### Test Script M&R/CLARA/IMM/2022/006/0013

### Matter(006)/Client Portal Documents(0013)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Matter Client Portal 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 |  |  |
| Client Portal Documents List | 2 | Click the Menu and navigate to Matter / Matter Management / Client Portal Documents and click the button | Has to open the Client Portal Documents List page |  |  |
|  |  |  | Should display all the Client Portal Documents details in the list page |  |  |
| Search | 3 | Click Filter button | Has to open the search criteria fields |  |  |
|  | 4 | 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 |  |  |
|  | 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 |  |  |
| Options | 6 | Click Options button | Will display the required options for this screen |  |  |
| 7 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |
| List search | 8 | 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 |  |  |
| Create New |  |  | Has to open a new Pop-up screen to Enter the below field details |  |  |
|  |  | **Documents New Tab** |  |  |
| 9 |  | Matter No-Auto Populate-Non-Editable |  |  |
| 10 |  | Case Category-Auto Populate-Non-Editable |  |  |
| 11 |  | Case Sub Category-Auto Populate-Non-Editable |  |  |
| 12 |  | Document No-Select relevant document from dropdown-Mandatory |  |  |
| 13 |  | Document File - Auto Populate based on selecting document number |  |  |
| 14 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
| 15 |  | On Clicking Save button, 1. will save the files to the selected matter and send those documents to respective client portal 2. Receive success Message  3. A new record is added in the List page |  |  |
| cancel creation | 16 |  | On Clicking cancel button, Close the Pop-up screen and go back to List page |  |  |
|  | 17 |  | 1.Will save the file to the selected matter and send that document to respective client portal. 2. Receive success Message  3. A new record is added in the List page with following fields |  |  |
|  |  |  | Actions |  |  |
|  |  |  | Document No |  |  |
|  |  |  | Document Name / File Path |  |  |
|  |  |  | Status |  |  |
|  |  |  | Doc |  |  |
|  |  |  | Sent By |  |  |
|  |  |  | Sent On |  |  |
|  |  |  | Received Date |  |  |
| Upload Agreement | 18 | 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 |  |  |
|  | 19 |  | On clicking upload, a pop-up screen will open to choose the file from the local system. Once the required agreement file is selected click ok button. Selected agreement has to be opened in send agreement 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 |  |  |
|  | 20 | Click send Agreement | Click the send button and this will send the agreement to the DocuSign. on successful sent, a record is added in the Client Portal Document screen list page |  |  |
| Document Upload | 21 |  | Click Choose File will open windows explorer, select the document to be uploaded and click upload icon. Document will be uploaded and sent to respective client portal; attachment link next to document upload will provide the location of the file being uploaded in the Share Folder. |  |  |
| Display | 22 | Select a record and click display from Options icon on the top of the list | validation - Should not allow to select multiple rows |  |  |
| Display the selected record from the list page |  |  |
| Delete | 23 | Select a record and click delete from Options icon on the top of the list | validation - Should not allow to select multiple rows |  |  |
| Delete the selected record from the 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 :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_