### Test Script M&R/CLARA/L&E/2022/005/0001

### Case Info sheet(005)/L&E(0001)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Case info sheet L&E 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 | 2 | Click the Menu and navigate to Matter /Case info sheet and click L&E case info sheet button | Has to open the Case info sheet List page |  |  |
|  | 3 | Should display all the L&E Case info sheet records with status |  |  |
| Search | 4 | Click Filter 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 | 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 |  |  |
| New Case info creation | 10 | Click New button from the top of List | Has to open the New case info creation screen with below tabs and fields |  |  |
|  |  |  | **General tab** |  |  |
|  | 11 |  | CLASS - Mandatory - Auto Populate / Non-Editable (Default L&E Class will be displayed) |  |  |
|  | 12 |  | Client ID - Mandatory-Select the Client ID of L&E Class from the dropdown |  |  |
|  | 13 |  | Prospective Client-Non-Editable (Will be blank) |  |  |
|  | 14 |  | Inquiry No.-Non-Editable (Will be blank) |  |  |
|  | 15 |  | Case Category -Select Case category from drop down |  |  |
|  | 16 |  | Case Sub Category -Select Sub case category from dropdown |  |  |
|  | 17 |  | Intake Form No.-Non-Editable (Will be blank) |  |  |
|  |  |  | **Case details** |  |  |
|  | 18 |  | Matter Description - Entry Field (Mandatory field) |  |  |
|  | 19 |  | Matter Type - Entry Field |  |  |
|  | 20 |  | Cause Number - Entry Field |  |  |
|  | 21 |  | Plaintiff - Entry Field |  |  |
|  | 22 |  | Defendant - Entry Field |  |  |
|  | 23 |  | Reference - Entry Field |  |  |
|  | 24 |  | Location of File - Entry Field |  |  |
|  |  |  | **Client Details** |  |  |
|  | 25 |  | Name - Auto Populate / Non-Editable |  |  |
|  | 26 |  | Title - Entry Field |  |  |
|  | 27 |  | Email ID - Auto Populate / Non-Editable |  |  |
|  | 28 |  | Company Name - Entry Field |  |  |
|  | 29 |  | Street Address - Auto Populate / Non-Editable |  |  |
|  | 30 |  | City - Auto Populate / Non-Editable |  |  |
|  | 31 |  | State - Auto Populate / Non-Editable |  |  |
|  | 32 |  | Country - Auto Populate / Non-Editable |  |  |
|  | 33 |  | Zip Code - Auto Populate / Non-Editable |  |  |
|  | 34 |  | Cell Phone - Auto Populate / Non-Editable |  |  |
|  |  |  | **Opposing Party** |  |  |
|  | 35 |  | Name - Entry Field |  |  |
|  | 36 |  | Email - Entry Field |  |  |
|  | 37 |  | Company Name - Entry Field |  |  |
|  | 38 |  | Street Address - Entry Field |  |  |
|  | 39 |  | City - Entry Field |  |  |
|  | 40 |  | State - Entry Field |  |  |
|  | 41 |  | Zip Code - Entry Field |  |  |
|  | 42 |  | Office Telephone - Entry Field |  |  |
|  | 43 |  | Direct Telephone - Entry Field |  |  |
|  | 44 |  | Cell Phone - Entry Field |  |  |
|  | 45 |  | Fax Number - Entry Field |  |  |
|  |  |  | **Opposing Counsel** |  |  |
|  | 46 |  | Name - Entry Field |  |  |
|  | 47 |  | Email - Entry Field |  |  |
|  | 48 |  | Company Name - Entry Field |  |  |
|  | 49 |  | Street Address - Entry Field |  |  |
|  | 50 |  | City - Entry Field |  |  |
|  | 51 |  | State - Entry Field |  |  |
|  | 52 |  | Zip Code - Entry Field |  |  |
|  | 53 |  | Office Telephone - Entry Field |  |  |
|  | 54 |  | Direct Telephone - Entry Field |  |  |
