WEALTHWISE FINANCIAL ADVISING PLATFORM

Acceptance Test Plan

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SE 306 - Software Project Management and Testing

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I. Introduction

1. Purpose of Acceptance Test

This document is to be used upon the completion of the program. The Acceptance Test Plan (ATP) document aims to outline our strategy and methods to ensure our program satisfies the requirements. It acts as a way to catch and correct faults before final deployment. It also serves the purpose of verifying that the program is what the end-user and stakeholders actually want. By completing the ATP, the team can be assured that we have properly completed our contract

2. Proposed System Overview or Configuration Chart

Our system is broken into five main apps that can be navigated from the navigation bar. The calculations app contains each financial calculation, including the budgeting tool. The scheduling app includes all the tools advisors need to make, edit, and delete events. Users also register for events through the scheduling app. The learning hub app redirects users to a separately hosted service that hosts the learning hub content. The admin app allows admins to edit any data in the database and create advisors. The user's apps enable new users to register or existing ones to log in and out. It also allows users to edit their account settings and subscriptions. The chart below shows how the website pages for these apps are represented on the website.

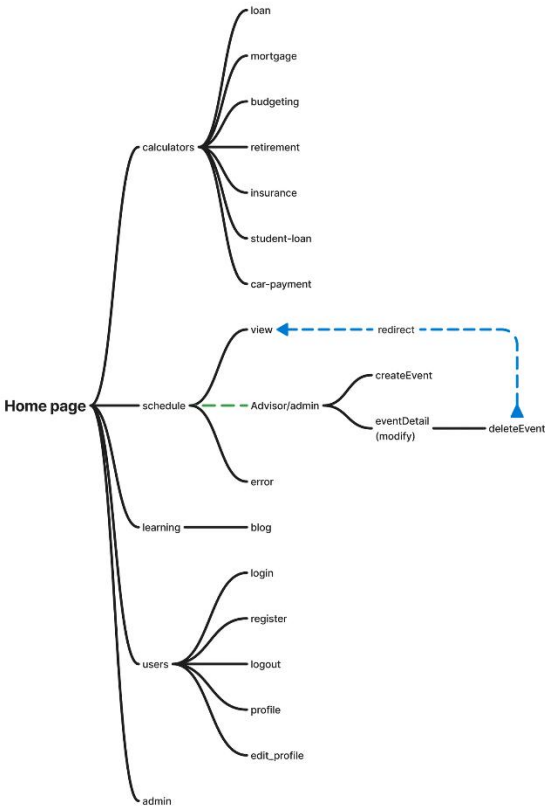

Figure 1. application modules structure

3. Definitions, Acronyms, and Abbreviations

- ATP – Acceptance Test Plan - A document outlining the scope, test cases, environment, and acceptance criteria for validating a product.
- Functional Work Breakdown Structure (FWBS) - A numbering system used to categorize software functions/modules being tested.
- Operating system (OS): the foundational software that manages hardware resources and provides essential services for application programs
- Output (expected output): The output or behavior under the specified conditions.

- P/F – Pass/Fail
- Test case: specific set of conditions or inputs, along with expected outcomes, designed to verify that a particular feature or functionality of a software application works as intended.
- Test input: The data or conditions to be used during testing.
- Test sets - subsets of data used specifically for testing the performance or functionality of a software system, application, or model.

4. Testing Principles Used

The test cases are all designed using black box testing, meaning the code was only examined after an error was identified. Black box testing was chosen over white box testing because it closely simulates how a user interacts with the system, ensuring that functionality aligns with requirements without bias from the implementation details. This approach allows testers to focus on output rather than code structure.

Error guessing will be used to determine what fields to input for each test case. Error guessing relies on the developer's intuition to identify potentially problematic areas. This approach saves time by avoiding writing and executing a comprehensive set of test cases. While it may allow some errors to slip through, the focus of this program prioritizes speed and feature development overachieving zero defects.

5. Overview of Rest of ATP

This document outlines test cases to verify whether the program meets its requirements. It also includes details on the hardware and software used during testing, which may be relevant for troubleshooting future errors. Additionally, it provides a test schedule to establish the order and

deadlines for test completion. Finally, a section is included for client and developer review and approval once testing is complete.

II. Hardware and Software Used for Testing

To make sure our acceptance test activities are consistent, reliable, and reproducible, we shall do evaluations within a controlled and clearly defined hardware and software environment.

Category	Details
Operating system	Windows 11 Pro (Versions 23H2 and 24H2)
Web Browsers	Mozilla Firefox v.136.0, Microsoft Edge v.122.0, Google Chrome v.122.0
Hardware Specs	Intel Core i7 @ 2.3GHz, 16GB RAM, 1920x1080 screen resolution
Network Environment	Stable 100 Mbps Wi-Fi; latency simulation via Chrome DevTools
Testing Tools	Manual UI testing using browser DevTools; internal test logs and reports
Development Tools	GitHub (source control), Localhost test environments, PgAdmin, PostgreSQL

1. Operating systems

We shall perform all tests using Microsoft Windows platforms, reflecting the intended production environment and what our customers shall most likely use. Specifically, we shall use:

- Windows 11 Pro, Version 23H2
- Windows 11 Pro, Version 24H2

These versions shall allow us to validate compatibility across both stable and near-future releases. They shall also be readily available to our team.

2. Web Browsers

To validate cross-browser compatibility and ensure a consistent user experience, we shall manually test the platform using these browsers:

- Mozilla Firefox, Version v.136.0
- Microsoft Edge, Version v.122.0
- Google Chrome, Version v.122.0.6261.111

These browsers shall represent the most commonly used environments by our target users. We shall use the default browser settings unless a test requires specific conditions, such as incognito mode or cleared cache.

3. Hardware specifications

We shall do all tests on machines that meet or exceed the following baseline hardware specifications:

- Processor: Intel Core i7 (2.3GHz, Quad-Core)
- RAM: 16 GB
- Display Resolution: 1920×1080 (Full HD)
- Graphics: Integrated Intel Graphics or equivalent

These configurations shall enable us to run all platform features smoothly, including complex user interfaces, real-time interactions, and analytics dashboards.

4. Network conditions

Our tests shall be done using the SDSU Student and Faculty networks. This stable local network environment shall closely mirror the typical company Wi-Fi that our users might use. Our setup shall include:

- Connection Type: Secure Wi-Fi
- Internet Speed: 100 Mbps broadband
- Latency Testing: Simulated using Chrome DevTools to throttle network speeds and emulate slower connections

This approach shall help us identify latency-related issues and monitor system responses under constrained conditions.

5. Testing tools and Methodology

We shall base our testing strategy on structured manual testing and use several tools to support the process:

- Browser DevTools: To monitor network activity, debug errors, and inspect DOM elements
- Localhost Server: We shall host most modules on `localhost:8000` for test execution
- GitHub: For source control and release version tracking
- Jira: To log bugs, document test results, and coordinate issue resolution
- Internal Test Logs: Maintained by each tester to track inputs, outputs, and observations

This controlled environment shall make sure our tests are valid, reproducible and mirror that of real user experiences after production.

