### Test Script M&R/CLARA/IMM/2022/008/0001

### Reports(008)/PROSPECTIVE CLIENT(0001)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Reports Prospective client 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 |  |  |
| Prospective client | 2 | Choose Menu, navigate to Reports and then Click CRM followed by Prospective client | Has to display the Prospective client report generation page |  |  |
|  | 3 |  | New screen should open with below selection fields |  |  |
|  | 4 |  | 1. Class ID - select the relevant Class from dropdown - Mandatory |  |  |
|  | 5 |  | 2. Referral Source - select the relevant referral source for the selected Class from dropdown - optional |  |  |
|  | 6 |  | 3. Prospective client ID -select the relevant Prospective client ID from dropdown - optional |  |  |
|  | 7 |  | 4. Inquiry No -select the relevant Inquiry No from dropdown - optional |  |  |
|  | 8 |  | 5. Status - select the relevant Status from dropdown - Mandatory |  |  |
|  | 9 |  | 6. On boarding Status -select the relevant on boarding Status from dropdown - optional |  |  |
|  | 10 |  | 7. Consulting Attorney -select the relevant Consulting Attorney from dropdown - optional |  |  |
|  | 11 |  | 8. Retained By -select the relevant Retained By from dropdown - optional |  |  |
|  | 12 |  | 9. Prospective File Date -select the relevant Prospective File Date from dropdown - Mandatory |  |  |
|  | 13 |  | On Clicking Execute button will display the below tabs and fields in the new screen |  |  |
|  |  |  | **Prospective Client** |  |  |
|  | 14 |  | 1.Class |  |  |
|  | 15 |  | 2.Prospective Client Name |  |  |
|  | 16 |  | 3.Name |  |  |
|  | 17 |  | 4.Address |  |  |
|  | 18 |  | 5.Email |  |  |
|  | 19 |  | 6.Phone Number |  |  |
|  | 20 |  | 7.Referral Source |  |  |
|  | 21 |  | 8.Consulting Attorney |  |  |
|  | 22 |  | 9.Follow Up |  |  |
|  | 23 |  | 10.Status |  |  |
|  | 24 |  | 11.Onboarding Status |  |  |
| Options | 25 | Click Options button | Will display the required options for this screen |  |  |
| 26 | 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:**

|  |
| --- |
|  |
|  |
|  |
|  |

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

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

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