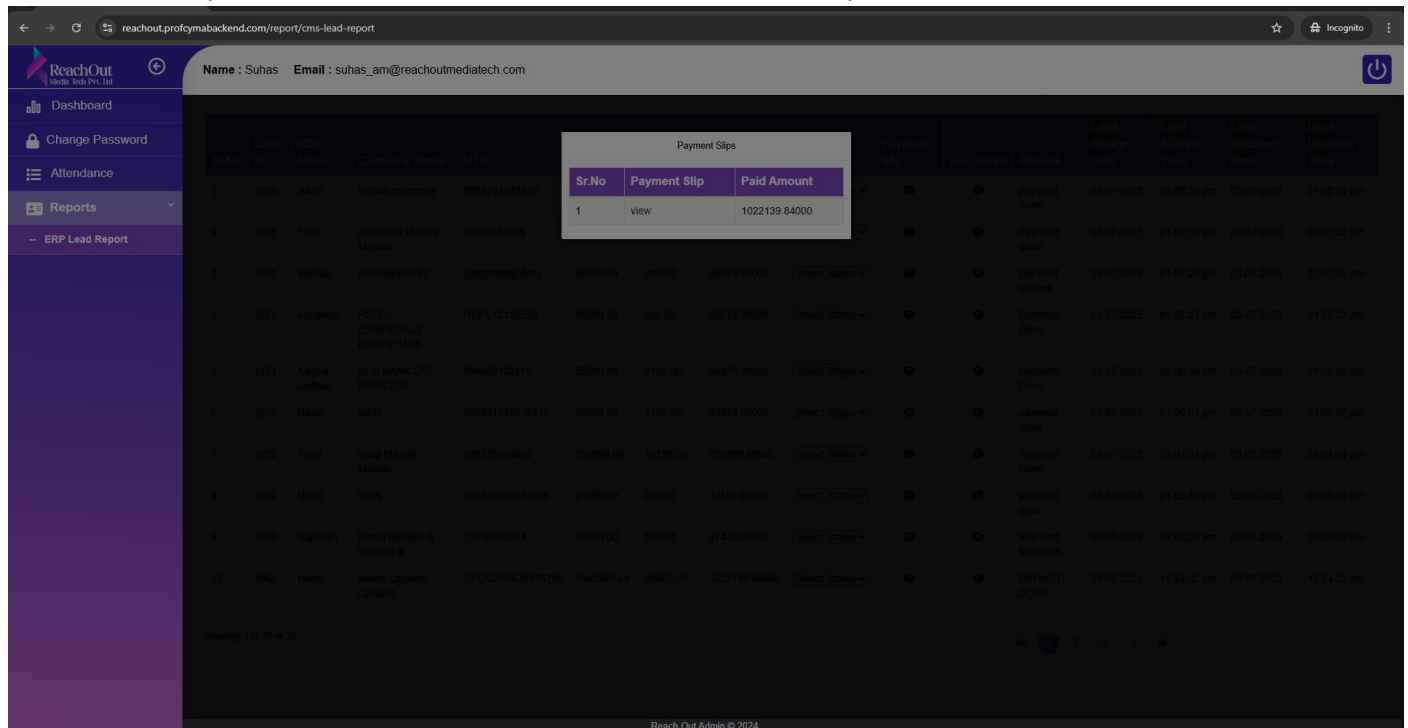# -: ERP-CRM-CMS Test Cases:-

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.
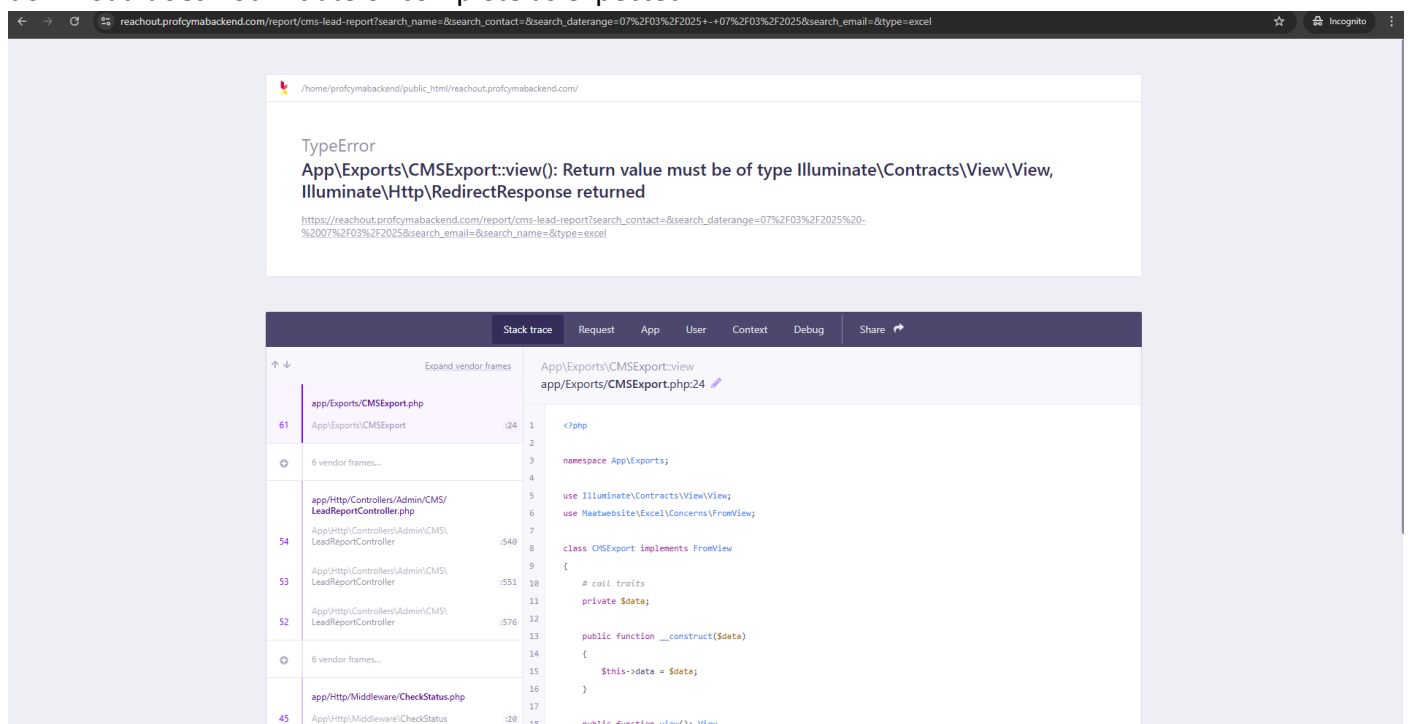

-- When I tried to export the Lead Report in Excel format from the ERP portal, I encountered the following error. The export process did not complete successfully.

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.

