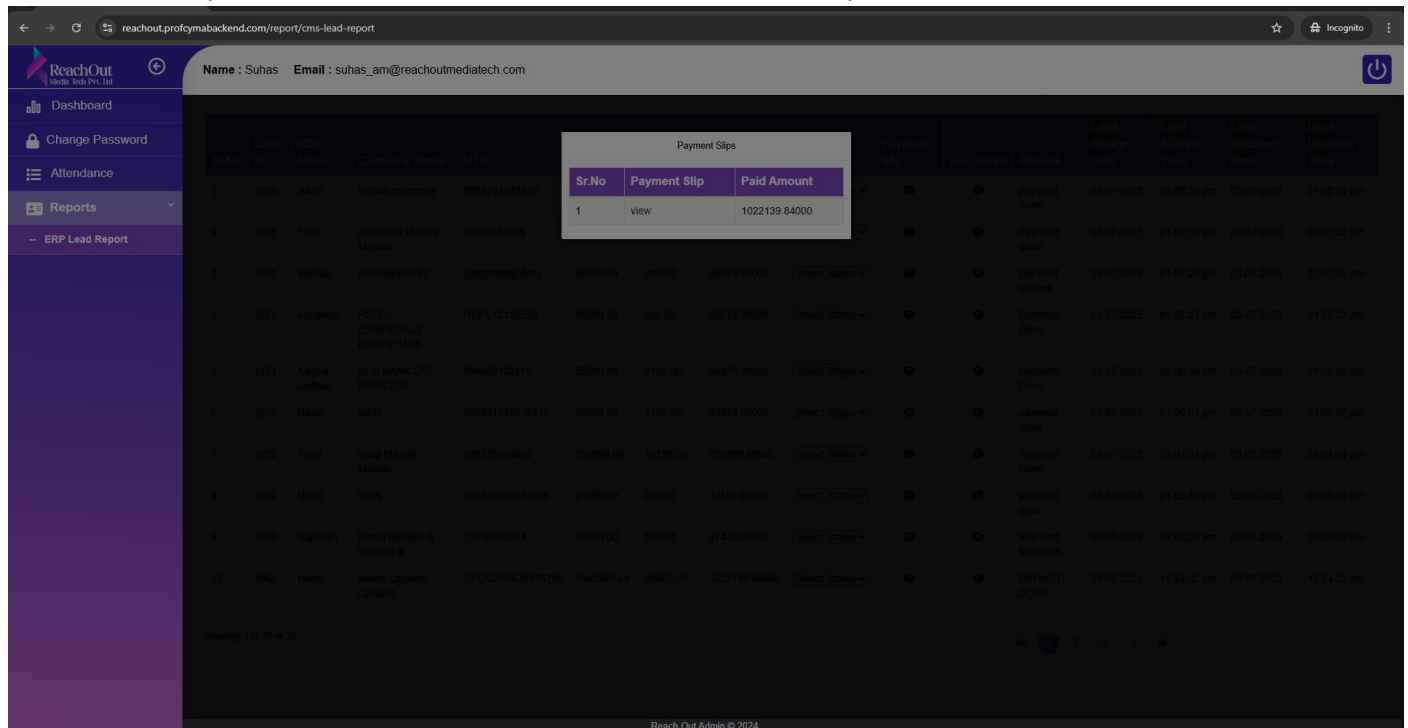


## --: ERP-CRM-CMS Test Cases:-

### ERP Portal:

--On the ERP portal, when I click on the **Payment Slip** or **Document** tab, the screen loads but becomes unresponsive afterward. The options are not clickable and no further actions can be performed.

