

Application: Salesforce

Complexity: Medium

Browser: Chrome

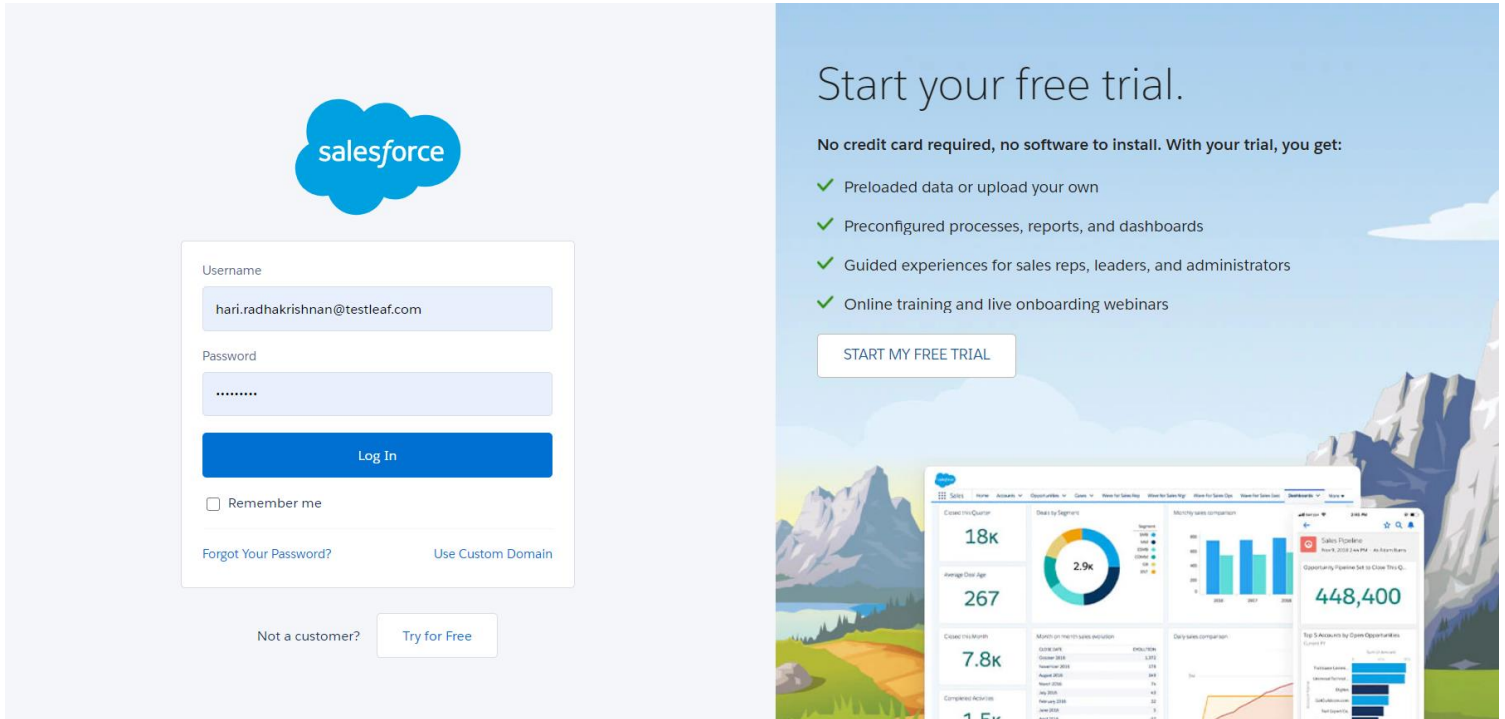
Scenario: 1

Time: 120 Minutes

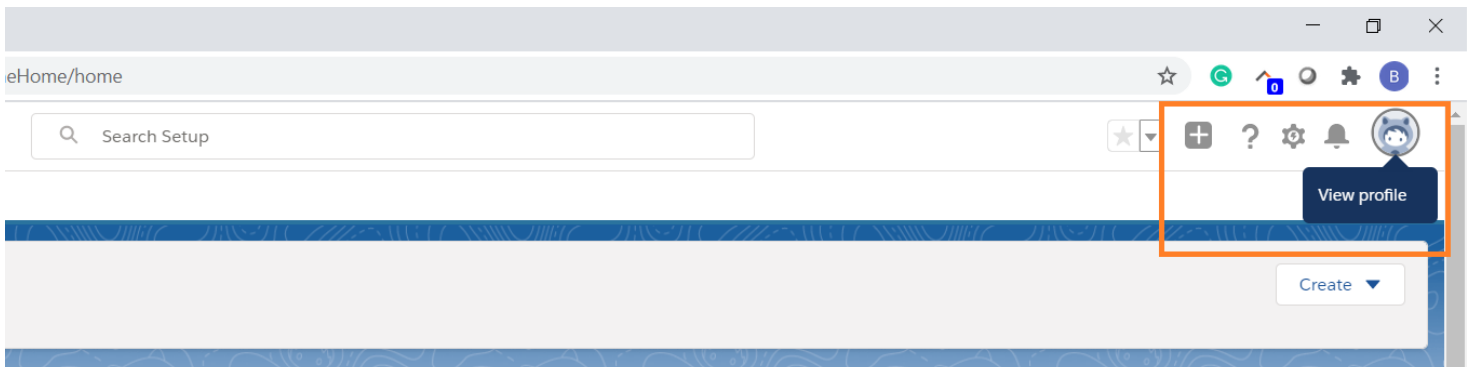
After completing the testcase (even if it is incomplete, push/upload the script to your github and share the link)

