to creator/admin</div> <div> <div>Created: 02/Apr/25</div> <div>Updated: 02/Apr/25</div> </div> </div> </div>
<div> <div>Status:</div> <div>To Do</div> </div>

Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.

Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0007z:
Sprint:	LP Sprint 4

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As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. (LP-13)

 [LP-41] Create UI for editing notes (restricted to creator/admin) Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.


Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0007r:		
Sprint:	LP Sprint 4		

As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. (LP-13)

 [LP-40] [Create UI for adding and submitting new notes](#) Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.

Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		

Original estimate:	Not Specified		
Rank:	0 i0007j:		
Sprint:	LP Sprint 4		
As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. (LP-13)			
 [LP-39] Display notes on the lead profile with timestamp and creator's name Created: 02/Apr/25 Updated: 02/Apr/25			
Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.		
Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0007b:		
Sprint:	LP Sprint 4		

As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. (LP-13)

🔗 [LP-38] Implement API to retrieve all internal notes for a specific lead Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.

Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i00073:
Sprint:	LP Sprint 4

As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. (LP-13)

🔗 [LP-37] Build API to edit an internal note with access control for creator/admin Created: 02/Apr/25 Updated: 02/Apr/25

Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		


Rank:	0 i0006n:
Sprint:	LP Sprint 4


[As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.](#) (LP-13)

 [\[LP-35\] Create a data model to store internal notes with timestamps and user ownership](#) Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team.

Type:	Subtask	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		

Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0006f:		
Sprint:	LP Sprint 4		
As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts. (LP-10)			
 [LP-34] Display visual graphs and charts to illustrate campaign performance over time Created: 02/Apr/25 Updated: 02/Apr/25			
Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts.		
Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i00067:		

Sprint:		LP Sprint 3	
As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts. (LP-10)			
 [LP-33] Add filtering options by campaign, time period, lead source, and customer segment Created: 02/Apr/25 Updated: 02/Apr/25			
Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts.		
Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0005z:		
Sprint:	LP Sprint 3		

As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts. (LP-10)

 [LP-32] Calculate the conversion rate (leads that became customers / total leads) Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts.

Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0005r:
Sprint:	LP Sprint 3

As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts. (LP-10)

[LP-31] Connect to data sources (CRM, Google Analytics, adplatforms) to fetch campaign data

Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts.		

Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		


Rank:	0 i0005j:		
Sprint:	LP Sprint 3		

Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts.

Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0005b:
Sprint:	LP Sprint 3

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As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups. <small>(LP-15)</small>
 [LP-29] Add a "Cancel" or "Exit Update Mode" button to return to view-only mode <small>Created: 02/Apr/25 Updated: 02/Apr/25</small>

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None

Parent:	As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups.
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Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i00053:
Sprint:	LP Sprint 3

As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups. (LP-15)

🔗 [LP-28] Display a success message after update (e.g., "Status updated") Created: 02/Apr/25 Updated: 02/Apr/25


Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups.

Type:	Subtask	Priority:	Medium
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🔗 [LP-27] Show a status dropdown only when update mode is active Created: 02/Apr/25 Updated: 02/Apr/25

Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		

Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0004n:		
Sprint:	LP Sprint 3		
As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups. (LP-15)			
📌 [LP-26] Add an "Update Status" toggle/button on the dashboard page Created: 02/Apr/25 Updated: 02/Apr/25			
Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups.		
Type:	Subtask	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0004f:		

Sprint:	LP Sprint 3		
As a lead manager, I want to view all incoming leads in a centralized dashboard so that I can quickly review and manage them. (LP-9)			
<div><div></div><div>[LP-25] Create a "Lead Management" button or link on the main page that routes to a new dashboard page showing all leads in a table</div><div>Created: 02/Apr/25 Updated: 02/Apr/25</div></div>			
Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead manager, I want to view all incoming leads in a centralized dashboard so that I can quickly review and manage them.		
Type:	Subtask	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i00047:		
Sprint:	LP Sprint 3		

As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently. (LP-16)

🔗 [LP-24] Create a search box to find leads by name Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently.

Type:	Subtask	Priority:	Medium
Reporter:	Ethan St.	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0003t:
Sprint:	LP Sprint 4

As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently. (LP-16)

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently.

Type:	Subtask	Priority:	Medium
Reporter:	Ethan St.	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0003v:
Sprint:	LP Sprint 4

As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently. (LP-16)

Status:	To Do
Project:	leads-project
Components:	None

Affects versions:	None
Fix versions:	None
Parent:	As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently.