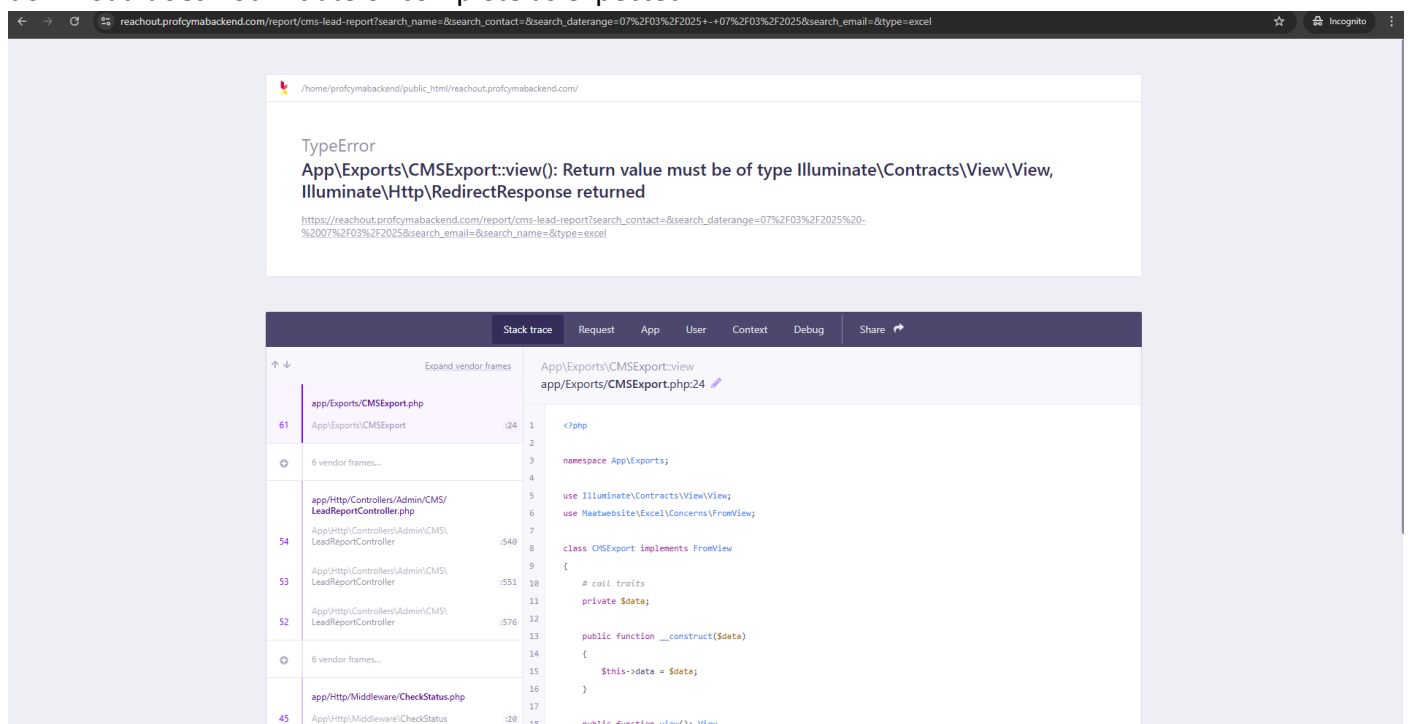


The screenshot shows the ERP portal interface. The left sidebar contains navigation links: Dashboard, Change Password, Attendance, Reports, and ERP Lead Report. The main content area displays a table of payment slips. A modal window titled "Payment Slips" is open, showing a table with the following data:

Sr.No	Payment Slip	Paid Amount
1	view	1022139.84000

-- When I tried to export the Lead Report in Excel format from the ERP portal, I encountered the following error. The export process did not complete successfully.

I am unable to download the Excel report when searching with a specific date range on the ERP portal. The download does not initiate or complete as expected.



The screenshot shows the ERP portal interface with an error message displayed. The error message is:

```
TypeError
App\Exports\CMSExport::view(): Return value must be of type Illuminate\Contracts\View\View,
Illuminate\Http\RedirectResponse returned
```

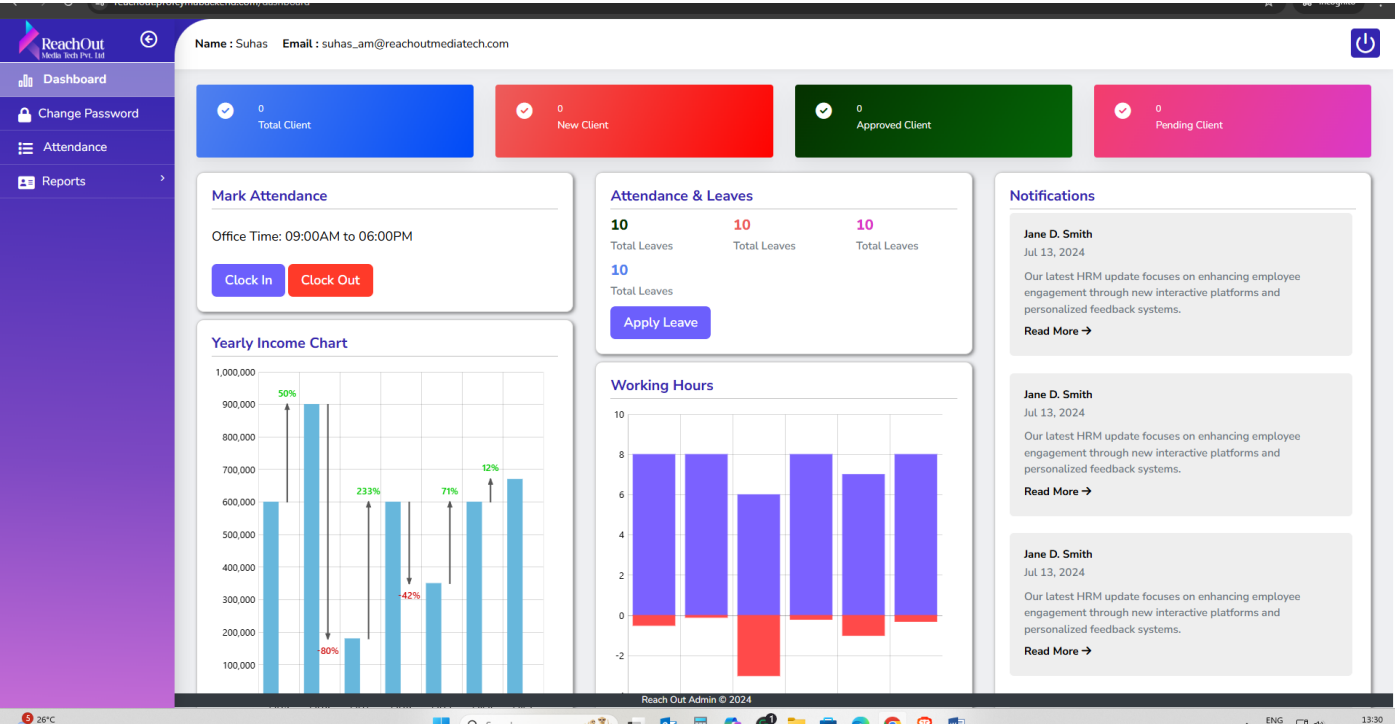
The error occurred in the file `app/Exports/CMSExport.php` at line 24. The error message also includes the URL: `https://reachout.profyomabackend.com/report/cms-lead-report?search_name=&search_contact=&search_daterange=07%2F03%2F2025+-+07%2F03%2F2025&search_email=&type=excel`.

