USER ACCEPTANCE TEST PLAN

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Circle USP - User Acceptance Test Plan

Version: 2.0 **Date:** January 2026 **Scope:** MVP Features

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1. Introduction

This document serves as the consolidated User Acceptance Test (UAT) plan for the Circle Unified System Platform (USP) MVP release. It merges three key testing artifacts:

- **Use Case Catalog** (64 use cases) - Business requirements specification
- **Detailed Test Cases** (67 tests) - Step-by-step verification procedures

- **Role-Based Scripts** (10 scripts) - Quick validation by role

The purpose of UAT is to validate that the system meets business requirements before production deployment. All critical and major defects must be resolved before the Go/No-Go decision on February 26, 2026.

Testing Objectives: 1. Verify all MVP features function as specified 2. Validate role-based access controls (RBAC) 3. Confirm integrations operate correctly (KQM sync, E-automate push) 4. Ensure acceptable performance and usability

v2.0 Changes: - Reorganized for role-based execution (testers cannot switch roles mid-test) - Split multi-role tests into separate procedures per role - Added coordination markers for tests requiring handoffs - Added Section 5: Multi-Role Coordination Tests

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2. Test Administration

Test Environments

Environment	URL	Purpose
UAT	https://uat.circle.local	User acceptance testing
Staging	https://staging.circle.local	Pre-production validation

Test Credentials

Role	Email	Password	Notes
Sales Rep	`s.wallace.test@circlemsp.com`	`MyPassw0rd123!`	Standard rep permissions
Sales Rep 2	`s.simran.test@circlemsp.com`	`MyPassw0rd123!`	Second rep for assignment tests
Sales Manager	`t.gentry.test@circlemsp.com`	`MyPassw0rd123!`	Team management, approvals
VP Sales	`j.smith.test@circlemsp.com`	`MyPassw0rd123!`	Regional visibility
Executive	`s.hayden.test@circlemsp.com`	`MyPassw0rd123!`	Global visibility

Role	Email	Password	Notes
Administrator	`h.nguyen.test@circlemsp.com`	`MyPassw0rd123!`	Full system access
External Customer	None	None	Public proposal access

Defect Reporting Standard

When a test fails: 1. **Summary:** `[Test-ID] Brief failure description` 2. **Steps to Reproduce:** Numbered steps taken 3. **Expected:** What should happen per this document 4. **Actual:** What actually happened (screenshots/console errors) 5. **Severity:** - **Critical:** Cannot complete workflow, data loss, security issue - **Major:** Feature works incorrectly, calculation error - **Minor:** UI/cosmetic, typo, minor inconvenience

Reporting Tool: Userback (embedded in application) **Tracking:** GitLab Issues **Communication:** Microsoft Teams (Known Issues pinned post)

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3. Traceability Matrix

This matrix maps each test case (TEST-xxx) to the use case(s) (UC-xxx) it validates.

Test ID	Test Name	Use Cases Covered
TEST-AUTH-001	Successful Login	UC-AUTH-001
TEST-AUTH-002	Invalid Credentials	UC-AUTH-001 (AF-2)
TEST-AUTH-003	Session Persistence	UC-AUTH-003
TEST-AUTH-004	Logout	UC-AUTH-002
TEST-AUTH-005	Role-Based Access (Rep Cannot Access Admin)	UC-AUTH-004
TEST-AUTH-006	API Key Authentication	UC-AUTH-005
TEST-CRM-001	View Company List	UC-CRM-001
TEST-CRM-002	Create Company via Quick Create	UC-CRM-002
TEST-CRM-003	Create Company - Validation Errors	UC-CRM-002 (AF-1, AF-3)
TEST-CRM-004	View Company Detail	UC-CRM-003
TEST-CRM-005	Edit Company	UC-CRM-004

Test ID	Test Name	Use Cases Covered
TEST-CRM-006	Add Contact to Company	UC-CRM-006
TEST-CRM-007	Add Company Location	UC-CRM-010
TEST-CRM-008	Delete Company	UC-CRM-005
TEST-CRM-009	View Contact Detail	UC-CRM-007
TEST-CRM-010	Edit Contact	UC-CRM-008
TEST-CRM-011	Delete Contact	UC-CRM-009
TEST-ACT-001	Log Phone Call	UC-ACT-001
TEST-ACT-002	Schedule Follow-up	UC-ACT-007
TEST-ACT-003	Log Meeting with Attendees	UC-ACT-003
TEST-ACT-004	Create Task	UC-ACT-004
TEST-ACT-005	Mark Task Complete	UC-ACT-008
TEST-ACT-006	Log an Email	UC-ACT-002
TEST-ACT-007	Create a Note	UC-ACT-005
TEST-ACT-008	View Activity Timeline	UC-ACT-006
TEST-OPP-001	Create Opportunity	UC-OPP-001
TEST-OPP-002	Change Opportunity Stage	UC-OPP-004
TEST-OPP-003	Change to Forecast Stage	UC-OPP-004
TEST-OPP-004	Close Opportunity - Won	UC-OPP-004 (AF-1), UC-INT-001
TEST-OPP-005	Close Opportunity - Lost	UC-OPP-004 (AF-2)
TEST-OPP-006	View Opportunity Detail	UC-OPP-002
TEST-OPP-007	Edit Opportunity	UC-OPP-003
TEST-OPP-008	View Pipeline Kanban	UC-OPP-005
TEST-OPP-009	Link Contact to Opportunity	UC-OPP-006
TEST-SOL-001	Create Solution and Add Products	UC-SOL-001, UC-SOL-002
TEST-SOL-002	Configure Product Accessories	UC-SOL-003
TEST-SOL-003	Set Quantity	UC-SOL-004
TEST-SOL-004	Configure Lease Pricing	UC-SOL-005
TEST-SOL-005	Save Solution	UC-SOL-006
TEST-SOL-006	Version Solution	UC-SOL-007
TEST-PROP-001	Create Proposal from Solution	UC-PROP-001
TEST-PROP-002	Preview Proposal PDF	UC-PROP-003
TEST-PROP-003	Send Proposal	UC-PROP-004
TEST-PROP-004	Customer Views Proposal (Public)	UC-PROP-005
TEST-PROP-005	Customer Accepts and Signs	UC-PROP-006

Test ID	Test Name	Use Cases Covered
TEST-PROP-006	Rep Views Accepted Proposal	UC-PROP-007
TEST-PROP-007	Edit Proposal in Builder	UC-PROP-002
TEST-WF-001-REP	Low Margin Triggers Approval (Rep Portion)	UC-PROP-008
TEST-WF-001-MGR	Low Margin Triggers Approval (Manager Verification)	UC-PROP-008
TEST-WF-002	Manager Approves Proposal	UC-PROP-008, UC-WF-002
TEST-WF-002-VERIFY	Rep Verifies Approval	UC-PROP-008
TEST-WF-003-REP	Create Second Low-Margin for Rejection Test	UC-PROP-008
TEST-WF-003	Manager Rejects Proposal	UC-PROP-008 (AF-1)
TEST-WF-003-VERIFY	Rep Verifies Rejection	UC-PROP-008 (AF-1)
TEST-WF-004	View Approval Queue	UC-WF-001
TEST-DASH-001	Sales Rep Dashboard	UC-DASH-001
TEST-DASH-002	Manager Dashboard - Team View	UC-DASH-002
TEST-DASH-003	Executive Dashboard - Global View	UC-DASH-003
TEST-SRCH-001	Global Quick Search	UC-SRCH-001
TEST-SRCH-002	Apply Filter on List	UC-SRCH-002
TEST-SRCH-003	Save Filter	UC-SRCH-003, UC-SRCH-004
TEST-NOTIF-001-MGR	Trigger Notification (Manager Assigns)	UC-NOTIF-001
TEST-NOTIF-001-REP	Receive Real-time Notification (Rep Verifies)	UC-NOTIF-001
TEST-NOTIF-002	Mark All as Read	UC-NOTIF-003
TEST-NOTIF-003	Mark Notification as Read	UC-NOTIF-002
TEST-SYS-001	Sync Products from KQM	UC-SYS-001
TEST-SYS-002	View and Edit User (Admin)	UC-SYS-002, UC-SYS-004
TEST-SYS-003	Create New User	UC-SYS-003
TEST-SYS-004	Deactivate User	UC-SYS-005
TEST-SYS-005	Assign User to Team	UC-SYS-006
TEST-IMP-001	Import Companies from CSV	UC-IMP-001
TEST-INT-001	E-automate Write-back on Close-Won	UC-INT-001

4. Test Execution by Role

4.1 Sales Rep Tests

Credentials: `s.wallace.test@circlemsp.com` / `MyPassw0rd123!`

The Sales Rep role executes the core sales workflow tests covering authentication, CRM, activities, opportunities, solutions, and proposals. Each test in this section can be completed using only the Sales Rep credentials.

