### Test Script M&R/CLARA/IMM/2022/007/0001

### Billing(007)/Quotation(0001)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Billing Quotation 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 |  |  |
| Quotation | 2 | Choose Menu, navigate to Billing and then Click Quotation button | Has to display the Quotation screen list page |  |  |
| Search Quotation | 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 |  |  |
| Add New Quotation | 7 | Select a new button from top of list page | Will Open a New screen with below fields |  |  |
|  |  |  | **Header** |  |  |
|  | 8 |  | 1. Client ID - select the relevant Client from dropdown - Mandatory |  |  |
|  | 9 |  | 2. Matter No - select the relevant Matter for the selected Client  from dropdown - Mandatory |  |  |
|  | 10 |  | 3. Case Category - Auto Populate based on Selected Matter No and this is Non-Editable |  |  |
|  | 11 |  | 4. Case Sub Category - Auto Populate based on Selected Matter No and this is Non-Editable |  |  |
|  | 12 |  | 5. Corporation - Can be selected if required - Optional |  |  |
|  | 13 |  | 6. Quotation date - Select the date - Mandatory |  |  |
|  | 14 |  | 7. Total Amount - Calculated Field - Non-Editable |  |  |
|  | 15 |  | 8. Due date - Entry field - Optional |  |  |
|  | 16 |  | 9 - Term details - Entry field - Optional |  |  |
|  | 17 |  | 10- Sent on - Auto populate- Non-Editable |  |  |
|  | 18 |  | 11. Approved on - Auto Populate - Non-Editable |  |  |
|  |  |  | **Lines** |  |  |
|  | 19 |  | 1. Item - Select the required Item from drop down - Mandatory |  |  |
|  | 20 |  | 2. Description - Entry field - Optional |  |  |
|  | 21 |  | 3. Hours - Entry field - Optional |  |  |
|  | 22 |  | 4. Rate/Hr - Entry field - Optional |  |  |
|  | 23 |  | 5. Amount - Calculated field - Mandatory - Editable |  |  |
|  | 24 |  | On Clicking Save button 1. will add a new Quotation entry for the selected Client and Matter and added in the list page 2. Receive success Message |  |  |
| Update Quotations | 25 | Select a Quotation and go to Options and Click Edit Icon | Will Open the details of Selected Quotation. (Approved Quotations are not editable) |  |  |
|  |  |  | **Header** |  |  |
|  | 26 |  | 1. Client ID - Auto Populate- Non-Editable |  |  |
|  | 27 |  | 2. Matter No - Auto Populate- Non-Editable |  |  |
|  | 28 |  | 3. Case Category - Auto Populate- Non-Editable |  |  |
|  | 29 |  | 4. Case Sub Category - Auto Populate- Non-Editable |  |  |
|  | 30 |  | 5. Corporation - Auto Populate- Editable |  |  |
|  | 31 |  | 6. Quotation date - Auto Populate- Editable |  |  |
|  | 32 |  | 7. Total Amount - Auto Populate- Non-Editable |  |  |
|  | 33 |  | 8. Due date - Auto Populate- Editable |  |  |
|  | 34 |  | 9 - Term details - Auto Populate- Editable |  |  |
|  | 35 |  | 10. Sent on - Auto populate- Non-Editable |  |  |
|  | 36 |  | 11. Approved on - Auto Populate - Non-Editable |  |  |
|  | 37 |  | 12. Status - dropdown - Editable |  |  |
|  |  |  | **Lines** |  |  |
|  | 38 |  | 1. Item - Auto Populate- Editable |  |  |
|  | 39 |  | 2. Description - Entry field - Auto Populate- Editable |  |  |
|  | 40 |  | 3. Hours - Auto Populate- Editable |  |  |
|  | 41 |  | 4. Rate/Hr -Auto Populate- Editable |  |  |
|  | 42 |  | 5. Amount - Auto Populate- Editable |  |  |
|  | 43 |  | On Clicking Update button 1. Update the details of selected Quotation 2. Receive success message |  |  |
| Cancel Update | 44 |  | On Clicking cancel button, Close the Pop-up screen and go back to Matter List page |  |  |
| Attach Payment Link | 45 | Generate Payment Link from QuickBooks Manually. Click paylink button by selecting respective quotation and paste the link | Able to save the payment link against the quotation and make available in the client portal for payments |  |  |
| Display Quotation | 46 | Select a Quotation and Click Options button and then click display icon | Has to display the selected Quotation Details |  |  |
| Delete Quotation | 47 | Select a Quotation and Click Options button and then click delete icon | Will Delete the Selected the record if the Quotation is not approved |  |  |
| Options | 48 | Click Options button | Will display the required options for this screen |  |  |
| 49 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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