Type:	Subtask	Priority:	Medium
Reporter:	Ethan St.	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0003z:
Sprint:	LP Sprint 4

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As a lead manager, I want to launch targeted digital ad campaigns on platforms like Google, Facebook, and affiliate networks, so that our business gains exposure and attracts potential leads. (LP-7)

 [LP-21] Launch a digital campaign by promoting a landing page link through google,facebook or affiliate networks. Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None

Parent:	As a lead manager, I want to launch targeted digital ad campaigns on platforms like Google, Facebook, and affiliate networks, so that our business gains exposure and attracts potential leads.
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Type:	Subtask	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0003r:
Sprint:	LP Sprint 3

As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that's comfortable for me. (LP-5)


🔗 [LP-20] Create a submit button that validates the inputs and saves the data into the leads database table Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that's comfortable for me.

Type:	Subtask	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i0003j:
Sprint:	LP Sprint 3

As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that’s comfortable for me. (LP-5)

 [LP-19] Create a field to input phone number (required, must be in format like 05XX-XXXXXX) Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that’s comfortable for me.

Type:	Subtask	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		

Remaining Estimate:	Not Specified
Time Spent:	Not Specified
Original estimate:	Not Specified

Rank:	0 i0003b:
Sprint:	LP Sprint 3

As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that’s comfortable for me. (LP-5)

 [LP-18] Create a field to input email address (required, must be in format like example@example.com) Created: 02/Apr/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that’s comfortable for me.

Type:	Subtask	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	0 i00033:		
Sprint:	LP Sprint 3		
As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that’s comfortable for me. (LP-5)			
🔗 [LP-17] Create a field to input full name (required, max 255 characters(a-zA-Z) no special charachters allowed and not null)			
Created: 02/Apr/25 Updated: 02/Apr/25			
Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that’s comfortable for me.		
Type:	Subtask	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0002v:		
Sprint:	LP Sprint 3		

Post-Lead Submission (LP-4)

[LP-16] As a lead manager, I want to filter(by status), search(name), or sort leads database col(except note), so that I can quickly find the right leads and manage my workload more efficiently.

Created: 02/Apr/25 Updated: 02/Apr/25

Status:

To Do

Project:

leads-project

Components:

None

Affects versions:

None

Fix versions:

None

Parent:

Post-Lead Submission

Type:

Story

Reporter:

Ethan St.

Resolution:

Unresolved

Labels:

None

Σ Remaining Estimate:

Not Specified

Σ Time Spent:

Not Specified

Σ Original Estimate:

Not Specified

Priority:

Medium

Assignee:

Unassigned

Votes:

0

Remaining Estimate:

Not Specified

Time Spent:

Not Specified

Original estimate:

Not Specified

Sub-tasks:

Key

LP-22

Summary

Add sort triangles (▲ ▼) next to each ...

Type

Subtask

Status

To Do

Assignee

Key

LP-23

Summary

Create a dropdown to filter leads by ...

Type

Subtask

Status

To Do

Assignee

Key

LP-24

Summary

Create a search box to find leads by ...

Type

Subtask

Status

To Do

Assignee

</

Rank:	0 i0002n:
Sprint:	LP Sprint 4

Description
Enable lead managers to efficiently manage their workload by allowing them to filter leads by status, search by name, and sort by any column (excluding the note column). This functionality will help users quickly locate specific leads and organize data according to their needs.

Post-Lead Submission (LP-4)

[LP-15] As a lead manager, I want to update the status of a lead (e.g., New, Contacted, Disqualified), so that I can track its progress and prevent duplicates or missed follow-ups.

Created: 02/Apr/25 Updated: 02/Apr/25


Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	Post-Lead Submission		

Type:	Story	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-26	Add an "Update Status" toggle/button ...	Subtask	To Do	
	LP-27	Show a status dropdown only when upda...	Subtask	To Do	
	LP-28	Display a success message after updat...	Subtask	To Do	
	LP-29	Add a "Cancel" or "Exit Update Mode" ...	Subtask	To Do	
Rank:	0 i0002f:				
Sprint:	LP Sprint 3				

Description

The system should allow the lead manager to easily update the status of each lead through a simple and intuitive interface. Status options should include predefined stages such as New, Contacted, In Progress, Converted, and Disqualified, with the flexibility to add custom statuses if needed. Changes should be logged with timestamps and user information for transparency. This functionality helps ensure accurate tracking of each lead’s journey, improves team coordination, and enhances the overall lead management process by reducing redundancy and ensuring timely follow-ups.