Salesforce Automation Test Steps [Total of 25 Steps]:

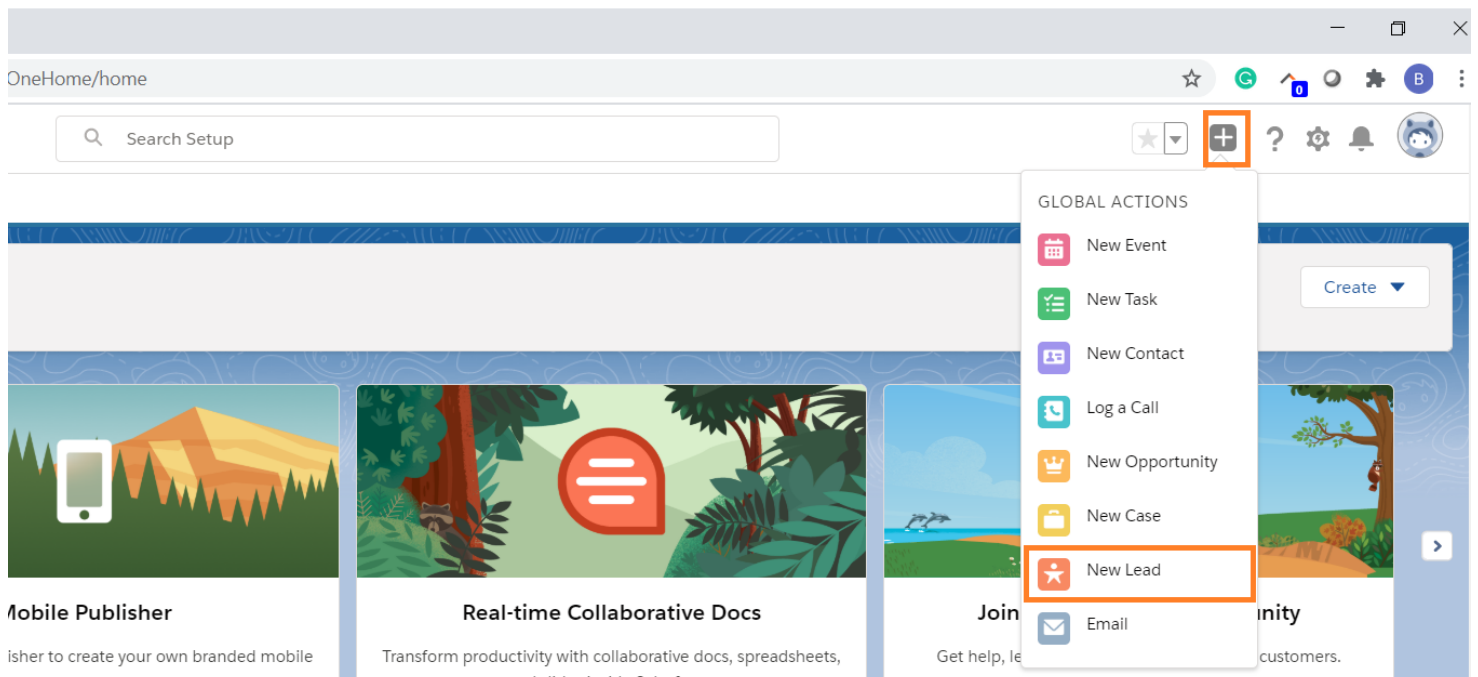
1. Load <https://login.salesforce.com/>
2. Enter username as `hari.radhakrishnan@testleaf.com`
3. Enter password as `India@123`
4. Click Login