The screenshot also shows the Stack trace for the error:

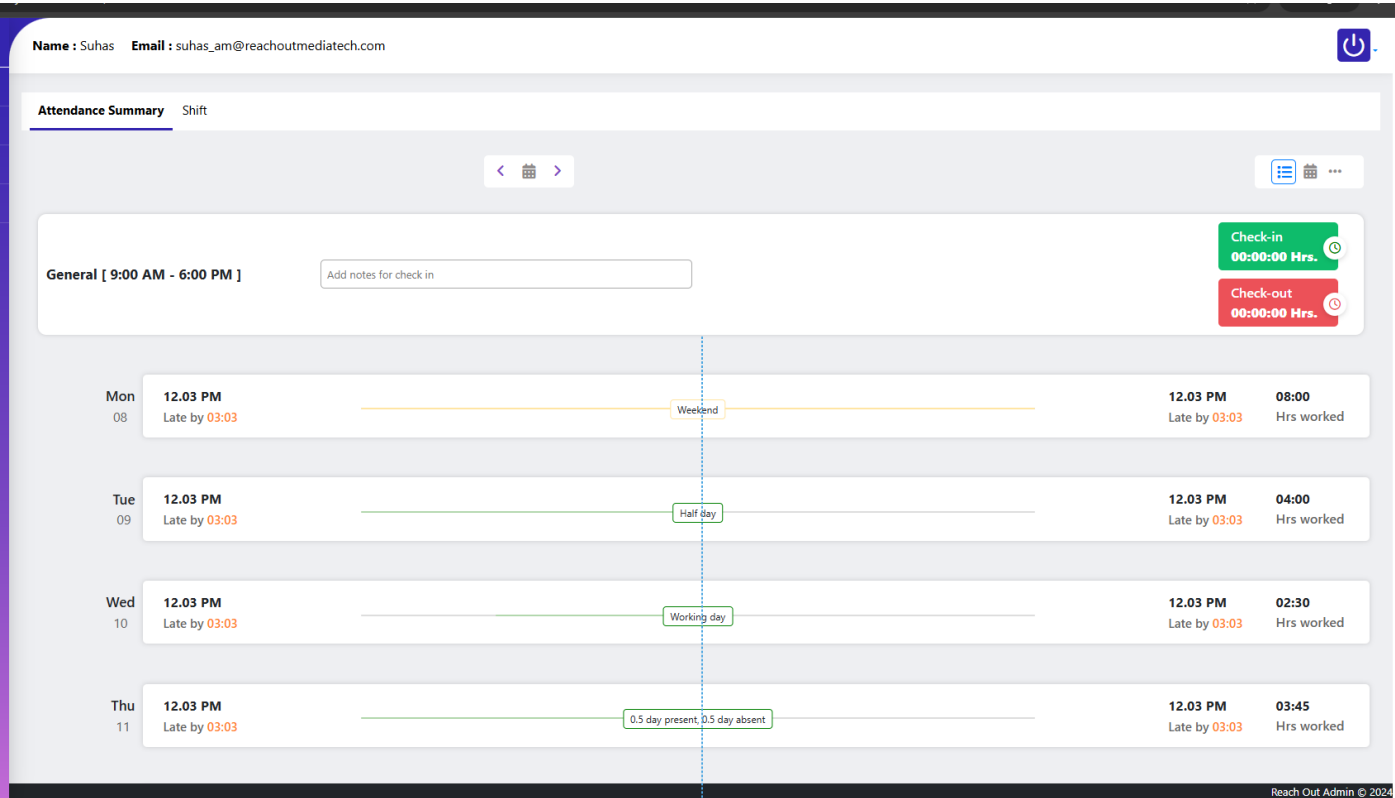
Stack trace	Request	App	User	Context	Debug	Share
61	app/Exports/CMSExport.php	App\Exports\CMSExport				
6	vendor frames...					
54	app/Http/Controllers/Admin/CMS/LeadReportController.php	App\Http\Controllers\Admin\CMS\LeadReportController				
53	App\Http\Controllers\Admin\CMS\LeadReportController					
52	App\Http\Controllers\Admin\CMS\LeadReportController					
6	vendor frames...					
45	app/Http/Middleware/CheckStatus.php	App\Http\Middleware\CheckStatus				

--Invoice should be added at ERP Level. How we can run business without invoice.

--Make live all above tabs. There is no clarity in numbers in these tabs



--Due to incomplete HRMS part users unable to see there daily attendance and working hrs.



--Sometimes we are unable to search leads by using search tab.

