### Test Script M&R/CLARA/IMM/2022/004/0004

### Client(004)/Documents(0004)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Client Documents 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 |  |  |
| Document tab | 2 | Select a client and Click Options button, click Edit icon and then Click Document tab | Has to display the Document tab list page |  |  |
| Search Notes | 3 | Click Search Button | Has to open the search criteria fields |  |  |
| 4 | Search Options can be single or multiple (only for required fields). Enter the required search field values and click search. This will update the list page records according to the search |  |  |
| 5 | 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 |  |  |
| List search | 6 | 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 |  |  |
| 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 |  |  |
| Send Document | 9 | Select a new button from top of list page | Will Open a New popup screen to Select the Document |  |  |
|  | 10 |  | 1. Matter No - Selection the required Matter from dropdown (This is optional) |  |  |
|  | 11 |  | 2. Case Category will be filled automatically based on the selected Matter (this is optional) |  |  |
|  | 12 |  | 3. Document No - Select the required Document template from Drop down (DocuSign documents are picked from Share Folder template) |  |  |
|  | 13 |  | 4. Document File - Name of the Document is automatically filled based on selected Document No |  |  |
| Mail Merge / Non-Mail Merge | 14 | Click Submit for Mail merge or retrieve Document template from Storage server | On Clicking Submit button, System will check whether Mail merge is enabled for the selected Document in Document master. |  |  |
|  |  |  | If mail merge is enabled in Master, mail merge functionality is processed and the processed document is displayed in the Send Document screen |  |  |
|  |  |  | If Mail merge is not enabled in Master, Document template is fetched from Share Folder without mail merge and displayed in send Document screen |  |  |
|  | 15 | Cancel Document selection | On Clicking cancel button, Close the Pop-up screen and go back to Prospective client snapshot/ list page |  |  |
| Send to DocuSign | 16 | Click send Document | Send the Document to DocuSign and Client will receive E Mail |  |  |
|  | 17 | Edit Mail merged Document | Mail Merged Document can be edited by Downloading the Document from Send Document screen by clicking Download button. On clicking download, that will save the document to the local drive. Document manually edited in the local system |  |  |
|  | 18 | Edit Non-Mail Merged document | For Non-Mail Merged Document, template is available in the Send Document screen. Download the Document by clicking Download button. On clicking download, that will save the document to the local drive. Document manually edited in the local system |  |  |
|  | 19 | Download the Document | Document can be downloaded by clicking download icon from options button. |  |  |
|  | 20 | Select a record and click upload button from Action icon on the right of each row | Manually edited mail merged or non-mail merged documents will be uploaded in this option |  |  |
|  |  |  | On clicking upload, a pop-up screen will open to choose the file from the local system. Once the required Document file is selected click ok button. Selected Document has to be opened in send Document screen. 1. On clicking display icon - Document will be opened in the screen 2. on clicking upload icon - Chosen document will be uploaded in the Share Folder under Client Number. |  |  |
|  | 21 | Click send Document | send the Document to DocuSign and Client will receive DocuSign link in E Mail and the status is changed as "Sent" |  |  |
|  |  | Signed document received in DocuSign from client | Once the signed document is received in DocuSign from client, the status gets updated automatically as “Received " in Document list page. The same document will get stored in Share Folder under Client Number. |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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