TEST-AUTH-001: Successful Login **Use Cases:** UC-AUTH-001

Prerequisites: - User account exists and is active - Browser cookies cleared

Step	Action	Expected Result	Pass/Fail
1	Open browser and navigate to application URL	Login page loads with email and password fields	
2	Enter valid email: `s.wallace.test@circlemsp.com`	Email field accepts input	
3	Enter valid password: `MyPassw0rd123!`	Password field accepts input, masked	
4	Click “Sign In” button	Button shows loading state	
5	Wait for authentication	Page redirects to Dashboard	
6	Verify dashboard loads	User name appears in top-right header	
7	Verify welcome notification	“Welcome, [Name]” notification appears	

Acceptance Criteria: - [ ] Login completes in under 3 seconds - [ ] Dashboard is role-appropriate (Sales Rep view) - [ ] User name is displayed correctly - [ ] No error messages displayed

TEST-AUTH-002: Invalid Credentials **Use Cases:** UC-AUTH-001 (AF-2)

Step	Action	Expected Result	Pass/Fail
1	Navigate to login page	Login form displayed	
2	Enter valid email: `s.wallace.test@circlemsp.com`	Email accepted	
3	Enter INVALID password: `WrongPassword!`	Password field accepts input	
4	Click "Sign In"	Authentication attempt made	
5	Verify error response	Error message: "Invalid email or password"	
6	Verify login form remains	Form still visible, fields preserved	

Acceptance Criteria: - [ ] Generic error message shown (not "wrong password" specifically) - [ ] User remains on login page - [ ] Can retry login immediately

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TEST-AUTH-003: Session Persistence **Use Cases:** UC-AUTH-003

Step	Action	Expected Result	Pass/Fail
1	Log in as Sales Rep	Dashboard loads	
2	Navigate to Companies list	Companies page loads	
3	Press F5 to refresh page	Page reloads	
4	Verify session maintained	Still on Companies list, still logged in	
5	Copy current URL	URL copied	
6	Open new browser tab	New tab opens	

Step	Action	Expected Result	Pass/Fail
7	Paste URL and navigate	Same page loads, still authenticated	

Acceptance Criteria: - [ ] Session persists across page refreshes - [ ] Session persists across browser tabs - [ ] No re-authentication required

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TEST-AUTH-004: Logout **Use Cases:** UC-AUTH-002

Step	Action	Expected Result	Pass/Fail
1	Log in as any user	Dashboard loads	
2	Click user avatar/name in top-right	Dropdown menu appears	
3	Click "Sign Out"	Logout initiated	
4	Verify redirect	Login page displayed	
5	Verify confirmation message	"You have been signed out" displayed	
6	Navigate to /companies	Protected page attempted	
7	Verify access blocked	Login form returned (401)	

Acceptance Criteria: - [ ] Logout redirects to login page - [ ] Confirmation message displayed - [ ] Cannot access protected pages after logout

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TEST-AUTH-005: Role-Based Access (Rep Cannot Access Admin) **Use Cases:** UC-AUTH-004 (AF-1)

Step	Action	Expected Result	Pass/Fail
1	Log in as Sales Rep	Dashboard loads	
2	Navigate directly to `/system/users`	URL entered	

Step	Action	Expected Result	Pass/Fail
3	Verify access denied	403 Forbidden or "Access Denied" page	
4	Verify cannot see user list	No user data displayed	

Acceptance Criteria: - [ ] Sales Rep cannot access admin pages - [ ] Clear "Access Denied" message shown - [ ] No admin data exposed

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TEST-AUTH-006: API Key Authentication **Use Cases:** UC-AUTH-005

Prerequisites: - API key is configured in system settings - Access to a tool that can make API requests (curl, Postman, etc.)

Step	Action	Expected Result	Pass/Fail
1	Prepare API request to `/api/companies`	Request ready	
2	Add header: `Authorization: API {valid-api-key}`	Header added	
3	Send the request	Request sent	
4	Verify response status: `200 OK`	Authentication successful	
5	Verify response body contains company data	Data returned	
6	Send same request with invalid API key	Request sent	
7	Verify response status: `401 Unauthorized`	Authentication failed	
8	Verify error message: `Invalid API key`	Error message correct	

Acceptance Criteria: - [ ] Valid API key authenticates successfully - [ ] Invalid API key returns 401 - [ ] Requests are processed with appropriate user permissions

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TEST-CRM-001: View Company List **Use Cases:** UC-CRM-001

Step	Action	Expected Result	Pass/Fail
1	Log in as Sales Rep	Dashboard loads	
2	Click "Companies" in left navigation	Companies list loads	
3	Verify page header	"Companies" title displayed	
4	Verify stats row	Shows counts by status	
5	Verify table headers	Name, Industry, Status, Owner, Last Activity visible	
6	Verify data loads	Company rows displayed (if any exist)	
7	Verify pagination	Page numbers or "Load More" visible	

Acceptance Criteria: - [ ] Page loads within 2 seconds - [ ] Table shows all expected columns - [ ] Pagination controls present - [ ] Data displays correctly

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TEST-CRM-002: Create Company via Quick Create **Use Cases:** UC-CRM-002

Prerequisites: Note current company count for verification

Step	Action	Expected Result	Pass/Fail
1	Log in as Sales Rep	Dashboard loads	
2	Click "+" (Quick Create) button in top header	Dropdown menu appears	
3	Verify menu options	"Company", "Contact", "Opportunity" visible	
4	Click "Company"	"Create Company" modal opens	

Step	Action	Expected Result	Pass/Fail
5	Verify modal fields	Name (required), Industry, Website, Phone fields visible	
6	Enter Name: `UAT Test Corp - [Your Name]`	Field accepts text	
7	Select Industry: `Technology`	Dropdown selection works	
8	Enter Website: `https://example.com`	Field accepts URL	
9	Verify "Create" button state	Button is enabled/active	
10	Click "Create"	Modal shows loading state	
11	Verify navigation	Browser redirects to new company detail page	
12	Verify company name in header	"UAT Test Corp - [Your Name]" displayed	
13	Verify success notification	"Company created successfully" toast appears	
14	Verify status	Status badge shows "Company"	

Test Data Created: Company: `UAT Test Corp - [Your Name]`

Acceptance Criteria: - [ ] Quick create menu appears - [ ] Modal form displays correctly - [ ] Company is created successfully - [ ] Redirected to detail page - [ ] All entered data is saved correctly

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TEST-CRM-003: Create Company - Validation Errors **Use Cases:** UC-CRM-002 (AF-1, AF-3)

Step	Action	Expected Result	Pass/Fail
1	Open Quick Create > Company modal	Modal opens	
2	Leave Name field empty	Field is blank	
3	Click "Create"	Validation triggered	
4	Verify error message	"Company name is required" error displayed	

Step	Action	Expected Result	Pass/Fail
5	Verify field highlight	Name field has red border/indicator	
6	Verify modal stays open	Modal did not close	
7	Enter Name: `Test Company`	Field accepts input	
8	Enter invalid Website: `not-a-url`	Field accepts input	
9	Click "Create"	Validation triggered	
10	Verify URL error	"Please enter a valid URL" error displayed	

Acceptance Criteria: - [ ] Empty required field shows error - [ ] Invalid URL shows error - [ ] Modal stays open on validation failure - [ ] Can correct and resubmit

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TEST-CRM-004: View Company Detail **Use Cases:** UC-CRM-003

Prerequisites: Company `UAT Test Corp - [Your Name]` exists from TEST-CRM-002

Step	Action	Expected Result	Pass/Fail
1	Navigate to Companies list	List displays	
2	Locate and click `UAT Test Corp - [Your Name]`	Company detail page loads	
3	Verify header section	Company name, Industry badge, Status badge visible	
4	Verify Contacts section	Section visible with "+" button	
5	Verify Opportunities section	Section visible with "New Opportunity" button	
6	Verify Activities section	Section visible, may show "No activities"	

Step	Action	Expected Result	Pass/Fail
7	Verify Locations section	Section visible with "+" button	

Acceptance Criteria: - [ ] Detail page loads correctly - [ ] All sections present - [ ] Data matches what was entered

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TEST-CRM-005: Edit Company **Use Cases:** UC-CRM-004

Prerequisites: Viewing `UAT Test Corp - [Your Name]` detail page

Step	Action	Expected Result	Pass/Fail
1	Click "Edit" button on company detail	Edit modal/dialog opens	
2	Verify current values pre-filled	All fields show current data	
3	Change Industry to `Healthcare`	Dropdown selection works	
4	Change Website to `https://updated-example.com`	Field accepts new value	
5	Click "Save Changes"	Save initiated	
6	Verify modal closes	Modal is dismissed	
7	Verify page updates	Industry badge now shows "Healthcare"	
8	Verify success notification	"Company updated" toast appears	

Acceptance Criteria: - [ ] Edit modal pre-populates correctly - [ ] Changes save successfully - [ ] Page reflects updates immediately - [ ] Success notification displayed

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TEST-CRM-006: Add Contact to Company **Use Cases:** UC-CRM-006

Prerequisites: Viewing `UAT Test Corp - [Your Name]` detail page

Step	Action	Expected Result	Pass/Fail
1	Locate "Contacts" section on company detail	Section visible in sidebar	
2	Click "+" button next to Contacts heading	"Add Contact" modal opens	
3	Enter First Name: `Jane`	Field accepts input	
4	Enter Last Name: `Doe`	Field accepts input	
5	Enter or select Title: `CTO`	Field accepts input	
6	Click "Add Contact Method"	Contact method row appears	
7	Select Type: `Email`	Dropdown shows options	
8	Enter Value: `jane.doe@example.com`	Field accepts email	
9	Click the "Preferred" star icon	Star turns solid/yellow	
10	Click "Add Contact Method" again	Second method row appears	
11	Select Type: `Phone`	Dropdown shows options	
12	Enter Value: `555-123-4567`	Field accepts phone	
13	Click "Save Contact"	Save initiated	
14	Verify modal closes	Modal dismissed	
15	Verify contact in list	"Jane Doe" appears in Contacts section	
16	Verify preferred badge	Email shows "Preferred" indicator	

Test Data Created: Contact: `Jane Doe` (CTO) with Email (preferred) and Phone

Acceptance Criteria: - [ ] Contact form accepts all fields - [ ] Multiple contact methods can be added - [ ] Preferred star toggles correctly - [ ] Contact appears in list after save - [ ] Preferred method is indicated

TEST-CRM-007: Add Company Location **Use Cases:** UC-CRM-010

Step	Action	Expected Result	Pass/Fail
1	On company detail, locate Locations section	Section visible	
2	Click “+” button	Add Location modal opens	
3	Enter Location Name: `Headquarters`	Field accepts input	
4	Select Location Type: `Headquarters`	Dropdown works	
5	Enter Address Line 1: `123 Main Street`	Field accepts input	
6	Enter City: `Los Angeles`	Field accepts input	
7	Select State: `California`	Dropdown works	
8	Enter Postal Code: `90001`	Field accepts input	
9	Select Country: `United States`	Dropdown works	
10	Check “Primary Location”	Checkbox is checked	
11	Click “Save”	Save initiated	
12	Verify location appears	“Headquarters” in Locations section	
13	Verify primary badge	“Primary” badge visible	