ReachOut

Media Tech Pvt. Ltd

Dashboard

Change Password

Attendance

Reports

ERP Lead Report

Name : Suhas    Email : suhas\_am@reachoutmediatech.com

Search by Company Name

Search by Company Contact

07/03/2025 - 07/03/2025

Search by Company Email

Excel

Search

Reset

Lead Report:

Showing 1 to 10 of 35

1

2

3

4

Sr.No	Lead Id	BDE Name	Company Name	UTR	Grand Total	TDS Amount	Paid Amount	Lead Status	Payment Slip	Document	Remark	Lead Assign Date	Lead Assign Time	Lead Updated Date	Lead Updated Time
1	1096	Sandesh	Chapane Managali Karayalayi Managali Karayalayi	85285285250	41999.99	840.00	41159.99000	Select Status			Payment Received	03-07-2025	01:28:18 pm	03-07-2025	01:28:18 pm
2	1095	Snehal	wellness pharmaceuticals pharmaceuticals	gnfghfjghgcbdtgtd	48999.99	980.00	48019.99000	Select Status			payment receive	03-07-2025	01:27:41 pm	03-07-2025	01:27:41 pm
3	1093	Kalpita Jadhav	Intex Technologies Technologies	987841313112	14000.00	280.00	13720.00000	Select Status			Payment Done	03-07-2025	01:27:10 pm	03-07-2025	01:27:10 pm
4	1094	Apksha	NARAIN EXTRACTIONS P. EXTRACTIONS P.	HDFC20202356	83999.99	1680.00	82319.99000	Select Status			Payment Done	03-07-2025	01:25:00 pm	03-07-2025	01:25:00 pm
5	1092	Apksha	MEDI NATURAL PVT.LTD. NATURAL PVT.LTD.	ICICI20278989	111999.98	2240.00	109759.98000	Select Status			Payment Done	03-07-2025	01:21:45 pm	03-07-2025	01:21:45 pm
6	1090	Sandesh	Hotel Maratheshahi Maratheshahi	51246235874	21000.00	420.00	20580.00000	Select Status			Payment Received	03-07-2025	01:21:32 pm	03-07-2025	01:21:32 pm
7	1089	Snehal	Magic stone spaces stone spaces	ghhjkhuyityjgfbcbcvv	55999.99	1120.00	54879.99000	Select Status			payment receive	03-07-2025	01:21:31 pm	03-07-2025	01:21:31 pm

Password must be at least 8 characters long and include a combination of alphabets, numbers, and at least one special character.

ReachOut

Media Tech Pvt. Ltd

Dashboard

Change Password

Attendance

Reports

Name : Suhas    Email : suhas\_am@reachoutmediatech.com

Change Password:

Password \*

Confirm Password \*

User Password

Confirm Password

Submit

## CRM Portal:-

--Change Name to Company Name

Mentor Name : Tanvi

Status

Dashboard

List

Name\*

Enter Name

Mobile\*

Enter Mobile No.

Lead Id

Enter Lead Id

Search

Kumar Properties Kumar

New ME ME

CARESVETS PHARMA PVT PHARMA  
PVT PHARMA PVT

Summary

New Lead

1

Payment Done

11

Proceed To QC

9

LEAD ID

Company

Company

Enter Name

Mobile No

Enter Mobile No

Person Name

Enter Company Name

Company

Enter Company Name

Sector

Select sector

Position

Select Position

Concern Person

Enter Concern Person

Position

Select Position

--Discount is not getting calculated as percentage.

https://reachout.profcymabackend.com/quote/quations/create

Name : Tanvi Email : tanvi\_bde@reachoutmediattech.com

Quote

Company: 1050 | Fasal

Quote Date: dd-mm-yyyy

Quote #: QTN/VBS/25-26/44

Valid Until: dd-mm-yyyy

PO #:

Discount: 20 Percent

Sr. no.	Campaign	Location	Description	Unit Cost	Screen Count	Total Slot	Line Total	
1	One Week	PANVEL	URAN	Product Description	16.94915	4	34300	581355.845

Terms Footer

Payment Terms-100% Advance before delivery.  
Delivery Time- As per the modification  
Account Number:624005019931  
Account Name: Profcyma Solutions Pvt Ltd  
Branch: Bhandarkar road  
IFSC: ICIC0000340