Post-Lead Submission <small>(LP-4)</small>	
 [LP-13] As a lead manager, I want to add internal notes to a lead's profile, so that I can share important information with the rest of the team. Created: 31/Mar/25 Updated: 02/Apr/25	
Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None

Parent:	Post-Lead Submission		
Type:	Story	Priority:	Medium
Reporter:	yakovsh1	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-35	Create a data model to store internal...	Subtask	To Do	
	LP-36	Build API to create a new internal n...	Subtask	To Do	
	LP-37	Build API to edit an internal note wi...	Subtask	To Do	
	LP-38	Implement API to retrieve all interna...	Subtask	To Do	
	LP-39	Display notes on the lead profile wit...	Subtask	To Do	
	LP-40	Create UI for adding and submitting n...	Subtask	To Do	
	LP-41	Create UI for editing notes (restrict...	Subtask	To Do	
	LP-42	Implement permission logic to restri...	Subtask	To Do	
Rank:	0 i00027:				
Sprint:	LP Sprint 4				

Description

Notes should be timestamped and editable only by the user who created them or an admin, ensuring accountability.

Post-Lead Submission (LP-4)

🔗 [LP-10] As a lead manager, I want to track campaign performance and view the number of leads generated along with the conversion rate, so that I can assess the effectiveness of our marketing efforts. Created: 31/Mar/25 Updated: 02/Apr/25

Status:	To Do
Project:	leads-project
Components:	None
Affects versions:	None
Fix versions:	None
Parent:	Post-Lead Submission

Type:	Story	Priority:	Medium
Reporter:	Yinon Alfasi	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified


Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-30	Add a data widget on the dashboard to...	Subtask	To Do	
	LP-31	Connect to data sources (CRM, Google ...	Subtask	To Do	

	LP-32	Calculate the conversion rate (leads ...	Subtask	To Do	
	LP-33	Add filtering options by campaign, ti...	Subtask	To Do	
	LP-34	Display visual graphs and charts to i...	Subtask	To Do	
Rank:	0 i0001j:				
Sprint:	LP Sprint 3				

Description

The system should offer detailed analytics for each marketing campaign, displaying key metrics such as the total number of leads generated and the conversion rate from leads to customers. Data should be presented in real-time or near real-time on an intuitive dashboard that includes visual aids like graphs and charts for easy interpretation. Additionally, the tool should allow for filtering by campaign, time period, and other relevant parameters, enabling the lead manager to drill down into specific details and make informed decisions to optimize future campaigns.

Post-Lead Submission (LP-4)


[LP-9] As a lead manager, I want to view all incoming leads in a centralized dashboard so that I can quickly review and manage them.

Created: 31/Mar/25
Updated: 02/Apr/25


Status:	To Do				
Project:	leads-project				
Components:	None				
Affects versions:	None				
Fix versions:	None				
Parent:	Post-Lead Submission				

Type:	Story	Priority:	Medium
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Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-25	Create a "Lead Management" button or ...	Subtask	To Do	
Rank:	0ji0001b:				
Sprint:	LP Sprint 3				

Description
<p>The system should provide a centralized dashboard that aggregates all incoming leads, displaying key details such as name, contact information, submission date, and source. This dashboard must allow the lead manager to easily filter, sort, and search through leads. Additionally, it should support quick actions like assigning leads, marking them for follow-up, or flagging important entries. The interface should be intuitive and responsive to accommodate different devices, ensuring that the lead manager can efficiently manage leads regardless of their location.</p>

Pre-Lead Submission (LP-3)	
<div> <div>  </div> <div> <div>[LP-7] As a lead manager, I want to launch targeted digital ad campaigns on platforms like Google, Facebook, and affiliate networks, so that our business gains exposure and attracts potential leads.</div> <div> <div>Created: 31/Mar/25</div> <div>Updated: 02/Apr/25</div> </div> </div> </div>	
Status:	To Do
Project:	leads-project
Components:	None