III. Test Schedule and Test Sets

Test #	FWBS #	Test Name	Test Description	Who	Date	P/F
T1	1.1	User Registration	This test ensures the user can successfully register an account, passwords can be tested, and email verification is successful.	Draix	Apr. 30	
T2	1.2	User login	This test ensures the user can successfully re-authenticate with valid credentials.	Draix	Apr. 30	
T3	1.3	Password recovery	This test ensures the user can change their password by with access of their registered email.	Draix	Apr. 30	
T4	1.4	Profile Management	This test ensures the user can update their profile with relevant information, and advisor-specific fields are only present for advisors.	Draix	Apr. 30	
T5	1.5	Subscription Management	This test ensure the user can see their subscription status and transaction history. Additionally, this test ensures payments can be made to purchase a subscription.	Draix	Apr. 30	
T6	1.6	Interaction History	This test ensures the user can see their event and consultant history.	Draix	Apr. 30	
T7	1.7	Advisor management system	This test ensures an advisor can be added by an administrator and can be managed by admins as needed.	Draix	Apr. 30	
T8	1.8	Messaging and Notification	This test ensures in-app messages and notifications as well as email notifications are working.	Draix	Apr. 30	

T9	3.1	Advisor Booking System	This test ensures the advisor booking system for users allow users to search, filter, ensure confirmation and reminder.	Sawyer	Apr. 30	
T10	3.2	Virtual Consultation Session	This test checks if the creation of virtual consultation sessions and their virtual meetings links are functioning well.	Sawyer	Apr. 30	
T11	5.2	Event Integration	This test checks if the event registration system allows users to lookup and register for event.	Sawyer	Apr. 30	
T12	5.1	Create and manage event	This test ensures that event creation, editing, and deleting is functioning for advisors.	Sawyer	Apr. 30	
T13	6.1	Payment Gateway Integration	This test ensures that the system can handle all matters dealing with money transaction processing, and subscription payments securely and properly.	Norman	Apr. 30	
T14	6.2	Transaction Management	This test ensures the system returns the correct invoice and receipts to the user. Additionally, check if the user can initiate a refund or cancellation.	Norman	Apr. 30	
T15	7.1	User Reports	Test if the system can create a full financial report and customize the report options of a user.	Norman	Apr. 30	
T16	7.2	Administrative Analytics	This test ensures the admin is able to monitor and create reports about user metrics, and system analytics such as active user number, consultation rates, platform performance… And admin also can generate reports on system metrics in income and health.	Norman	Apr. 30	
T17	2.1	Loan Calculator	Validates that users can input loan terms to calculate accurate monthly payments, total interest, and overall loan cost with a visual breakdown of principal vs. interest.	John	Apr. 30	

T18	2.2	Mortgage Calculator	Validates that users can input loan terms to calculate accurate monthly payments, total interest, and overall loan cost with a visual breakdown of principal vs. interest.	John	Apr. 30	
T19	2.4	Retirement Calculator	Ensures that users can project retirement savings based on current age, contributions, and expected returns, and receive feedback on meeting retirement goals.	John	Apr. 30	
T20	2.3	Budgeting Tool	Checks that users can enter income and expenses to generate a monthly surplus/deficit, track savings progress, and receive warnings for overspending.	John	Apr. 30	
T21	2.5	Insurance Calculator	Ensures the system can estimate life insurance coverage needs by evaluating income replacement, debt payoff, education costs, and existing policy coverage.	John	Apr. 30	
T22	2.6	Student Loan Calculator	Confirms users can evaluate student loan repayment options and see the effect of extra payments on interest savings and payoff timeline.	John	Apr. 30	
T23	2.7	Car Payment Calculator	Verifies car loan calculations based on vehicle price, trade-in value, taxes, and fees, and displays monthly payment and total cost with a breakdown.	John	Apr. 30	
T24	4.1	Market News	This test ensures that the learning module displays the latest financial news articles from external news APIs, providing users with up-to-date market information.	John	Apr. 30	
T25	4.2	Learning Tools	This test ensures that the learning module integrates properly, and handles user requests for available resource and interactive learning.	John	Apr. 30	

IV. Error Handling Policy

If a test case fails, developers must document the failed test number(s), error messages, and relevant details. Upon completing the acceptance test, they should identify any product issues.

Developers have 48-72 hours to resolve these issues, after which another acceptance test is scheduled with the client. This follow-up test will repeat all cases—both failed and passed. The cycle continues until the product passes all tests or gains client approval.

Errors should be mitigated through the outlined error handling methodology:

Back-end:

- Use try-except blocks to catch and log critical errors.
- Implement logging for debugging and monitoring.
- Validate user inputs to prevent database errors and security issues.

Front-end:

- Utilize error boundaries in React to handle UI errors.
- Display user-friendly error messages for input validation, API failures, and connectivity issues.

V. Individual Test Cases

1. User Management System

T1. User Registration (FWBS 1.1)

Test Number	T1
Test Module	User Registration
F/S (WBS) number	1.1
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures the user can successfully register an account, passwords are verified, and email verification is performed.
- Setup**:** Navigate to the "User Registration" page. This can be achieved by clicking "Register" on the navigation bar. You will now be presented with the user registration page. Enter the relevant data, check "I agree to the Terms of Service and Privacy Policy", and click "Register" when complete.

Input Label	**Data**
Username	ExUser
Password	1qazXSW@
Confirm Password	1qazXSW@
Agree to TOS	Yes

Output: Successful user account creation.

Input Label	**Data**
Username	ExUser

Password	1qazXSW@
Confirm Password	2123qazXSW@2
Agree to TOS	Yes

Output: User entity will not be created – passwords do not match.

Input Label	**Data**
Username	TakenUser
Password	1qazXSW@
Confirm Password	1qazXSW@
Agree to TOS	Yes

Output: User entity will not be created – an account with this username already exists.

Input Label	**Data**
Username	ExUser
Password	1qazXSW
Confirm Password	1qazXSW
Agree to TOS	Yes

Output: User entity will not be created – password requirement not met, missing at least one special character.

Input Label	**Data**
Username	ExUser
Password	1qazXSW@
Confirm Password	1qazXSW@
Agree to TOS	No

Output: User entity will not be created – terms of service and privacy policy are not agreed to. Prompt the user to agree with them.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T2. User Login (FWBS 1.2)

Test Number	T2
Test Module	User Login
F/S (WBS) number	1.2
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures the user can successfully re-authenticate with valid credentials.
- Setup: Navigate to the “User Login” page. This can be achieved by clicking “Login” on the navigation bar. You will now be presented with the user login page. Enter the relevant data and click “Login” when complete.

