### Test Script M&R/CLARA/IMM/2022/006/0004

### Matter(006)/Documents-DocuSign(0004)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Matter Documents-DocuSign 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 |  |  |
| Documents-DocuSign tab | 2 | Select a client and Click Options button, click Edit icon and then Click Documents-DocuSign tab | Has to display the Document tab list page |  |  |
| Search Document | 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 |  |  |
| 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 |  |  |
| 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 - Auto Populated and Non-Editable |  |  |
|  | 11 |  | 2. Case Category will be filled automatically based on the selected Matter |  |  |
|  | 12 |  | 3. Case Sub Category will be filled automatically based on the selected Matter |  |  |
|  | 13 |  | 4. Document No - Select the required Document template from Drop down |  |  |
|  | 14 |  | 5. Document File - Name of the Document is automatically filled based on selected Document No |  |  |
| Mail Merge / Non-Mail Merge | 15 | 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. |  |  |
|  | 16 |  | If mail merge is enabled, mail merge functionality is processed and the processed document is displayed in the Send Document screen |  |  |
|  | 17 |  | If Mail merge is not enabled, Document template is fetched from storage server without mail merge and displayed in send Document screen |  |  |
|  | 18 | Cancel Document selection | On Clicking cancel button, Close the Pop-up screen and go back to Prospective client snapshot/ list page |  |  |
| Send to DocuSign | 19 | Click send Document | System will Check Document Master whether DocuSign is enabled, if yes send the Document to DocuSign and Client will receive E Mail If No, Document will be sent to Client Portal 1. on successful sent, it will add a record in the Document screen list page 2. Status of the document is updated as Document sent |  |  |
|  | 20 | 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 |  |  |
|  | 21 | 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 |  |  |
|  | 22 | Download the Document | Document can be downloaded by clicking download icon from options button. |  |  |
|  | 23 | 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 |  |  |
|  | 24 |  | 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 storage server |  |  |
|  | 25 | Click send Document | System will Check Document Master whether DocuSign is enabled, if yes send the Document to DocuSign and Client will receive E Mail If No, Document will be sent to Client Portal 1. on successful sent, it will add a record in the Document screen list page 2. Status of the document is updated as Document sent |  |  |
|  | 26 | Signed document received in DocuSign from client | Once the signed document is received in DocuSign from client, the status gets updated automatically as “Document received in DocuSign" in Document 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 :**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_