Affects versions:	None				
Fix versions:	None				
Parent:	Pre-Lead Submission				
Type:	Story		Priority:	Medium	
Reporter:	Daniel Boguslavsky		Assignee:	Unassigned	
Resolution:	Unresolved		Votes:	0	
Labels:	None				
Σ Remaining Estimate:	Not Specified		Remaining Estimate:	Not Specified	
Σ Time Spent:	Not Specified		Time Spent:	Not Specified	
Σ Original Estimate:	Not Specified		Original estimate:	Not Specified	
Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-21	Launch a digital campaign by promotin...	Subtask	To Do	
Rank:	0 i00013:				
Sprint:	LP Sprint 3				
Description					
The initiative involves designing and executing digital advertising campaigns aimed at a specific audience. This includes researching the most effective keywords, demographics, and interests for each platform, as well as creating engaging ad creatives. The campaigns should be monitored and optimized regularly to maximize lead generation and cost-effectiveness. Data from these campaigns will be analyzed to refine future targeting strategies and improve overall conversion rates.					
Pre-Lead Submission <small>(LP-3)</small>					

 [LP-5] As a lead, I want to fill out a simple form that collects my full name, phone number, email, and other relevant information, so I can quickly and easily express my interest and be contacted in a way that's comfortable for me. Created: 31/Mar/25

Updated: 02/Apr/25

Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Parent:	Pre-Lead Submission		

Type:	Story	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Sub-tasks:	Key	Summary	Type	Status	Assignee
	LP-17	Create a field to input full name (re...	Subtask	To Do	
	LP-18	Create a field to input email address...	Subtask	To Do	
	LP-19	Create a field to input phone number ...	Subtask	To Do	
	LP-20	Create a submit button that validates...	Subtask	To Do	
Rank:	0 i0000n:				
Sprint:	LP Sprint 3				

Description

The form should be clean and minimal, requiring only essential fields to reduce friction for the user. It should include an option for the lead to specify their preferred method of contact (e.g., email or phone). The form must be optimized for both desktop and mobile devices, with clear labels, input validation, and a user-friendly layout. All submitted data should be captured securely and routed to the appropriate system or team for timely follow-up based on the contact preference selected.

[LP-4] **Post-Lead Submission** Created: 31/Mar/25 Updated: 02/Apr/25 Due: 13/Apr/25

Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Type:	Epic	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i0000f:		
Start date:	01/Apr/25		
Issue color:	purple		

[LP-3] Pre-Lead Submission

Created: 31/Mar/25 Updated: 02/Apr/25 Due: 07/May/27

Status:	To Do		
Project:	leads-project		
Components:	None		
Affects versions:	None		
Fix versions:	None		
Type:	Epic	Priority:	Medium
Reporter:	Daniel Boguslavsky	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Rank:	0 i00007:		
Start date:	24/Apr/27		
Issue color:	purple		

Validate "Full Name" field input according to requirements input: Daniel boguslavsky(User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test verifies that the "Full Name" input field accepts only alphabetic characters (a-z, A-Z), is required (cannot be left empty), and does not allow any special characters or numbers. Maximum allowed length is 255 characters.

Preconditions

The lead has navigated to the lead submission page where personal information (such as full name, email, and phone number) can be entered.

Postconditions

no error messeages apper

Steps to reproduce

#	Step	Action	Expected Result
1	Input full name	Daniel Boguslavsky	Name is accepted with no validation errors

Verify that the "Full Name" field does not accept empty input(User Story LP - 5)

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that the "Full Name" field is required and cannot be left blank when submitting the lead form.

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The form is not submitted, and a validation error is displayed for the full name field.

Steps to reproduce

#	Step	Action	Expected Result
1	Leave the "Full Name" field empty	Null	error messeage will appear

LEADS-5 /

Verify that the "Full Name" field does not accept input exceeding 255 characters(User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test checks that the "Full Name" field enforces the maximum character limit of 255 and does not allow longer input.

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The form is not submitted, and a validation error is shown indicating that the input exceeds the character limit.

Steps to reproduce

#	Step	Action	Expected Result
1	Enter a full name with more than 255 alphabetic characters	a*(256)	error messeage will appear

Verify that the "Full Name" field does not accept special characters(User Story LP-5).

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test verifies that the full name field only allows alphabetic characters and spaces, and rejects special characters such as @ , ! , or # .(User Story LP-5)

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The form is not submitted, and a validation error appears for using invalid characters in the full name.

Steps to reproduce

#	Step	Action	Expected Result
1	Fill the full name field.	d@a!niel bog#	error messeage will appear

Verify that the "Email Address" field accepts a valid email format(User Story LP-5).

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that the email address field accepts a properly formatted email.

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The email input is accepted

Steps to reproduce

#	Step	Action	Expected Result
1	Enter an email in the field	daniel555554@gmail.com	no error message will appear

LEADS-8 /

Verify that the "Email Address" field rejects an invalid email format(User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test verifies that the form displays a validation error when the email address entered is in an incorrect format

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The form is not submitted, and a validation error is shown for the email field.