5. If you get browser notifications, accept it.
6. Mouse on the image icon and confirm View profile text appears



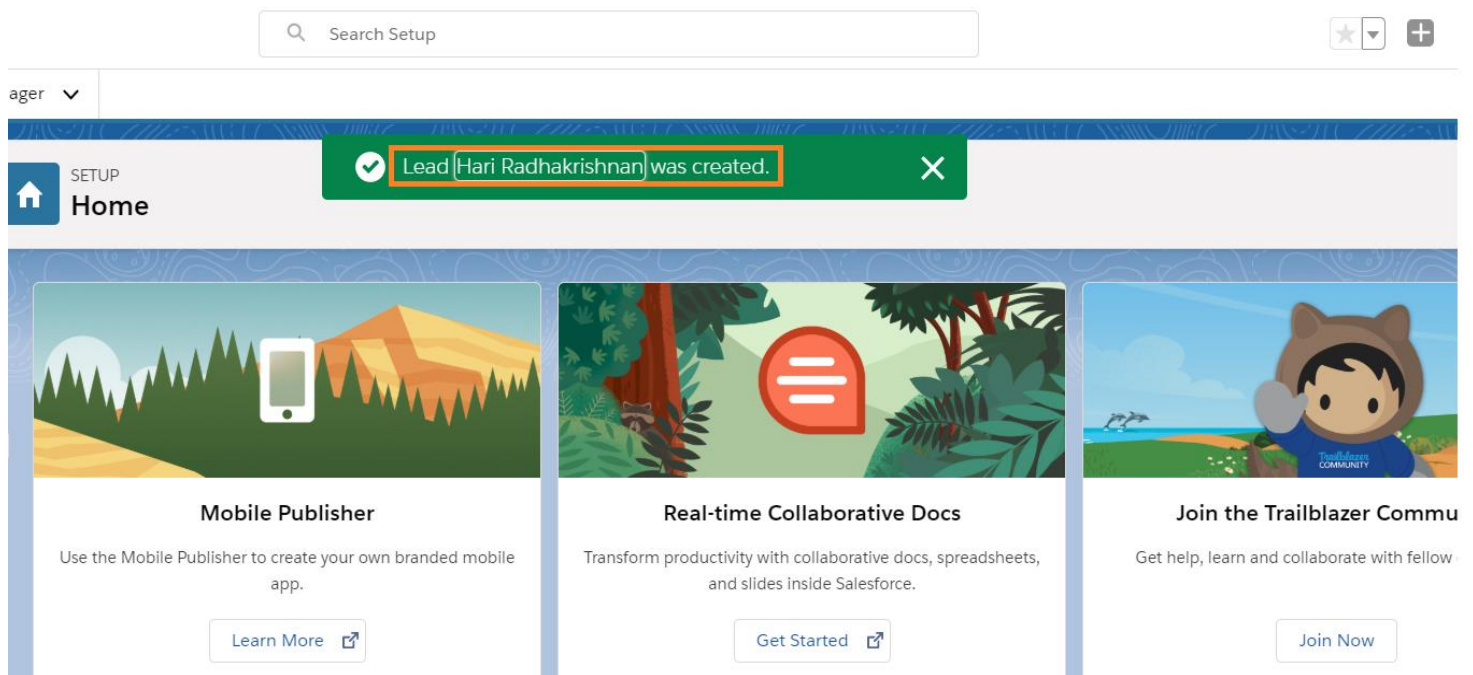
7. Click on plus icon (+) and Click New Lead