Acceptance Criteria: - [ ] All address fields accept input - [ ] Location appears after save - [ ] Primary location indicated

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TEST-CRM-009: View Contact Detail **Use Cases:** UC-CRM-007

Prerequisites: Contact `Jane Doe` exists from TEST-CRM-006

Step	Action	Expected Result	Pass/Fail
1	Navigate to company detail with contacts	Company page loads	
2	Click on contact name `Jane Doe`	Contact detail view opens	
3	Verify full name displayed	“Jane Doe” visible	

Step	Action	Expected Result	Pass/Fail
4	Verify title/role displayed	“CTO” visible	
5	Verify company link	Link to company is present and clickable	
6	Verify contact methods section	Email and Phone listed	
7	Verify preferred badge	Email shows “Preferred” indicator	
8	Verify activity history section	Activities involving contact shown	

Acceptance Criteria: - [ ] Contact detail shows all fields correctly - [ ] Contact methods listed with preferred indicator - [ ] Company link navigates correctly - [ ] Related activities visible

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TEST-CRM-010: Edit Contact **Use Cases:** UC-CRM-008

Prerequisites: Contact `Jane Doe` exists and is viewable

Step	Action	Expected Result	Pass/Fail
1	View contact detail for `Jane Doe`	Detail displayed	
2	Click “Edit” button	Edit dialog opens	
3	Verify current values pre-filled	All fields show current data	
4	Change Title to: `VP of Technology`	Field accepts new value	
5	Add new contact method: Mobile `555-987-6543`	Method added	
6	Click “Save”	Save initiated	
7	Verify dialog closes	Dialog dismissed	
8	Verify changes reflected	Title shows “VP of Technology”	
9	Verify new contact method	Mobile number appears in list	

Acceptance Criteria: - [ ] Edit dialog pre-populates correctly - [ ] Changes save successfully - [ ] New contact methods can be added - [ ] Page reflects updates immediately

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TEST-ACT-001: Log Phone Call **Use Cases:** UC-ACT-001

Prerequisites: `UAT Test Corp - [Your Name]` exists with contact `Jane Doe`

Step	Action	Expected Result	Pass/Fail
1	Navigate to `UAT Test Corp` detail	Page loads	
2	Click "Log Activity" button	Activity dialog opens	
3	Select Activity Type: `Call`	Type selected	
4	Select Direction: `Outbound`	Direction selected	
5	Enter Subject: `Discovery call with Jane`	Field accepts input	
6	Enter Duration: `15` minutes	Field accepts number	
7	Select Outcome: `Connected`	Dropdown works	
8	Enter Notes: `Discussed their IT infrastructure needs`	Field accepts text	
9	Select Contact: `Jane Doe`	Contact linked	
10	Click "Save Activity"	Activity saved	
11	Verify activity in timeline	Call appears with icon	
12	Verify timestamp	"Just now" or current time	

Step	Action	Expected Result	Pass/Fail
13	Verify company "Last Activity" updated	Date is today	

Test Data Created: Activity: Phone Call to Jane Doe

Acceptance Criteria: - [ ] Activity form shows all call-specific fields - [ ] Activity saves successfully - [ ] Activity appears in timeline - [ ] Last Activity date updates

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TEST-ACT-002: Schedule Follow-up **Use Cases:** UC-ACT-007

Prerequisites: Logged activity exists from TEST-ACT-001

Step	Action	Expected Result	Pass/Fail
1	View activity just logged	Activity visible in timeline	
2	Click "Schedule Follow-up" on activity	Follow-up form appears	
3	Select Follow-up Type: `Meeting`	Type selected	
4	Select Date/Time: `[Tomorrow 2:00 PM]`	Date picker works	
5	Enter Subject: `Demo meeting`	Field accepts input	
6	Click "Schedule"	Follow-up created	
7	Verify follow-up appears	Meeting shows in timeline/tasks	
8	Verify link to original	Follow-up references original call	

Acceptance Criteria: - [ ] Follow-up form opens from activity - [ ] Follow-up is created and linked - [ ] Appears in task list/calendar

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TEST-ACT-003: Log Meeting with Attendees **Use Cases:** UC-ACT-003

Step	Action	Expected Result	Pass/Fail
1	Click "Log Activity" on company	Dialog opens	
2	Select Activity Type: `Meeting`	Type selected	
3	Enter Subject: `Initial Discovery Meeting`	Subject entered	
4	Enter Date/Time: `[Today 10:00 AM]`	Date/time set	
5	Enter Duration: `60` minutes	Duration set	
6	Enter Location: `Client Office`	Location entered	
7	Add Attendee: `Jane Doe` (contact)	Contact added	
8	Enter Notes: `Discussed pain points and timeline`	Notes entered	
9	Click "Save Activity"	Activity saved	
10	Verify meeting in timeline	Shows with meeting icon	
11	Verify attendees listed	"Jane Doe" shown	

Acceptance Criteria: - [ ] Meeting-specific fields available - [ ] Attendees can be added - [ ] Meeting saves and displays correctly

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TEST-ACT-004: Create Task **Use Cases:** UC-ACT-004

Step	Action	Expected Result	Pass/Fail
1	Click “Log Activity” on company	Dialog opens	
2	Select Activity Type: `Task`	Type selected	
3	Enter Title: `Send proposal follow-up`	Title entered	
4	Select Due Date: `[Tomorrow]`	Date selected	
5	Select Priority: `High`	Priority set	
6	Enter Description: `Follow up on sent proposal`	Description entered	
7	Click “Save”	Task saved	
8	Verify task in timeline	Task appears	
9	Verify task in Dashboard tasks widget	Task listed in upcoming	

Acceptance Criteria: - [ ] Task saves with all fields - [ ] Appears in activity timeline - [ ] Appears in dashboard task widget

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TEST-ACT-005: Mark Task Complete **Use Cases:** UC-ACT-008

Prerequisites: Task exists from TEST-ACT-004

Step	Action	Expected Result	Pass/Fail
1	Locate task in timeline or task list	Task visible	
2	Click checkbox or “Complete” button	Completion initiated	
3	Verify task marked complete	Checkbox checked, strikethrough/completion indicator	

Step	Action	Expected Result	Pass/Fail
4	Verify completion timestamp	“Completed just now” or similar	

Acceptance Criteria: - [ ] Task can be marked complete - [ ] Visual indication of completion - [ ] Removed from active task list

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TEST-ACT-006: Log an Email **Use Cases:** UC-ACT-002

Prerequisites: Company and contact exist

Step	Action	Expected Result	Pass/Fail
1	Navigate to company detail	Page loads	
2	Click “Log Activity” button	Activity dialog opens	
3	Select Activity Type: `Email`	Type selected	
4	Select Direction: `Sent`	Direction selected	
5	Enter Subject: `Follow-up on our meeting`	Field accepts input	
6	Enter Body/Notes: `As discussed, please find attached...`	Field accepts text	
7	Select Contact: `Jane Doe`	Contact linked	
8	Click “Save Activity”	Activity saved	
9	Verify activity in timeline	Email appears with email icon	
10	Verify subject displayed	Subject line shown in timeline	

Acceptance Criteria: - [ ] Email-specific fields available (Direction, Subject, Body) - [ ] Activity saves successfully - [ ] Email appears in timeline with correct icon - [ ] Subject line visible in timeline

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TEST-ACT-007: Create a Note **Use Cases:** UC-ACT-005

Prerequisites: Company exists

Step	Action	Expected Result	Pass/Fail
1	Navigate to company detail	Page loads	
2	Click "Log Activity" button	Activity dialog opens	
3	Select Activity Type: `Note`	Type selected	
4	Verify minimal fields	Only note content field visible (no date/time)	
5	Enter Note content: `Customer mentioned budget approval expected Q2`	Field accepts text	
6	Click "Save Activity"	Activity saved	
7	Verify note in timeline	Note appears with note icon	
8	Verify timestamp auto-added	"Just now" or current time displayed	

Acceptance Criteria: - [ ] Note type requires only content field - [ ] Note saves successfully - [ ] Timestamp automatically added - [ ] Note appears in timeline

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TEST-ACT-008: View Activity Timeline **Use Cases:** UC-ACT-006

Prerequisites: Multiple activities logged on a company

Step	Action	Expected Result	Pass/Fail
1	Navigate to company with activities	Page loads	
2	Locate Activities section	Section visible	
3	Verify reverse chronological order	Most recent activity first	
4	Verify activity icons	Call, Email, Meeting, Task, Note have distinct icons	
5	Click on an activity to expand	Activity details shown	
6	Verify filter by type available	Filter dropdown present	
7	Select filter: `Calls`	Only calls shown	
8	Clear filter	All activities shown again	

Acceptance Criteria: - [ ] Activities displayed in reverse chronological order - [ ] Each activity type has distinct icon - [ ] Activities expandable for details - [ ] Filter by type works correctly

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TEST-OPP-001: Create Opportunity **Use Cases:** UC-OPP-001

Prerequisites: Company `UAT Test Corp - [Your Name]` exists

Step	Action	Expected Result	Pass/Fail
1	Navigate to company detail page	Page loads	
2	Click “New Opportunity” button	“New Opportunity” modal opens	
3	Verify Company is pre-filled	Shows `UAT Test Corp - [Your Name]`	
4	Enter Opportunity Name: `HQ Network Refresh`	Field accepts input	

Step	Action	Expected Result	Pass/Fail
5	Select Opportunity Type: `CMSP`	Dropdown shows all 10 types	
6	Verify Stage defaults to: `Assessment`	Stage is pre-selected	
7	Verify Probability shows: `35%` (or configured value)	Probability displayed	
8	Enter Est. Close Date: `[Next Month End]`	Date picker works	
9	Click "Create"	Opportunity created	
10	Verify redirect to opportunity detail	Detail page loads	
11	Verify header shows name	"HQ Network Refresh" displayed	
12	Verify stage badge	Shows "Assessment"	
13	Verify success notification	"Opportunity created" toast	