Discount: Rs. 20

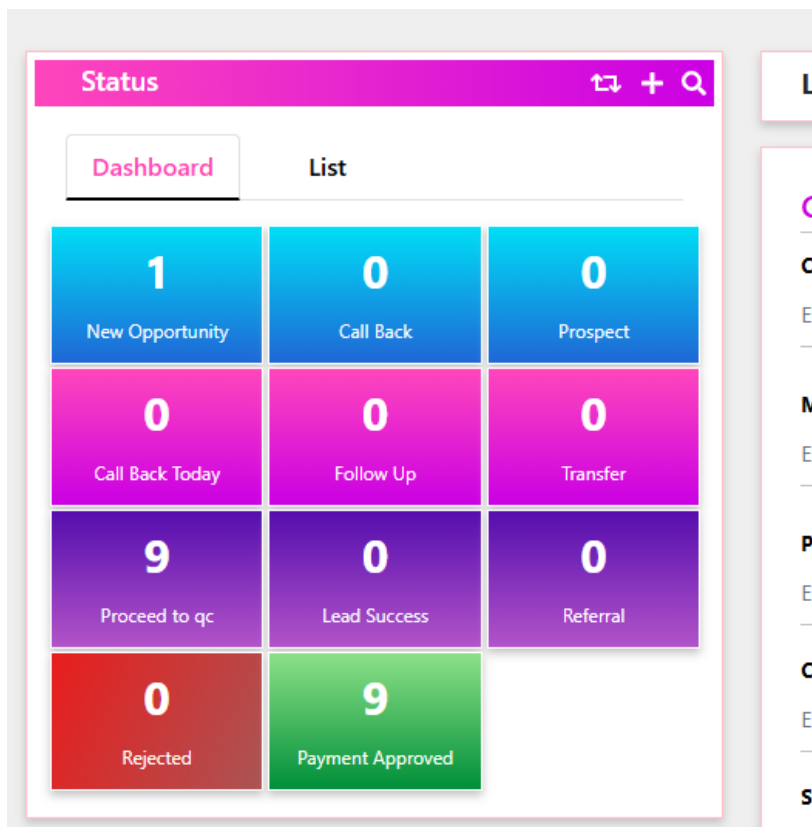
Subtotal: Rs. 116271.169

Tax: Rs. 95342.35858

Total: Rs. 20928.810419999998

Reach Out Admin © 2024

- Issues in payment approved and proceed to QC bucket.-



- 
- Project Name is not getting hold.

The form is titled 'Opportunity' and contains two main sections: 'Project' and 'Creatives'. The 'Project' section has a dropdown menu with 'ReachOut' selected. The 'Creatives' section has a dropdown menu with 'Select Creatives' selected.

- If all slots on certain location are full then there should be pop up of slots full.

Select

PIS Location

KOLHAPUR CENTRAL BUS STAND

Calendar

<

>

today

July 2025

month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Set Campaign

Select Campaign

One Week

Start Date

2025-07-07

End Date

2025-07-13

Minimum Slot Selection

1750

Max Slot Selection

350

Select Slot

Total Screen

5

Proceed Bill

- When I reject lead from ERP with reason UTR is wrong then its getting error when I tried to resend it from BDE end.

Mentor Name: Mansi

Dashboard

List

Name\*

Enter Name

Mobile\*

Enter Mobile No.

Lead Id

Enter Lead Id

Search

Uncles Masale Masale

Summary

New Lead

2

Payment Done

8

Proceed To QC

0

Rejected

1

Total

11

Company & Personal

Company Name

Uncles Masale Masale

Mobile No.

8474512333

Alternative No.

Enter Alternative Mobile No

Person Name

Enter Person Name

Company Area

Enter Company Area

Company Address

Enter Company Address

Sector

Select sector

Nature of sector

Enter Nature of sector

Position

Enter position

Email Id

unclesspices@gmail.com

Concern Person

Enter Concern Person

Position

Enter Concern Position

Mobile No.

Enter Mobile No

Email Id

Enter Email Id

Opportunity

Project

ReachOut

Creatives

YES

Preview

Create Link

Advertisement Area

Payment Mode

Onlinee

Payment Details

UTR

AKSH26473723455

GST No.

09AAACH7409R1ZZ

TDS

One - 2%

Grand Total

147000

Total Payable Amount

144060

Paid Amount

144060

Payment Slip

Choose Files

No file chosen

Action & Disposition

Lead Date

2025-07-03 12:32:42

Status

Payment Done

Status Details

Payment Receive

Date

2025-07-03

Time

14:09:00

Remark

UTR Clstf

Update

History

Sukun

2025-07-03 14:09:42

Lead Updated By Sukun And Transferred In Rejected And Reason: UTR us wrong

Mansi

2025-07-03 12:35:53

FULL AMT RECVD

Mansi

2025-07-03 12:32:42

New Lead

--After rejection from ERP end paid amount and total amount is getting round off.

Payment Details

UTR

AKSH26473723455

GST No.

09AAACH7409R1ZZ

TDS

One - 2%

Grand Total

147000

Total Payable Amount

144060

Paid Amount

144060

Payment Slip

Choose Files

No file chosen

Payment Slip (144059.98000)

Preview

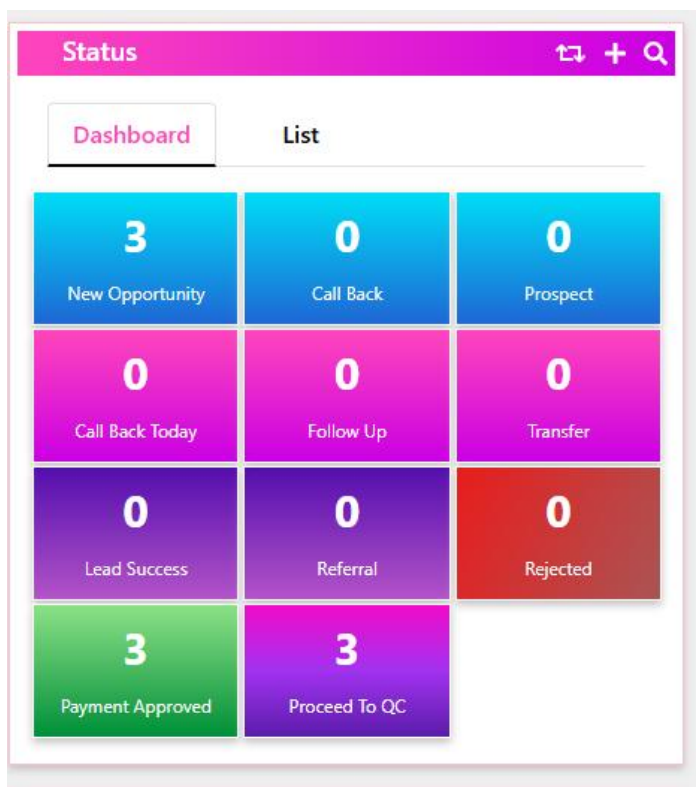
Document

Adharcard \*

Choose File

No file chosen

---Lead Success should increment after decided campaign period.

