## Test Plan

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| --- | --- |
| Test Items (Module Name) | Client |
| Brief Introduction | Use these steps to assign a person as an enquirer.  The **Enquirer** screen displays, including personal information copied over from the person record. |
| Environment | Windows 7/Apache 2.4/ |
| Test Type | Manual Regression Testing |
| Test Name | **Client/Enquirer** |
| Test Case ID | 13.1.1 - 13.7 |

|  |  |
| --- | --- |
| Tested By | Date |
|  |  |

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**Refer to generic test plan templates for the following features.**

[13.5 Contact Log](file:///\\zodiac\Keep%20Development\Software%20Development\Regression%20Project\040%20Development\Generic%20Test%20plans\Test%20Plan_Correspondence.dotx)

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## Test Cases

| Case ID &  Test Objective | Test Prerequisite | Test Procedure (Actions/Steps) | Data | Expected Outcome | Actual Outcome | Result | Actions Required |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 13.1.1 Add Enquirer | Must have Existing Person record. To create one refer to   * **2.2** Add Person * **2.3** Add person in live form   Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible in text fields |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Add Enquirer** Button on the person tree. |  | A Confirmation message appears on Screen asking user to confirm creation of Enquirer |  |  |  |
| Say **Yes** on the confirmation. |  | Screen changes to Enquirer View |  |  |  |
| Enter the data | * Age Bands * Regions * Secondary School * International * Address Line 1 to 6 * Post Code * Any Phone number * Email Address | Data is visible in text fields. |  |  |  |
| Click on **Save** button |  | Enquirer record created successfully. |  |  |  |
| 13.1.2 Edit Enquirer | Must have existing Enquirer record. To create one refer to   * [13.1.1 Add Enquirer](#_13.1.1_Add_Enquirer)   Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible in text fields |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Enquirer** Button on the person tree. |  | Screen changes to Enquirer view |  |  |  |
| Enter the data | * Age Bands * Regions * Secondary School * International * Address Line 1 to 6 * Post Code * Any Phone number * Email Address | Data is visible in text fields. |  |  |  |
| Click on **Save** button |  | Enquirer record Updated successfully. |  |  |  |
| 13.2.1 Add Enquiry | Must have existing Enquirer record. To create one refer to   * [13.1.1 Add Enquirer](#_13.1.1_Add_Enquirer)   Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible in text fields |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Enquirer** Button on the person tree. |  | Screen changes to Enquirer view |  |  |  |
| Click on **Enquirer Events** tab. |  |  |  |  |  |
| Click on **Add Enquiry** button |  |  |  |  |  |
| Enter the data | * Full/Part Time * Delivery Campus * Delivery Mode * Activity * People * Agency * Advertising Source * Name of the Source * Campaign Activity. * Enquiry Text   If the **component** List tab is selected, choose one from the available components  If the **Product** List tab is selected, choose one from the available Products  If the **UDA** tab is selected,   * UDA char 1 * UDA char 2 * UDA char 3 * UDA char 4 * UDA Num 1 * UDA Date 1   If the Task tab is selected, **See test case**   * [**13.14**](#_13.4_Add_Task) | Data is visible in the drop downs |  |  |  |
| Click on **Save** button |  | Enquiry record has been created. |  |  |  |
| 13.2.2 Edit Enquiry | Must have existing Enquirer record with Enquiry record.   * [13.1.1 Add Enquirer](#_13.1.1_Add_Enquirer) * [13.2.1 Add Enquiry](#_13.2.1_Add_Enquiry)   Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible in text fields |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Enquirer** Button on the person tree. |  | Screen changes to Enquirer view |  |  |  |
| Click on **Enquirer Events** tab. |  |  |  |  |  |
| Click on an **Enquiry** from the list |  |  |  |  |  |
| Click on **Edit** button |  |  |  |  |  |
| Enter the data | * Full/Part Time * Delivery Campus * Delivery Mode * Activity * People * Agency * Advertising Source * Name of the Source * Campaign Activity. * Enquiry Text   If the **component** List tab is selected, choose one from the available components  If the **Product** List tab is selected, choose one from the available Products  If the UDA tab is selected,   * UDA char 1 * UDA char 2 * UDA char 3 * UDA char 4 * UDA Num 1 * UDA Date 1   If the Task tab is selected, **See test case**   * [**13.4**](#_13.4_Add_Task) | Data is visible in the drop downs |  |  |  |
| Click on Save button |  | Enquiry record has been created. |  |  |  |
| 13.3.1 Add Response | Must have existing Enquirer record with Enquiry record.   * [13.1.1 Add Enquirer](#_13.1.1_Add_Enquirer) * [13.2.1 Add Enquiry](#_13.2.1_Add_Enquiry)   Must have set up campaigns from Marketing Dashboard -> Campaign Activities  Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible in text fields |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Enquirer** Button on the person tree. |  | Screen changes to Enquirer view |  |  |  |
| Click on **Enquirer Events** tab. |  |  |  |  |  |
| Click on **Add Response** button |  |  |  |  |  |
| Select a campaign that you wish to add a response to it. |  | Record Highlighted |  |  |  |
| Click on **Create Response** button |  |  |  |  |  |
| Enter the survey |  |  |  |  |  |
| Click on **Save** button |  | Response record has been created. |  |  |  |
| 13.3.2 Edit Response | Must have existing Enquirer record with Enquiry record.   * [13.1.1 Add Enquirer](#_13.1.1_Add_Enquirer) * [13.2.1 Add Enquiry](#_13.2.1_Add_Enquiry)   Must have set up campaigns from Marketing Dashboard -> Campaign Activities  Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible in text fields |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Enquirer** Button on the person tree. |  | Screen changes to Enquirer view |  |  |  |
| Click on **Enquirer Events** tab. |  |  |  |  |  |
| Select a response that you wish to edit. |  | Record Highlighted |  |  |  |
| Edit the survey |  |  |  |  |  |
| Click on **Save** button |  | Response record has been updated. |  |  |  |
| 13.4 Add Task to an Enquiry | Must have existing Enquirer record with Enquiry record.   * [13.1.1 Add Enquirer](#_13.1.1_Add_Enquirer) * [13.2.1 Add Enquiry](#_13.2.1_Add_Enquiry)   Must have security access to   * Client | Go to Client Module |  | Client module is loaded |  |  |  |
| Enter the data | * Surname * first name * Student ID * DOB | Data is visible |  |  |  |
| Click on **Search** button |  | Search displays list of persons |  |  |  |
| Double Click on the selected Person. |  | Screen changes to person view |  |  |  |
| Click on the **Enquirer** Button on the person tree. |  | Screen changes to Enquirer view |  |  |  |
| Click on **Enquirer Events** tab. |  |  |  |  |  |
| Click on **Add Enquiry** button |  | Enquiry details screen appears |  |  |  |
| Go to Task tab |  |  |  |  |  |
| Enter the data | * Description * Comment * Assigned to * Referred To * Due Date | Data is visible |  |  |  |
| Click save on the task popup |  | Task created |  |  |  |
| Click save on the Enquirer events |  | Enquirer events saved successfully. |  |  |  |