Test Data Created: Opportunity: `HQ Network Refresh` (CMSP, Assessment)

Acceptance Criteria: - [ ] Modal pre-fills company - [ ] All opportunity types available - [ ] Stage defaults correctly - [ ] Probability auto-fills based on stage - [ ] Opportunity created and detail page loads

---

TEST-OPP-002: Change Opportunity Stage **Use Cases:** UC-OPP-004

Prerequisites: Opportunity `HQ Network Refresh` exists in Assessment stage

Step	Action	Expected Result	Pass/Fail
1	View opportunity detail	Current stage: Assessment	
2	Click on stage badge/indicator	Stage selector appears	

Step	Action	Expected Result	Pass/Fail
3	Select new stage: `Quote`	Stage selected	
4	Verify confirmation (if required)	Confirmation prompt or direct save	
5	Verify stage updates	Badge shows “Quote”	
6	Verify probability updates	Probability changes (e.g., to 60%)	
7	Verify stage history	History shows “Assessment -> Quote”	

Acceptance Criteria: - [ ] Stage can be changed - [ ] Probability updates automatically - [ ] Stage change recorded in history

---

TEST-OPP-003: Change to Forecast Stage **Use Cases:** UC-OPP-004

Step	Action	Expected Result	Pass/Fail
1	Change opportunity stage to `Forecast`	Forecast selected	
2	Verify commit date prompt	System asks for committed close date	
3	Enter commit date: `[End of Next Month]`	Date entered	
4	Confirm stage change	Stage changes	
5	Verify probability: `90%` (or configured)	High probability for Forecast	

Acceptance Criteria: - [ ] Forecast stage requires commit date - [ ] High probability assigned

---

TEST-OPP-004: Close Opportunity - Won **Use Cases:** UC-OPP-004 (AF-1), UC-INT-001

Prerequisites: Opportunity has accepted proposal (created in PROP tests)

Note: Also validates E-automate integration (CRITICAL)

Step	Action	Expected Result	Pass/Fail
1	Change stage to `Closed-Won`	Close dialog appears	
2	Verify prompt for details	Amount and reason requested	
3	Enter Close Amount: `$50,000`	Amount entered	
4	Enter Win Reason: `Best technical solution`	Reason entered	
5	Confirm close	Opportunity closed	
6	Verify status: `Closed-Won`	Badge shows Closed-Won	
7	Verify probability: `100%`	Full probability	
8	**[CRITICAL]** Verify E-automate integration	Check integration logs for order creation	

Acceptance Criteria: - [ ] Close-Won requires amount and reason - [ ] Stage changes to Closed-Won - [ ] E-automate order created (CRITICAL)

TEST-OPP-005: Close Opportunity - Lost **Use Cases:** UC-OPP-004 (AF-2)

Prerequisites: Create another opportunity for this test

Step	Action	Expected Result	Pass/Fail
1	Change stage to `Closed-Lost`	Close dialog appears	

Step	Action	Expected Result	Pass/Fail
2	Select Lost Reason: `Lost to Competitor`	Reason dropdown works	
3	Enter Notes: `Lost to XYZ Corp on price`	Notes entered	
4	Confirm close	Opportunity closed	
5	Verify status: `Closed-Lost`	Badge shows Closed-Lost	

Acceptance Criteria: - [ ] Lost reason required - [ ] Notes can be added - [ ] Stage changes to Closed-Lost

---

TEST-OPP-006: View Opportunity Detail **Use Cases:** UC-OPP-002

Prerequisites: Opportunity `HQ Network Refresh` exists

Step	Action	Expected Result	Pass/Fail
1	Navigate to Opportunities list	List loads	
2	Click on `HQ Network Refresh`	Opportunity detail page loads	
3	Verify header section	Name, Stage badge, Probability, Close Date visible	
4	Verify company link	Company name shown and clickable	
5	Verify BANT Assessment panel	Qualification status section visible	
6	Verify Solutions tab	Tab present, shows configured solutions	
7	Verify Proposals tab	Tab present	
8	Verify Activities tab	Tab present with related activities	
9	Verify stage timeline/history	History of stage changes visible	

Acceptance Criteria: - [ ] All opportunity detail sections present - [ ] Header shows correct information - [ ] Related entities accessible via tabs - [ ] Stage history visible

TEST-OPP-007: Edit Opportunity **Use Cases:** UC-OPP-003

Prerequisites: Opportunity exists

Step	Action	Expected Result	Pass/Fail
1	View opportunity detail	Page loads	
2	Click "Edit" button	Edit dialog opens	
3	Verify current values pre-filled	Name, Type, Close Date shown	
4	Change Opportunity Name to: `HQ Network Refresh - Phase 1`	Field accepts new value	
5	Change Est. Close Date to next quarter	Date picker works	
6	Update Estimated Value: `$75,000`	Value field accepts input	
7	Click "Save Changes"	Save initiated	
8	Verify dialog closes	Dialog dismissed	
9	Verify changes reflected	New name and values displayed	
10	Verify stage history	Edit recorded in history	

Acceptance Criteria: - [ ] Edit dialog pre-populates correctly - [ ] All editable fields can be modified - [ ] Changes save successfully - [ ] History tracks changes

TEST-OPP-008: View Pipeline Kanban **Use Cases:** UC-OPP-005

Step	Action	Expected Result	Pass/Fail
1	Navigate to Opportunities list	List loads	
2	Click “Kanban” view toggle	View switches to Kanban	
3	Verify stage columns	Target, First Appointment, Assessment, Quote, Forecast columns visible	
4	Verify opportunity cards	Cards show: Name, Company, Value, Close Date, Owner	
5	Drag a card from Quote to Forecast	Drag initiated	
6	Verify stage change prompt	Commit date requested (for Forecast)	
7	Complete stage change	Card moves to new column	
8	Click on a card	Quick detail view appears	
9	Click “Open” on card	Full detail page loads	

Acceptance Criteria: - [ ] Kanban view displays correctly - [ ] All stage columns present - [ ] Cards show key information - [ ] Drag-and-drop changes stage - [ ] Cards are clickable

---

TEST-OPP-009: Link Contact to Opportunity **Use Cases:** UC-OPP-006

Prerequisites: Opportunity exists with company that has contacts

Step	Action	Expected Result	Pass/Fail
1	View opportunity detail	Page loads	
2	Locate Contacts section	Section visible	
3	Click “Add Contact”	Contact picker appears	
4	Verify contacts from company shown	Company contacts listed	
5	Select `Jane Doe`	Contact selected	

Step	Action	Expected Result	Pass/Fail
6	Mark as "Primary" contact	Primary toggle selected	
7	Click "Save"	Contact linked	
8	Verify contact appears	Jane Doe shown in opportunity contacts	
9	Verify "Primary" badge	Primary indicator visible	

Acceptance Criteria: - [ ] Can add contacts from company - [ ] Can mark contact as primary - [ ] Linked contacts display correctly - [ ] Primary contact indicated

---

TEST-SOL-001: Create Solution and Add Products **Use Cases:** UC-SOL-001, UC-SOL-002

Prerequisites: Opportunity `HQ Network Refresh` exists; Products synced from KQM

Step	Action	Expected Result	Pass/Fail
1	Navigate to opportunity detail	Page loads	
2	Click "Solutions" tab	Solutions tab content loads	
3	Click "New Solution"	Solution Configurator opens	
4	Verify two-column layout	Left: Items, Right: Search/Financials	
5	Enter Solution Name: `Option A - Full Refresh`	Name field accepts input	
6	In search bar, type: `Canon C5535`	Search initiated	
7	Verify search results	Products appear in dropdown with images	
8	Click "Add" on first result	Product added to solution	
9	Verify item in left panel	Product shows: Name, SKU, Qty=1	

Step	Action	Expected Result	Pass/Fail
10	Verify financials update	Total/prices in right panel update	
11	Repeat: Search and add `HP LaserJet Pro`	Second product added	
12	Verify both items listed	Two items in solution	
13	Verify cumulative total	Total = Sum of both products	

Acceptance Criteria: - [ ] Solution configurator opens correctly - [ ] Product search works - [ ] Products can be added - [ ] Financials update automatically

---

TEST-SOL-002: Configure Product Accessories **Use Cases:** UC-SOL-003

Prerequisites: Solution with `Canon C5535` from TEST-SOL-001

Step	Action	Expected Result	Pass/Fail
1	Click “Configure” (gear icon) on Canon C5535	Accessory picker modal opens	
2	Verify accessories displayed	Categories shown with options	
3	Check “Staple Finisher”	Checkbox selected	
4	Check “High Capacity Deck”	Checkbox selected	
5	Verify accessory prices shown	Each accessory shows price	
6	Click “Done”	Modal closes	
7	Verify accessories under parent	Indented below Canon C5535	
8	Verify total updated	Total includes accessory prices	

Acceptance Criteria: - [ ] Accessory picker shows relevant options - [ ] Multiple accessories can be selected - [ ] Accessories appear under parent - [ ] Pricing includes accessories

---

TEST-SOL-003: Set Quantity **Use Cases:** UC-SOL-004

Step	Action	Expected Result	Pass/Fail
1	Click quantity field for Canon C5535	Field editable	
2	Change quantity to: `3`	Quantity updated	
3	Verify extended price	Unit Price x 3	
4	Verify solution total	Total reflects quantity change	

Acceptance Criteria: - [ ] Quantity is editable - [ ] Extended price calculates correctly - [ ] Solution total updates

---

TEST-SOL-004: Configure Lease Pricing **Use Cases:** UC-SOL-005

Step	Action	Expected Result	Pass/Fail
1	Locate Financials panel (right side)	Panel visible	
2	Find Pricing Mode toggle/dropdown	Shows “Purchase” or “Lease”	
3	Select “Lease” mode	Mode changes	
4	Verify display changes	Shows “Monthly Payment” instead of “Total”	
5	Select Lease Term: `36 Month FMV`	Dropdown selection works	
6	Verify payment calculates	Monthly payment shows (Total / Rate Factor)	
7	Enter Margin: `15%`	Margin field accepts percentage	
8	Verify payment increases	Payment includes margin	
9	Verify Profit field	Shows margin amount	

