### Test Script M&R/CLARA/IMM/2022/006/0008

### Matter(006)/Intake(0008)

***General Information***

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| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Matter Intake 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 |  |  |
| Intake Tab | 2 | Select a Matter and Click Options button, click Edit icon and then Click intake form tab | Has to display the Intake form tab list page |  |  |
| Search Intake forms | 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 |  |  |
| New intake from | 9 | Select a new button from top of list page | Will Open a New popup screen with below fields |  |  |
|  | 10 |  | 1. Case Category - Auto filled for the selected Matter/Non-Editable |  |  |
|  | 11 |  | 2. Case Sub Category - Auto filled for the selected Matter/Non-Editable |  |  |
|  | 12 |  | 3. Client Name - Auto filled for the selected Matter |  |  |
|  | 13 |  | 4. Intake Form type - select the relevant form from dropdown |  |  |
|  | 14 |  | On Clicking Fill Form button, 1. will open the relevant intake forms to fill  2. once the form is filled and submitted success message is received and a new intake number is added into the list page |  |  |
| Update Intake form | 15 | Select an intake form and go to Options and Click Edit Icon | Will Open the intake form details for the selected record |  |  |
| Cancel Update | 16 |  | On Clicking cancel button, Close the Pop-up screen and go back to Matter intake form List page |  |  |
|  | 17 |  | Make the necessary edits and on clicking Update button 1. Update the details of selected Intake form 2. Receive success message |  |  |
| Approve Intake form | 18 | Select an intake form and select Approve button from the actions | Will Open the intake form details for the selected record with Approval tab |  |  |
|  | 19 |  | Select the Approval status from dropdown and click submit 1. Intake forms will be approved and success message will be displayed |  |  |
| Delete Intake | 20 | Select an intake form and go to Options and Click Delete Icon | Allow to delete only when the status is not approved. Will delete the selected intake form from the list. |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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