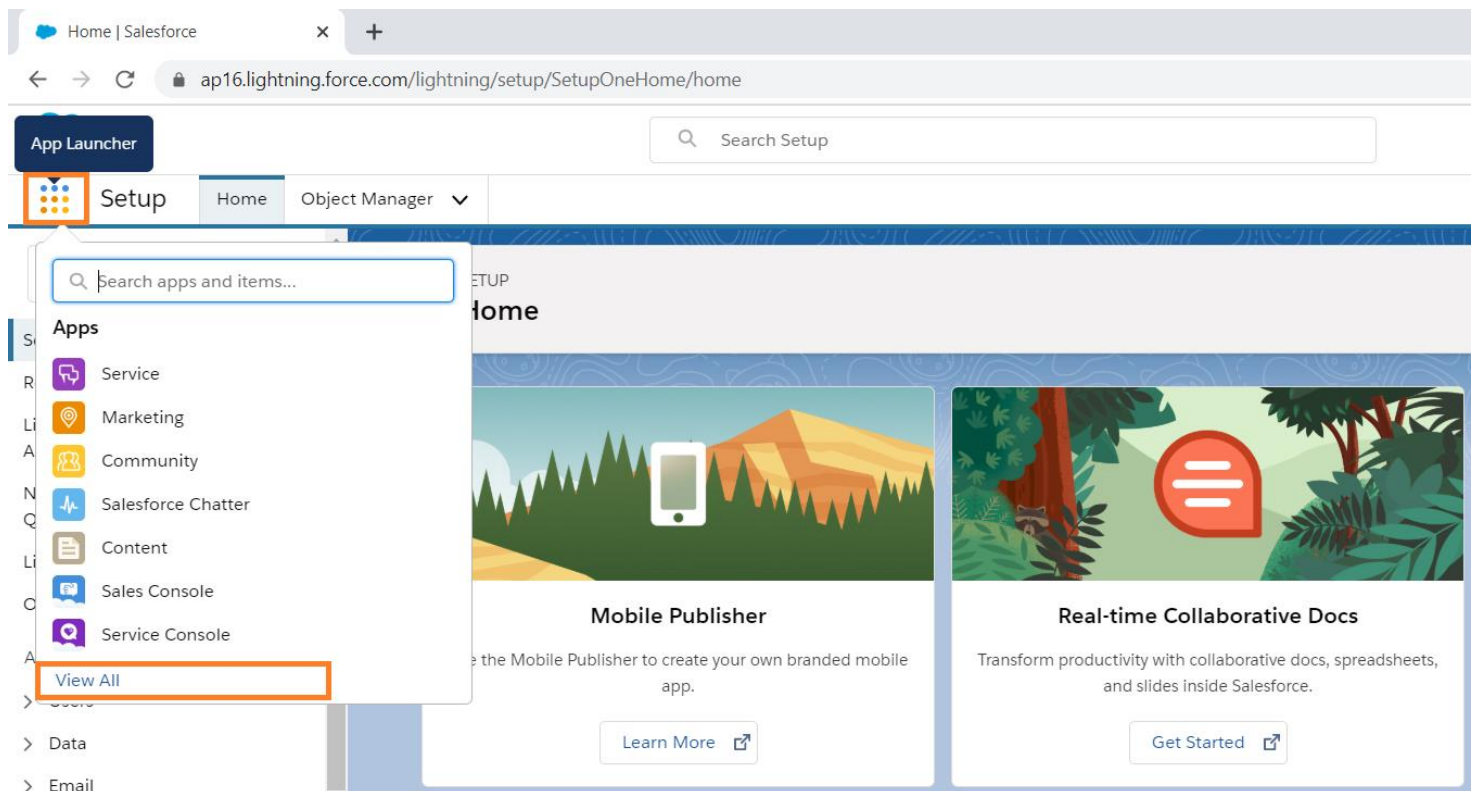
8. Select appropriate Salutation and enter all the mandatory fields and click Save [Note: Use your unique last name so that your data is unique]

The screenshot shows the 'New Lead' form. The form has a header with a star icon and the name 'Hari'. Below the header, there are several input fields: 'Last Name' (with a red asterisk indicating it is mandatory), 'Email', 'Phone', 'Company' (with a red asterisk indicating it is mandatory), and 'Title'. The 'Last Name' field contains the text 'Radhakrishnan' and the 'Company' field contains the text 'TestLeaf'. At the bottom right of the form, there is a green 'Save' button.