Steps to reproduce

#	Step	Action	Expected Result
1	Enter a email in the field.	daniel55554gmail.com	error message will appear with what is missing

Verify that the "Phone Number" field accepts a valid Israeli format (05XX-XXXXXX)(User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that the phone number field accepts input in the correct Israeli format — either local (05XX-XXXXXX).

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The phone number is accepted no message error apper

Steps to reproduce

#	Step	Action	Expected Result
1	Enter a phone number in the field	0587391234	no error message will appear

Verify that the "Phone Number" field rejects input with more than the allowed number of digits (User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Ensures that the form does not accept phone numbers longer than the expected format **05XX-XXXXXX** (i.e., more than 10 digits total).

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

error message will appear

Steps to reproduce

#	Step	Action	Expected Result
1	enter phone number in the field	052-123456789	error message will appear

LEADS-11 /

Verify that the "Phone Number" field rejects input with fewer digits than required (User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Ensures that the form does not accept incomplete phone numbers with fewer digits than required by the format **05XX-XXXXXX** .

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The form is not submitted, and a validation error is displayed for insufficient digits.

Steps to reproduce

#	Step	Action	Expected Result
1	enter a phone number	052-12	error message will appear

LEADS-12 /

Verify that the "Phone Number" field rejects input containing letters (User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Ensures that the form does not accept phone numbers that contain alphabetic characters.

Preconditions

The user has navigated to the lead submission page where personal information can be entered.

Postconditions

The form is not submitted, and a validation error is displayed for non-numeric input.

Steps to reproduce

#	Step	Action	Expected Result
1	Enter a phone number	05AB-12CDEF	error message will appear

Verify that the Submit button validates input and saves valid data to the leads database (User Story LP-5)

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that when all input fields (full name, email, and phone number) contain valid data, clicking the Submit button triggers validation and saves the data correctly into the leads table in the database.

Preconditions

The user has navigated to the lead submission page, and all form fields are visible.and email full name and phone number are valid

Postconditions

The data is successfully saved into the leads database table, and a success message is shown.

Steps to reproduce

#	Step	Action	Expected Result
1	Click the submit button	"click"	Confirm that a success message appears and the data is been saved in the database

Verify that the lead is redirected from the commercial link to the submission page and can enter personal details (User Story LP-7)

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that when a lead clicks on a commercial link (from platforms like Google or Facebook), they are redirected to the submission page where they can enter their full name, email, and phone number.

Preconditions

A commercial link has been launched on a selected platform, and it points to a valid lead submission page.

Postconditions

The lead lands on the correct submission page and is able to fill in and submit their personal information.

Steps to reproduce

#	Step	Action	Expected Result
1	As a lead, click on a live commercial link (e.g., from a Facebook ad).		The lead lands on the correct submission page and is able to fill in and submit their personal information.

LEADS-28 /

Verify that the leads table exists with the correct structure (User Story LP-43)

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

The database must include a leads table.

Preconditions

Database is deployed.

Postconditions

The leads table contains all specified columns with matching names and data types.

Steps to reproduce

#	Step	Action	Expected Result
1	Connect to the database and Check if the leads table exists		The leads table contains all specified columns with matching names and data types.

Verify that both phone and email are defined as a composite primary key (User Story LP-43).

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

The system must enforce uniqueness based on the combination of phone and email.

Preconditions

A record with specific phone and email exists.

Postconditions

Attempt to insert same phone+email again fails.

Steps to reproduce

#	Step	Action	Expected Result
1	Connect to the database and Insert a record with specific phone and email	'1234567890', 'test@example.com'	will added succefully to database
2	Attempt to insert a duplicate record with the same phone and email	'1234567890', 'test@example.com'	Attempt to insert same phone+email again fails.

Verify that interest_date is auto-populated with the current date (User Story LP-43).

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

When inserting a lead, the interest_date should default to the current system date.

Preconditions

Insert a new lead without specifying interest_date.

Postconditions

The DB assigns today’s date automatically

Steps to reproduce

# Step	Action	Expected Result
1 Connect to the database and Insert a new lead without specifying interest_date	VALUES ('1112223333', 'auto@test.com', 'Auto Test');	added succefully into database
2 enter a queary	SELECT interest_date FROM leads WHERE phone = '1112223333' AND email = 'auto@test.com';	The DB assigns today’s date automatically in the database

LEADS-31 /

Verify that status only accepts specific values (User Story LP-43).

