**Lead Follow-ups Application Workflows Testing Checklist**

**01 - Followup Sequence Main Flow**

When the Lead Followup item is in a Running state and the actions and actions due date fields are not empty (Minimum one Action and Action Due Date fields are filled), then the system checks Last Executed Action (If empty then no action performed yet and Action 1 will be performed on Due Date) and Due Date, When Due Date (field placing at last) is equal to Current Date then the system performs the next action. After performing the complete cycle add 1 in the cycle count value and trigger the manual flow i.e. 03 - Restart OR Complete Followup Sequence

**02 - Cancel Followup**

When Lead Follow Ups status is updated as canceled, update Followup Sequence Actions in Referenced Lead and add Comment.

**03 - Restart OR Complete the Followup Sequence (Manual Flow)**

Check If Repeat: Sequence (FU Templates) value = 1X, then after 1 complete cycle of Lead Followup, updates Lead Followup Status as Completed.

If Repeat: Sequence value (FU Templates) = 2X, 3X, 4X, then after 1 complete cycle of Lead Followup, the system updates the actions due dates (Add Delay After One Cycle: X Days in Action 1 due date). After that system checks the cycle count value in Lead Followup. If cycle count and Repeat: Sequence value are equal then the system mark Lead Followup Status as completed.

If Repeat: Sequence value (FU Templates) = Forever, then the system repeats the lead follow-up actions forever (including Add Delay After One Cycle: X Days in Action 1 due date).

**04 - Set Followup Action on Reply Received**

When a reply is received in follow-up Email, then update Response Received: Followup Action as Paused and update Communication Status as Need Reply in Ref Lead.

**05 - Update Follow Up Status**

When Response Received: Followup Action value change, update current Lead Followup Status.

**06 - Add Paused Date**

When Lead Follow up Status is updated as Pause, update Response Received: Followup Action update as Paused and add the current date in H\_Paused\_Date field.

**07 - Resume Lead Followup**

As we know, when the system/user paused the followups H\_Paused\_Date updated. When the user resumes the Lead Followup by clicking on Running, then the system checks the Last Executed Action and updates the next upcoming action's due dates and Due Date field by adding the day’s difference between the Current Date and H\_Paused\_Date.

**08 - Update Current Lead Follow-up Sequence in** **Leads**

When a new Item is created in Lead Followups and Related Lead is not empty, then assign this lead followup item to Ref Lead (Current Lead Followup Sequences -> Field Name)