--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==
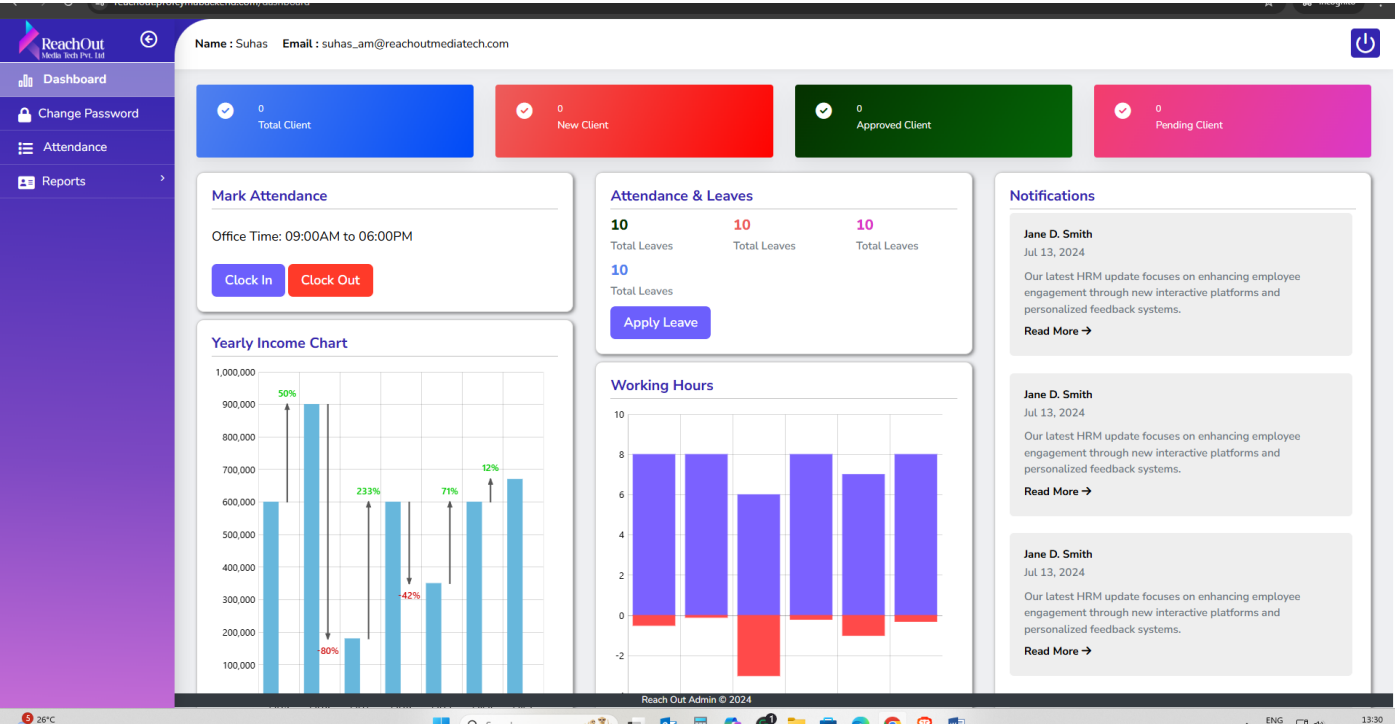
==Due to incomplete HRMS part users unable to see