Input Label	**Data**
Username	ExUser
Password	1qazXSW@

Output: User successfully logged in.

Input Label	Data
Username	ExUser
Password	1qazXSW@2

Output: User will not be logged in – username and password do not match.

Input Label	Data
Username	ExUser765456765
Password	1qazXSW@

Output: User will not be logged in – username and password do not match.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T3. Password Recover (FWBS 1.3)

Test Number	T3
Test Module	Password recovery
F/S (WBS) number	1.3
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures the user can change their password by with access to their registered email.

- Setup: While on the “user login” page, click on the “Forgot Password” link. A link will be sent to the email on file for that username. Follow the link in the email to the password reset page. Enter your New Password and the Confirm Password and click “Reset Password”.

Input Label	**Data**
Password	2wsxCDE#
Confirm password	2wsxCDE#

Output: Password successfully reset.

Input Label	**Data**
Password	2wsxCDE#
Confirm password	2wsxCDE#2

Output: Password will not reset – passwords entered do not match.

Input Label	**Data**
Password	2wsxCD
Confirm password	2wsxCD

Output: Password will not reset – password does not meet requirements.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T4. Profile Management (FWBS 1.4)

Test Number	T4
Test Module	Profile Management
F/S (WBS) number	1.4
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures the user can update their profile with relevant information hand advisor specific fields are only present for advisors.
- Setup: Navigate to the “User Profile” page by click “Profile” on the navigation bar. Next, click “Edit Profile”. Enter any relevant information you wish to change. Click “Save”.

Input Label	**Data**
Account type	User
Email	my.test.email@email.com
Advisor Field Present	No

Output: Advisor fields not present; email updated to my.test.email@email.com.

Input Label	**Data**
Account type	Advisor
Email	my.test.email@email.com
Advisor Field Present	Yes

Output: Advisor fields present; email updated to my.test.email@email.com.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T5. Subscription Management (FWBS 1.5)

Test Number	T5
Test Module	Subscription Management
F/S (WBS) number	1.5
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensure the user can see their subscription status and transaction history. Additionally, this module ensures payments can be made to purchase a subscription.
- Setup: From the "User Profile" page, click "Subscription" on the left side of the page. Click "Transaction History" or "Subscribe" as relevant.

Input Label	**Data**
Subscribed	Yes
Transaction History Clicked	No
Subscribe Clicked	No

Output: No payment history data shown; no payment fields shown; subscription status shown "subscribed."

Input Label	**Data**
Subscribed	No
Transaction History Clicked	No
Subscribe Clicked	No

Output: No payment history data shown; no payment fields shown; subscription status shown "You have not subscribed."

Input Label	Data
Subscribed	Yes
Transaction History Clicked	Yes
Subscribe Clicked	No

Output: Payment history data shown; no payment fields shown; subscription status shown “You have not subscribed.”

Input Label	Data
Subscribed	No
Transaction History Clicked	No
Subscribe Clicked	Yes

Output: No payment history data shown; payment fields shown; subscription status shown “You have not subscribed.”

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T6. Interaction History (FWBS 1.6)

Test Number	T6
Test Module	Interaction History
F/S (WBS) number	1.6
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures the user can see their event and consultant history.
- Setup: From the “User Profile” page, click “Interaction History”.

Input Label	**Data**
Event History Data Present	Yes
Consultation History Data Present	Yes

Output: Data for all events and consultations shown.

Input Label	**Data**
Event History Data Present	No
Consultation History Data Present	Yes

Output: Data for all consultations shown. “No Event History” shown.

Input Label	**Data**
Event History Data Present	Yes
Consultation History Data Present	No

Output: Data for all events shown. “No Consultation History” shown.

Input Label	**Data**
Event History Data Present	No
Consultation History Data Present	No

Output: “No Consultation History” shown. “No Event History” shown.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T7. Advisor Management System (FWBS 1.7)

Test Number	T7
Test Module	Advisor management system
F/S (WBS) number	1.7
Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures an advisor can be added by an administrator and can be managed by admins as needed.
- Setup: Navigate to the admin page by going to "localhost:8000/admin" and login with admin credentials. Click on the user you wish to modify.

Input Label	**Data**
StaffStatus	No
ChangeToStaff	Yes
DeleteUser	No

Output: User will be promoted to advisor.

Input Label	**Data**
StaffStatus	No
ChangeToStaff	No
DeleteUser	No

Output: User will not be promoted to advisor.

Input Label	**Data**
StaffStatus	Yes

ChangeToStaff	No
DeleteUser	No

Output: Advisor will be demoted to user.

Input Label	**Data**
StaffStatus	Yes
ChangeToStaff	Yes
DeleteUser	Yes

Output: Advisor account will be deleted.

Input Label	**Data**
StaffStatus	Yes
ChangeToStaff	No
DeleteUser	No

Output: Advisor account will be deleted.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T8. Messaging and Notification (FWBS 1.8)

Test Number	T8
Test Module	Subscription Management
F/S (WBS) number	1.8

Software Setup	OS: Windows 11 23H2; Morilla Firefox Version 136.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures app messages and notifications as well as email notifications are working.
- Setup: From the "User Profile" page, click "Subscription" on the left side of the page. Click "Transaction History" or "Subscribe" as relevant.

Input Label	**Data**
Sender	User1
Recipient	User2
MessageType	Message
Message	Hello

Output: user2 will receives an in-app message: "Hello". User1 will get update about message status.

Input Label	**Data**
Sender	System
Recipient	User2
MessageType	Message
Message	You have renewed your subscription.

Output: user2 receives an in-app message and email notification: "You have renewed your subscription.".

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Signature:

Name: Arqer**:**

Name: Signature:

T9. Advisor Booking System (FWBS 3.1)

Test Number	T9
Test Module	Advisor Booking System
F/S (WBS) number	3.1
Software Setup	OS: Windows 11 23H2; Google Chrome, Version ^122.0.6261.111
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module allows users to book an consultation session with an advisor
- Setup: Navigate to the “Schedule” page. This can be achieved by clicking “Calendar” on the navigation bar. You must login as a user and not a advisor. Search and filter with the search box show on the page to look for advisor and book a session with them. If there is an upcoming meeting, the system will show a reminder on user’s screen.

Input Label	**Data**
User logged in	No
Advisor found	No/Yes
Selected advisor availability	No/Yes
Confirmed upcoming meeting	No

Output: redirect user to the login page.

Input Label	**Data**
User logged in	Yes
Advisor found	No
Selected advisor availability	No

Confirmed upcoming meeting	No

Output: show the list of all advisors.

Input Label	**Data**
User logged in	Yes
Advisor found	Yes
Selected advisor availability	Yes
Confirmed upcoming meeting	No

Output: list all the advisors that match the search text. For the selected advisor, allow user to book a session with them.