9. Verify the message displayed that "Lead <name> was created"



10. Click on the App launcher menu and click on View All




11. Click on Sales Link

App Launcher

Q Search apps or items...


Visit AppExchange

▼ All Apps




Service

Manage customer service with accounts, contacts, cases, and more




Marketing

Best-in-class on-demand marketing automation




Community

Salesforce CRM Communities




Salesforce Chatter

The Salesforce Chatter social network, including profiles and feeds




Content

Salesforce CRM Content




Sales Console

(Lightning Experience) Lets sales reps work with multiple records on one screen




Service Console

(Lightning Experience) Lets support agents work with multiple records across customer...




Sales

Manage your sales process with accounts, leads, opportunities, and more




Lightning Usage App

View Adoption and Usage Metrics for Lightning Experience




Lightning Scheduler Setup

Set up personalized appointment scheduling.



Bolt Solutions

Discover and manage business solutions designed for your industry.




Commerce

Manage your store's products, catalogs, and pricebooks.


▼ All Items

12. Verify Sales tab is displayed and get the open USD value (just the number alone)



All ▼

Q Search...

Sales

Home

Opportunities ▼

Leads ▼

Tasks ▼

Files ▼

Accounts ▼

Contacts ▼


Campaigns ▼

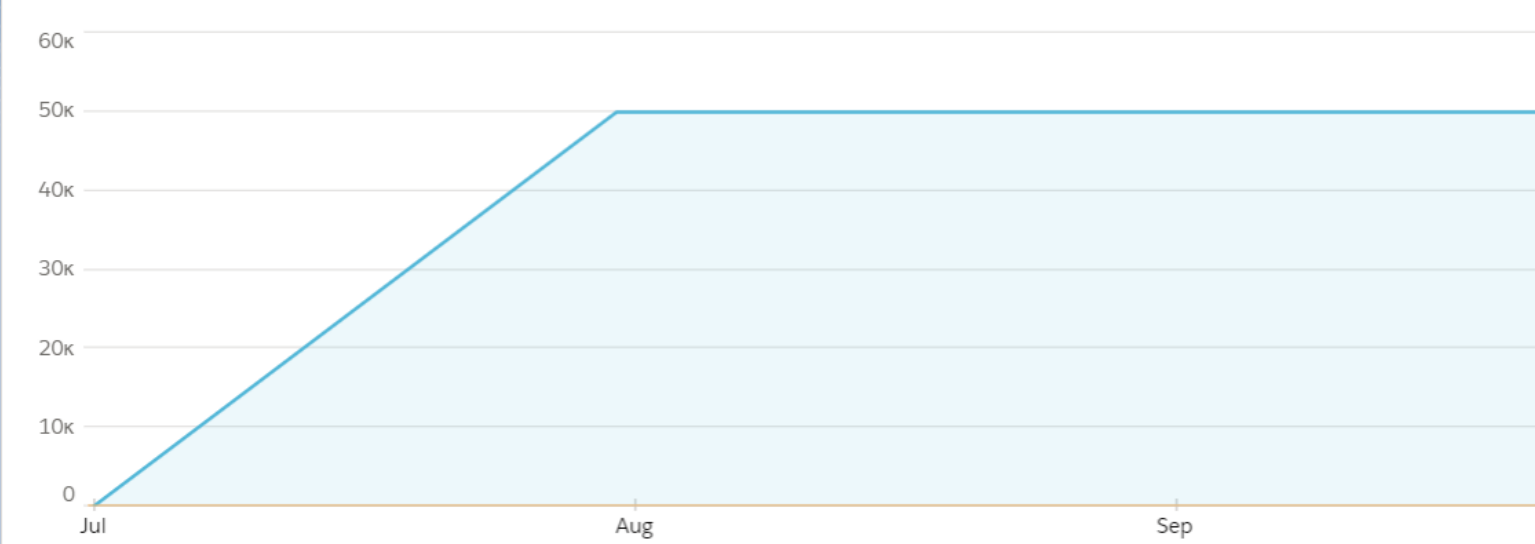
Quarterly Performance

As of Jul 2, 2020

CLOSED \$0

OPEN (>70%) \$50,000

GOAL -- 



60k

50k

40k

30k

20k


10k


0


Jul

Aug

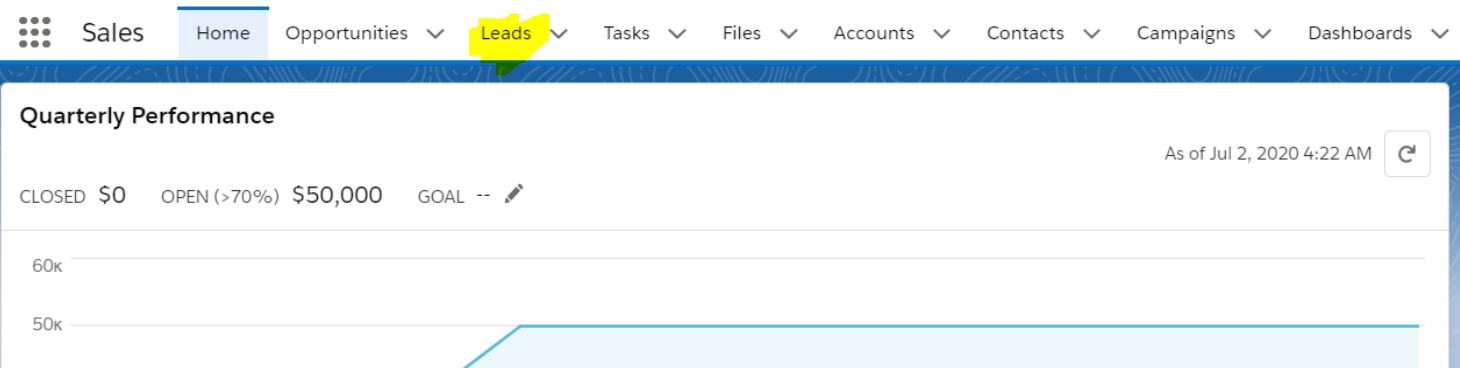
Sep

 Closed

 Goal

 Closed + Open (>70%)

13. Clicks on the leads Tab



14. Sort by Name column and confirm the displayed names are sorted correctly

Leads Recently Viewed

3 items • Sorted by Name • Updated a few seconds ago

	<input type="checkbox"/>	Name ↑	Title	Company	Phone	Mobi
1	<input type="checkbox"/>	Manickam		TestLeaf		
2	<input type="checkbox"/>	RadhaKrishnan		TL		
3	<input type="checkbox"/>	Radhakrishnan		Testleaf		