|  | 55 |  | Cell Phone - Entry Field |  |  |
|  | 56 |  | Fax Number - Entry Field |  |  |
|  |  |  | **Court Information** |  |  |
|  | 57 |  | Judge Name - Entry Field |  |  |
|  | 58 |  | Court - Entry Field |  |  |
|  | 59 |  | Email - Entry Field |  |  |
|  | 60 |  | Street Address - Entry Field |  |  |
|  | 61 |  | City - Entry Field |  |  |
|  | 62 |  | State - Entry Field |  |  |
|  | 63 |  | Postal/Zip Code - Entry Field |  |  |
|  | 64 |  | Court Telephone - Entry Field |  |  |
|  | 65 |  | Fax Number - Entry Field |  |  |
|  | 66 |  | Clerk Name - Entry Field |  |  |
|  | 67 |  | Clerk Telephone - Entry Field |  |  |
|  | 68 |  | Clerk Email - Entry Field |  |  |
|  | 69 |  | Assistant Clerk Name - Entry Field |  |  |
|  | 70 |  | Assistant Clerk Telephone - Entry Field |  |  |
|  | 71 |  | Assistant Clerk Email - Entry Field |  |  |
|  | 72 |  | Section Coordinator Name - Entry Field |  |  |
|  | 73 |  | Section Coordinator Telephone - Entry Field |  |  |
|  | 74 |  | Section Coordinator Email - Entry Field |  |  |
|  | 75 |  | Court Reporter Name - Entry Field |  |  |
|  | 76 |  | Court Reporter Telephone - Entry Field |  |  |
|  | 77 |  | Court Reporter Email - Entry Field |  |  |
|  |  |  | **Administrative Agency** |  |  |
|  | 78 |  | Agency Name - Entry Field |  |  |
|  | 79 |  | Agent Name - Entry Field |  |  |
|  | 80 |  | Agent Email - Entry Field |  |  |
|  | 81 |  | Street Address - Entry Field |  |  |
|  | 82 |  | City - Entry Field |  |  |
|  | 83 |  | State - Entry Field |  |  |
|  | 84 |  | Zip Code - Entry Field |  |  |
|  | 85 |  | Office Telephone - Entry Field |  |  |
|  | 86 |  | Direct Telephone - Entry Field |  |  |
|  | 87 |  | Fax Number - Entry Field |  |  |
|  |  |  | **Others** |  |  |
|  | 88 |  | Schedule - Entry Field |  |  |
|  | 89 |  | Schedule date - Entry Field |  |  |
|  | 90 |  | Notes - Entry Field |  |  |
|  | 91 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 92 |  | On Clicking save button  1. a new case info record number is created and added in the case info list page  2. receive success message |  |  |
| Edit Case info sheet | 93 | Select a case info record and go to options button and click Edit icon | Selected Case info record is opened for Editing with below tab and fields |  |  |
|  |  |  | **General tab** |  |  |
|  | 94 |  | CLASS - Auto Populate / Non-Editable |  |  |
|  | 95 |  | Client ID - Auto Populate / Editable |  |  |
|  | 96 |  | Prospective Client ID - Auto Populate / Non-Editable  (For Non-CRM clients, a default No will be filled)  For the existing clients this field will be blank |  |  |
|  | 97 |  | Inquiry Number - Auto Populate / Non-Editable  (For Non-CRM clients, a default No will be filled)  For the existing clients this field will be blank |  |  |
|  | 98 |  | Case Category - Auto Populate / Editable |  |  |
|  | 99 |  | Case Sub Category - Auto Populate / Editable |  |  |
|  | 100 |  | Intake Form Number - Auto Populate / Non-Editable  (For Non-CRM Clients / Existing Clients, there will not be any intake form Number) |  |  |
|  | 101 |  | Click Intake Form Button-For CRM Clients, this will open respective intake form details and for Non-CRM Clients there will not be any intake form and this button will be non-functional |  |  |