Input Label	**Data**
User logged in	Yes
Advisor found	Yes
Selected advisor availability	No
Confirmed upcoming meeting	No

Output: list all the advisor tat match the search text. For the selected advisor, show user warning “advisor is not available” on the list and disable the booking button.

Input Label	**Data**
User logged in	No
Advisor found	No/Yes
Selected advisor availability	No/Yes
Confirmed upcoming meeting	Yes

Output: Send the reminder to the user preference communication method only.

Input Label	**Data**
User logged in	Yes

Advisor found	No/Yes
Selected advisor availability	No/Yes
Confirmed upcoming meeting	No

Output: send the reminder to the user preference communication method and pop up notification on their view.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T10. Virtual Consultation Session (FWBS 3.2)

Test Number	T10
Test Module	Virtual Consultation Session
F/S (WBS) number	3.2
Software Setup	OS: Windows 11 23H2; Google Chrome, Version ^122.0.6261.111
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module allows users and advisors to join a video call service
- Setup: Navigate to the “Schedule” page. This can be achieved by clicking “Calendar” on the navigation bar. Make a consultation session for an advisor and user account. Then click the video call service link in the upcoming events section.

Input Label	**Data**
Is valid credential	True

Video call service link available	True

Output: Direct advisor/user to the video hosting service successfully.

Input Label	**Data**
Is valid credential	False
Video call service link available	True

Output: redirect user to login page.

Input Label	**Data**
Is valid credential	False/True
Video call service link available	False

Output: Show error and make log report to the system. Send request to the video call service to create a new room.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T11. Event Registration (FWBS 5.2)

Test Number	T11
Test Module	Event Registration
F/S (WBS) number	5.2
Software Setup	OS: Windows 11 23H2; Google Chrome, Version ^122.0.6261.111
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This test checks if the event registration system allows user to look up and register for event.
- Setup: Navigate to the “Schedule” page. This can be achieved by clicking “Calendar” on the navigation bar. You will now be presented with a list of upcoming events.

Input Label	**Data**
User logged in	No
Event registration	Yes/No

Output: redirect user to the login page.

Input Label	**Data**
User logged in	Yes
Event registration	No

Output: show the list of events and user registered events.

Input Label	**Data**
User logged in	Yes
Event registration	Yes

Output: show the event details in the confirmation page for users to double check their registration.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T12. Event Creation and Editing (FWBS 5.1)

Test Number	T12
Test Module	Event creation and editing
F/S (WBS) number	5.1
Software Setup	OS: Windows 11 24H2; Microsoft Edge Version 134.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: this module ensures that the system can handle all matters dealing with money transaction processing, subscription payments securely and properly.
- Setup: select gateway to make a payment. The system will listen to the transaction status and check sum to ensure transaction security.

Input Label	**Data**
Date and Time Start	28 April 2025, 13:00
Date and Time And	30 April 2025, 13:00
Description	
Title	Steak Fest
Location	Brookings

Output: Invalid because the start time has already occurred. Show errors: “Start and end time must be in the future”

Input Label	**Data**
Date and Time Start	30 April 2025, 13:00
Date and Time And	20 April 2025, 13:00
Description	
Title	Steak Fest
Location	Brookings

Output: Invalid because the end time is before the start time. Show error “end time must be after the start time.”

Input Label	**Data**
Date and Time Start	30 April 2025, 13:00
Date and Time And	30 April 2025, 14:00
Description	Hello Good Sir
Title	
Location	

Output: Invalid because event requires a title and location

Input Label	**Data**
Date and Time Start	30 April 2025, 13:00
Date and Time And	30 April 2025, 14:00
Description	Hello Good Sir
Title	Steak Fest
Location	Brookings

Output: Creates a new event that is displayed in the list of events

- Setup for editing: must login as an advisor. Navigate to the “Schedule” page. This can be achieved by clicking “Calendar” on the navigation bar. Click on the edit event button on a newly created event.

Input Label	**Previous data**	**Data**
Date and Time Start	30 April 2025, 13:00	N/A
Date and Time And	30 April 2025, 14:00	30 April 2025, 12:00
Description	Hello Good Sir	N/A
Title	Steak Fest	N/A

Location	Brookings	N/A
Delete		False

Output: Invalid because new end time is before the previous start time.

Input Label	**Previous data**	**Data**
Date and Time Start	30 April 2025, 13:00	N/A
Date and Time And	30 April 2025, 14:00	N/A
Description	Hello Good Sir	N/A
Title	Steak Fest	
Location	Brookings	
Delete		False

Output: Invalid because event needs a title and location

Input Label	**Previous data**	**Data**
Date and Time Start	30 April 2025, 13:00	N/A
Date and Time And	30 April 2025, 14:00	1 May 2025, 17:00
Description	Hello Good Sir	What's new
Title	Steak Fest	Willy Wonka
Location	Brookings	Lawsuit impending
Delete		False

Output: Updates the event with new values that should be displayed on the event list

Input Label	**Previous data**	**Data**
Date and Time Start	30 April 2025, 13:00	N/A
Date and Time And	30 April 2025, 14:00	N/A
Description	Hello Good Sir	N/A
Title	Steak Fest	N/A
Location	Brookings	N/A

Delete		False

Output: The event should be removed from the database and the event list

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T13. Payment Gateway Integration (FWBS 6.1)

Test Number	T13
Test Module	Payment Gateway Integration
F/S (WBS) number	6.1
Software Setup	OS: Windows 11 24H2; Microsoft Edge Version 134.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: this module ensures that the system can handle all matters dealing with money transaction processing, subscription payments securely and properly.
- Setup: select gateway to make a payment. The system will listen to the transaction status and check sum to ensure transaction security.

Input Label	**Data**
Transaction status	Succeed
SHA256 check sum match	Yes

Output: process to handle the payment by returning the success response.

Input Label	Data
Transaction status	Declined/Cancelled
SHA256 check sum match	Yes

Output: process to handle the payment by returning false response with the reason if applicable.

Input Label	Data
Transaction status	Succeed/Declined/Cancelled
SHA256 check sum match	No

Output: process to initiate security report and return user to the error page.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T14. Transaction Management (FWBS 6.2)

Test Number	T14
Test Module	Transaction Management
F/S (WBS) number	6.2
Software Setup	OS: Windows 11 24H2; Microsoft Edge Version 134.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: ensures the system returns the correct invoice and receipts to the user. Additionally, check if the user can initiate a refund or cancellation.

- Setup: user navigate to the payment section. The system will return all the invoices and receipts from that specific user.

Input Label	**Data**
User existed	Yes
Invoice data existed	No
Receipt data existed	No

Output: show message “You have no invoice and receipt” message.

Input Label	**Data**
User existed	No
Invoice data existed	No
Receipt data existed	No

Output: redirect user to login page.

Input Label	**Data**
User existed	Yes
Invoice data existed	Yes
Receipt data existed	No

Output: show user invoice data. No receipt would show.

