### Test Script M&R/CLARA/L&E/2022/008/0004

### Reports(008)/NEW CLIENT INFO - L&E(0004)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Report New Client Info–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 |  |  |
| New Client Info–L&E | 2 | Choose Menu, navigate to Reports and then Click clients followed by New Client Info–L&E | Has to display the report generation page |  |  |
|  | 3 |  | New screen should open with below fields |  |  |
|  | 4 |  | 1.Class ID - select the relevant Class from dropdown - Mandatory |  |  |
|  | 5 |  | 2.Client ID - select the Client ID from dropdown - Optional |  |  |
|  | 6 |  | 3.Referral Source - select the Referral Source from dropdown - Optional |  |  |
|  | 7 |  | 4.Date Opened - select the start date and end date from calendar for opened date - Mandatory |  |  |
|  | 8 |  | 5.Status - select the status from dropdown - Mandatory |  |  |
|  | 9 |  | 6.Client Category - select the Client category from dropdown - Optional |  |  |
|  | 10 |  | 7.Date Closed - select the start date and end date from calendar for closed date- Optional |  |  |
|  | 11 |  | On Clicking Execute button will display the below tabs and fields in the new screen |  |  |
|  |  |  | **New Client Info–L&E** |  |  |
|  | 12 |  | Crop. Client Name |  |  |
|  | 13 |  | Client ID |  |  |
|  | 14 |  | First Name |  |  |
|  | 15 |  | Full Name |  |  |
|  | 16 |  | Last Name |  |  |
|  | 17 |  | Referral Source |  |  |
|  | 18 |  | Client Category |  |  |
|  | 19 |  | Billing Address |  |  |
|  | 20 |  | Phone Number |  |  |
|  | 21 |  | Email Address |  |  |
|  | 22 |  | Fax |  |  |
|  | 23 |  | Home Phone |  |  |
|  | 24 |  | Alt. Email |  |  |
|  | 25 |  | Tax ID or SSN |  |  |
|  | 26 |  | Const. Date |  |  |
|  | 27 |  | Const. By |  |  |
|  | 28 |  | Opened Date |  |  |
|  | 29 |  | Opened By/Created By |  |  |
|  | 30 |  | Updated On |  |  |
|  | 31 |  | Updated By |  |  |
|  | 32 |  | Signed Agreement |  |  |
|  | 33 |  | Status |  |  |
|  | 34 |  | Closed Date |  |  |
| Options | 35 | Click Options button | Will display the required options for this screen |  |  |
| 36 | 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:**

|  |
| --- |
|  |
|  |
|  |
|  |

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

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

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