### Test Script M&R/CLARA/L&E/2022/003/0004

### CRM(003)/Intake(0004)

***General Information***

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| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
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|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Intake 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 |  |  |
| Intake List | 2 | Click the Menu and navigate to CRM-INTAKE and click the button | Has to open the Intake List page |  |  |
|  |  | Should display all the intake details in the list page |  |  |
| Search Intake | 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 |  |  |
| Intake Assign | 9 | Select a record and click Assign from Action icon on the right of each row | validation - Should not allow to select multiple rows |  |  |
|  | 10 |  | Assign intake screen will open the filled intake form along with below fields |  |  |
|  | 11 |  | All the intake form field values are editable |  |  |
|  |  |  | **Assign Tab** |  |  |
|  | 12 |  | 1. Consultation date - Input field (Optional) |  |  |
|  | 13 |  | 2. Assigned to- Select an Attorney User ID from drop down. Allow only single value selection (Mandatory) |  |  |
|  | 14 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 15 |  | On Clicking Save Button,  1. will send the intake form to the Assigned Attorney for consultation and validation (Next process)  2. Receive success message 3. Update the status of the Intake form as Intake Assigned in the Intake list page |  |  |
| Cancel Assign | 17 |  | On Clicking cancel button, Close the Pop-up screen and go back to Intake form list page |  |  |
| Intake Form Validation | 18 | Select a record and click Validation button from Action icon on the right of each row | validation - Should not allow to select multiple rows |  |  |
| 19 | Intake validation screen will open the filled intake form along with below fields |  |  |
|  | 20 |  | All the intake form field values are editable |  |  |
|  |  |  | **Assign Tab** |  |  |
|  | 21 |  | 1. Consultation date - Auto Populate/Editable |  |  |
|  | 22 |  | 2. Assigned to- Auto Populate/Editable |  |  |
|  |  |  | **Status tab** |  |  |
|  | 23 |  | 1. Intake status - Select the actual status of validation from dropdown options (Approved/Hold/Reject) - Allow only single selection (Mandatory) |  |  |
|  | 24 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 25 |  | On Clicking Save Button,  1. will create Potential Client automatically if the intake status is approved (Next process)  2. Receive success message 3. Update the status of the Intake form as Approved in the Intake list page 4. If the Intake form status is hold/reject, update the respective status in intake form list page for the respective Inquiry. Potential client will not be created for these status |  |  |
| Cancel Validation | 26 |  | On Clicking cancel button, Close the Pop-up screen and go back to Intake form list page |  |  |
| Delete Intake | 27 | 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 Potential client is already created" |  |  |
| 28 |  | Deleted the selected Inquiry 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 :**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_