### Test Script M&R/CLARA/CORP/2022/002/0013

### Business(002)/Document template(0013)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Document template 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 |  |  |
| List page | 2 | Click the Settings Menu and navigate to Business/Document template and click the button | Has to open the List page |  |  |
| 3 | Should display all the records in the list page |  |  |
| Search | 4 | Click Search button | Has to open the search criteria fields |  |  |
| 5 | Search Options can be single or multiple. Enter the required search field values and click search. This will update the list page records according to the search |  |  |
| 6 | Click Reset button | On Clicking reset will clear the search field values and will make all the fields as blank & Click search again will provide the unfiltered list |  |  |
| Options | 7 | Click Options button | Will display the required options for this screen |  |  |
| 8 | Click Download icon from Options | Will down the list page records in xlsx format |  |  |
| List search / filter | 9 | 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 |  |  |
| Create New | 10 | Click New Button | Has to open a new Pop-up screen to Enter the below field details |  |  |
| 11 | 1. Class - Dropdown - Mandatory |  |  |
| 12 | 2. Case Category - Dropdown - Mandatory |  |  |
| 13 | 3. Status- Autofill "ACTIVE" status - Mandatory |  |  |
| 14 | 4. Document/Upload file - select the suitable document from local drive - Mandatory |  |  |
| 15 | 5. Document file description - Entry field - Mandatory |  |  |
| 16 | 6. Mail Merge - Dropdown - Mandatory |  |  |
| 17 | 7. DocuSign - checkbox - check this if the document is DocuSign |  |  |
| 18 | 8. Client Portal - checkbox - check this if the document is client portal |  |  |
| 19 | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
| 20 | On Clicking Save button, 1. will save the uploaded file in Share Folder under template 2. Receive success Message  3. A new record is added in the List page |  |  |
| cancel creation | 21 |  | On Clicking cancel button, Close the Pop-up screen and go back to List page |  |  |
| Edit | 22 | Select a record and click edit from Options icon on the top of the list | validation - Should not allow to select multiple rows |  |  |
| 23 |  | Has to open the update screen with below options to edit |  |  |
| 24 |  | Error message will be Popped up if Mandatory fields are not filled |  |  |
| 25 |  | 1. Class - Auto Populate/Non-Editable |  |  |
| 26 |  | 2. Case Category - Auto Populate/Non-Editable |  |  |
| 27 |  | 3. Status- Auto Populate/Editable |  |  |
| 28 |  | 4. Document file - Auto Populate/Editable |  |  |
| 29 |  | 5. Document file description -Auto Populate/Editable |  |  |
| 30 |  | 6. Mail Merge - Auto Populate/Editable |  |  |
| 31 |  | 7. DocuSign - checkbox - Editable |  |  |
| 32 |  | 8. Client Portal - checkbox - Editable |  |  |
| 33 |  | on clicking Update button 1. Update the edited records in the list page 2. Receive success message |  |  |
| Cancel Edit | 34 |  | On Clicking cancel button, Close the Pop-up screen and go back to List page |  |  |
| Delete | 35 | Select a record and click delete from Options icon on the top of the list | validation - Should not allow to select multiple rows |  |  |
| 36 |  | Delete the selected record from the list page |  |  |

***Confirmation / Approval of Testing Results***

**Overall Testing Status:**

Pass and accepted

Passed with note \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Failed

**Comments:**

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

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

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