### Test Script M&R/CLARA/L&E/2022/008/0003

### Reports(008)/REFERRAL REPORT(0003)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Referral Report 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 |  |  |
| Referral Report | 2 | Choose Menu, navigate to Reports and then Click CRM followed by Referral Report | Has to display the Referral Report generation page |  |  |
|  | 3 |  | New screen should open with below fields |  |  |
|  | 4 |  | 1. Class ID - select the relevant Class from dropdown - Mandatory |  |  |
|  | 5 |  | 2. Referred By - select the relevant referred by for the selected Class from dropdown - optional |  |  |
|  | 6 |  | 3. Date -select the relevant Date from dropdown - Mandatory |  |  |
|  | 9 |  | On Clicking Execute button will display the below tabs and fields in the new screen |  |  |
|  |  |  | **Referral Report** |  |  |
|  | 10 |  | 1.Client ID |  |  |
|  | 11 |  | 2.Name |  |  |
|  | 12 |  | 3.Email |  |  |
|  | 13 |  | 4.Inquiry |  |  |
|  | 14 |  | 5.Potential Client ID |  |  |
|  | 15 |  | 6.Referral ID |  |  |
|  | 16 |  | 7.Referral Description |  |  |
| Options | 21 | Click Options button | Will display the required options for this screen |  |  |
| 22 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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