|  |  |  | **Case details** |  |  |
|  | 102 |  | Matter Description - Auto Populate / Editable |  |  |
|  | 103 |  | Matter Type - Auto Populate / Editable |  |  |
|  | 104 |  | Cause Number - Auto Populate / Editable |  |  |
|  | 105 |  | Plaintiffs - Auto Populate / Editable |  |  |
|  | 106 |  | Defendant - Auto Populate / Editable |  |  |
|  | 107 |  | Reference - Auto Populate / Editable |  |  |
|  | 108 |  | Location of File - Auto Populate / Editable |  |  |
|  |  |  | **Client Details** |  |  |
|  | 109 |  | Name-Auto Populate/ Non-Editable |  |  |
|  | 110 |  | Title - Auto Populate / Editable |  |  |
|  | 111 |  | Email ID-Auto Populate/ Non-Editable |  |  |
|  | 112 |  | Company Name - Auto Populate / Editable |  |  |
|  | 113 |  | Street Address-Auto Populate/ Non-Editable |  |  |
|  | 114 |  | City-Auto Populate/ Non-Editable |  |  |
|  | 115 |  | State-Auto Populate/ Non-Editable |  |  |
|  | 116 |  | Country-Auto Populate/ Non-Editable |  |  |
|  | 117 |  | Zip Code-Auto Populate/ Non-Editable |  |  |
|  | 118 |  | Cell Phone-Auto Populate/ Non-Editable |  |  |
|  |  |  | **Opposing Party** |  |  |
|  | 119 |  | Name - Auto Populate / Editable |  |  |
|  | 120 |  | Email - Auto Populate / Editable |  |  |
|  | 121 |  | Company Name - Auto Populate / Editable |  |  |
|  | 122 |  | Street Address - Auto Populate / Editable |  |  |
|  | 123 |  | City - Auto Populate / Editable |  |  |
|  | 124 |  | State - Auto Populate / Editable |  |  |
|  | 125 |  | Zip Code - Auto Populate / Editable |  |  |
|  | 126 |  | Office Telephone - Auto Populate / Editable |  |  |
|  | 127 |  | Direct Telephone - Auto Populate / Editable |  |  |
|  | 128 |  | Cell Phone - Auto Populate / Editable |  |  |
|  | 129 |  | Fax Number - Auto Populate / Editable |  |  |
|  |  |  | **Opposing Counsel** |  |  |
|  | 130 |  | Name - Auto Populate / Editable |  |  |
|  | 131 |  | Email - Auto Populate / Editable |  |  |
|  | 132 |  | Company Name - Auto Populate / Editable |  |  |
|  | 133 |  | Street Address - Auto Populate / Editable |  |  |
|  | 134 |  | City - Auto Populate / Editable |  |  |
|  | 135 |  | State - Auto Populate / Editable |  |  |
|  | 136 |  | Zip Code - Auto Populate / Editable |  |  |
|  | 137 |  | Office Telephone - Auto Populate / Editable |  |  |
|  | 138 |  | Direct Telephone - Auto Populate / Editable |  |  |
|  | 139 |  | Cell Phone - Auto Populate / Editable |  |  |
|  | 140 |  | Fax Number - Auto Populate / Editable |  |  |
|  |  |  | **Court Information** |  |  |
|  | 141 |  | Judge Name - Auto Populate / Editable |  |  |
|  | 142 |  | Court - Auto Populate / Editable |  |  |
|  | 143 |  | Email - Auto Populate / Editable |  |  |
|  | 144 |  | Street Address - Auto Populate / Editable |  |  |
|  | 145 |  | City - Auto Populate / Editable |  |  |
|  | 146 |  | State - Auto Populate / Editable |  |  |
|  | 147 |  | Postal/Zip Code - Auto Populate / Editable |  |  |
|  | 148 |  | Court Telephone - Auto Populate / Editable |  |  |
|  | 149 |  | Fax Number - Auto Populate / Editable |  |  |
|  | 150 |  | Clerk Name - Auto Populate / Editable |  |  |
|  | 151 |  | Clerk Telephone - Auto Populate / Editable |  |  |
|  | 152 |  | Clerk Email - Auto Populate / Editable |  |  |