Acceptance Criteria: - [ ] Lease mode available - [ ] Term selection works - [ ] Monthly payment calculates correctly - [ ] Margin adjusts payment - [ ] Profit displayed

---

TEST-SOL-005: Save Solution **Use Cases:** UC-SOL-006

Step	Action	Expected Result	Pass/Fail
1	Click "Save Solution"	Save initiated	
2	Verify success notification	"Solution saved" toast	
3	Return to opportunity detail	Navigate back	
4	Verify solution in Solutions tab	Solution listed	
5	Verify opportunity totals updated	Solution value reflected	

Acceptance Criteria: - [ ] Solution saves successfully - [ ] Appears in opportunity solutions list - [ ] Opportunity totals reflect solution

---

TEST-SOL-006: Version Solution **Use Cases:** UC-SOL-007

Prerequisites: Solution `Option A - Full Refresh` exists and has been saved

Step	Action	Expected Result	Pass/Fail
1	Open existing solution in configurator	Solution loads with current items	
2	Make a change (add/remove product or change quantity)	Change made	
3	Click "Save as New Version"	Version dialog appears	
4	Verify version increment prompt	"Save as v2?" or similar	
5	Confirm version save	New version created	

Step	Action	Expected Result	Pass/Fail
6	Verify original version preserved	v1 still exists	
7	Return to opportunity Solutions tab	Solutions list loads	
8	Verify version history	Both v1 and v2 visible in history	

Acceptance Criteria: - [ ] Can save solution as new version - [ ] Original version is preserved - [ ] Version history shows all versions - [ ] Finalized solutions cannot be edited (only versioned)

TEST-PROP-001: Create Proposal from Solution **Use Cases:** UC-PROP-001

Prerequisites: Solution `Option A - Full Refresh` saved

Step	Action	Expected Result	Pass/Fail
1	From opportunity, click "Create Proposal"	Proposal wizard opens	
2	Step 1: Select Solution	Solution dropdown shows options	
3	Select: `Option A - Full Refresh`	Solution selected	
4	Click "Next"	Proceed to template step	
5	Step 2: Select Template	Template options displayed	
6	Select: `Standard Proposal`	Template selected	
7	Click "Next"	Proceed to sections step	
8	Step 3: Configure Sections	Default sections listed	
9	Drag "Executive Summary" to top	Reordering works	
10	Click "Create Proposal"	Proposal created	

Step	Action	Expected Result	Pass/Fail
11	Verify redirect to builder	Proposal builder loads	
12	Verify proposal status: `Draft`	Status badge shows Draft	

Test Data Created: Proposal in Draft status

Acceptance Criteria: - [ ] Wizard steps work correctly - [ ] Solution can be selected - [ ] Template selection works - [ ] Sections can be reordered - [ ] Proposal created in Draft status

---

TEST-PROP-002: Preview Proposal PDF **Use Cases:** UC-PROP-003

Prerequisites: Proposal exists from TEST-PROP-001

Step	Action	Expected Result	Pass/Fail
1	On proposal, click "Preview PDF"	New tab opens	
2	Verify PDF loads	Document displays	
3	Verify company name correct	`UAT Test Corp - [Your Name]`	
4	Verify solution totals	Match what was configured	
5	Verify branding	Company logo, colors present	
6	Verify section order	Executive Summary is first	
7	Close preview tab	Return to builder	

Acceptance Criteria: - [ ] PDF generates correctly - [ ] Data matches entered values - [ ] Branding appears - [ ] Sections in correct order

---

TEST-PROP-003: Send Proposal **Use Cases:** UC-PROP-004

Prerequisites: Proposal in Draft status; Contact `Jane Doe` has email address

COORDINATION REQUIRED - Partner Role: External Customer (incognito browser window) - Partner Tests: TEST-PROP-004, TEST-PROP-005 - Signal: "Proposal sent - link posted in Teams chat" - Method: Teams call + chat for link sharing

Step	Action	Expected Result	Pass/Fail
1	Click "Finalize & Send"	Send dialog opens	
2	Select Recipient: `Jane Doe`	Dropdown shows contacts	
3	Verify email displayed	`jane.doe@example.com` shown	
4	Verify default subject	Subject pre-filled	
5	Verify email body template	Default message shown	
6	Set Expiration: `30 days from today`	Date picker works	
7	Click "Send"	Send initiated	
8	Verify status changes to: `Sent`	Status badge updates	
9	Verify public link displayed	`/p/token-xxx` URL shown	
10	Copy the public link	**Post link in Teams chat for External Customer test**	
11	Verify success notification	"Proposal sent to Jane Doe"	
12	**SIGNAL External Customer via Teams**	"Proposal sent - link in chat"	

Test Data: Public Link: (record and share via Teams chat)

PAUSE: Wait for External Customer to complete TEST-PROP-004 and TEST-PROP-005 before proceeding to TEST-PROP-006

Acceptance Criteria: - [ ] Send dialog shows all fields - [ ] Recipient selection works - [ ] Status changes to Sent - [ ] Public link is generated - [ ] Success notification appears

---

TEST-PROP-007: Edit Proposal in Builder **Use Cases:** UC-PROP-002

Prerequisites: Proposal exists in Draft status

Step	Action	Expected Result	Pass/Fail
1	Open proposal in Draft status	Proposal builder loads	
2	Verify section list on left	All sections listed	
3	Verify preview on right	Proposal preview visible	
4	Click on “Executive Summary” section	Section editor opens	
5	Edit section content	Rich text editor available	
6	Drag a section to reorder	Section moves to new position	
7	Click “Add Section”	Section options appear	
8	Add optional section	New section added to proposal	
9	Click “Remove” on optional section	Section removed	
10	Verify auto-save or click “Save”	Changes saved	
11	Verify preview updates	Preview reflects changes	

Acceptance Criteria: - [ ] Section list displays correctly - [ ] Sections are editable - [ ] Drag-and-drop reordering works - [ ] Can add/remove optional sections - [ ] Changes save and preview updates

---

TEST-PROP-006: Rep Views Accepted Proposal **Use Cases:** UC-PROP-007

Prerequisites: External Customer completed TEST-PROP-005 (proposal signed)

COORDINATION REQUIRED - Partner Role: External Customer - Partner Test: TEST-PROP-005 - Wait for signal: “Proposal signed” - Method: Teams call

Step	Action	Expected Result	Pass/Fail
1	Refresh proposal page	Page reloads	
2	Verify status: `Accepted`	Green “Accepted” badge	
3	Verify signature section	“Signed by Jane Doe”	
4	Verify timestamp	Signature date/time shown	
5	Check notifications	Notification of acceptance received	

Acceptance Criteria: - [ ] Status shows Accepted - [ ] Signature details visible - [ ] Notification received

---

TEST-DASH-001: Sales Rep Dashboard **Use Cases:** UC-DASH-001

Step	Action	Expected Result	Pass/Fail
1	Log in as Sales Rep	Dashboard loads	
2	Verify dashboard title	Shows rep-appropriate view	
3	Verify “My Pipeline” widget	Shows personal opportunities only	
4	Verify “Upcoming Activities” widget	Shows scheduled activities	
5	Verify “Tasks Due Today” widget	Shows personal tasks	
6	Verify “Revenue Forecast” widget	Shows personal forecast	
7	Click on opportunity in pipeline	Navigates to opportunity	

Acceptance Criteria: - [ ] Dashboard loads within 2 seconds - [ ] All widgets display personal data only - [ ] Widgets are clickable/interactive - [ ] Data is current

---

TEST-SRCH-001: Global Quick Search **Use Cases:** UC-SRCH-001

Step	Action	Expected Result	Pass/Fail
1	Press “/” key on keyboard	Search input activates	
2	Type: `UAT Test`	Search initiated as typing	
3	Verify results appear	Dropdown shows matches	
4	Verify grouped by type	Companies, Contacts, Opportunities	
5	Click on company result	Navigates to company detail	

Acceptance Criteria: - [ ] “/” shortcut works - [ ] Search is responsive (types ahead) - [ ] Results grouped correctly - [ ] Click navigates to record

---

TEST-SRCH-002: Apply Filter on List **Use Cases:** UC-SRCH-002

Step	Action	Expected Result	Pass/Fail
1	Navigate to Companies list	List loads	
2	Click “Filter” button	Filter panel opens	
3	Select field: `Industry`	Field selected	
4	Select operator: `equals`	Operator selected	
5	Select value: `Healthcare`	Value selected	
6	Click “Apply”	Filter applied	
7	Verify list filters	Only Healthcare companies shown	
8	Verify filter badge	Shows active filter count	

Acceptance Criteria: - [ ] Filter panel opens - [ ] Filter options available - [ ] Filter applies correctly - [ ] Badge shows active count

---

TEST-SRCH-003: Save Filter **Use Cases:** UC-SRCH-003, UC-SRCH-004

Step	Action	Expected Result	Pass/Fail
1	With filter applied, click “Save Filter”	Save dialog opens	
2	Enter name: `Healthcare Companies`	Name entered	
3	Click “Save”	Filter saved	
4	Clear current filter	Filter removed	
5	Click “Load Filter” dropdown	Saved filters shown	
6	Select “Healthcare Companies”	Filter applied	
7	Verify same filter active	Healthcare companies shown	

Acceptance Criteria: - [ ] Filter can be saved - [ ] Saved filter appears in list - [ ] Loading filter restores criteria

---

TEST-WF-001-REP: Create Low-Margin Solution (Rep Portion) **Use Cases:** UC-PROP-008

COORDINATION REQUIRED - Partner Role: Sales Manager - Partner Test: TEST-WF-001-MGR - Signal to send: “Ready for approval - [proposal name]” - Method: Teams call