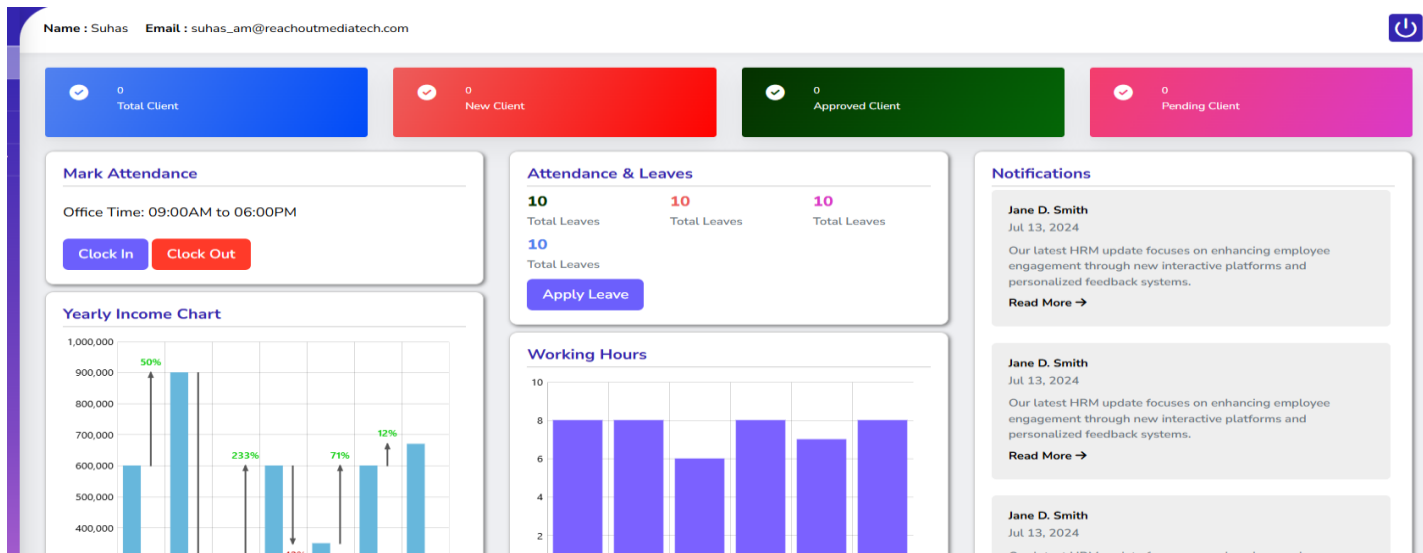


--

CMS:--

Quality Assurance portal:

Make live all above tabs:



BDE unable to track lead in CMS (which QC /md is handling particular lead.)?

--Upload button at QA portal.(If we are unable to integrate Video converter API).

Name : Harshal Email : harshal\_gd@reachoutmediatech.com

Search by Company Name

Search by Company Contact

Search Date Range

Search by Company Email

**Excel** **Search** **Reset**

**Lead Report:**

Showing 1 to 5 of 5

Sr.No	Lead Id	BDE Name	Company Name	Paid Amount	Lead Status	Creative	Remark	Lead Assign Date	Lead Assign Time	Lead Updated Date	Lead Updated Time
1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar	20580.00000	Approved	🔗	Lead Updated By Harshal And Transferred In Approved And Reason: werjkijitkj	03-07-2025	10:27:12 am	03-07-2025	01:22:14 pm
2	1051	Sandesh	Amrendra Plastic Industries Patil Patil	27440.00000	Approved	🔗	Lead Updated By Akshay And Transferred In Approved And Reason: sdcvbnm,	02-07-2025	01:04:32 pm	02-07-2025	01:20:35 pm
3	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane Bhojane	20581.00000	Approved	🔗	Lead Updated By Pooja And Transferred In Approved And Reason: Approved	30-06-2025	11:03:24 am	02-07-2025	01:20:53 pm
4	1045	Tarvi	Vivakdis Health & Health & Health & Health &	987889.00000	Approved	🔗	Stzdnv	28-06-2025	03:46:56 pm	28-06-2025	03:49:41 pm
5	1032	Tarvi	New ME ME	933007.00000	Approved	🔗	Lead Updated By Akshay And Transferred In Approved And Reason: Akshay Done	28-06-2025	03:10:27 pm	28-06-2025	03:49:52 pm

Showing 1 to 5 of 5

- In Excel report all the columns on portal like lead Id, Lead Assign date, Lead Assign time, lead uploaded date/time should reflect.