there daily attendance and working hrs.==
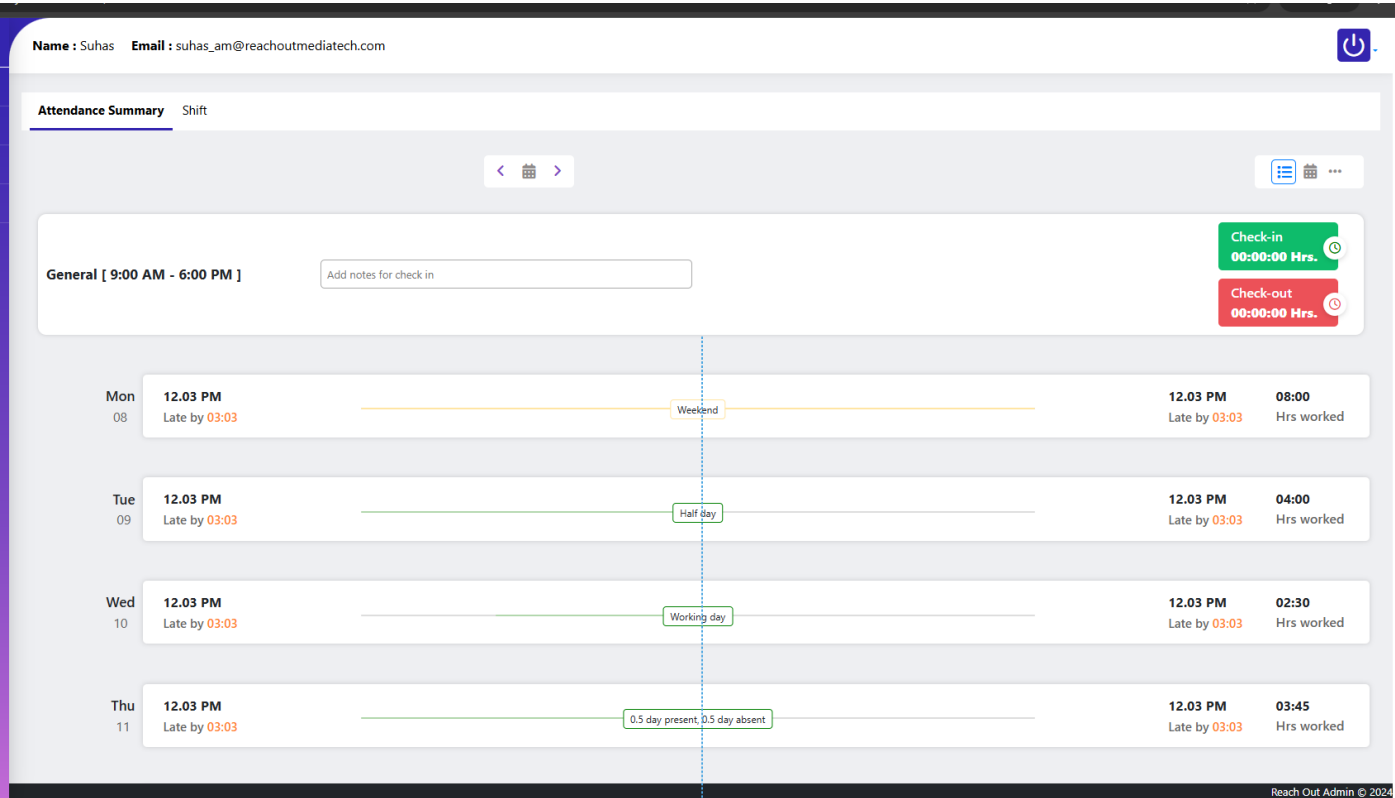
--Sometimes we are unable to search leads by using search tab.