Prerequisites: Create new opportunity for this test

Step	Action	Expected Result	Pass/Fail
1	Create a new solution with low margin (e.g., 5%)	Solution saved	
2	Create proposal from this solution	Proposal created	
3	Click "Finalize & Send"	Send attempted	
4	Verify approval required	System blocks send	
5	Verify status: `Pending Approval`	Status badge shows	
6	**SIGNAL MANAGER via Teams call**	"Ready for approval - [proposal name]"	

PAUSE: Wait for Manager to complete TEST-WF-001-MGR, then TEST-WF-002 before proceeding to TEST-WF-002-VERIFY

Acceptance Criteria: - [ ] Low margin triggers approval requirement - [ ] Status changes to Pending Approval - [ ] Cannot send until approved

---

TEST-WF-002-VERIFY: Rep Verifies Approval **Use Cases:** UC-PROP-008

Prerequisites: Manager completed TEST-WF-002 (approval granted)

COORDINATION REQUIRED - Partner Role: Sales Manager - Wait for signal: "Proposal approved" - Method: Teams call

Step	Action	Expected Result	Pass/Fail
1	Check notifications	Approval notification received	
2	Click notification or navigate to proposal	Proposal detail loads	

Step	Action	Expected Result	Pass/Fail
3	Verify status shows: `Approved`	Status badge updated	
4	Verify approval note visible	"Approved per conversation" shown	
5	Verify can now send	"Finalize & Send" button enabled	

Acceptance Criteria: - [ ] Approval notification received - [ ] Status shows Approved - [ ] Approval note visible - [ ] Can now send proposal

---

TEST-WF-003-REP: Create Second Low-Margin for Rejection Test **Use Cases:** UC-PROP-008 (AF-1)

COORDINATION REQUIRED - Partner Role: Sales Manager - Partner Test: TEST-WF-003 - Signal to send: "Ready for rejection test" - Method: Teams call

Step	Action	Expected Result	Pass/Fail
1	Create another solution with low margin (e.g., 3%)	Solution saved	
2	Create proposal from this solution	Proposal created	
3	Click "Finalize & Send"	Send attempted	
4	Verify status: `Pending Approval`	Status badge shows	
5	**SIGNAL MANAGER via Teams call**	"Ready for rejection test"	

PAUSE: Wait for Manager to complete TEST-WF-003 before proceeding to TEST-WF-003-VERIFY

Acceptance Criteria: - [ ] Low margin triggers approval requirement - [ ] Status changes to Pending Approval

---

TEST-WF-003-VERIFY: Rep Verifies Rejection **Use Cases:** UC-PROP-008 (AF-1)

Prerequisites: Manager completed TEST-WF-003 (rejection)

COORDINATION REQUIRED - Partner Role: Sales Manager - Wait for signal: "Proposal rejected" - Method: Teams call

Step	Action	Expected Result	Pass/Fail
1	Check notifications	Rejection notification received	
2	Click notification or navigate to proposal	Proposal detail loads	
3	Verify status shows: `Rejected`	Status badge updated	
4	Verify rejection reason visible	"Margin too low, need 8% minimum" shown	
5	Verify cannot send	"Finalize & Send" button disabled or shows revision required	

Acceptance Criteria: - [ ] Rejection notification received - [ ] Status shows Rejected - [ ] Rejection reason visible - [ ] Cannot send rejected proposal

---

TEST-NOTIF-001-REP: Receive Real-time Notification (Rep Verifies) **Use Cases:** UC-NOTIF-001

Prerequisites: Manager completed TEST-NOTIF-001-MGR (assignment made)

COORDINATION REQUIRED - Partner Role: Sales Manager - Wait for signal: "Assignment sent" - Method: Teams call

Step	Action	Expected Result	Pass/Fail
1	Note current bell badge count	Initial count noted	
2	Wait for Manager signal	Manager assigns opportunity	
3	Verify bell badge increments	Count increases (real-time)	
4	Click bell icon	Dropdown opens	
5	Verify new notification	"You've been assigned…" message	
6	Click notification	Navigates to opportunity	
7	Verify notification marked read	Badge count decreases	

Acceptance Criteria: - [ ] Notification appears in real-time - [ ] Badge count updates - [ ] Clicking notification navigates correctly - [ ] Read status updates

---

TEST-NOTIF-002: Mark All as Read **Use Cases:** UC-NOTIF-003

Step	Action	Expected Result	Pass/Fail
1	Ensure multiple unread notifications	Badge > 0	
2	Click bell icon	Dropdown opens	
3	Click “Mark All as Read”	Action processed	
4	Verify all notifications read	All marked read	
5	Verify badge count: 0	Badge cleared	

Acceptance Criteria: - [ ] Mark All works - [ ] All notifications marked read - [ ] Badge goes to zero

---

TEST-NOTIF-003: Mark Notification as Read **Use Cases:** UC-NOTIF-002

Prerequisites: At least one unread notification exists

Step	Action	Expected Result	Pass/Fail
1	Note current badge count	Count > 0	
2	Click bell icon	Notification dropdown opens	
3	Locate an unread notification	Unread indicator visible	
4	Click “Mark as Read” icon on notification	Read action triggered	
5	Verify notification marked read	Visual indicator changes	
6	Verify badge count decrements	Count decreases by 1	
7	Alternatively: Click notification itself	Navigates and marks read	

Step	Action	Expected Result	Pass/Fail
8	Return to check badge	Count reflects read status	

Acceptance Criteria: - [ ] Individual notifications can be marked read - [ ] Badge count updates correctly - [ ] Clicking notification also marks it read - [ ] Visual distinction between read/unread

---

4.2 External Customer Tests

Credentials: None (Public Access)

These tests verify the external customer experience for proposal viewing and signature. Execute these tests in an **incognito/private browser window** to simulate an unauthenticated customer.

TEST-PROP-004: Customer Views Proposal (Public) **Use Cases:** UC-PROP-005

COORDINATION REQUIRED - Partner Role: Sales Rep - Partner Test: TEST-PROP-003 - Wait for signal: "Proposal sent - link in chat" - Method: Teams call + chat for link

Prerequisites: Sales Rep has sent proposal and posted public link in Teams chat

Step	Action	Expected Result	Pass/Fail
1	Open **Incognito/Private** browser window	New session	
2	Get public link from Teams chat	Link copied	
3	Paste public link and navigate	Proposal loads	
4	Verify NO login required	Content displays without auth	
5	Verify proposal content	All sections visible	
6	Scroll through entire proposal	Content readable	
7	Verify pricing visible	Total/monthly payment shown	
8	Verify "Accept & Sign" button	Button visible at bottom	

Acceptance Criteria: - [ ] Public link loads without authentication - [ ] Full proposal content visible - [ ] Pricing information displayed - [ ] Accept button present

---

TEST-PROP-005: Customer Accepts and Signs **Use Cases:** UC-PROP-006

Prerequisites: Viewing proposal via public link (TEST-PROP-004)

COORDINATION REQUIRED - Partner Role: Sales Rep - Partner Test: TEST-PROP-006 - Signal to send: "Proposal signed" - Method: Teams call

Step	Action	Expected Result	Pass/Fail
1	Click "Accept & Sign" button	Signature modal appears	
2	Verify modal contents	Name field and signature pad	
3	Enter Name: `Jane Doe`	Field accepts input	
4	Draw signature in signature box	Signature captured	
5	Click "Confirm Acceptance"	Submission initiated	
6	Verify page updates	"Signed/Accepted" state	
7	Verify success indication	Confetti/success animation	
8	Verify confirmation message	Thank you message displayed	
9	**SIGNAL SALES REP via Teams call**	"Proposal signed"	

Acceptance Criteria: - [ ] Signature modal appears - [ ] Name and signature can be entered - [ ] Confirmation shows success - [ ] Page reflects accepted status

---

4.3 Sales Manager Tests

Credentials: `t.gentry.test@circlemsp.com` / `MyPassw0rd123!`

Manager tests focus on team visibility, RBAC, and approval workflows. Each test in this section can be completed using only the Sales Manager credentials.

TEST-CRM-008: Delete Company **Use Cases:** UC-CRM-005

Prerequisites: Create a throwaway company: `Delete Test Company`

Step	Action	Expected Result	Pass/Fail
1	Log in as Manager	Dashboard loads	

Step	Action	Expected Result	Pass/Fail
2	Navigate to `Delete Test Company` detail	Detail page loads	
3	Click "…" (more actions) menu	Dropdown appears	
4	Verify "Delete Company" option visible	Option is present	
5	Click "Delete Company"	Confirmation dialog appears	
6	Verify warning message	"Are you sure…" with consequences listed	
7	Click "Delete" to confirm	Deletion initiated	
8	Verify redirect	Redirected to Companies list	
9	Verify success notification	"Company deleted" toast	
10	Search for deleted company	No results found	

Acceptance Criteria: - [ ] Delete option visible for authorized users - [ ] Confirmation required - [ ] Company removed from all lists - [ ] Success notification displayed

---

TEST-CRM-011: Delete Contact **Use Cases:** UC-CRM-009

Prerequisites: Create a test contact: `Delete Test Contact`

Step	Action	Expected Result	Pass/Fail
1	Log in as Manager	Dashboard loads	
2	Navigate to company with test contact	Company detail loads	
3	Click on `Delete Test Contact`	Contact detail opens	

Step	Action	Expected Result	Pass/Fail
4	Click “Delete” or “. . .” menu > Delete	Confirmation dialog appears	
5	Verify warning message	“Are you sure. . . ” displayed	
6	Click “Delete” to confirm	Deletion initiated	
7	Verify contact removed	Contact no longer in company’s list	
8	Verify success notification	“Contact deleted” toast	

Acceptance Criteria: - [ ] Delete option visible for authorized users - [ ] Confirmation required before deletion - [ ] Contact removed from all lists - [ ] Success notification displayed

---

TEST-WF-001-MGR: Low Margin Triggers Approval (Manager Verification) **Use Cases:** UC-PROP-008