	A	B	C	D	E	F	G	H	I	J	K
1	Sr.No	Counselor Name	Company Name	Paid Amount	Lead Status	Creative	Remark				
2	1	Sandesh	Mahendra Real Estate Builders & Developers Bhojan	20581	Approved	cymabackend.com/public/admin/creativeVideos/1029/2025-06-28	Lead Updated By Pooja And Transferred In Approved And Reason: Approved				
3											
4											
5											
6											
7											
8											
9											
10											

- Here in search option there should be only Company name, Date Range, Lead No.



Name : Harshal Email : harshal\_gog@reachnourmediatech.com

Search by Company Name Search by Company Contact Search Date Range Search by Company Email

Excel Search Reset

**Lead Report:**

Showing 1 to 5 of 5

Sr.No	Lead Id	BDE Name	Company Name	Paid Amount	Lead Status	Creative	Remark	Lead Assign Date	Lead Assign Time	Lead Updated Date	Lead Updated Time
1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar	20580.00000	Approved	👁	Lead Updated By Harshal And Transferred In Approved And Reason: werjkljklj	03-07-2025	10:27:12 am	03-07-2025	01:22:14 pm
2	1051	Sandesh	Amrendra Plastic Industries Patil Patil	27440.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: sdcfvbnm,	02-07-2025	01:04:32 pm	02-07-2025	01:20:35 pm
3	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane Bhojane	20581.00000	Approved	👁	Lead Updated By Pooja And Transferred In Approved And Reason: Approved	30-06-2025	11:03:24 am	02-07-2025	01:20:53 pm
4	1045	Tanvi	Vivaldis Health & Health & Health & Health &	987889.00000	Approved	👁	Stzdvn	28-06-2025	03:46:56 pm	28-06-2025	03:49:41 pm

## Md/HigherAuthority Portal:--

--In Company name column some part of it is repeating itself.

Name : MD Email : md@gmail.com

Sr.No	Lead Id	BDE Name	Company Name	Mobile	Email	Paid Amount	Lead Status	Creative	Payment Slip	Document	Remark	Lead Assign Date	Lead Assign Time	Lead Updated Date	Lead Updated Time	View Details
1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar Yelgandarwar	9517538524	shivanand07@gmail.com	20580.00000	Approved	👁	👁	👁	Lead Updated By MD And Transferred In Approved And Reason: aprvcd	02-07-2025	03:17:18 pm	03-07-2025	03:37:42 pm	👁
2	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane Bhojane	2546315879	Mahendra07@gmail.com	20581.00000	Approved	👁	👁	👁	Lead Updated By MD And Transferred In Approved And Reason: approved	02-07-2025	01:20:53 pm	03-07-2025	03:36:40 pm	👁
3	1051	Sandesh	Amrendra Plastic Industries Patil Patil	8954231567	Amrendra95@gmail.com	27440.00000	Approved	👁	👁	👁	Lead Updated By Akshay And Transferred In Approved And Reason: sdcfvbnm,	02-07-2025	01:20:35 pm	02-07-2025	01:22:57 pm	👁
4	1040	Tanvi	Vetox Healthcare Private Healthcare Private Healthcare Private	9890737344	info@vetoxhealthcare.com	1317186.00000	Approved	👁	👁	👁	Lead Updated By Akshay And Transferred In Approved And Reason: AkDone	28-06-2025	03:51:55 pm	28-06-2025	04:08:22 pm	👁
5	1032	Tanvi	New ME ME	8563214890	Vishal@newme.com	933007.00000	Approved	👁	👁	👁	Lead Updated By Akshay And Transferred In Approved And Reason: Akshay Done	28-06-2025	03:49:52 pm	28-06-2025	04:08:29 pm	👁

- There should option for 2 emails(MSRTC and Rozmerta) for broadcast notification.

Name : MD    Email : md@gmail.com																
Sr.No	Lead Id	BDE Name	Company Name	Mobile	Email	Paid Amount	Lead Status	Creative	Payment Slip	Document	Remark	Lead Assign Date	Lead Assign Time	Lead Updated Date	Lead Updated Time	View Details
1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar	9517538524	shivanand07@gmail.com	20580.00000	Approved				Lead Updated By MD And Transferred In Approved And Reason: aprvcd	02-07-2025	03:17:18 pm	03-07-2025	03:37:42 pm	
2	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane	2546315879	Mahendra07@gmail.com	20581.00000	Approved				Lead Updated By MD And Transferred In Approved And Reason: approved	02-07-2025	01:20:53 pm	03-07-2025	03:36:40 pm	
3	1051	Sandesh	Amrendra Plastic Industries Patil Patil	8954231567	Amrendra95@gmail.com	27440.00000	Approved				Lead Updated By Akshay And Transferred In Approved And Reason: sdcfvbnm,	02-07-2025	01:20:35 pm	02-07-2025	01:22:57 pm	
4	1040	Tanvi	Vetox Healthcare Private Healthcare Private Healthcare Private	9890737344	info@vetoxhealthcare.com	1317186.00000	Approved				Lead Updated By Akshay And Transferred In Approved And Reason: AkDone	28-06-2025	03:51:55 pm	28-06-2025	04:08:22 pm	
5	1032	Tanvi	New ME ME	8563214890	Vishal@newme.com	933007.00000	Approved				Lead Updated By Akshay And Transferred In Approved And Reason: Akshay Done	28-06-2025	03:49:52 pm	28-06-2025	04:08:29 pm	

--E-mail id from ReachOut end – info@reachoutmediatech.com

For Rozmerta –akshay\_it@reachoutmeditech.com

For MSRTC – manthan\_it@reachoutmediatech.com

### Email Format:

**Subject:** Upcoming Ad Broadcast Notification.

**Dear [Partner's Name],**

I hope this message finds you well.