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

CRM Portal:-

--Change Name to Company Name

--Discount is not getting calculated as percentage.

- Issues in payment approved and proceed to QC bucket.-
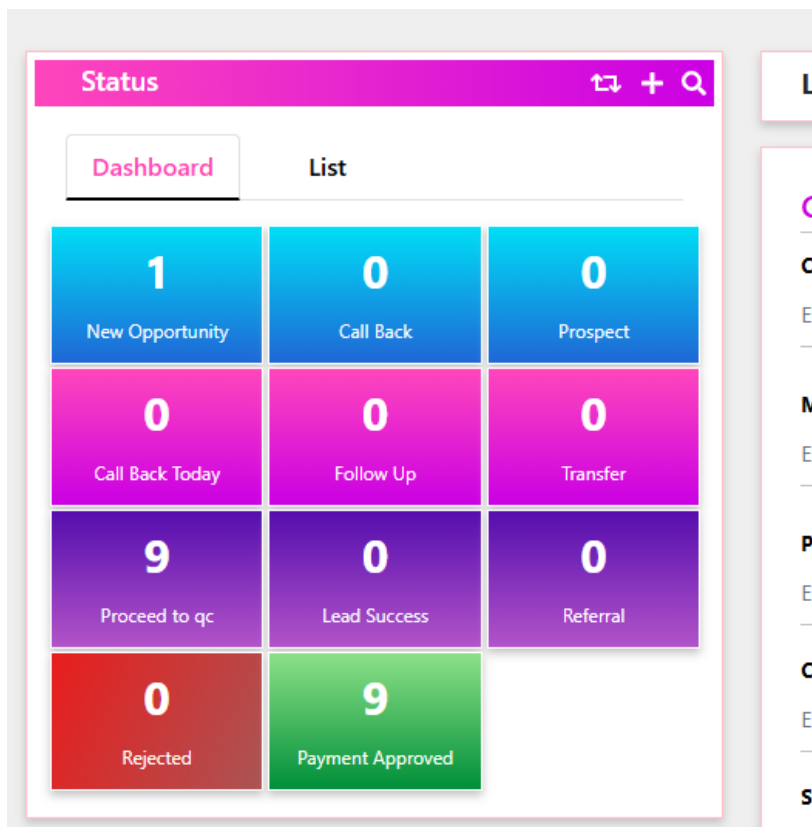
-
- Project Name is not getting hold.