|  | 153 |  | Assistant Clerk Name - Auto Populate / Editable |  |  |
|  | 154 |  | Assistant Clerk Telephone - Auto Populate / Editable |  |  |
|  | 155 |  | Assistant Clerk Email - Auto Populate / Editable |  |  |
|  | 156 |  | Section Coordinator Name - Auto Populate / Editable |  |  |
|  | 157 |  | Section Coordinator Telephone - Auto Populate / Editable |  |  |
|  | 158 |  | Section Coordinator Email - Auto Populate / Editable |  |  |
|  | 159 |  | Court Reporter Name - Auto Populate / Editable |  |  |
|  | 160 |  | Court Reporter Telephone - Auto Populate / Editable |  |  |
|  | 161 |  | Court Reporter Email - Auto Populate / Editable |  |  |
|  |  |  | **Administrative Agency** |  |  |
|  | 162 |  | Agency Name - Auto Populate / Editable |  |  |
|  | 163 |  | Agent Name - Auto Populate / Editable |  |  |
|  | 164 |  | Agent Email - Auto Populate / Editable |  |  |
|  | 165 |  | Street Address - Auto Populate / Editable |  |  |
|  | 166 |  | City - Auto Populate / Editable |  |  |
|  | 167 |  | State - Auto Populate / Editable |  |  |
|  | 168 |  | Zip Code - Auto Populate / Editable |  |  |
|  | 169 |  | Office Telephone - Auto Populate / Editable |  |  |
|  | 170 |  | Direct Telephone - Auto Populate / Editable |  |  |
|  | 171 |  | Fax Number - Auto Populate / Editable |  |  |
|  |  |  | **Others** |  |  |
|  | 172 |  | Schedule - Auto Populate / Editable |  |  |
|  | 173 |  | Schedule date - Auto Populate / Editable |  |  |
|  | 174 |  | Notes - Auto Populate / Editable |  |  |
|  |  |  | **Admin tab** |  |  |
|  | 175 |  | Created by - Auto Populate / Non-Editable |  |  |
|  | 176 |  | Created on - Auto Populate / Non-Editable |  |  |
|  | 177 |  | Updated by - Auto Populate / Non-Editable |  |  |
|  | 178 |  | Updated on - Auto Populate / Non-Editable |  |  |
|  | 179 |  | Status - Auto Populate / Non-Editable |  |  |
|  | 180 |  | On Clicking update, 1. Update the edited fields for the selected Case info record 2. Display success message |  |  |
| Cancel Update | 181 |  | On Clicking cancel button, Close the Pop-up screen and go back to Case info List page |  |  |
| Display Case info record | 182 | Select a Case info record and Click Options button and then click display icon | Has to display the details of the selected Case info record |  |  |
| Delete Case info record | 183 | Select a client and Click Options button and then click delete icon | Should allow to delete Case info record with Status "Open or updated". Else error message is displayed |  |  |
| Create New Matter | 184 | Select a Case info record and Click Create Matter button from the Actions on the right side of the row | On Clicking this button, validation is done to check the below fields are filled  1. Case Category  2. Case Sub Category  3. Matter Description If Validation is successful, a Matter No is created for the selected case info record and display the success message. Created matter no added in the Matter list page for the respective Class Also a new matter will be created in QuickBooks |  |  |
|  | 185 | Matter creation in QuickBooks | once Matter is created successfully in CLARA, a customer job is automatically created in QuickBooks with same Matter ID |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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