COORDINATION REQUIRED - Partner Role: Sales Rep - Partner Test: TEST-WF-001-REP - Wait for signal: “Ready for approval - [proposal name]” - Method: Teams call

Prerequisites: Sales Rep has created low-margin proposal (TEST-WF-001-REP)

Step	Action	Expected Result	Pass/Fail
1	Log in as Manager	Dashboard loads	
2	Check notification bell	Red badge indicates pending	
3	Click notification	Proposal detail opens	
4	Verify “Approval Actions” bar	Approve/Reject buttons visible	
5	Verify proposal details visible	Solution, margin, pricing shown	

Acceptance Criteria: - [ ] Manager receives notification - [ ] Approval actions visible to manager - [ ] Can review proposal details

---

TEST-WF-002: Manager Approves Proposal **Use Cases:** UC-PROP-008, UC-WF-002

COORDINATION REQUIRED - Partner Role: Sales Rep - Partner Test: TEST-WF-002-VERIFY - Signal to send: “Proposal approved” - Method: Teams call

Prerequisites: Proposal in Pending Approval status from TEST-WF-001

Step	Action	Expected Result	Pass/Fail
1	View pending proposal	Approval actions visible	
2	Click “Approve”	Approval dialog opens	
3	Enter Note: `Approved per conversation`	Note entered	
4	Confirm approval	Approval processed	
5	Verify status: `Approved`	Status badge updates	
6	**SIGNAL SALES REP via Teams call**	“Proposal approved”	

Acceptance Criteria: - [ ] Approve action works - [ ] Note is recorded - [ ] Status changes to Approved - [ ] Rep will be notified

---

TEST-WF-003: Manager Rejects Proposal **Use Cases:** UC-PROP-008 (AF-1)

COORDINATION REQUIRED - Partner Role: Sales Rep - Partner Test: TEST-WF-003-VERIFY - Wait for signal: “Ready for rejection test” - Signal to send: “Proposal rejected” - Method: Teams call

Prerequisites: Sales Rep has created second low-margin proposal (TEST-WF-003-REP)

Step	Action	Expected Result	Pass/Fail
1	View pending proposal	Approval actions visible	
2	Click “Reject”	Rejection dialog opens	
3	Enter Reason: `Margin too low, need 8% minimum`	Reason required	
4	Confirm rejection	Rejection processed	
5	Verify status: `Rejected`	Status badge shows	

Step	Action	Expected Result	Pass/Fail
6	**SIGNAL SALES REP via Teams call**	"Proposal rejected"	

Acceptance Criteria: - [ ] Reject action works - [ ] Reason is required - [ ] Status changes to Rejected - [ ] Rep will be notified with reason

---

TEST-WF-004: View Approval Queue **Use Cases:** UC-WF-001

Step	Action	Expected Result	Pass/Fail
1	Log in as Manager	Dashboard loads	
2	Click notification bell	Dropdown opens	
3	Verify badge shows pending count	Count > 0 if approvals pending	
4	Click "See All" or navigate to Approvals	Approval Queue page loads	
5	Verify list shows pending approvals	Type, Subject, Requested By, Date columns	
6	Click filter dropdown	Filter options appear	
7	Filter by type: `Proposals`	Only proposal approvals shown	
8	Sort by date	List reorders	
9	Click on a pending item	Item detail view opens	

Acceptance Criteria: - [ ] Approval queue accessible from notifications - [ ] Pending items listed with key information - [ ] Filter by type works - [ ] Sort by date works - [ ] Can open item detail from queue

---

TEST-NOTIF-001-MGR: Trigger Notification (Manager Assigns) **Use Cases:** UC-NOTIF-001

COORDINATION REQUIRED - Partner Role: Sales Rep - Partner Test: TEST-NOTIF-001-REP - Signal to send: “Assignment sent” - Method: Teams call

Prerequisites: An opportunity exists that can be assigned

Step	Action	Expected Result	Pass/Fail
1	Log in as Manager	Dashboard loads	
2	Navigate to an opportunity	Opportunity detail loads	
3	Click “Assign” or edit owner field	Assignment dialog opens	
4	Select Sales Rep: `s.wallace.test@circlemsp.com`	Rep selected	
5	Confirm assignment	Assignment saved	
6	**SIGNAL SALES REP via Teams call**	“Assignment sent”	

Acceptance Criteria: - [ ] Can assign opportunity to rep - [ ] Assignment saves successfully

---

TEST-DASH-002: Manager Dashboard - Team View **Use Cases:** UC-DASH-002

Step	Action	Expected Result	Pass/Fail
1	Log in as Manager	Dashboard loads	
2	Verify “Team Pipeline” widget	Shows team data	
3	Verify data includes team members	Multiple reps visible	
4	Find filter dropdown	“My Deals” / “My Team” options	
5	Select “My Team”	Team data displayed	
6	Verify Approval Queue count	Shows pending approvals	
7	Click into team member’s deal	Detail page opens	
8	Verify can view deal details	All data accessible	

Acceptance Criteria: - [ ] Team data visible - [ ] Filter toggle works - [ ] Can drill into team member data - [ ] Approval count accurate

4.4 Executive Tests

Credentials: `s.hayden.test@circlemsp.com` / `MyPassw0rd123!`

Executive tests verify global visibility and unrestricted data access.

TEST-DASH-003: Executive Dashboard - Global View **Use Cases:** UC-DASH-003

Step	Action	Expected Result	Pass/Fail
1	Log in as Executive	Dashboard loads	
2	Verify "Total Company Pipeline"	All-company data	
3	Verify "Revenue vs Target" widget	Company-wide metrics	
4	Verify "High-Risk Opportunities"	No activity >30 days	
5	Verify can see all teams	No restrictions	

Acceptance Criteria: - [ ] Global/company-wide data visible - [ ] No data restrictions - [ ] High-risk report shows all company

---

4.5 Administrator Tests

Credentials: `h.nguyen.test@circlemsp.com` / `MyPassw0rd123!`

Administrator tests cover system configuration, user management, and integrations.

TEST-SYS-001: Sync Products from KQM **Use Cases:** UC-SYS-001

Step	Action	Expected Result	Pass/Fail
1	Log in as Administrator	Dashboard loads	

Step	Action	Expected Result	Pass/Fail
2	Navigate to System > Sync Status	Sync page loads	
3	Verify last sync timestamps	Timestamps displayed	
4	Click “Sync Products Now”	Sync initiated	
5	Verify progress indicator	Spinner/progress shown	
6	Wait for completion	Sync completes	
7	Verify success notification	“X records processed”	
8	Search for a KQM product	Product found	

Acceptance Criteria: - [ ] Sync button works - [ ] Progress indicator shown - [ ] Success message with count - [ ] Products queryable after sync

---

TEST-SYS-002: View and Edit User (Admin) **Use Cases:** UC-SYS-002, UC-SYS-004

Step	Action	Expected Result	Pass/Fail
1	Navigate to System > Users	User list loads	
2	Verify user list displays	Names, emails, roles visible	
3	Click on a user	User detail opens	
4	Click “Edit”	Edit form opens	
5	Change a field (e.g., add to team)	Field modified	
6	Click “Save”	Changes saved	
7	Verify changes applied	Updated data shown	

Acceptance Criteria: - [ ] User list loads - [ ] User detail accessible - [ ] Can edit user - [ ] Changes persist

---

TEST-SYS-003: Create New User **Use Cases:** UC-SYS-003

Step	Action	Expected Result	Pass/Fail
1	Navigate to System > Users	User list loads	
2	Click “Create User”	Create user form opens	

Step	Action	Expected Result	Pass/Fail
3	Enter Email: `test.newuser@circlemsp.com`	Field accepts email	
4	Enter First Name: `Test`	Field accepts input	
5	Enter Last Name: `NewUser`	Field accepts input	
6	Select Role: `Sales Rep`	Role dropdown works	
7	Select Team: `[Available Team]`	Team dropdown works	
8	Click "Create"	User creation initiated	
9	Verify success notification	"User created" message	
10	Verify user in list	New user appears	
11	Verify welcome email sent	Email with password reset link	

Acceptance Criteria: - [ ] Create user form has all required fields - [ ] User is created successfully - [ ] User appears in user list - [ ] Welcome email is sent with password reset link

---

TEST-SYS-004: Deactivate User **Use Cases:** UC-SYS-005

Prerequisites: Test user exists that can be deactivated

Step	Action	Expected Result	Pass/Fail
1	Navigate to System > Users	User list loads	
2	Click on test user	User detail opens	
3	Click "Deactivate" button	Confirmation dialog appears	
4	Verify warning message	"Deactivating will prevent login"	
5	Click "Confirm"	Deactivation processed	

Step	Action	Expected Result	Pass/Fail
6	Verify status changes to: `Inactive`	Status badge updates	
7	Log out and attempt login as deactivated user	Login attempted	
8	Verify login blocked	“Account is disabled” error	

Acceptance Criteria: - [ ] Deactivate option available - [ ] Confirmation required - [ ] User status changes to Inactive - [ ] Deactivated user cannot log in

---

TEST-SYS-005: Assign User to Team **Use Cases:** UC-SYS-006

Step	Action	Expected Result	Pass/Fail
1	Navigate to System > Users	User list loads	
2	Click on a user	User detail opens	
3	Click “Manage Teams”	Team assignment dialog opens	
4	View available teams	Teams list displayed	
5	Select team(s) to add user to	Team selected	
6	Select role within team: `Member`	Role dropdown works	
7	Click “Save”	Assignment saved	
8	Verify team assignment shown	User shows as team member	
9	Verify user sees team data	User can access team resources	

Acceptance Criteria: - [ ] Manage Teams option available - [ ] Can select teams to assign - [ ] Can specify role within team - [ ] Assignment persists and affects data visibility

