### Test Script M&R/CLARA/IMM/2022/005/0001

### Case Info sheet(005)/IMMIGRATION(0001)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Case info sheet Immigration 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 |  |  |
| List | 2 | Click the Menu and navigate to Matter /Case info sheet and click IMMIGRATION case info sheet button | Has to open the Case info sheet List page |  |  |
|  | 3 | Should display all the IMMIGRATION Case info sheet records with status |  |  |
| Search | 4 | Click Filter 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 | 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 |  |  |
| New Case info creation | 10 | Click New button from the top of List | Has to open the New case info creation screen with below tabs and fields |  |  |
|  |  |  | **General tab** |  |  |
|  | 11 |  | CLASS - Auto Populate/Non-Editable  (Default Immigration Class will be displayed) |  |  |
|  | 12 |  | Client ID - Select the Client ID of Immigration Class from the dropdown |  |  |
|  | 13 |  | Prospective Client - Non-Editable (Will be blank) |  |  |
|  | 14 |  | Inquiry Number - Non-Editable (Will be blank) |  |  |
|  | 15 |  | Case Category - Select Case category from drop down |  |  |
|  | 16 |  | Case Sub Category - Select Sub case category from dropdown |  |  |
|  | 17 |  | Intake Form No. - Non-Editable (Will be blank) |  |  |
|  |  |  | **Case details** |  |  |
|  | 18 |  | Matter Description - Entry Field |  |  |
|  | 19 |  | Location of File - Entry Field |  |  |
|  | 20 |  | Name of ER - Entry Field |  |  |
|  | 21 |  | Alternate E Mail ID - Entry Field |  |  |
|  | 22 |  | Alternative Telephone - Entry Field |  |  |
|  | 23 |  | Type of Matter - Entry Field |  |  |
|  | 24 |  | Alien Number - Entry Field |  |  |
|  | 25 |  | Country of Birth - Entry Field |  |  |
|  | 26 |  | Date of Birth - Entry Field |  |  |
|  |  |  | **Client Details** |  |  |
|  | 27 |  | Name - Auto Populate/Non-Editable |  |  |
|  | 28 |  | Title - Auto Populate/ Editable |  |  |
|  | 29 |  | Email ID - Auto Populate/Non-Editable |  |  |
|  | 30 |  | Company Name - Auto Populate/ Editable |  |  |
|  | 31 |  | Street Address - Auto Populate/Non-Editable |  |  |
|  | 32 |  | City - Auto Populate/Non-Editable |  |  |
|  | 33 |  | State - Auto Populate/Non-Editable |  |  |
|  | 34 |  | Country - Auto Populate/Non-Editable |  |  |
|  | 35 |  | Zip Code - Auto Populate/Non-Editable |  |  |
|  | 36 |  | Cell Phone - Auto Populate/Non-Editable |  |  |
|  | 37 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 38 |  | On Clicking save button  1. a new case info record number is created and added in the case info list page  2. receive success message |  |  |
| Edit Case info sheet | 39 | Select a case info record and go to options button and click Edit icon | Selected Case info record is opened for Editing with below tab and fields |  |  |
|  |  |  | **General tab** |  |  |
|  | 40 |  | CLASS - Auto Populate/Non-Editable |  |  |
|  | 41 |  | Client ID - Auto Populate/ Editable |  |  |
|  | 42 |  | Prospective Client ID - Auto Populate/Non-Editable (For Non-CRM clients, a default No will be filled)  For the existing clients this field will be blank |  |  |
|  | 43 |  | Inquiry Number - Auto Populate/Non-Editable (For Non-CRM clients, a default No will be filled)  For the existing clients this field will be blank |  |  |
|  | 44 |  | Case Category - Auto Populate/ Editable |  |  |
|  | 45 |  | Case Sub Category - Auto Populate/ Editable |  |  |
|  | 46 |  | Intake Form Number - Auto Populate/Non-Editable  (For Non-CRM Clients / Existing Clients, there will not be any intake form Number) |  |  |
|  | 47 |  | Click Intake Form Button - For CRM Clients, this will open respective intake form details and for Non-CRM Clients there will not be any intake form and this button will be non-functional |  |  |
|  |  |  | **Case details** |  |  |
|  | 48 |  | Matter Description - Auto Populate/ Editable |  |  |
|  | 49 |  | Location of File - Auto Populate/ Editable |  |  |
|  | 50 |  | Name of ER - Auto Populate/ Editable |  |  |
|  | 51 |  | Alternate E Mail ID - Auto Populate/ Editable |  |  |
|  | 52 |  | Alternative Telephone - Auto Populate/ Editable |  |  |
|  | 53 |  | Type of Matter - Auto Populate/ Editable |  |  |
|  | 54 |  | Alien Number - Auto Populate/ Editable |  |  |
|  | 55 |  | Country of Birth - Auto Populate/ Editable |  |  |
|  | 56 |  | Date of Birth - Auto Populate/ Editable |  |  |
|  |  |  | **Client Details** |  |  |
|  | 57 |  | Name - Auto Populate/Non-Editable |  |  |
|  | 58 |  | Title - Auto Populate/ Editable |  |  |
|  | 59 |  | Email - Auto Populate/Non-Editable |  |  |
|  | 60 |  | Company Name - Auto Populate/ Editable |  |  |
|  | 61 |  | Street Address - Auto Populate/Non-Editable |  |  |
|  | 62 |  | City - Auto Populate/Non-Editable |  |  |
|  | 63 |  | State - Auto Populate/Non-Editable |  |  |
|  | 64 |  | Country - Auto Populate/Non-Editable |  |  |
|  | 65 |  | Zip Code - Auto Populate/Non-Editable |  |  |
|  | 66 |  | Cell Phone - Auto Populate/Non-Editable |  |  |
|  |  |  | **Admin tab** |  |  |
|  | 67 |  | Created by - Auto Populate/Non-Editable |  |  |
|  | 68 |  | Created on - Auto Populate/Non-Editable |  |  |
|  | 69 |  | Updated by - Auto Populate/Non-Editable |  |  |
|  | 70 |  | Updated on - Auto Populate/Non-Editable |  |  |
|  | 71 |  | Status - Auto Populate/Non-Editable |  |  |
|  | 72 |  | On Clicking update, 1. Update the edited fields for the selected Case info record 2. Display success message |  |  |
| Cancel Update | 73 |  | On Clicking cancel button, Close the Pop-up screen and go back to Case info List page |  |  |
| Display Case info record | 74 | Select a Case info record and Click Options button and then click display icon | Has to display the details of the selected Case info record |  |  |
| Delete Case info record | 75 | Select a client and Click Options button and then click delete icon | Should allow to delete Case info record with Status "Open or updated". Else error message is displayed |  |  |
| Create New Matter | 76 | Select a Case info record and Click Create Matter button from the Actions on the right side of the row | On Clicking this button, validation is done to check the below fields are filled  1. Case Category  2. Case Sub Category  3. Matter Description If Validation is successful, a Matter No is created for the selected case info record and display the success message. Created matter no added in the Matter list page for the respective Class Also a new matter will be created in QuickBooks and Docket wise systems |  |  |
|  | 77 | Matter creation in DocketWise | once Matter is created successfully in CLARA, a Matter is automatically created in DocketWise with same Matter ID with below fields copied from CLARA |  |  |
|  | 78 |  | Matter Number |  |  |
|  | 79 |  | title |  |  |
|  | 80 |  | description |  |  |
|  | 81 |  | Client ID |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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