Test Plan

Release Name: Updates 01-01
Branch: `updates-01-01`

This document defines the test scenarios, prerequisites, and verification steps for the new features and enhancements deployed in the Updates 01-01 release. The objective is to validate functional correctness, data accuracy, and access control behavior.

Feature 1: Savings Deposit – Branch Field

Objective

Verify that the Branch field is visible and automatically populated on Savings Deposit transactions.

Prerequisites

- A Savings Account linked to a Customer assigned to a specific Branch.

Test Steps and Expected Results

Step	Action	Expected Result
1	Navigate to **Savings > Transactions > Deposits**	Deposit list view opens
2	Click **New**	New deposit form opens
3	Select a **Savings Account**	Account details load
4	Verify **Branch** field	Branch auto-populates based on account
5	Enter Amount and click **Save**	Deposit saved successfully
6	Return to deposit list view	Record appears in list
7	Verify **Branch** column	Correct branch is displayed

Feature 2: Savings Withdrawal – Branch Field

Objective

Verify that the Branch field is visible and automatically populated on Savings Withdrawal transactions.

Prerequisites

- A Savings Account linked to a Customer assigned to a specific Branch.

Test Steps and Expected Results

Step	Action	Expected Result
1	Navigate to **Savings > Transactions > Withdrawals**	Withdrawal list view opens
2	Click **New**	New withdrawal form opens
3	Select a **Savings Account**	Account information loads
4	Verify **Branch** field	Branch auto-populates in Account Information
5	Enter Amount and click **Save**	Withdrawal saved successfully
6	Return to withdrawal list view	Record appears in list
7	Verify **Branch** column	Correct branch is displayed

Feature 3: Contract Search by Phone or Mobile

Objective

Verify that Loan Contracts can be searched using a customer's Phone or Mobile number.

Prerequisites

- At least one Loan Contract linked to a Customer with a Phone or Mobile number.

Test Steps and Expected Results

Step	Action	Expected Result
1	Navigate to **Loan > All Contracts**	Contract list view opens
2	Enter full phone or mobile number in search bar	Search suggestions appear
3	Select **Search Phone or Mobile**	List filters to matching contracts
4	Verify search results	Only related customer contracts are shown
5	Repeat using partial number	"Contains" search works correctly

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Feature 4: Loan Aging Report – Search by Phone

Objective

Verify that the Loan Aging Report wizard supports phone-based search and auto-fills related fields.

Prerequisites

- A Loan Client with a valid Phone or Mobile number.

Test Scenarios

Scenario A: Phone to Client

Step	Action	Expected Result
1	Open **Loan Aging Report** wizard	Wizard loads
2	Enter phone or mobile number	Input accepted
3	Press Enter or tab out	Client auto-selected

Scenario B: Client to Phone

Step	Action	Expected Result

1	Clear or reopen wizard	Empty form loads
2	Select Client	Client selected
3	Verify Phone field	Phone or mobile auto-fills

Feature 5: Savings Payment Plan Report – Access Rights

Objective

Verify that users with Savings User access rights can generate the Savings Payment Plan Report without access errors.

Prerequisites

- A user account with **Savings / User** role.

Test Steps and Expected Results

Step	Action	Expected Result
1	Log out from Administrator account	Session ends
2	Log in as Savings User	User dashboard loads
3	Navigate to **Savings > Reports > Savings Payment Plan Report**	Report wizard opens
4	Enter required parameters	Parameters accepted
5	Generate report	Report displays successfully
6	Verify system behavior	No access error is shown

Test Completion Criteria

- All features behave as expected
- No functional or access-related errors encountered
- Data consistency verified acros