---

TEST-IMP-001: Import Companies from CSV **Use Cases:** UC-IMP-001

Prerequisites: CSV file with company data prepared

Step	Action	Expected Result	Pass/Fail
1	Navigate to Companies list	List loads	
2	Click “Import” button	Import dialog opens	
3	Click “Choose File”	File picker opens	
4	Select CSV file with company data	File selected	
5	System parses CSV	Preview screen appears	
6	Verify column mapping preview	CSV columns mapped to system fields	
7	Verify first 10 rows preview	Data preview correct	
8	Adjust mapping if needed	Dropdowns allow remapping	
9	Click “Import”	Import processing begins	
10	Wait for completion	Progress indicator shown	
11	Verify results screen	“X created, Y updated, Z errors”	
12	If errors, download error report	CSV with error details	
13	Search for imported company	Company found in system	

Acceptance Criteria: - [ ] Import button visible to authorized users - [ ] CSV upload and parsing works - [ ] Column mapping preview accurate - [ ] Import creates/updates records correctly - [ ] Error report downloadable if errors occur

---

TEST-INT-001: E-automate Write-back on Close-Won **Use Cases:** UC-INT-001

Priority: CRITICAL

Prerequisites: Opportunity has accepted proposal; E-automate integration configured

Step	Action	Expected Result	Pass/Fail
1	Open opportunity with accepted proposal	Opportunity detail loads	
2	Change stage to “Closed-Won”	Close dialog appears	
3	Enter close details and confirm	Stage changes	
4	Verify integration triggers	Processing indicator	
5	Navigate to System > Integration Logs	Logs page loads	
6	Find E-automate entry for this deal	Entry exists	
7	Verify status: “Success”	Integration succeeded	
8	Verify order number recorded	Order # on opportunity	
9	**[Manual]** Check E-automate system	Order exists in E-automate	

Acceptance Criteria: - [ ] Closed-Won triggers integration - [ ] Log entry created - [ ] Status shows Success - [ ] Order number stored - [ ] Order exists in E-automate

If Test Fails: THIS IS A CRITICAL MVP BLOCKER - Document exact error message - Escalate immediately - Cannot proceed to production without this working

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5. Multi-Role Coordination Tests

This section documents the coordination sequences for tests requiring multiple roles to execute together. All coordination uses **real-time Microsoft Teams calls**.

5.1 Approval Workflow Sequence

Required Participants: Sales Rep + Sales Manager **Estimated Duration:** 15-20 minutes **Communication:** Teams call (both participants on same call)

Seq	Role	Test ID	Action	Signal to Partner
1	Sales Rep	TEST-WF-001-REP	Create low-margin solution, attempt to send	"Ready for approval"
2	Manager	TEST-WF-001-MGR	Verify notification received, review proposal	"Verified, proceeding to approve"
3	Manager	TEST-WF-002	Approve proposal	"Proposal approved"
4	Sales Rep	TEST-WF-002-VERIFY	Verify approval notification and status	-
5	Sales Rep	TEST-WF-003-REP	Create second low-margin for rejection test	"Ready for rejection test"
6	Manager	TEST-WF-003	Reject proposal with reason	"Proposal rejected"
7	Sales Rep	TEST-WF-003-VERIFY	Verify rejection notification and reason	-

Completion: Both participants sign off on all acceptance criteria

---

5.2 Notification Test Sequence

Required Participants: Sales Manager + Sales Rep **Estimated Duration:** 10 minutes **Communication:** Teams call (both participants on same call)

Seq	Role	Test ID	Action	Signal to Partner
1	Sales Rep	-	Note current notification badge count	"Ready, badge count is X"
2	Manager	TEST-NOTIF-001-MGR	Assign opportunity to Sales Rep	"Assignment sent"
3	Sales Rep	TEST-NOTIF-001-REP	Verify real-time notification appears	"Notification received"

Completion: Both participants sign off on acceptance criteria

---

5.3 Proposal Signature Sequence

Required Participants: Sales Rep + External Customer (same person in incognito window) **Estimated Duration:** 10 minutes **Communication:** Teams call + chat (for sharing public link)

Seq	Role	Test ID	Action	Signal to Partner
1	Sales Rep	TEST-PROP-003	Send proposal, copy public link	"Link posted in Teams chat"
2	External	TEST-PROP-004	Open incognito window, view proposal	"Viewing proposal"
3	External	TEST-PROP-005	Accept and sign proposal	"Proposal signed"
4	Sales Rep	TEST-PROP-006	Verify acceptance status and signature	-

Note: The "External Customer" tests can be performed by the same person as Sales Rep using an incognito/private browser window, or by a second tester. The key is that the public link must be accessed without any authentication.

Completion: Verify proposal shows Accepted status with signature details

6. Coverage Analysis

All use cases from the specification now have corresponding test cases, achieving 100% test coverage.

Coverage Summary

- **Total Use Cases:** 64
- **Use Cases with Test Coverage:** 64
- **Use Cases without Direct Test Coverage:** 0
- **Coverage Percentage:** 100%

Test Case Distribution by Module

Module	Use Cases	Test Cases
Authentication (AUTH)	5	6
CRM - Companies & Contacts (CRM)	10	11
Activities (ACT)	8	8
Opportunities (OPP)	6	9
Solutions (SOL)	7	6
Proposals (PROP)	8	7
Workflows (WF)	2	7 (split for role-based execution)
Dashboards (DASH)	3	3
Search (SRCH)	4	3
Notifications (NOTIF)	3	4 (split for role-based execution)
System Admin (SYS)	6	5
Import (IMP)	1	1
Integration (INT)	1	1

Note: Some test cases cover multiple use cases, and some modules have additional tests for alternative flows. Workflow and Notification tests are split for role-based execution but cover the same use cases.

Appendix A: Use Case Reference

For full use case details including alternative flows, business rules, and acceptance criteria, refer to `USE-CASES.md`.

Authentication & Authorization (UC-AUTH)

UC-ID	Title
UC-AUTH-001	User Login with Email/Password
UC-AUTH-002	User Logout
UC-AUTH-003	Session Persistence Across Page Refresh
UC-AUTH-004	Role-Based Page Access
UC-AUTH-005	API Key Authentication

CRM - Companies & Contacts (UC-CRM)

UC-ID	Title
UC-CRM-001	View Company List
UC-CRM-002	Create New Company
UC-CRM-003	View Company Detail
UC-CRM-004	Edit Company Information
UC-CRM-005	Delete Company
UC-CRM-006	Add Contact to Company
UC-CRM-007	View Contact Detail
UC-CRM-008	Edit Contact
UC-CRM-009	Delete Contact
UC-CRM-010	Add Company Location

Activities (UC-ACT)

UC-ID	Title
UC-ACT-001	Log a Phone Call

UC-ID	Title
UC-ACT-002	Log an Email
UC-ACT-003	Log a Meeting
UC-ACT-004	Create a Task
UC-ACT-005	Create a Note
UC-ACT-006	View Activity Timeline
UC-ACT-007	Schedule Follow-up Activity
UC-ACT-008	Mark Task as Complete

Opportunities (UC-OPP)

UC-ID	Title
UC-OPP-001	Create New Opportunity
UC-OPP-002	View Opportunity Detail
UC-OPP-003	Edit Opportunity
UC-OPP-004	Change Opportunity Stage
UC-OPP-005	View Opportunity Pipeline (Kanban)
UC-OPP-006	Link Contact to Opportunity

Solutions (UC-SOL)

UC-ID	Title
UC-SOL-001	Create New Solution
UC-SOL-002	Add Product to Solution
UC-SOL-003	Configure Product Accessories
UC-SOL-004	Set Quantity
UC-SOL-005	Configure Lease Pricing
UC-SOL-006	Save Solution
UC-SOL-007	Version Solution

Proposals (UC-PROP)

UC-ID	Title
UC-PROP-001	Create Proposal from Solution
UC-PROP-002	Edit Proposal in Builder
UC-PROP-003	Preview Proposal PDF
UC-PROP-004	Send Proposal to Customer
UC-PROP-005	Customer Views Proposal (Public)
UC-PROP-006	Customer Accepts and Signs Proposal
UC-PROP-007	Sales Rep Views Accepted Proposal
UC-PROP-008	Proposal Approval Workflow

Workflows & Approvals (UC-WF)

UC-ID	Title
UC-WF-001	View Approval Queue
UC-WF-002	Approve/Reject Item from Queue

Dashboards (UC-DASH)

UC-ID	Title
UC-DASH-001	View Sales Rep Dashboard
UC-DASH-002	View Manager Dashboard
UC-DASH-003	View Executive Dashboard

Search & Filters (UC-SRCH)

UC-ID	Title
UC-SRCH-001	Global Quick Search
UC-SRCH-002	Apply List Filter
UC-SRCH-003	Save Filter
UC-SRCH-004	Load Saved Filter

Notifications (UC-NOTIF)

UC-ID	Title
UC-NOTIF-001	Receive In-App Notification
UC-NOTIF-002	Mark Notification as Read
UC-NOTIF-003	Mark All Notifications as Read

System Administration (UC-SYS)

UC-ID	Title
UC-SYS-001	Sync Product Catalog from KQM
UC-SYS-002	View User List (Admin)
UC-SYS-003	Create New User (Admin)
UC-SYS-004	Edit User (Admin)
UC-SYS-005	Deactivate User (Admin)
UC-SYS-006	Assign User to Team (Admin)

Import/Export (UC-IMP)

UC-ID	Title
UC-IMP-001	Import Companies from CSV

Integrations (UC-INT)

UC-ID	Title
UC-INT-001	Push Closed-Won to E-automate

Appendix B: Test Data Cleanup

After testing, the following test data should be managed:

Retain (for reference)

- `UAT Test Corp - [Your Name]` - Use for ongoing testing

Delete (cleanup)

- `Delete Test Company` - Was deleted during testing
- Any additional test companies created

Reset (if needed)

- Proposals may need to be reset to Draft for re-testing
- Opportunity stages may need to be reset

This UAT Plan v2.0 contains 71 test procedures (including split coordination tests) covering all 64 use cases (100% coverage) across all MVP functionality. Tests are organized by role for independent execution, with explicit coordination sequences for multi-role tests. Execute all tests and document results before production release.