We are scheduled to broadcast the following advertisement on our public TV screens.

**Customer Name:** [Customer Name]

**Campaign Duration:**[Start Date : End Date]

**Link:** [Link]

If we do not receive a response, we will proceed with the broadcast as planned.

Thank you for your attention to this matter. Should you have any questions or need further information, please do not hesitate to contact us.

Best regards,

**ReachOut**

# IT Portal:

Folder Structure is not developing properly. (Folders should be created as locations selected in BDE end.)

--Leads are getting Duplicated(here lead 2 and 4)

<input type="checkbox"/>	Sr.No	Lead Id	Name	Company Name	Amount	Status	Creative	Remark	Date	Time	Date	Time
<input type="checkbox"/>	1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar	20580.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: stgdfgj	03-07-2025	03:37:43 pm	03-07-2025	05:04:48 pm
<input type="checkbox"/>	2	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane Bhojane	20581.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: fnsdlkfnslkj	03-07-2025	03:36:40 pm	03-07-2025	05:04:45 pm
<input type="checkbox"/>	3	1051	Sandesh	Amrendra Plastic Industries Patil Patil	27440.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: sdctvbnm,	02-07-2025	01:22:57 pm	02-07-2025	01:23:52 pm
<input type="checkbox"/>	4	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane Bhojane	20581.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: fnsdlkfnslkj	02-07-2025	01:22:53 pm	03-07-2025	05:04:45 pm
<input type="checkbox"/>	5	1045	Tanvi	Vivaldis Health & Health & Health & Health &	987889.00000	Approved		Lead Updated By Ankit And Transferred In Approved And Reason: xbcvnbxc	28-06-2025	04:08:39 pm	28-06-2025	04:11:59 pm
<input type="checkbox"/>	6	1032	Tanvi	New ME ME	933007.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: Akshay Done	28-06-2025	04:08:29 pm	28-06-2025	04:11:53 pm
<input type="checkbox"/>	7	1040	Tanvi	Velox Healthcare Private Healthcare Private Healthcare Private	1317186.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: AkDone	28-06-2025	04:08:22 pm	28-06-2025	04:11:45 pm
<input type="checkbox"/>	8	1024	Tushar	Puma	6860.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: asfd	27-06-2025	04:06:54 pm	28-06-2025	10:09:42 am
<input type="checkbox"/>	9	1022	Tushar	New Test Lead	13720.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: Done	20-06-2025	05:12:25 pm	20-06-2025	05:12:44 pm
<input type="checkbox"/>	10	1021	Tushar	Yuktesh Jadhav	6860.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: Done	20-06-2025	11:39:12 am	20-06-2025	11:39:41 am

Showing 1 to 10 of 10

---New Week Zip and Creative Download button are not working properly.(at our end).

Name : AkshayEmail : akshay@gmail.com

Search by Company Name

Search by Company Contact

Search Date Range

Search by Company Email

Excel

Search

Reset

Lead Report:

Next Week Zip

Showing 1 to 10 of 10

Creative Download

<input type="checkbox"/>	Sr.No	Lead Id	BDE Name	Company Name	Paid Amount	Lead Status	Creative	Remark	Lead Assign Date	Lead Assign Time	Lead Updated Date	Lead Updated Time
<input type="checkbox"/>	1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar	20580.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: stgdfgj	03-07-2025	03:37:43 pm	03-07-2025	05:04:48 pm
<input type="checkbox"/>	2	1029	Sandesh	Mahendra Real Estate Builders & Developers Bhojane Bhojane Bhojane	20581.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: fnsdlkfnslkj	03-07-2025	03:36:40 pm	03-07-2025	05:04:45 pm
<input type="checkbox"/>	3	1051	Sandesh	Amrendra Plastic Industries Patil Patil	27440.00000	Approved		Lead Updated By Akshay And Transferred In Approved And Reason: sdctvbnm,	02-07-2025	01:22:57 pm	02-07-2025	01:23:52 pm
<input type="checkbox"/>	4	1029	Sandesh	Mahendra Real Estate Builders &	20581.00000	Approved		Lead Updated By Akshay And Transferred In	02-07-2025	01:22:53 pm	03-07-2025	05:04:45 pm

---

# SuperAdmin Portal:-

--Administrator –Roles(edit—There should be search option for permissions).

--Quotation Tab: All BDE Quotations should be displayed. BDE wise filter should be provided.

--User Group Tab :- Explain Team Lead and BDE functions.

--Distribution :- Lead distribution cycle should be automatic (System defined/unbised)

--Reports:--

- >BDE Call : (unfunctional)

- >Fresh IP Report: (Unfunctional)

- >ERP Lead Report: (Unfunctional)(Error)

- >QA Lead Report: (Unfunctional)

- >Higher Authority Lead Report: (Unfunctional)

- >BDE wise report and BDE report—Explain functions

- >Login report –not working properly