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

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

-

--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.

--
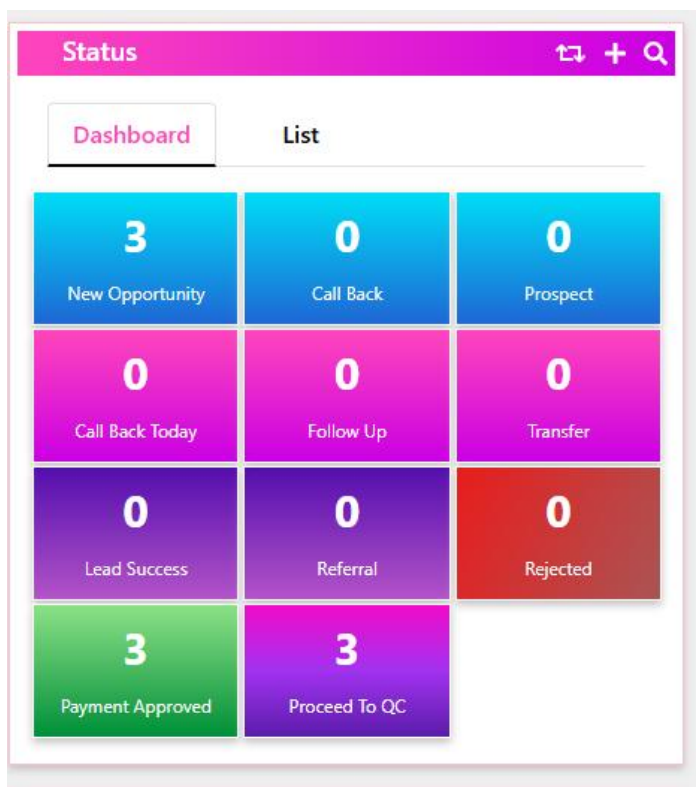
CMS:--

Quality Assurance portal:

Make live all above tabs:
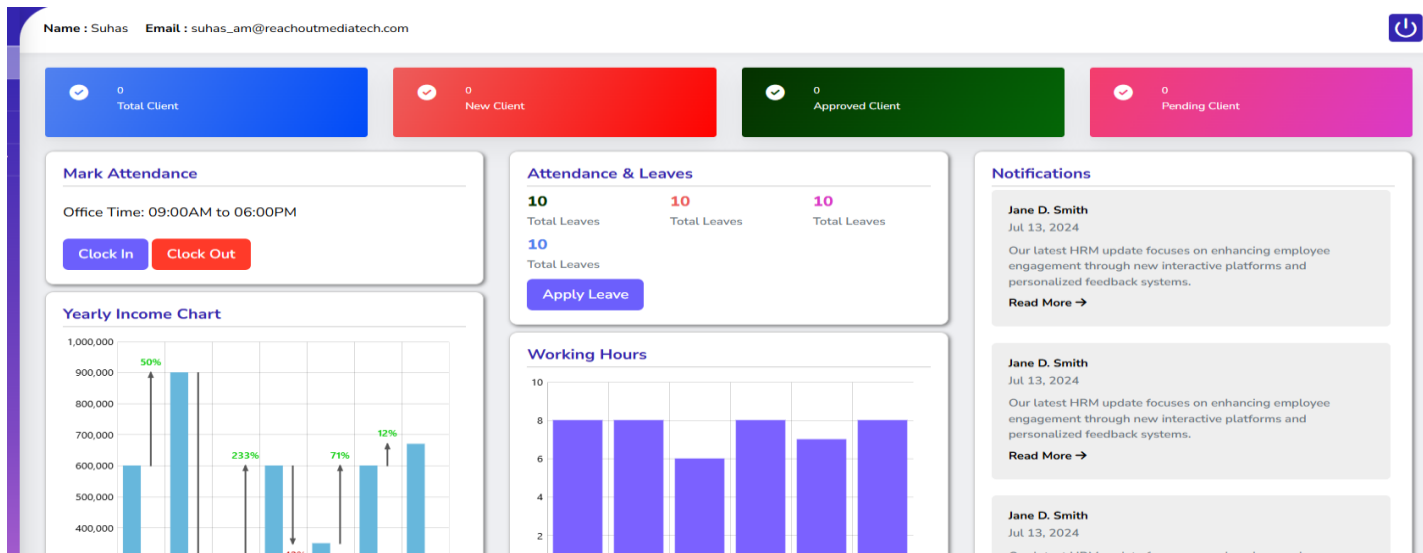
BDE unable to track lead in CMS (which QC /md is handling particular lead.)?