Priority	Severity	Behavior	Type
Low	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

The status column must allow only 'new', 'contacted', or 'disqualified'.

Preconditions

DB schema uses ENUM or a CHECK constraint.

Postconditions

Attempt to insert a different value is rejected

Steps to reproduce

#	Step	Action	Expected Result
1	Connect to the database using a SQL client.	Use a tool like pgAdmin / DBeaver / MySQL Workbench.	Connection to DB is successful.
2	Insert a lead with a valid status value.	INSERT INTO leads (full_name, phone, email, status) VALUES ('Dana Levi', '0501234567', 'dana@example.com', 'new');	Insert is successful.
3	Insert a lead with an invalid status value.	INSERT INTO leads (full_name, phone, email, status) VALUES ('Roni Cohen', '0507654321', 'roni@example.com', 'pending');	Database rejects the insert with a constraint error.

LEADS-16 / Leads - Post submission

Verify that the "Lead Management" button routes to a dashboard displaying all leads in a table (User Story LP-9)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that clicking the "Lead Management" button on the main page routes to a dashboard that retrieves all leads from the leads database and displays them in a table format.

Preconditions

A database exists and is connected, containing stored lead records.

Postconditions

The dashboard successfully fetches data from the database and displays it in a structured table.

Steps to reproduce

#	Step	Action	Expected Result
1	Log in as a lead manager		a button to navigate to the leads dashboard will appeared

#	Step	Action	Expected Result
2	Click the button to navigate to the leads dashboard.	"click"	The dashboard successfully fetches data from the database and displays it in a structured table.

LEADS-21 / Leads - Post submission

Verify that a user can successfully add a new note to a lead’s profile (User Story LP-13)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Ensure that users with proper access can add a note with text content to a lead profile and see it saved.

Preconditions

User is logged in and has access to a lead’s profile

Postconditions

New note is stored and displayed under the lead’s notes section

Steps to reproduce

#	Step	Action	Expected Result
1	Fill the note colum		

LEADS-22 / Leads - Post submission

Verify that the note includes the correct timestamp and creator’s name (User Story LP-13)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

After submitting a note, the UI should show the name of the note’s author and the exact creation timestamp.

Preconditions

A note has been added by the user

Postconditions

Note is displayed with creator name and timestamp visible

Steps to reproduce

#	Step	Action	Expected Result
1	Verify that each note includes a timestamp in the expected format (e.g., DD/MM/YYYY HH:MM)		

LEADS-23 / Leads - Post submission

Verify that only the note's creator or an admin can edit (User Story LP-13)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Only the user who created the note or a system admin should be able to edit the note.

Preconditions

Multiple users are viewing the same lead profile

Postconditions

Only permitted users edit the note

Steps to reproduce

#	Step	Action	Expected Result
1	press edit as an admin		

Verify that submitting an empty note shows a validation error (User Story LP-13)

Priority	Severity	Behavior	Type
Medium	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

The system must prevent users from saving an empty note when editing

Preconditions

User tries to remove all content while editing a note

Postconditions

Edit is blocked; error message is shown

Steps to reproduce

#	Step	Action	Expected Result
1	write "something" into the note		

Verify that a newly added note appears immediately in the notes section of the lead profile (User Story LP-13)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Once a note is added, it should be immediately visible without refreshing

Preconditions

User has added a note

Postconditions

The new note is instantly shown in the UI under the notes section

Steps to reproduce

#	Step	Action	Expected Result
1	press "save" and check if the note was updated		

LEADS-37 / Leads - Post submission

Verify that the "Update Status" button/toggle appears on the leads dashboard (User Story LP-15)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that a visible "Update Status" button or toggle is displayed on the leads dashboard interface for lead managers to interact with.

Preconditions

- The user is on the **leads dashboard** page.

Postconditions

- The "Update Status" button/toggle is confirmed to exist and be visible on the dashboard page.

Steps to reproduce

#	Step	Action	Expected Result
1	Confirm that the button/toggle is visible and clearly labeled		The "Update Status" button/toggle is confirmed to exist and be visible on the dashboard page.

Verify that the status dropdown is shown only when "Update Status" mode is active (User Story LP-15)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that the status dropdowns next to each lead are **hidden by default**, and only become visible when the **"Update Status" toggle/button** is activated.

Preconditions

The user is on the **leads dashboard** with multiple leads visible and "Update Status" mode is currently **off** by default.

Postconditions

Status dropdowns is visible.

