### Test Script M&R/CLARA/IMM/2022/007/0003

### Billing(007)/Prebill generation(0003)

***General Information***

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| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Payment Prebill generation 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 |  |  |
| Prebill | 2 | Choose Menu, navigate to Billing and then Click Prebill generate button | Has to display the Prebill generation screen list page |  |  |
| Search Prebill | 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 Prebill | 7 | Select a new button from top of list page | Will Open a New screen with below fields |  |  |
|  |  | There are 2 options in the selection parameters (Bill Individual and Bill by group) | **Selection Parameters (Bill Individual)** |  |  |
|  | 8 |  | 1.Class ID - select the relevant class ID from dropdown - optional |  |  |
|  | 9 |  | 2. Client ID - select the relevant Client from dropdown - optional |  |  |
|  | 10 |  | 3. Matter No - select the relevant Matter for the selected Client from dropdown - optional |  |  |
|  | 11 |  | 4. Bill date - Enter the date - Mandatory |  |  |
|  | 12 |  | 5. Start date - Enter the date - Mandatory |  |  |
|  | 13 |  | 6. Fees/Cost cutoff date - Enter the date - Mandatory |  |  |
|  | 14 |  | 7. Payment cutoff date - Enter the date - Mandatory |  |  |
|  |  |  | **Selection Parameters (Bill by Group)** |  |  |
|  | 15 |  | 1. Class ID - Select Class ID from the dropdown - Optional |  |  |
|  | 16 |  | 2. Billing Mode - select from dropdown - optional |  |  |
|  | 17 |  | 3. Case category - Select from dropdown - Optional |  |  |
|  | 18 |  | 4. Case sub category - select from dropdown - Optional |  |  |
|  | 19 |  | 5. Responsible Time keeper - Select from dropdown - Optional |  |  |
|  | 20 |  | 6. Assigned Time keeper - Select from dropdown - Optional |  |  |
|  | 21 |  | 7. Client ID - select the relevant Client from dropdown - optional |  |  |
|  | 22 |  | 8. Matter No - select the relevant Matter for the selected Client from dropdown - optional |  |  |
|  | 23 |  | 9. Bill Date - Enter / select the Bill Date - Mandatory |  |  |
|  | 24 |  | 10. Start Date - Enter / select the Start Date - Mandatory |  |  |
|  | 25 |  | 11. Fees / Cost Cutoff Date - Enter / select the fees cutoff Date - Mandatory |  |  |
|  | 26 |  | 12. Payment Cutoff Date- Enter / select the payment cutoff Date - Mandatory |  |  |
|  | 27 |  | On Clicking Run button 1. will display the below tabs and fields in the new screen |  |  |
|  | 28 |  | Selection Parameters and Dates entered in the previous screen as Non-Editable fields |  |  |
|  |  |  | **Pre-bill details tab** |  |  |
|  | 29 |  | 1. Prebill date - Auto populated - Non-Editable |  |  |
|  | 30 |  | 2. Client ID - Auto populated - Non-Editable |  |  |
|  | 31 |  | 3. Matter No - Auto Populated - Non-Editable |  |  |
|  | 32 |  | 4. Time tickets - Auto Populated - Non-Editable |  |  |
|  | 33 |  | 5. Expenses - Auto populated - Non-Editable |  |  |
|  | 34 |  | 6. Total Amount - Auto Populated - Non-Editable |  |  |
|  | 35 | Click Assign | On selecting the records and clicking Assign button, a pop-up screen will open and display the below fields |  |  |
|  | 36 |  | Partner ID - Auto Populated - Non-Editable |  |  |
|  | 37 |  | Partner Name - Auto Populated - Non-Editable |  |  |
|  | 38 |  | Select relevant Partner ID and click Confirm |  |  |
|  | 39 |  | 1. Will create New Pre-bill Number and Pre-bill batch Number and a new record is inserted in the list page 2. Receive Success message 3. Assign Partner and Prebill No to the time tickets and Expenses 4. Notification has to be sent to the Partners |  |  |
|  | 40 |  | On selecting Cancel button, will close the Assignment Popup screen |  |  |
|  | 41 | Click cancel button | Will close the Prebill Run screen and go the selection screen and Prebill will not be generated |  |  |
|  | 42 | Prebill Edit is not allowed |  |  |  |
| Display Prebill | 43 | Select a Prebill and Click Options button and then click display icon | Has to display the selected Prebill Details |  |  |
| Delete Prebill | 44 | Select a Prebill and Click Options button and then click delete icon | Will Delete the Selected the record if the Prebill is not Approved |  |  |
| Options | 45 | Click Options button | Will display the required options for this screen |  |  |
| 46 | 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 :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_