Input Label	**Data**
User existed	Yes
Invoice data existed	No
Receipt data existed	Yes

Output: show user receipt data. No invoice would show.

Input Label	**Data**

User existed	Yes
Invoice data existed	Yes
Receipt data existed	Yes

Output: show both user invoice and receipt data.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T15. User Report (FWBS)

Test Number	T15
Test Module	User Reports
F/S (WBS) number	6.1
Software Setup	OS: Windows 11 24H2; Microsoft Edge Version 134.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensures the system can create full financial reports and customized reports for the user.
- Setup: Navigate to “reports” by clicking “Reports” on the navigation bar. Then click “Create report” for a full financial report using user financial data or select “customize report” to create customized report.

Input Label	**Data**
User financial data available	No
Create report selected	No/Yes

Customized report selected	No/Yes

Output: show message “You don’t have any financial data available on the system” with a button with label “Create new” that redirect them to create new financial record.

Input Label	**Data**
User financial data available	Yes
Create report selected	No
Customized report selected	No

Output: show the user the most recent of their data on the “Report” page.

Input Label	**Data**
User financial data available	No
Create report selected	Yes
Customized report selected	No

Output: Generate the full report from user’s data. Open the report in new tab in a PDF format.

Input Label	**Data**
User financial data available	Yes
Create report selected	No
Customized report selected	Yes

Output: show a list of available fields the user can select from. Generate a customized report from the selected fields. Open the report in new tab in a PDF format.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Name:

Signature: Name:

Arqer**:** Signature:

T16. Administrative Analytics (FWBS 7.2)

Test Number	T16
Test Module	Administrative Analytics
F/S (WBS) number	7.2
Software Setup	OS: Windows 11 24H2; Microsoft Edge Version 134.0
Hardware Setup	CPU 2.3GHz Intel Core i7; Memory 16GB

- Purpose of module: This module ensure the admin is able to monitor and create reports about user metrics and system metrics in income and health.
- Setup: Navigate to the admin page at “localhost:8000/admin” and login with the admin account. Navigate to “Reports” tab on the navigation bar.

Input Label	**Data**
Admin role	No
User metrics available	No/Yes
System metrics available	No/Yes

Output: user will be redirected to the admin login page to login with an admin credential.

Input Label	**Data**
Admin role	Yes
User metrics available	No
System metrics available	No

Output: show error message “Data is not available” for the missing metrics.

Input Label	Data
Admin role	Yes
User metrics available	Yes
System metrics available	No

Output: show the User metrics analytics and report. Show error “Data is not available” for system metrics sections.

Input Label	Data
Admin role	Yes
User metrics available	No
System metrics available	Yes

Output: show error “Data is not available” for the user metrics analytics and report. Show report and analysis for system metrics sections.

Input Label	Data
Admin role	Yes
User metrics available	Yes
System metrics available	Yes

Output: show report and analysis for both sections.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T17. Loan Calculator (FWBS 2.1)

Test Number	T17
Test Module	Loan calculator
F/S (WBS) number	2.1
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module allows users to calculate loan payments, total interest, and visualize payment breakdowns for various loan scenarios.
- Setup: Navigate to “Calculators”, then select “Loan Calculator.” Input data and click “Calculate.”

Input Label	**Data**
Loan amount	$10,000
Interest rate	5%
Loan term	5 years

Output:

- Monthly payment: $188.2
- Total interest: $1292.24
- Total cost: $11292.24
- Payment breakdown chart shows principal (88%) and interest (12%)

Input Label	**Data**
Loan amount	$10,000
Interest rate	0%
Loan term	5 years

Output:

- Monthly payment: $166.67

- Total interest: $0.00
- Total cost: $10,000.00
- Payment breakdown chart shows principal (100%) and interest (0%)

Input Label	**Data**
Loan amount	$0
Interest rate	5%
Loan term	5 years

Output: Show user warning “please type the correct loan amount”

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T18. Mortgage Calculator (FWBS 2.2)

Test Number	T18
Test Module	Mortgage calculator
F/S (WBS) number	2.2
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module allows users to calculate mortgage payments, total interest, and visualize payment breakdowns for home loans.

- Setup: Navigate to the "Calculators" page by clicking "Calculators" on the navigation bar. Click on "Mortgage Calculator" to access the tool. Enter the relevant data and click "Calculate" when complete.

Input Label	**Data**
Home price	$300,000
Down payment	$60,000
Loan term	30 years
Interest Rate	4.5%

Output:

- Monthly payment: $1,216.04
- Total interest: $240,000.00
- Total cost: $193156.26

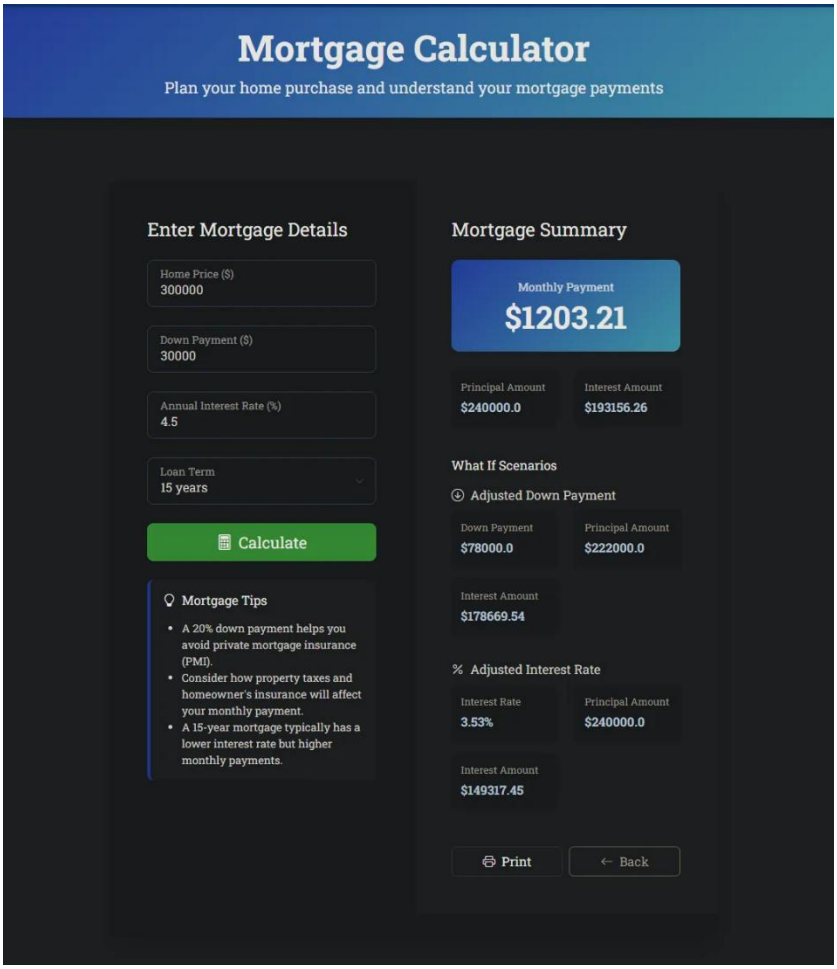

Figure 2. Screenshot for test case 1 - T18

Input Label	**Data**
Home price	$300,000
Down payment	$60,000
Loan term	30 years
Interest Rate	4.5%

