### Test Script M&R/CLARA/L&E/2022/003/0005

### CRM(003)/Prospective Client(0005)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  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 List | 2 | Click the Menu and navigate to CRM-Prospective CLIENT and click the button | Has to open the Prospective Client List page |  |  |
|  | Should display all the Prospective client details in the list page |  |  |
| Search | 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 |  |  |
| Prospective Client Edit | 9 | Select a record and click Edit icon from Options button | validation - Should not allow to select multiple rows |  |  |
| 10 | Edit screen will open the filled intake form along with below fields |  |  |
|  |  |  | **Details** |  |  |
|  | 11 |  | on clicking this tab, it opens the below fields |  |  |
|  | 12 |  | 1.Inquiry No - Auto Populate/Non-Editable |  |  |
|  | 13 |  | 2. Full Name - Auto Populate/Editable |  |  |
|  | 14 |  | 3. First Name - Auto populate/editable |  |  |
|  | 15 |  | 4. Last Name - Auto populate/editable |  |  |
|  | 16 |  | 5. E Mail - Auto populate/editable |  |  |
|  | 17 |  | 6. Alt E mail - Auto populate/editable |  |  |
|  | 18 |  | 7. Case Category - Auto populate/editable |  |  |
|  | 19 |  | 8. Referral source- Auto populate/editable |  |  |
|  | 20 |  | 9. Occupation - Auto populate/editable |  |  |
|  | 21 |  | 10. SSN/PIN/Tax Id- Auto populate/editable |  |  |
|  | 22 |  | 11. Address - Auto populate/editable |  |  |
|  | 23 |  | 12. Door No- Auto populate/editable |  |  |
|  | 24 |  | 13.City/Town - Auto populate/editable |  |  |
|  | 25 |  | 14.State/Province - Auto populate/editable |  |  |
|  | 26 |  | 15. Postal Code - Auto populate/editable |  |  |
|  | 27 |  | 16. Country - Auto populate/editable |  |  |
|  | 28 |  | 17. Telephone 1 - Auto populate/editable |  |  |
|  | 29 |  | 18. Telephone 2 - Auto populate/editable |  |  |
|  | 30 |  | 19. Mailing address - Auto populate/editable |  |  |
|  | 31 |  | 20. Mobile No - Auto populate/editable |  |  |
|  | 32 |  | 21. Client Category - Auto populate/editable |  |  |
|  | 33 |  | 22. Consultation date - Auto populate/editable |  |  |
|  | 34 |  | 23. Follow up by - Auto populate/editable |  |  |
|  | 35 |  | 24. assigned Attorney - Auto populate/editable |  |  |
|  | 36 |  | 25. Notes - Auto populate/editable |  |  |
|  |  |  | **Admin tab** |  |  |
|  | 37 |  | 1. Created by - Auto Populate /Non-Editable |  |  |
|  | 38 |  | 2. Created on - Auto Populate /Non-Editable |  |  |
|  |  |  | **Status tab** |  |  |
|  | 39 | Prospective Client Status - select the status options from dropdown (drop down options are No relief available, waiting for reform, fees too high, second opinion only) | Allow only single selection (Optional) - Dropdown |  |  |
|  | 40 |  | Onboarding Status - Auto Populate/Non-Editable |  |  |
|  | 41 |  | On Clicking Update Button,  1. will update the details for the selected Potential Client 2. Receive success message |  |  |
| Prospective Client - Display | 42 | Select a record and click Display icon from Options button | Should open the Prospective Client display screen and display all the field values with Non-Editable option |  |  |
| Agreement Selection | 43 | Select a record and click Agreement from Action icon on the right of each row | This will open the Agreement selection screen and open the below field values |  |  |
|  | 44 |  | 1. Prospective Client ID - Auto Populate/Non-Editable |  |  |
|  | 45 |  | 2. Inquiry No - Auto Populate/Non-Editable |  |  |
|  | 46 |  | 3. Case Category - Auto populate/editable |  |  |
|  | 47 |  | 4. Intake form - Auto Populate/Non-Editable |  |  |
|  | 48 |  | 5. Name - Auto Populate/Editable |  |  |
|  | 49 |  | 6. Email-Auto Populate/Editable |  |  |
|  | 50 |  | 7. Agreement - Select the required agreement template from dropdown - Allow only single selection (Mandatory) |  |  |
|  | 51 | Click Submit for Mail merge or retrieve agreement template from Storage server | On Clicking Submit button, System will check whether Mail merge is enabled for the selected Agreement in agreement master. |  |  |
|  | 52 |  | If mail merge is enabled, mail merge functionality is processed and the processed document in the Send Agreement screen |  |  |
|  | 53 |  | If Mail merge is not enabled, Agreement template is fetched from storage server without mail merge and displayed in send agreement screen |  |  |
|  | 54 | Cancel Agreement selection | On Clicking cancel button, Close the Pop-up screen and go back to Prospective client list page |  |  |
|  | 55 | Click send Agreement | For the Mail merged document, if there are no edits. Click the send button and this will send the agreement to DocuSign. 1. on successful sent, it will add a record in the Agreement screen list page 2. Status of the selected Prospective client is updated as Agreement sent |  |  |
|  | 56 | Edit Mail merged Agreement | Mail Merged Agreement can be edited by Downloading the agreement from Send Agreement screen by clicking Download button. On clicking download, that will save the document to the local drive. Document manually edited in the local system |  |  |
|  | 57 | Edit Non-Mail Merged document | For Non-Mail Merged Agreement, template is available in the Send Agreement screen. Download the agreement by clicking Download button. On clicking download, that will save the document to the local drive. Document manually edited in the local system |  |  |
|  | 58 | Download the Document | Document can be downloaded by clicking download icon from options button. Document will be printed in pdf format |  |  |
| Upload Agreement | 59 | Select a record and click upload button from Action icon on the right of each row | Manually edited mail merged or non-mail merged documents will be uploaded in this option |  |  |
|  | 60 |  | On clicking upload, a pop-up screen will open to choose the file from the local system. Once the required agreement file is selected click ok button. Selected agreement has to be opened in send agreement screen. 1. On clicking display icon - Document will be opened in the screen 2. on clicking upload icon - Chosen document will be uploaded in the Share Folder under prospective client number folder |  |  |
|  | 61 | Click send Agreement | Click the send button and this will send the agreement to the DocuSign. 1. on successful sent, a record is added in the Agreement screen list page 2. Status of the selected Prospective client is updated as Agreement sent |  |  |
| Client to DocuSign | 62 | Signed document received in DocuSign from client | Once the signed document is received in DocuSign from client, the status gets updated automatically as “Document received in DocuSign" in prospective client's list page and Agreement list page |  |  |
| DocuSign to CLARA | 63 | Validate the Agreement and download the document in DocuSign | 1. The document has to be saved into Document storage (Share Folder) of CLARA 2. Status of the respective Prospective Client is updated as "Agreement validated and received" in Prospective Client list page and Agreement list page |  |  |
| Delete Prospective client | 64 | Select a record and click Delete from options | validation -  1. Should not allow to select multiple rows 2. Should not delete and display error message "when the client is already created" |  |  |
| 65 |  | Delete the selected prospective client from the list page.  Validation: Display error message when status of prospective client is “client created" and restrict deletion |  |  |
| Client creation | 66 | Select a record and click client creation button from Action icon on the right of each row | On clicking this button  1. Validation: Display error message when status of prospective client is not "Agreement received from DocuSign " and restrict client creation  2. If the validation is success, a new client is automatically created and displayed in the client management in the list page 3. Status of the prospective client is updated as "client created" 4. Display success message |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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