### Test Script M&R/CLARA/L&E/2022/003/0003

### CRM(003)/Inquiry Validation(0003)

***General Information***

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| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Inquiry Validation 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 |  |  |
| Inquiry List | 2 | Click the Menu and navigate to CRM-Inquiry-Inquiry Validation and click the button | Has to open the Inquiry Validation List page |  |  |
|  |  | Should display all the Assigned and Validated inquiry records in the list page |  |  |
| Search Inquiry | 3 | Click Search button | Has to open the search criteria fields |  |  |
| 4 | 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 |  |  |
|  | 5 | 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 | 6 | Click Options button | Will display the required options for this screen |  |  |
| 7 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |
| List search / filter | 8 | 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 |  |  |
| Inquiry Update & validate | 9 | Select a record and click update& validate from Action icon on the right of each row | validation - Should not allow to select multiple rows |  |  |
| 10 | Update Inquiry screen will allow below fields |  |  |
|  |  |  | **General tab** |  |  |
|  | 11 |  | 1. First Name - Auto Populate /Editable |  |  |
|  | 12 |  | 2. Last Name - Auto Populate /Editable |  |  |
|  | 13 |  | 3. Phone No - Auto Populate /Editable |  |  |
|  | 14 |  | 4. E Mail - Auto Populate /Editable |  |  |
|  | 15 |  | 5. Inquiry Mode - Auto Populate /Editable |  |  |
|  | 16 |  | 6. Inquiry date - Auto Populate /Non-Editable |  |  |
|  | 17 |  | 7. Objective of Visit. What is the purpose of your visit? - Auto Populate /Editable |  |  |
|  |  |  | **Assign Tab** |  |  |
|  | 18 |  | 1. Class - Auto Populate/ Editable - Select Immigration or L&E from dropdown. Allow only single value selection (Mandatory) |  |  |
|  | 19 |  | 2. Assigned to- Auto Populate/ Editable - Select a User ID from drop down. Allow only single value selection (Mandatory) |  |  |
|  |  |  | **Status tab** |  |  |
|  | 20 |  | Inquiry Status - Select a status from dropdown (Hold/Reject) - Allow only single value selection (Optional) |  |  |
|  |  |  | **Admin Tab** |  |  |
|  | 21 |  | 1. Created by - Auto Populate /Non-Editable |  |  |
|  | 22 |  | 2. Created on - Auto Populate /Non-Editable |  |  |
|  | 23 |  | 3. Assigned by - Auto Populate /Non-Editable |  |  |
|  | 24 |  | 4. Assigned on - Auto Populate /Non-Editable |  |  |
|  | 25 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 26 |  | on clicking Update button 1. Update the edited records in the list page 2. Receive success message |  |  |
| Cancel Update | 27 |  | On Clicking cancel button, Close the Pop-up screen and go back to Inquiry Assign List page |  |  |
| Delete Inquiry | 28 | Select a record and click Delete from Action icon on the right of each row | validation -  1. Should not allow to select multiple rows 2. Should not delete and display error message "when the status of Inquiry is Intake Form sent" |  |  |
| 29 |  | Deleted the selected Inquiry from the list page |  |  |
| Intake form Selection | 30 | Select a record and click Intake from Action icon on the right of each row | validation - Should not allow to select multiple rows |  |  |
|  | 31 | Has to open the Prospective Client Intake Form selection screen with below field options |  |  |
|  | 32 |  | 1. Inquiry No - Auto Populate/Non-Editable |  |  |
|  | 33 |  | 2. First Name - Auto Populate /Editable |  |  |
|  | 34 |  | 3. Phone No - Auto Populate /Editable |  |  |
|  | 35 |  | 4. E Mail - Auto Populate /Editable |  |  |
|  | 36 |  | 5. Alt E Mail - Input Field |  |  |
|  | 37 |  | 7. Intake Form type - Select a Prospective Client intake form from the dropdown - Allow only single selection (Mandatory) |  |  |
|  | 38 |  | 8. Notes - Input Field |  |  |
| Send Intake | 39 | Click Send intake form button after selecting the required form | Has to open an E mail popup screen with below fields |  |  |
|  | 40 |  | 1. From - Auto Populate/Non-Editable |  |  |
|  | 41 |  | 2. To - Auto Populate /Editable |  |  |
|  | 42 |  | 3. CC- Auto Populate /Editable |  |  |
|  | 43 |  | 4. Date and Time - Current date |  |  |
|  | 44 |  | 5. Subject - Auto Populate/Editable |  |  |
|  | 45 |  | 6. Body - Auto Populate / Editable (Scheduled Date and time has to be filled manually) |  |  |
| E Mail integration | 46 |  | On Clicking Send Button,  1. will send the intake form link to the Client's E mail ID 2. Receive success message 3. Update the status of the selected Inquiry as Intake sent in the Inquiry validation page 4. If the E Mail ID is not valid, error message to be displayed |  |  |
| Cancel Sending E Mail | 47 |  | On Clicking cancel button, Close the Pop-up screen and go back to Prospective Client intake form selection page |  |  |
| Fill form through hyperlink | 48 | Click the hyperlink sent through E Mail | Has to open the required intake form with all the Fields as Mandatory |  |  |
| 49 |  | Error message will be Popped up if Mandatory fields are not filled. |  |  |
|  | 50 |  | on clicking Submit button 1. Send the Filled forms to CLARA and updated against the Inquiry No in the Intake Form List page (Next process) 2. Disable the hyperlink On Clicking Cancel button 1. Close the Intake form screen and the hyperlink can be clicked again to fill the form |  |  |
| Fill Form in CLARA | 51 | Click Fill Form button | Has to open the selected intake form with all the Fields as Mandatory |  |  |
|  | 52 |  | on clicking Submit button 1. Save the filled intake form details and updated against the Inquiry No in the Intake Form List page (Next process) 2. Status of the selected Inquiry record in the Inquiry validation page is updated as Intake form sent/filled On Clicking Cancel button 1. Close the Intake form screen and go back to Prospective Client intake form selection screen |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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