### Test Script M&R/CLARA/IMM/2022/006/0002

### Matter(006)/Billing(0002)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Matter Billing 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 |  |  |
| Billing Tab | 2 | Click the Menu and navigate to MATTER and click Matter Management button | Has to open the Matter List page |  |  |
|  | 3 | Should display all the Matter records based on L&E and Immigration |  |  |
| Options | 4 | Click Options button | Will display the required options for this screen |  |  |
| 5 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |
| List search / Filter | 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 |  |  |
| Assign Billing details | 7 | Select a client and Click Options button and then click Edit icon | Has to open the Matter Edit screen |  |  |
|  |  | Select the Billing tab and this open the relevant fields | **Billing tab** |  |  |
|  |  |  | **General details** |  |  |
|  | 8 |  | Billing Mode - Select the suitable billing mode option from the dropdown |  |  |
|  | 9 |  | Billing frequency - Select the suitable billing mode option from the dropdown |  |  |
|  | 10 |  | Billing Format Code - Select the suitable billing mode option from the dropdown |  |  |
|  | 11 |  | Billing remarks - Text field |  |  |
|  | 12 |  | Flat Fee - Enter the fees for Flat fee cases |  |  |
|  | 13 |  | Admin Cost- Automatically Selected based on the flat fee |  |  |
|  | 14 |  | Contingency fee- Enter the fees for Contingency cases |  |  |
|  | 15 |  | Referred by - Select the referral person from the drop down |  |  |
|  | 16 |  | Accounting Phone No. - Entry Field |  |  |
|  | 17 |  | Billing Address - Entry Field |  |  |
|  |  |  | **Account details** |  |  |
|  | 18 |  | Legal Fees GL Account - Select the Legal Fee Income from drop down |  |  |
|  | 19 |  | Legal Cost GL Account - Select the Legal cost Income from drop down |  |  |
|  |  |  | **Admin - tab** |  |  |
|  | 20 |  | Created By - Non-Editable |  |  |
|  | 21 |  | Created on - Non-Editable |  |  |
|  | 22 |  | Updated by - Non-Editable |  |  |
|  | 23 |  | Updated on - Non-Editable |  |  |
|  | 24 |  | Status - Select the appropriate status from drop down |  |  |
|  | 25 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 26 |  | On Clicking Update button, 1. will update the changes for the selected Matter 2. Receive success Message |  |  |
| Cancel Update | 27 |  | On Clicking cancel button, Close the Pop-up screen and go back to Matter List page |  |  |
| Display Billing details | 28 | Select a Matter and Click Options button and then click display icon | Has to display the Matter Billing tab |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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