### Test Script M&R/CLARA/IMM/2022/007/0002

### Billing(007)/Payment Plan(0002)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Payment plan 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 |  |  |
| Payment Plan | 2 | Choose Menu, navigate to Billing and then Click Payment Plan button | Has to display the Payment Plan screen list page |  |  |
| Search Payment Plan | 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 Payment Plan | 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. Quote Number - Select the relevant Quote if required - Optional |  |  |
|  | 11 |  | 4. Payment plan total Amount - Entry field - Mandatory |  |  |
|  | 12 |  | 5. Installment Amount - Entry field - Mandatory |  |  |
|  | 13 |  | 6. Start date - Select the date - Mandatory |  |  |
|  | 14 |  | 7. Intervals by date - Entry field - Mandatory |  |  |
|  | 15 |  | 8. Payment plan date - Entry field - Mandatory |  |  |
|  | 16 |  | 9. Reminder notes - Entry field - Optional |  |  |
|  | 17 | Calculate Dues button | On clicking Calculate Due button, system will calculate the installments and display in the below fields |  |  |
|  |  |  | **Lines** |  |  |
|  | 18 |  | 1. Installment No - Auto Populated - Non-editable |  |  |
|  | 19 |  | 2. Due Date - Auto Populated - Non-editable |  |  |
|  | 20 |  | 3. Installment Amount - Auto Populated - Non-editable |  |  |
|  | 21 |  | 4. Balance Amount - Auto Populated - Non-editable |  |  |
|  | 22 |  | On Clicking Save button 1. will add a new Payment Plan entry for the selected Client and Matter and added in the list page 2. Receive success Message |  |  |
| Update Payment Plans | 23 | Select a Payment Plan and go to Options and Click Edit Icon | Will Open the details of Selected Payment Plan. (Approved Quotations are not editable) |  |  |
|  |  |  | **Header** |  |  |
|  | 24 |  | 1. Client ID - Auto Populated - Non-editable |  |  |
|  | 25 |  | 2. Matter No - Auto Populated - Non-editable |  |  |
|  | 26 |  | 3. Quote Number - Auto Populated - Editable |  |  |
|  | 27 |  | 4. Payment plan total Amount - Auto Populated - editable |  |  |
|  | 28 |  | 5. Installment Amount - Auto Populated - editable |  |  |
|  | 29 |  | 6. Start date - Auto Populated - editable |  |  |
|  | 30 |  | 7. Intervals by date - Auto Populated - editable |  |  |
|  | 31 |  | 8. Payment plan date - Auto Populated - editable |  |  |
|  | 32 |  | 9 - Reminder notes - Auto Populated - editable |  |  |
|  | 33 |  | 10 - Status - Auto Populated - editable |  |  |
|  | 34 | Calculate Dues button | On clicking Calculate Due button, system will re calculate the installments and display in the below fields |  |  |
|  |  |  | **Lines** |  |  |
|  | 35 |  | 1. Installment No - Auto Populated - Non-editable |  |  |
|  | 36 |  | 2. Due Date - Auto Populated - Non-editable |  |  |
|  | 37 |  | 3. Installment Amount - Auto Populated - Non-editable |  |  |
|  | 38 |  | 4. Balance Amount - Auto Populated - Non-editable |  |  |
|  | 39 |  | On Clicking Update button 1. Update the details of selected Payment Plan 2. Receive success message |  |  |
| Cancel Update | 40 |  | On Clicking cancel button, Close the Pop-up screen and go back to Matter List page |  |  |
| Display Payment Plan | 41 | Select a Payment Plan and Click Options button and then click display icon | Has to display the selected Payment Plan Details |  |  |
| Delete Payment Plan | 42 | Select a Payment Plan and Click Options button and then click delete icon | Will Delete the Selected the record if the Payment Plan is not Closed |  |  |
| Options | 43 | Click Options button | Will display the required options for this screen |  |  |
| 44 | 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 :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_