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

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

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

| 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 Yelgandarwar	20580.00000	Approved	👁	Lead Updated By Harshal And Transferred In Approved And Reason: werjlkjlfkj	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 & Devlopers 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	👁	Sfzdnv	28-06-2025	03:46:56 pm	28-06-2025	03:49:41 pm

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Md/HigherAuthority Portal:--

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

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 & Devlopers 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.

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 & Devlopers 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	👁

--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)

	Sr.No	Id	Name	Company Name	Amount	Status	Creative	Remark	Date	Time	Date	Time
☐	1	1049	Sandesh	Shivanand Yelgandarwar Yelgandarwar Yelgandarwar Yelgandarwar	20580.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: sfgdfgj	03-07-2025	03:37:43 pm	03-07-2025	05:04:48 pm
☐	2	1029	Sandesh	Mahendra Real Estate Builders & Devlopers Bhojane Bhojane Bhojane	20581.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: fnsdlkfnslkfj	03-07-2025	03:36:40 pm	03-07-2025	05:04:45 pm
☐	3	1051	Sandesh	Amrendra Plastic Industries Patil Patil	27440.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: sdcfvbnm,	02-07-2025	01:22:57 pm	02-07-2025	01:23:52 pm
☐	4	1029	Sandesh	Mahendra Real Estate Builders & Devlopers Bhojane Bhojane	20581.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: fnsdlkfnslkfj	02-07-2025	01:22:53 pm	03-07-2025	05:04:45 pm
☐	5	1045	Tanvi	Vivaldis Health & Health & Health & Health &	987889.00000	Approved	👁	Lead Updated By Ankita And Transferred In Approved And Reason: zxbcnvbcx	28-06-2025	04:08:39 pm	28-06-2025	04:11:59 pm
☐	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
☐	7	1040	Tanvi	Vetox 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
☐	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
☐	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
☐	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 : Akshay   **Email :** 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

	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 Akshay And Transferred In Approved And Reason: sfgdfgj	03-07-2025	03:37:43 pm	03-07-2025	05:04:48 pm
☐	2	1029	Sandesh	Mahendra Real Estate Builders & Devlopers Bhojane Bhojane Bhojane	20581.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: fnsdlkfnslkfj	03-07-2025	03:36:40 pm	03-07-2025	05:04:45 pm
☐	3	1051	Sandesh	Amrendra Plastic Industries Patil Patil	27440.00000	Approved	👁	Lead Updated By Akshay And Transferred In Approved And Reason: sdcfvbnm,	02-07-2025	01:22:57 pm	02-07-2025	01:23:52 pm
☐	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

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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