15. Type and Enter your last name in Search box

Leads Recently Viewed

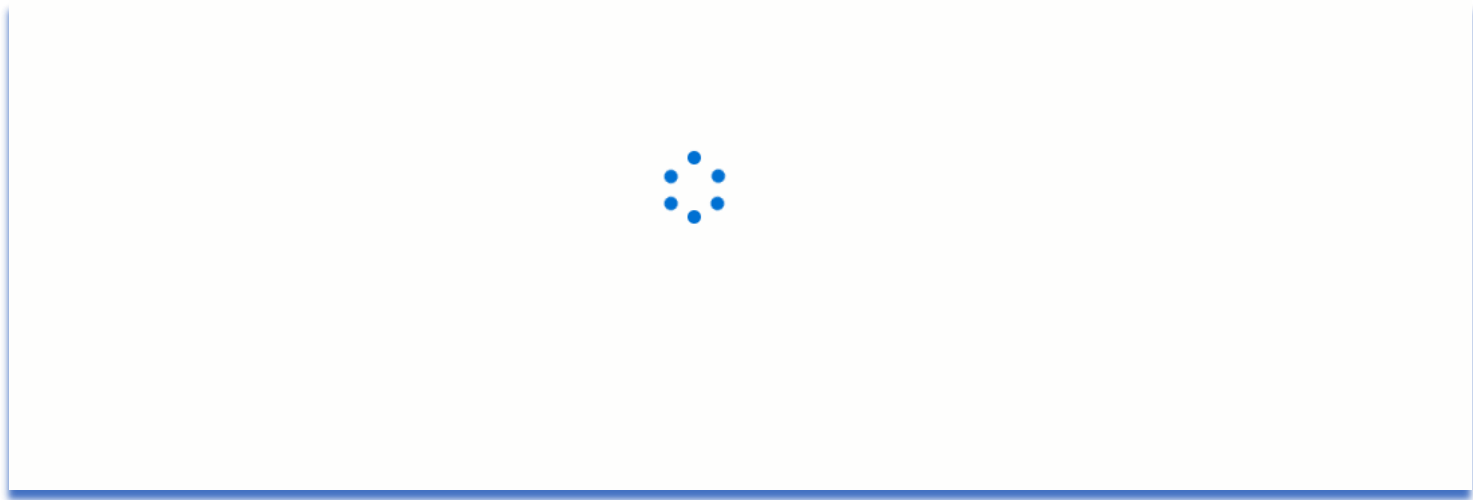
New Import Add to Campaign Change

3 items • Updated a few seconds ago

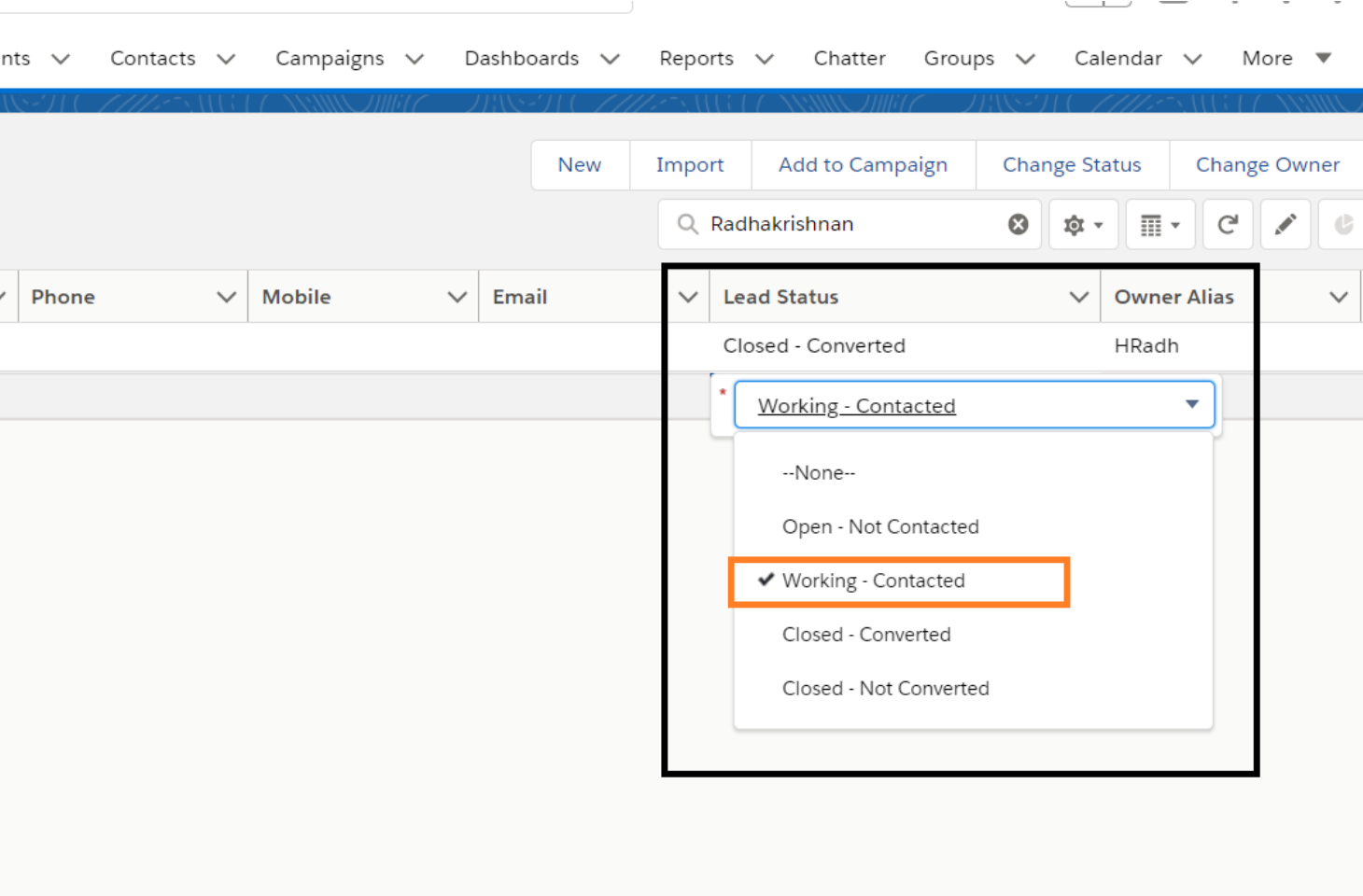
Radhakrishnan

	<input type="checkbox"/>	Name	Title	Company	Phone	Mobile	Email	Lead Status
1	<input type="checkbox"/>	RadhaKrishnan		TL				Closed - Converted
2	<input type="checkbox"/>	Radhakrishnan		Testleaf				Working - Contacted
3	<input type="checkbox"/>	Hari Radhakrishnan		TestLeaf				Open - Not Contacted

16. Wait for the loading bar to disappear



17. Change the Lead Status as "Working - Contacted" and Click on Save button



18. Open a new tab programmatically

The screenshot shows a web browser with two tabs. The active tab is titled 'New Tab' and shows the address bar with 'chrome://newtab'. The background tab is titled 'Recently Viewed | Leads | Salesforce' and shows the Salesforce interface. The Salesforce interface includes a navigation bar with 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', and 'Contacts'. The 'Leads' section is active, showing a 'Recently Viewed' list with 2 items. The list is sorted by Name and updated 4 minutes ago. The items are:

	Name ↑	Title	Company	Phone
1	RadhaKrishnan		TL	
2	Radhakrishnan		Testleaf	

19. Get the Lead navigation URL and load in the new Tab

The screenshot shows a web browser with two tabs. The active tab is titled 'New Tab' and shows the address bar with 'chrome://newtab'. The background tab is titled 'Recently Viewed | Leads | Salesforce' and shows the Salesforce interface. The 'Leads' section is active, showing a 'Recently Viewed' list with 2 items. The list is sorted by Name and updated 4 minutes ago. The items are:

	Name ↑	Title	Company	Phone
1	RadhaKrishnan		TL	
2	Radhakrishnan		Testleaf	

The 'Radhakrishnan' link is highlighted, and a tooltip is shown with the following text:

```
forceOutputLookup
" data-ownerid=
"5050:0" data-