Steps to reproduce

#	Step	Action	Expected Result
1	Click to activate the Update Status mode		Status dropdowns is visible.

Verify that a success message ("Status updated") is displayed after updating a lead’s status (User Story LP-15).)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that when a lead’s status is successfully updated using the status dropdown in update mode, the system displays a clear confirmation message such as **“Status updated”**, indicating the action was completed successfully.

Preconditions

The **Update Status** toggle is available and the table displays at least one lead.

Postconditions

Confirm that a **success message** appears with the text: **“Status updated”**.

Steps to reproduce

#	Step	Action	Expected Result
1	Click the Update Status toggle to activate update mode.		enter a update mode and the change status value dropbox is visible
2	Change the status to a different value (e.g., from New to Contacted).	Contact ed	Confirm that a success message appears with the text: “Status updated” .

LEADS-40 / Leads - Post submission

Verify that clicking the “Cancel” or “Exit Update Mode” button returns the dashboard to view-only mode (User Story LP-15).

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that when the lead manager activates **Update Status** mode, they can return to the default view-only mode by clicking a **“Cancel”** or **“Exit Update Mode”** button, which hides all editable elements (such as status dropdowns).

Preconditions

The **Update Status** toggle/button has been activated.

Postconditions

All editable controls, such as status dropdowns, are no longer visible.

Steps to reproduce

#	Step	Action	Expected Result
1	Click the “Cancel” or “Exit Update Mode” button.	Cancel or Exit Update	All editable controls, such as status dropdowns, are no longer visible.

LEADS-17 / Leads - Post submission

Verify that clicking on column headers sorts the leads table by that column (User Story LP-16)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that clicking a column header with sort arrows (▲▼) rearranges the leads in ascending or descending order, except the Notes column.

Preconditions

The lead manager is logged in and on the leads dashboard. The table contains multiple leads with varying data.

Postconditions

The table is sorted by the selected column, with sort direction visibly indicated.

Steps to reproduce

#	Step	Action	Expected Result
1	Click a sortable column header	Name ▲	The table is sorted by the selected column, with sort direction visibly indicated.

Verify that clicking the “Notes” column header does not trigger sorting (User Story LP-16)

Priority	Severity	Behavior	Type
Medium	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures that the "Notes" column is excluded from sorting and does not react to clicks.

Preconditions

The lead manager is on the leads dashboard. The table includes a Notes column.

Postconditions

No sorting occurs, and the table order remains unchanged.

Steps to reproduce

#	Step	Action	Expected Result
1	Attempt to click the "Notes" column header.		No sorting occurs, and the table order remains unchanged.

Verify that filtering by lead status using the dropdown updates the leads table accordingly (User Story LP-16)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures the dropdown allows filtering the leads by status (New, Contacted, Disqualified, All), and updates the table accordingly.

Preconditions

The lead manager is on the leads dashboard. Leads exist with multiple statuses.

Steps to reproduce

#	Step	Action	Expected Result
1	Select a status :Contacted from the dropdown.	Contacted (in the dropbox)	The table displays only leads that match the selected status.(Contacted)

LEADS-20 / Leads - Post submission

Verify that searching by name filters the leads table correctly (User Story LP-16)

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

This test ensures the search box filters leads by full or partial name input and updates the table view accordingly.

Preconditions

The lead manager is on the dashboard. Leads with names matching the test input exist.

Postconditions

The table shows only leads with names that match or partially match the search query.

Steps to reproduce

#	Step	Action	Expected Result
1	In the search box, type a name	Daniel	The table shows only leads with names that match to daniel or partially match the search query .

Login to Campaign Management System (User Story LP-10).

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the user can successfully log into the campaign management system with valid credentials.

Preconditions

The user has valid credentials and access to the system

Postconditions

The user is logged in successfully and navigates to the campaign management interface.

Steps to reproduce

#	Step	Action	Expected Result
1	Enter valid username and password	Username, Password	Successful login to the system

Invalid Login Attempt (User Story LP-10).

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the system does not allow login with invalid credentials

Preconditions

The user has incorrect credentials

Postconditions

The user remains on the login page and sees an error message

Steps to reproduce

#	Step	Action	Expected Result
1	Enter invalid username and/or password	Incorrect Username, Incorrect Password	The system displays an error message and does not allow login

LEADS-43 / Leads - Post submission

Display Campaign Data (User Story LP-10).

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that campaign data, including the number of generated leads, is displayed correctly in the system.

Preconditions

There are active campaigns with lead data

Postconditions

The system correctly displays campaign data, including lead count and other statistics.

