### Test Script M&R/CLARA/IMM/2022/003/0001

### CRM(003)/Inquiry New(0001)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Inquiry New Created/updated/deleted Successfully | | | |

***Process***

| **Process** | **Step #** | **Steps** | **Expected Results** | **Actual Results** | **Pass/Fail/**  **Not executed** |
| --- | --- | --- | --- | --- | --- |
| Login | 1 | Enter the User ID and Password in the login page | Should be able to Login successfully and open the landing page |  |  |
| Inquiry List | 2 | Click the Menu and navigate to CRM-INQUIRY-INQUIRY NEW and click the button | Has to open the Inquiry New List page |  |  |
|  | 3 | Should display all the inquiry records with status as "open" in the list page |  |  |
| Search Inquiry | 4 | Click Search button | Has to open the search criteria fields |  |  |
| 5 | Search Options can be single or multiple. Enter the required search field values and click search. This will update the list page records according to the search |  |  |
| 6 | Click Reset button | On Clicking reset will clear the search field values and will make all the fields as blank & Click search again will provide the unfiltered list |  |  |
| Options | 7 | Click Options button | Will display the required options for this screen |  |  |
| 8 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |
| List search / filter | 9 | Enter the required values in the Search field on the top of list page | Will filter the records according to search criteria in the list page |  |  |
| Create an Inquiry | 10 | Click New Button | Has to open a new Pop-up screen to Enter the new Inquiry details |  |  |
|  | 11 | Click Inquiry Shortcut icon | Has to open a new Pop-up screen to Enter the new Inquiry details |  |  |
|  | 12 |  | New Inquiry details are as below |  |  |
|  |  |  | **General Tab** |  |  |
|  | 13 |  | 1. First Name - Input/Mandatory |  |  |
|  | 14 |  | 2. Last Name - Input/Optional |  |  |
|  | 15 |  | 3. Phone No - Input/Mandatory |  |  |
|  | 16 |  | 4. E Mail - Input/Mandatory |  |  |
|  | 17 |  | 5. Inquiry Mode - Select an Inquiry mode from drop down. Allow only single value selection - Mandatory |  |  |
|  | 18 |  | 6. Inquiry date - Autofill current date - Non-Editable |  |  |
|  | 19 |  | 7. Objective of Visit - Input/Optional |  |  |
|  | 20 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 21 |  | On Clicking Save button, 1. will save the all the inquiry details  2. Create a new Inquiry No  3. Receive success Message  4. A new record is added in the List page |  |  |
| Mozeo integration | 22 |  | A SMS is sent to the given Client's phone No and a green color icon is highlighted in the SMS status field of the list page |  |  |
| 23 |  | Red color icon is display on SMS status field when Sending SMS is failed |  |  |
| Inquiry Assign | 24 |  | Created Inquiry will be moved to the next process Assign Inquiry and displayed in the Inquiry Assign list page |  |  |
| cancel creation | 25 |  | On Clicking cancel button, Close the Pop-up screen and go back to Inquiry List page |  |  |
| Update Inquiry | 26 | Select a record and click update from Action icon on the right of each row | validation - Should not allow to select multiple rows |  |  |
|  | 27 |  | Has to open the update screen with below options to edit |  |  |
|  |  |  | **General Tab** |  |  |
|  | 28 |  | 1. First Name - Auto Populate /Editable |  |  |
|  | 29 |  | 2. Last Name - Auto Populate /Editable |  |  |
|  | 30 |  | 3. Phone No - Auto Populate /Editable |  |  |
|  | 31 |  | 4. E Mail - Auto Populate /Editable |  |  |
|  | 32 |  | 5. Inquiry Mode - Auto Populate /Editable |  |  |
|  | 33 |  | 6. Inquiry date - Auto Populate /Non-Editable |  |  |
|  | 34 |  | 7. Objective of Visit - Auto Populate /Editable |  |  |
|  |  |  | **Admin tab** |  |  |
|  | 35 |  | 1. Created by - Auto Populate /Non-Editable |  |  |
|  | 36 |  | 2. Created on - Auto Populate /Non-Editable |  |  |
|  | 37 |  | Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 38 |  | on clicking Update button 1. Update the edited records in the list page 2. Receive success message |  |  |
| Cancel Update | 39 |  | On Clicking cancel button, Close the Pop-up screen and go back to Inquiry List page |  |  |

***Confirmation / Approval of Testing Results***

**Overall Testing Status:**

Pass and accepted

Passed with note \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Failed

**Comments:**

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**Approved by :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date :**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_