refid="recordId"
data-recordid=
"00Q2w000003i0yCE
AU" data-special-
link="true" data-
navigable="true"
href="/lightning/
r/
00Q2w000003i0yCEA
```


20. Verify title of new Tab displays Last Name of your Lead and Click Create New Task

The screenshot shows the Salesforce interface for a Lead record titled "Mr. Radhakrishnan". The lead's company is "Testleaf". The record is in the "Working - Contacted" stage. Below the record details, there is a "New Task" tab highlighted in blue. The "Add" button next to the "New Task" tab is highlighted in yellow.

21. Select Subject as "Send Quote"

22. Select Due Date as Current Day+2 [Calculated Value and not hardcoded]

23. Click Save

The screenshot shows the "New Task" form in Salesforce. The "Subject" field is filled with "Send Quote". The "Due Date" field is filled with "7/21/2020". The "Name" field is filled with "Radhakrishnan". The "Related To" field is filled with "Search Accounts...". The "Assigned To" field is filled with "Hari Prasad Radhakrishnan". The "Status" field is set to "Not Started". The "Save" button is highlighted in yellow.

24. Click on the New Task and Click Mark Complete

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Gro

Task

Send Quote

✓ Mark Complete

Edit Comments

C

Name

Related To

[Radhakrishnan](#)

Details

Related

Assigned To

[Hari Prasad Radhakrishnan](#)

Subject

Send Quote

Due Date

7/21/2020

Priority

Normal

Created By

[Hari Prasad Radhakrishnan](#), 7/18/2020, 9:41 PM

Comments

Status

Not Started

Name

[Radhakrishnan](#)

Related To

Last Modified By

[Hari Prasad Radhakrishnan](#), 7/18/2020, 9:41 PM

25. Confirm the task is completed and displayed in blue color.

All

Search...

★

+

?

⚙

🔔

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

✓ Completed

Edit Comments

Change Date

Create Follow-Up Task

Status

Completed

Name

[Radhakrishnan](#)

Related To

Last Modified By

[Hari Prasad Radhakrishnan](#), 7/18/2020, 9:44 PM