Steps to reproduce

#	Step	Action	Expected Result
1	Navigate to the campaign management interface	Campaign management dashboard	The interface displays the list of active campaigns
2	Select a campaign from the list	Active campaign	The system displays specific data for the selected campaign (e.g., leads, conversions, etc.).

No Campaign Data Available (User Story LP-10).

Priority	Severity	Behavior	Type
Medium	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies the system’s behavior when no campaign data is available

Preconditions

There are no campaigns or lead data in the system

Postconditions

The system should inform the user that no data is available

Steps to reproduce

#	Step	Action	Expected Result
1	Navigate to the campaign management interface	Empty campaign list	The interface displays a message like "No campaigns available" or "No data available".
2	Select a campaign (if an	No campaigns listed	The system shows a message or warning that no data is available

Calculate Conversion Rate (User Story LP-10).

Priority	Severity	Behavior	Type
High	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the conversion rate (conversions/leads * 100) is calculated correctly.

Preconditions

- There are leads and conversion data in the campaign.
-

Postconditions

The system calculates and displays the correct conversion rate

Steps to reproduce

#	Step	Action	Expected Result
1	Select a campaign with leads and conversions	Campaign with 100 leads and 20 conversions	The system displays the correct number of leads and conversions
2	Verify the conversion rate calculation	100 leads, 20 conversions	The system correctly calculates the conversion rate (20%)

LEADS-46 / Leads - Post submission

Incorrect Conversion Rate Calculation (User Story LP-10).

Priority	Severity	Behavior	Type
High	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the system correctly handles scenarios where conversion data is incorrect or missing.

Preconditions

The campaign has incorrect or missing conversion data

Postconditions

The system should display an error or a fallback value for the conversion rate.

Steps to reproduce

#	Step	Action	Expected Result
1	Select a campaign with missing or incorrect conversion data	Campaign with 100 leads, but no conversions or incorrect data	The system may display an error or "Conversion rate not available"
2	Verify if the conversion rate is calculated	Missing conversion data	The system should either not display a conversion rate or show a warning/error.

LEADS-47 / Leads - Post submission

Generate Campaign Summary Report (User Story LP-10).

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the system can generate a summary report that includes key campaign data such as leads and conversion rate.

Preconditions

Campaigns have sufficient data for reporting

Postconditions

The user is able to download or view the generated report

Steps to reproduce

#	Step	Action	Expected Result
1	Select the campaign you want to generate a report for	Active campaign	The system displays the selected campaign details
2	Click the "Generate Report" button	"Generate Report" button	The system generates and allows downloading of a summary report in PDF or Excel format.

Report Generation Failure (User Story LP-10).

Priority	Severity	Behavior	Type
Medium	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the system behaves correctly when report generation fails (e.g., due to missing data).

Preconditions

Campaign data is incomplete or corrupted

Postconditions

The system fails to generate the report and notifies the user

Steps to reproduce

#	Step	Action	Expected Result
1	Select a campaign with incomplete or missing data	Incomplete campaign data	The system should display an error or warning regarding missing data for report generation.
2	Click the "Generate Report" button	"Generate Report" button	The system fails to generate the report and displays an error message

Edit Campaign Data (User Story LP-10)..

Priority	Severity	Behavior	Type
Medium	Normal	Positive	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the user can edit campaign data such as budget, time frame, and other settings.

Preconditions

The campaign is active and editable

Postconditions

The campaign data is updated correctly

Steps to reproduce

#	Step	Action	Expected Result
1	Select an active campaign	Active campaign	The campaign data is displayed
2	Edit the campaign's budget or time frame	New budget, new time frame	The system updates the campaign data successfully
3	Click "Save Changes	"Save Changes" button	The changes are saved successfully

LEADS-50 / Leads - Post submission

Edit Campaign Data Failure (User Story LP-10).

Priority	Severity	Behavior	Type
Medium	Normal	Negative	Other
Layer	Is Flaky	Is Muted	Automation
Not set	No	No	Manual
Status	Milestone		
Actual	-		

Description

Verifies that the system behaves correctly when campaign data cannot be edited due to restrictions or errors.

Preconditions

The campaign is locked or data is invalid

Postconditions

The user is unable to make changes and sees an error message

Steps to reproduce

#	Step	Action	Expected Result
1	Select an inactive or locked campaign	Locked campaign	The system prevents editing

#	Step	Action	Expected Result
2	Attempt to edit the campaign data	Invalid or locked data	The system displays an error message indicating that the data cannot be edited.