Output:

- Monthly payment: $2053.05
- Principal amount: $30,000
- Interest amount: $99549.54

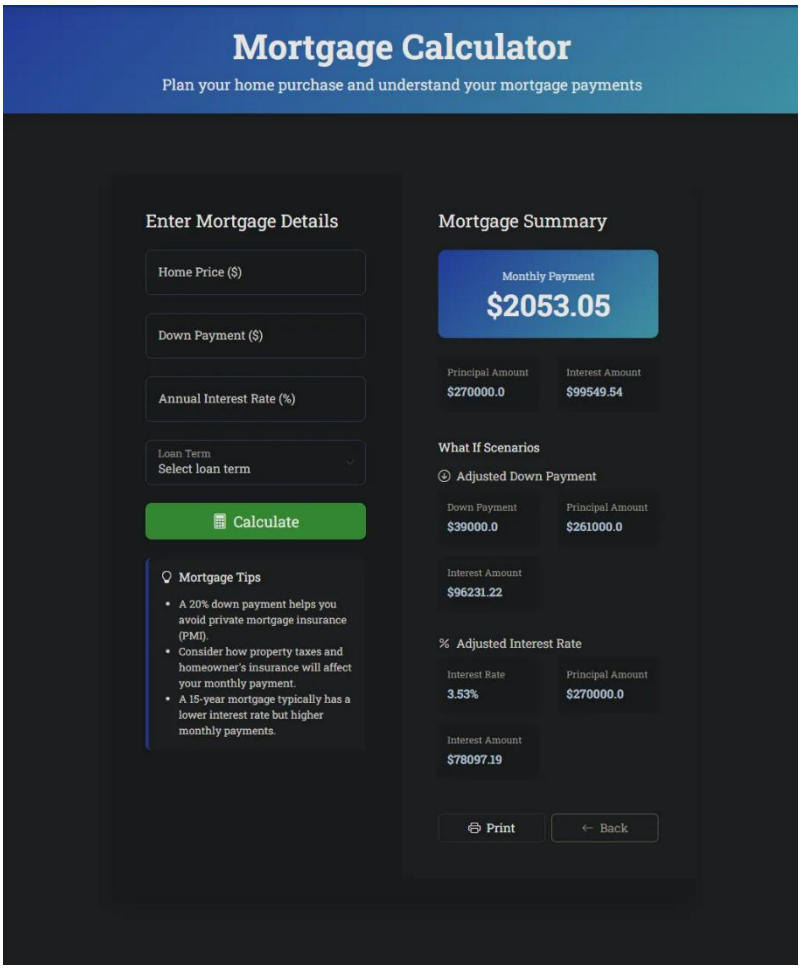

Figure 3. screenshot for test case 2 - T18

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:**	Arqer**:**
Name:	Name:
Signature:	Signature:

T19. Retirement Calculator (FWBS 2.4)

Test Number	T19

Test Module	Retirement calculator
F/S (WBS) number	2.4
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module allows users to calculate retirement savings projections, determine if they're on track to meet retirement goals, and identify additional savings needed.
- Setup: Navigate to the "Calculators" page by clicking "Calculators" on the navigation bar. Click on "Retirement Calculator" to access the tool. Enter the relevant data and click "Calculate" when complete.

Input Label	**Data**
Current age	30
Retirement age	65
Present savings	$50,000
Monthly contributions	$500
Rate of return	7%
Retirement goal	$1,500,000

Output:

- Expected savings at retirement: $1,197,811.27
- Will meet goal: no
- Additional monthly savings needed: $178.43
- Progress bar shows approximately 80% progress toward goal

Input Label	**Data**
Current age	30

Retirement age	65
Present savings	$100,000
Monthly contributions	$1000
Rate of return	7%
Retirement goal	$1,500,000

Output:

- Expected savings at retirement: $2,295,622.54
- Will meet goal: yes
- Additional monthly savings needed: $0
- Progress bar shows approximately 100% progress toward goal

Input Label	**Data**
Current age	30
Retirement age	65
Present savings	$200,000
Monthly contributions	$100
Rate of return	5%
Retirement goal	$1,000,000

Output:

- Expected savings at retirement: $642,705.81
- Will meet goal: no
- Additional monthly savings needed: $1,507.35
- Progress bar shows approximately 64% progress toward goal

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Name:

Signature: Name:

Arqer**:** Signature:

T20. Budgeting Tool (FWBS 2.3)

Test Number	T20
Test Module	Budgeting Tool
F/S (WBS) number	2.3
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module allows users to create and analyze budgets, and expenses, and track progress toward savings goals.
- Setup: Navigate to the "Calculators" page by clicking "Calculators" on the navigation bar. Click on the “Budgeting Tool" to access the tool. Enter the relevant data and click "Analyze Budget" when complete.

Input Label	**Data**
Fixed income	$5,000
Variable Income	$500
One year savings goal	$12,000
Housing	$1,500
Taxes	$1,000
Car payment	$400
Internet and phone	$150
Subscriptions	$50
Food	$600

Entertainment	$200
Personal items	$150
Utilities	$200
Transportation	$100
Medical	$200
Miscellaneous	$100

Output:

- Total income: $5,500
- Total expenses: $4,650
- Monthly surplus: $850
- Annual savings: $10,200
- Savings goal message: “You are on track to save $12,000 this year, which is $1,800 short of your annual goal of $12,000.”

