### Test Script M&R/CLARA/IMM/2022/006/0014

### Matter(006)/Client Portal Checklist(0014)

***General Information***

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| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Matter Client Portal Checklist 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 Checklist List | 2 | Click the Menu and navigate to Matter / Matter Management / Client Portal Checklist and click the button | Has to open the Client Portal Checklist List page |  |  |
|  |  |  | Should display all the Client Portal Checklist 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 |  |  |
| 9 |  | **General Tab** |  |  |
| 10 |  | 1.Check List No-Auto populate/Editable |  |  |
| 11 |  | 2.Case Category-Auto populate/Non-Editable |  |  |
| 12 |  | 3.Case Sub Category-Auto populate/Non-Editable |  |  |
| 13 |  | 4.Matter ID-Auto populate/Non-Editable |  |  |
| 14 |  | 5.Matter Description-Auto populate/Non-Editable |  |  |
|  |  | **Document Details Tab** |  |  |
| 15 |  | 1.S No-Auto populate/Non-Editable |  |  |
| 16 |  | 2.Document Name-Auto populate/Non-Editable |  |  |
| 17 |  | 3.Checklist Template-Auto populate/Non-Editable |  |  |
| 18 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
| 19 |  | 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 | 20 |  | On Clicking cancel button, Close the Pop-up screen and go back to 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 :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_