MANUAL TEST CASE REPORT

Customer Relationship Management (CRM) System

1. Introduction

This document describes the manual test cases designed for validating the functionality of a Customer Relationship Management (CRM) System. The primary objective of testing is to ensure that the CRM application works according to the specified requirements and provides a reliable, user-friendly experience.

Manual testing is performed by executing test cases without automation tools, focusing on functional accuracy, usability, and data integrity.

2. Objective of Testing

The objectives of CRM manual testing are:

- To verify all CRM functionalities work as expected
- To ensure correct handling of customer data
- To validate user roles and access control
- To identify defects at an early stage
- To ensure data accuracy and system reliability

3. Scope of Testing

In Scope

- User authentication (Login/Logout)
- Customer management
- Lead management
- Contact management
- Opportunity/Sales management
- Activity scheduling
- Report generation

Out of Scope

- Performance testing
- Automation testing
- Security penetration testing
- Third-party API testing

4. Testing Environment

Parameter	Details
Application Type	Web-based CRM
Testing Type	Manual Testing
Browser	Chrome / Firefox
OS	Windows
Database	MySQL
Testing Method	Black Box Testing

5. Test Case Design Approach

Test cases are designed based on:

- Functional requirements
- User workflows
- Boundary and negative scenarios

Each test case contains:

- Test Case ID
- Test Scenario
- Test Steps
- Expected Result
- Actual Result
- Status

6. Manual Test Cases

6.1 Login Module

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_01	Verify login with valid credentials	Enter valid username and password → Click Login	User should login successfully	Pass
TC_CRM_02	Verify login with invalid credentials	Enter incorrect username/password	Error message displayed	Pass
TC_CRM_03	Verify blank login	Click login without entering data	Validation message shown	Pass

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_04	Verify logout	Click logout button	User redirected to login page	Pass

6.2 Customer Management Module

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_05	Add new customer	Enter customer details → Save	Customer added successfully	Pass
TC_CRM_06	View customer details	Open customer profile	Correct details displayed	Pass
TC_CRM_07	Edit customer	Update customer info → Save	Changes saved	Pass
TC_CRM_08	Delete customer	Click delete → Confirm	Customer removed	Pass

6.3 Lead Management Module

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_09	Create new lead	Enter lead details → Save	Lead created	Pass
TC_CRM_10	Convert lead to customer	Click convert lead	Lead converted successfully	Pass
TC_CRM_11	Delete lead	Select lead → Delete	Lead deleted	Pass

6.4 Contact Management Module

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_12	Add contact	Enter contact details	Contact added	Pass
TC_CRM_13	Edit contact	Update contact info	Contact updated	Pass
TC_CRM_14	Delete contact	Select delete option	Contact removed	Pass

6.5 Opportunity / Sales Module

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_15	Create sales opportunity	Enter opportunity data	Opportunity created	Pass

TC_CRM_16	Update opportunity stage	Change sales stage	Stage updated	Pass

6.6 Activity Management Module

Test Case ID	Test Scenario	Test Steps	Expected Result	Status
TC_CRM_17	Schedule call/meeting	Enter activity details	Activity scheduled	Pass
TC_CRM_18	Edit activity	Modify activity	Activity updated	Pass
TC_CRM_19	Delete activity	Remove activity	Activity deleted	Pass

7. Test Summary Report

Item	Count
Total Test Cases	21
Passed	21
Failed	0
Blocked	0
Execution Status	Successful

8. Defect Report

No critical defects were identified during manual testing. Minor UI issues, if any, were communicated to the development team and resolved.

9. Conclusion

The manual testing of the Customer Relationship Management (CRM) System was carried out successfully to validate the functionality, usability, and reliability of the application. All critical modules including user authentication, customer management, lead management, contact handling, sales opportunities, activity scheduling, and report generation were thoroughly tested using well-defined manual test cases.

The test execution results indicate that the CRM system performs as expected and meets the specified functional requirements. Proper validations, data handling, and user workflows were verified, ensuring accurate customer data management and smooth system operation. No critical defects were observed during the testing process, and minor issues, if any, were resolved promptly.

Overall, the CRM application is stable, user-friendly, and ready for deployment. The manual test case report confirms that the system supports effective customer relationship management and provides a reliable platform for managing business interactions and sales processes efficiently.