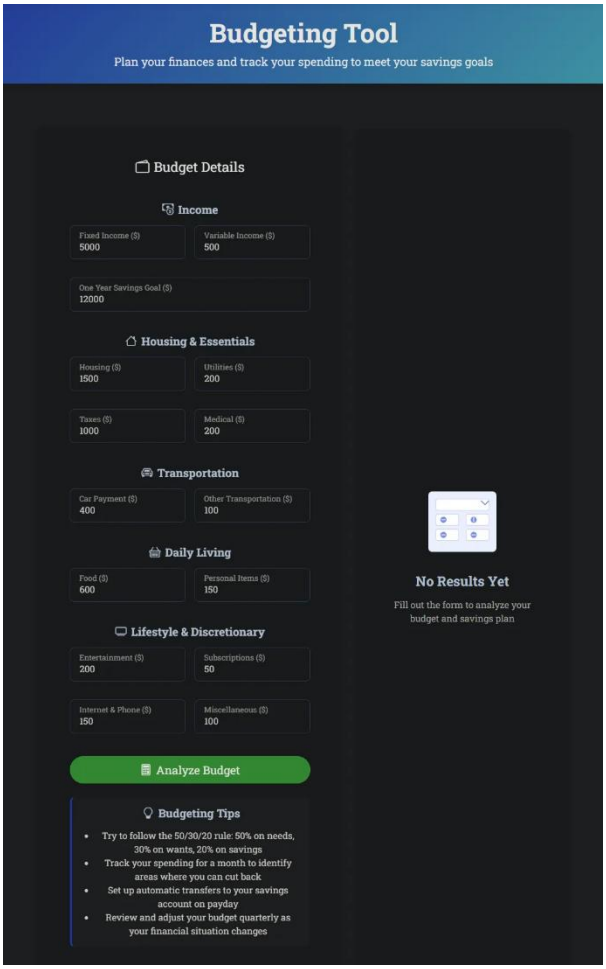

Figure 4. Screenshot 1 for test case 1 – T20

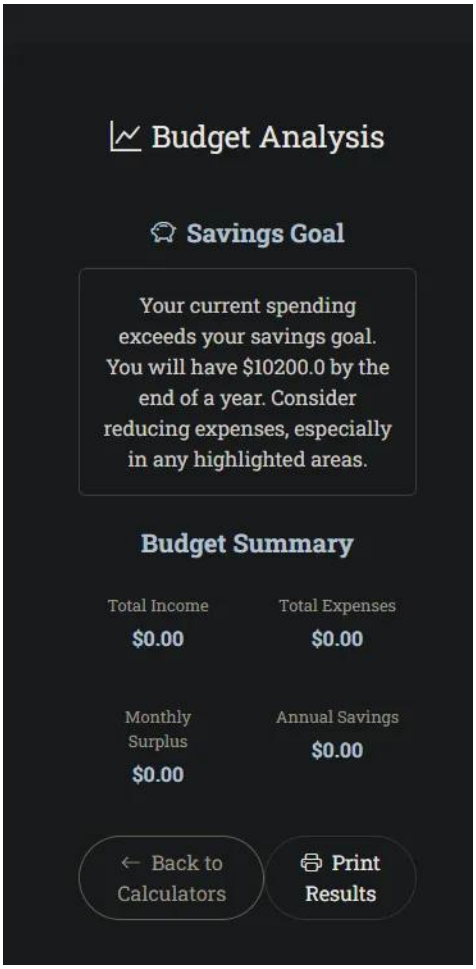

Figure 5. Screenshot 2 for test case 1 - T20

Input Label	**Data**
Fixed income	$4,000
Variable Income	$0
One year savings goal	$6,000
Housing	$1,500
Taxes	$800
Car payment	$400
Internet and phone	$150
Subscriptions	$50
Food	$600
Entertainment	$300

Personal items	$200
Utilities	$200
Transportation	$100
Medical	$100
Miscellaneous	$100

Output:

- Total income: $4,000
- Total expenses: $4,500
- Monthly surplus: -$500
- Annual savings: $6,000
- Overspend Areas Warning: "Your current spending exceeds your savings goal. You will have $-6000.0 by the end of a year. Consider reducing expenses, especially in any highlighted areas."

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T21. Insurance Calculator (FWBS 2.5)

Test Number	T21
Test Module	Insurance calculator
F/S (WBS) number	2.5
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72

Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module helps users estimate appropriate life insurance coverage based on financial obligations and family needs.
- Setup: Navigate to the "Calculators" page by clicking "Calculators" on the navigation bar. Click on "Insurance Calculator" to access the tool. Enter the relevant data and click "Calculate" when complete.

Input Label	**Data**
Annual income	$80,000
Years to replace	10
Outstanding mortgage	$250,000
Other debts	$20,000
Children’s Education	$100,000
Final Expenses	$15,000
Existing life insurance	$100,000

Output:

- Income replacement: $800,000
- Debt payoff: $270,000
- Education expenses: $100,000
- Final expenses: $15,000
- Total insurance needs: $1,185,000
- Existing coverage: $100,000
- Additional coverage needed: $1,085,000

Input Label	**Data**

Annual income	$80,000
Years to replace	10
Outstanding mortgage	$250,000
Other debts	$20,000
Children’s Education	$100,000
Final Expenses	$15,000
Existing life insurance	$1,200,000

Output:

- Income replacement: $800,000
- Debt payoff: $270,000
- Education expenses: $100,000
- Final expenses: $15,000
- Total insurance needs: $1,185,000
- Existing coverage: $1,200,000
- Additional coverage needed: $0

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T22. Student Loan Calculator (FWBS 2.6)

Test Number	T22
Test Module	Student Loan Calculator

F/S (WBS) number	2.6
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module helps users analyze student loan repayment options and visualize the impact of different payment strategies.
- Setup: Navigate to the "Calculators" page by clicking "Calculators" on the navigation bar. Click on the “Student Loan Calculator" to access the tool. Enter the relevant data and click "Calculate" when complete.

Input Label	**Data**
Loan amount	$30,000
Interest rate	5.8%
Loan term	10 years
Extra payment	$0

Output:

- Monthly payment: $330.06
- Total interest: $9,607.20
- Total payment: $39,607.20
- Loan payoff date: March 2035
- Payment breakdown chart shows principal (76%) and interest (24%)

Input Label	**Data**
Loan amount	$30,000
Interest rate	5.8%
Loan term	10 years
Extra payment	$100

Output:

- Monthly payment: $430.06
- Total interest: $7,553.92
- Total payment: $37,553.92
- Loan payoff date: June 2033
- Payment breakdown chart shows principal (80%) and interest (20%)
- Savings from extra payments: $2,053.28

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:**	Arqer**:**
Name:	Name:
Signature:	Signature:

T23. Car payment calculator (FWBS 2.7)

Test Number	T24
Test Module	Car payment calculator
F/S (WBS) number	2.7
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module helps users calculate car loan payments and analyze the total cost of vehicle ownership.

- Setup: Navigate to the "Calculators" page by clicking "Calculators" on the navigation bar. Click on the “Car Payment Calculator" to access the tool. Enter the relevant data and click "Calculate" when complete.

Input Label	**Data**
Vehicle price	$25,000
Down payment	$5,000
Trade-in value	$0
Loan term	60 months
Interest rate	4.5%
Sales tax	6%
Title & registration	$300

Output:

- Loan amount: $21,800
- Monthly payment: $405.83
- Total interest: $2,549.80
- Total cost: $30,349.80
- Payment breakdown chart shows principal (89%) and interest (11%)

Input Label	**Data**
Vehicle price	$25,000
Down payment	$5,000
Trade-in value	$8,000
Loan term	48 months
Interest rate	4.5%
Sales tax	6%
Title & registration	$300

Output:

- Loan amount: $13,800
- Monthly payment: $315.44
- Total interest: $1,341.12
- Total cost: $22,641.12
- Payment breakdown chart shows principal (91%) and interest (9%)

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:**	Arqer**:**
Name:	Name:
Signature:	Signature:

T24. Market News (FWBS 4.2)

Test Number	T24
Test Module	Market news
F/S (WBS) number	4.2
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This module displays the latest financial news articles from external news APIs, providing users with up-to-date market information.
- Setup: Navigate to the WealthWise learning hub where the Financial News component is displayed.

