### Test Script M&R/CLARA/IMM/2022/007/0005

### Billing(007)/Invoice(0005)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Payment Invoice Created/updated/deleted Successfully | | | |

***Process***

| **Process** | **Step #** | **Steps** | **Expected Results** | **Actual Results** | **Pass/Fail/**  **Not executed** |
| --- | --- | --- | --- | --- | --- |
| Invoice | 1 | Enter the User ID and Password in the login page | Should be able to Login successfully and open the landing page |  |  |
|  | 2 | Choose Menu, navigate to Billing and then Click Invoice button | Has to display the Invoice screen list page |  |  |
| Search Invoice | 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 |  |  |
| Invoice - Generation | 7 | Click New button on the top of list page | Will Open a New screen with below fields |  |  |
|  |  |  | **Selection Parameters** |  |  |
|  | 8 |  | 1.Prebill No - Select relevant No from dropdown - Optional |  |  |
|  | 9 |  | 2.Prebill Batch No - Select relevant No from dropdown - Optional |  |  |
|  | 10 |  | 3.Matter No - Select relevant No from dropdown - Optional |  |  |
|  | 11 |  | 4.Prebill Date - Enter the date range for selection - optional |  |  |
|  | 12 |  | 5.Invoice Date - Select Invoice date - Mandatory |  |  |
|  | 13 |  | 6.Invoice Remarks - Entry field - Mandatory |  |  |
|  | 14 | Click Cancel Button | Will Reset the selection Parameters and New Selection parameters can be entered |  |  |
|  | 15 | Click Run button | Has to Open New screen with below tabs and fields |  |  |
|  | 16 |  | Will display selected parameters entered in Previous screen under Selection Parameters table |  |  |
|  |  |  | **Invoice Details tab** |  |  |
|  | 17 |  | 1.Client Name - Auto Populated - Non-Editable |  |  |
|  | 18 |  | 2.Prebill No - Auto Populated - Non-Editable |  |  |
|  | 19 |  | 3.Matter No - Auto Populated - Non-Editable |  |  |
|  | 20 |  | 4.Partner - Auto Populated - Non-Editable |  |  |
|  | 21 |  | 5.Total Amount - Auto Populated - Non-Editable |  |  |
|  | 22 |  | 6.Bill To - Auto Populated - Non-Editable |  |  |
|  | 23 |  | 7.Bill Amount - Auto Populated - Non-Editable |  |  |
|  | 24 |  | 8.Add Client - Editable - add more when required |  |  |
|  | 25 | Click Save Button | Below Changes will be applied 1. A New invoice number will be generated and a record is inserted into the list page 2. Status of the Corresponding Prebill Numbers, Time tickets and Expense details are updated as Billed 3. Create a New invoice in QuickBooks system 4. Receive Success message |  |  |
|  | 26 | Click cancel button | Will close the new Invoice screen and go the list page without saving the details |  |  |
| Attach Payment Link | 27 | 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 |  |  |
| Payment Integration with QuickBooks | 28 | Make Payment/Credit Memos entries against the invoice in QuickBooks | Corresponding invoice has to be updated with payment status, payment amount and balance amount. |  |  |
| Display Invoice | 29 | Select an Invoice Number and Click Options button and then click display icon | Has to display the selected Invoice Details |  |  |
| Delete Invoice | 30 | Click Delete icon from Options | Delete the selected Invoice No by validating the Payment status |  |  |
| Options | 31 | Click Options button | Will display the required options for this screen |  |  |
| 32 | 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 :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_