### Test Script M&R/CLARA/IMM/2022/008/0002

### Reports(008)/LEAD CONVERSION(0002)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Reports Lead Conversion 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 |  |  |
| Lead Conversion | 2 | Choose Menu, navigate to Reports and then Click CRM followed by Lead Conversion | Has to display the Lead Conversion report generation page |  |  |
|  | 3 |  | New screen should open with below fields |  |  |
|  | 4 |  | 1. Class ID - select the relevant Class from dropdown - Mandatory |  |  |
|  | 5 |  | 2. Inquiry Assigned to - select the relevant Inquiry Assigned to for the selected Class from dropdown - optional |  |  |
|  | 6 |  | 3. Consulting Attorney -select the relevant Consulting Attorney from dropdown - optional |  |  |
|  | 7 |  | 4. Status -select the relevant Status from dropdown - Mandatory |  |  |
|  | 8 |  | 5. Intake Date - select the relevant Intake Date from dropdown - Mandatory |  |  |
|  | 9 |  | On Clicking Execute button will display the below tabs and fields in the new screen |  |  |
|  |  |  | **Lead Conversion** |  |  |
|  | 10 |  | 1.Inquiry No |  |  |
|  | 11 |  | 2.Inquiy Date |  |  |
|  | 12 |  | 3.Inquiy Date |  |  |
|  | 13 |  | 4.Inquiry Assigned to |  |  |
|  | 14 |  | 5.Name |  |  |
|  | 15 |  | 6.Phone No |  |  |
|  | 16 |  | 7.Email |  |  |
|  | 17 |  | 8.Mode of Inquiry |  |  |
|  | 18 |  | 9.Date Intake Form Rec |  |  |
|  | 19 |  | 10.Date of Cons |  |  |
|  | 20 |  | 11.Cons. Attorney |  |  |
| Options | 21 | Click Options button | Will display the required options for this screen |  |  |
| 22 | 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 :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_