Input Label	Data
News API pulls successfully	No
Selected news content is available	No/Yes

Output: Generate error log for the admin/staff.

Input Label	Data
News API pulls successfully	Yes
Selected news content is available	No

Output: Update the news when the user view the page or refreshes. Redirect user to not found page. Show message “The content is not available now. Please try later!”

Input Label	Data
News API pulls successfully	Yes
Selected news content is available	Yes

Output: Update the news when the user view the page or refreshes. Show the news content in the correct format for the user.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

T25. Learning Tools (FWBS 4.2)

Test Number	T25
Test Module	Learning Tools
F/S (WBS) number	4.2
Software Setup	- Operating System: Windows 11 Education 24H2. - Browser: Microsoft Edge 134.0.3124.72
Hardware Setup	- Processor; 13th Gen Intel(R) Core(TM) i7-1355U 1.70 GHz - Memory: 32 GB

- Purpose of module: This test ensures that the learning module integrates properly, and handles user requests for available resource and interactive learning.
- Setup: Navigate to the WealthWise learning hub homepage. Then, select “Learning” to view all the active resources.

Input Label	**Data**
User logged in	No
Resource is available	No/Yes
Interactive learning data available in the resource	No/Yes

Output: redirect user to the login page.

Input Label	**Data**
User logged in	Yes
Resource is available	No
Interactive learning data available in the resource	No/Yes

Output: show error message “resources is not available now, please come back later.” Generate error log for the admin/staff.

Input Label	**Data**
User logged in	Yes
Resource is available	Yes

Interactive learning data available in the resource	No

Output: show the user the resource in the correct format such as video, power point, documentation, study case, etc.

Input Label	**Data**
User logged in	Yes
Resource is available	Yes
Interactive learning data available in the resource	Yes

Output: show the user the resource in the correct format. The user should be able to interact with the interface to enhance their learning process.

Acceptance of Test

Date**:** 30 April 2024

Wealthwise**:** Arqer**:**

Name: Name:

Signature: Signature:

VI. Log of Meetings, Reviews, and Meetings

Weekly meeting report and review – 2/20/2025

- Planning for presentation
- Fixing build errors in environment
- Adjusting to do list, things need to be done before Monday: calculator navigation, insurance calculator, mortgage calculator, learning hub – stocks, schedule – event
- Double check and resolve open issues

Meeting with client – 2/1/2025

- Discussing questions for the presentation
- Confirming the project modules

Code review 2/21/2025

- Fixing bug and attempting to implement connection between web and database.

Team code report and review – 2/26/2025

- Wrapping up for presentation by fixing bugs
- Finalize components that the team decided to demonstrate

Weekly meeting report and review 2/26/2025

- Assigned new task for team members
- Continuing to be implementing learning hub
- Fix front-end for homepage and calculators. Create a base HTML file and style across the project

- Modify user profile and register form. Add features: change password, delete account, and forgot password button
- Modify budget calculator
- Planning for payment and subscription module
- Continuing on scheduling and 404 HTTP response handling.

Weekly meeting report and review – 3/6/2025

- Planning for the acceptance test plan document
- Assigning test sets and document section
- Review front-end for the current available web pages

VII. Project Acceptance Signatures for Client and Developers

By signing this document, you are confirming that the project has been completed to the standards outlined in the agreed-upon requirements and scope. Your signature acknowledges that you have thoroughly reviewed the deliverables and find them to meet the expectations and specifications initially defined. Additionally, you agree that the project is ready for its next phase, whether that involves deployment, maintenance, or closure, and that all parties have fulfilled their respective responsibilities. This signature represents mutual agreement and approval of the project's completion.

Wealthwise**:**	Arqer**:**
Name:	Name:
Signature:	Signature:

VIII. Appendix

Appendix A: Glossary of Terms

Term / Acronym	Definition
Acceptance Testing	A phase of software testing where the system is tested for acceptability. It ensures the software meets business requirements and is ready for delivery.
ATP	Stands for Acceptance Test Plan. A document outlining the scope, test cases, environment, and acceptance criteria for validating a product.
FWBS	Functional Work Breakdown Structure. A numbering system used to categorize software functions/modules being tested.
Test Case (T#)	A specific scenario or procedure designed to verify a particular functionality or feature. Identified by a test number (e.g., T1, T2).
P/F	Pass/Fail. Indicates whether a test case passed or failed based on expected outcomes.
UI	User Interface. The visual elements through which a user interacts with the application.
API	Application Programming Interface. A set of protocols for building and integrating software applications.
Advisor	A user type in the system with specialized privileges to offer financial guidance, book consultations, and appear in the advisor directory.
Admin	A user with elevated permissions who can manage users, advisors, events, analytics, and platform configurations.
User	A general platform user with access to standard functionalities like registration, login, subscriptions, and consultations.

Consultation	A virtual or scheduled session between a user and an advisor, typically involving financial or investment advice.
Subscription	A recurring payment plan granting users access to premium services or advisor consultations.
Transaction	A record of a user’s payment activity, including subscriptions, refunds, and payment history.
Interaction History	A log or page showing a user's past events and consultations with advisors.
Error Guessing	A test design technique where testers apply experience to guess where defects might be found.
Checksum (SHA256)	A cryptographic hash used to verify the integrity of transaction data, ensuring it hasn't been tampered with.
Manual Testing	Testing performed by humans, executing test cases without automation tools.
DevTools	Browser-based tools (e.g., Chrome DevTools) used by developers and testers to inspect HTML, monitor network traffic, and debug JavaScript.
Localhost	The local testing environment (usually at localhost:8000) where the application is run and tested before deployment.
In-App Messaging	Messaging system within the platform allowing users or the system to send messages directly to user accounts.
Notification System	System component that alerts users via email or in-app messages about relevant events, updates, or actions.
Invoice	A bill generated for a completed payment, usually including itemized charges.

Receipt	A confirmation document issued after successful payment, confirming transaction details.
Refund	A return of funds to the user due to a cancelled or erroneous transaction.
Consultation Rate	A system metric showing the frequency or volume of consultations between users and advisors.
Platform Health	General system status includes uptime, error rates, and system performance indicators.
PDF Report	A downloadable, printable report generated by the system based on user data or analytics, typically in PDF format.
Latency Simulation	The act of artificially slowing down a network connection to test how the system responds under less-than-ideal conditions.
Custom Report	A user-generated report where specific fields and metrics are selected for inclusion.
System Metrics	Quantitative measurements reflect the performance, usage, and technical status of the platform.