

UAT EXECUTIVE SUMMARY

Client: Circle MSP
Contact: Max Raziqi, CEO
Date: January 27, 2026

Circle USP - UAT Executive Summary

Version: 2.0 | **Date:** January 2026 | **Status:** Ready for Execution

Purpose

User Acceptance Testing (UAT) validates that the Circle Unified System Platform (USP) meets business requirements before production deployment. This document provides leadership with a high-level overview of the testing approach, timeline, and success criteria.

Scope

The UAT covers all MVP features across 13 functional modules:

Category	Modules	Test Count
Core CRM	Authentication, Companies & Contacts, Activities	25 tests
Sales Pipeline	Opportunities, Solutions, Proposals	24 tests
Workflow & Approvals	Approval Routing, Notifications	11 tests
Operations	Dashboards, Search, Import, Integrations	12 tests

Total: 72 test procedures across 6 user roles

Testing Timeline

Phase	Dates	Focus
Phase 2: Core UAT	Jan 26-30	Chuck & Ashley validate core workflows
Phase 3-5: Role Testing	Feb 2-20	Role-specific testing cycles
Phase 6: Pre-Launch	Feb 23-27	Final validation, training
Go/No-Go Decision	Feb 26 @ 2:00 PM	Leadership approval gate
Cutover	Feb 28	Data migration, system switchover
Go-Live	Mar 2	Production launch

Role-Based Execution Model

Testers execute tests using their assigned role credentials only. Tests requiring multiple roles (e.g., approval workflows) use real-time Microsoft Teams coordination:

Role	Tester Assignment	Test Count
Sales Rep	TBD	48 tests
Sales Manager	TBD	10 tests
Executive	TBD	1 test
Administrator	TBD	9 tests
External Customer	(Incognito browser)	2 tests

Multi-Role Coordination

Three test sequences require real-time coordination between testers:

1. **Approval Workflow** (15-20 min): Sales Rep creates low-margin proposal, Manager approves/rejects
2. **Notification Tests** (10 min): Manager assigns task, Rep receives notification
3. **Proposal Signature** (10 min): Rep sends proposal, External Customer signs

Success Criteria

Metric	Target
Critical defects	0 unresolved
Major defects	0 unresolved
Test pass rate	100% of tests pass
Sign-off	All stakeholders approve

Go/No-Go Decision

Date: February 26, 2026 @ 2:00 PM PST

Decision Makers: Max Raziqi (CEO), Ashley (Product Owner), Chuck (Business Lead)

Criteria for GO: - All critical and major defects resolved - All test cases passed - Stakeholder sign-off obtained
- Training completed - Rollback procedure documented

Resources

- **Full UAT Plan:** Available at unified-uat.avnc.net/docs/
 - **Test Execution:** unified-uat.avnc.net
 - **Issue Tracking:** GitLab + Microsoft Teams
 - **Defect Reporting:** Userback (embedded in application)
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Document: CUS-UAT-002 | Circle Unified System Platform