

UAT PLAN SUMMARY

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

Circle USP - UAT Plan Summary

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

Overview

This summary provides a condensed view of the UAT Plan for quick reference. For detailed test procedures, see the full UAT Plan or the interactive test guide at unified-uat.avnc.net.

Test Environment

Environment	URL	Purpose
UAT	https://uat.circle.local	User acceptance testing
Test Guide	https://unified-uat.avnc.net	Interactive test execution

Test Credentials by Role

Role	Email	Password
Sales Rep	s.wallace.test@circlemsp.com	MyPassw0rd123!
Sales Rep 2	s.simran.test@circlemsp.com	MyPassw0rd123!
Sales Manager	t.gentry.test@circlemsp.com	MyPassw0rd123!
VP Sales	j.smith.test@circlemsp.com	MyPassw0rd123!
Executive	s.hayden.test@circlemsp.com	MyPassw0rd123!
Administrator	h.nguyen.test@circlemsp.com	MyPassw0rd123!

Test Matrix by Module

Authentication (6 tests)

Test ID	Description	Role
TEST-AUTH-001	Valid Login - Sales Rep	Sales Rep
TEST-AUTH-002	Invalid Credentials	Sales Rep
TEST-AUTH-003	Session Persistence	Sales Rep
TEST-AUTH-004	Logout	Sales Rep
TEST-AUTH-005	Role-Based Access Control	Sales Rep
TEST-AUTH-006	API Key Authentication	Administrator

Companies & Contacts (11 tests)

Test ID	Description	Role
TEST-CRM-001	View Company List	Sales Rep
TEST-CRM-002	Create Company - Quick Create	Sales Rep
TEST-CRM-003	Create Company - Validation Errors	Sales Rep
TEST-CRM-004	View Company Detail	Sales Rep
TEST-CRM-005	Edit Company	Sales Rep
TEST-CRM-006	Add Contact to Company	Sales Rep
TEST-CRM-007	Add Company Location	Sales Rep
TEST-CRM-008	Delete Company	Sales Manager
TEST-CRM-009	View Contact Detail	Sales Rep
TEST-CRM-010	Edit Contact	Sales Rep
TEST-CRM-011	Delete Contact	Sales Manager

Activities (8 tests)

Test ID	Description	Role
TEST-ACT-001	Log Phone Call	Sales Rep
TEST-ACT-002	Schedule Follow-up	Sales Rep
TEST-ACT-003	Log Meeting with Attendees	Sales Rep
TEST-ACT-004	Create Task	Sales Rep
TEST-ACT-005	Mark Task Complete	Sales Rep
TEST-ACT-006	Log an Email	Sales Rep
TEST-ACT-007	View Activity Timeline	Sales Rep
TEST-ACT-008	Filter Activities	Sales Rep

Opportunities (9 tests)

Test ID	Description	Role
TEST-OPP-001	View Opportunities List	Sales Rep
TEST-OPP-002	Create Opportunity	Sales Rep
TEST-OPP-003	Edit Opportunity	Sales Rep
TEST-OPP-004	View Opportunity Pipeline	Sales Rep

Test ID	Description	Role
TEST-OPP-005	Move Through Pipeline Stages	Sales Rep
TEST-OPP-006	Add Opportunity Note	Sales Rep
TEST-OPP-007	Close Won	Sales Rep
TEST-OPP-008	Close Lost	Sales Rep
TEST-OPP-009	Reopen Closed Opportunity	Sales Rep

Solutions (6 tests)

Test ID	Description	Role
TEST-SOL-001	Create Solution from Opportunity	Sales Rep
TEST-SOL-002	Add Product to Solution	Sales Rep
TEST-SOL-003	Configure Product Options	Sales Rep
TEST-SOL-004	Calculate Pricing & Margin	Sales Rep
TEST-SOL-005	Clone Solution	Sales Rep
TEST-SOL-006	Delete Solution	Sales Rep

Proposals (7 tests)

Test ID	Description	Role
TEST-PROP-001	Create Proposal from Solution	Sales Rep
TEST-PROP-002	Edit Proposal Details	Sales Rep
TEST-PROP-003	Send Proposal	Sales Rep
TEST-PROP-004	Customer Views Proposal	External
TEST-PROP-005	Customer Signs Proposal	External
TEST-PROP-006	Rep Views Signed Proposal	Sales Rep
TEST-PROP-007	Generate PDF	Sales Rep

Workflows & Approvals (8 tests)

Test ID	Description	Role
TEST-WF-001-REP	Create Low-Margin Solution	Sales Rep

Test ID	Description	Role
TEST-WF-001-MGR	Verify Approval Request	Sales Manager
TEST-WF-002	Manager Approves Proposal	Sales Manager
TEST-WF-002-VERIFY	Rep Verifies Approval	Sales Rep
TEST-WF-003-REP	Create Second Low-Margin	Sales Rep
TEST-WF-003	Manager Rejects Proposal	Sales Manager
TEST-WF-003-VERIFY	Rep Verifies Rejection	Sales Rep
TEST-WF-004	View Approval Queue	Sales Manager

Notifications (5 tests)

Test ID	Description	Role
TEST-NOTIF-001-MGR	Trigger Notification	Sales Manager
TEST-NOTIF-001-REP	Receive Notification	Sales Rep
TEST-NOTIF-002	Mark All as Read	Sales Rep
TEST-NOTIF-003	Mark Single as Read	Sales Rep

Dashboards (3 tests)

Test ID	Description	Role
TEST-DASH-001	Sales Rep Dashboard	Sales Rep
TEST-DASH-002	Manager Dashboard	Sales Manager
TEST-DASH-003	Executive Dashboard	Executive

Search & Filters (3 tests)

Test ID	Description	Role
TEST-SRCH-001	Global Quick Search	Sales Rep
TEST-SRCH-002	Apply Filter on List	Sales Rep
TEST-SRCH-003	Save Filter	Sales Rep

System Administration (5 tests)

Test ID	Description	Role
TEST-SYS-001	Sync Products from KQM	Administrator
TEST-SYS-002	View and Edit User	Administrator
TEST-SYS-003	Create New User	Administrator
TEST-SYS-004	Deactivate User	Administrator
TEST-SYS-005	View Audit Log	Administrator

Import (1 test)

Test ID	Description	Role
TEST-IMP-001	Import Companies from CSV	Administrator

Integrations (1 test)

Test ID	Description	Role
TEST-INT-001	Push to E-automate	Administrator

Multi-Role Coordination Sequences

Tests requiring coordination between testers use real-time Microsoft Teams calls.

Sequence 1: Approval Workflow (15-20 min)

Step	Role	Test	Signal
1	Sales Rep	TEST-WF-001-REP	"Ready for approval"

Step	Role	Test	Signal
2	Manager	TEST-WF-001-MGR	-
3	Manager	TEST-WF-002	"Approval complete"
4	Sales Rep	TEST-WF-002-VERIFY	-
5	Sales Rep	TEST-WF-003-REP	"Ready for rejection test"
6	Manager	TEST-WF-003	"Rejected"
7	Sales Rep	TEST-WF-003-VERIFY	-

Sequence 2: Notification Tests (10 min)

Step	Role	Test	Signal
1	Manager	TEST-NOTIF-001-MGR	"Assignment sent"
2	Sales Rep	TEST-NOTIF-001-REP	-

Sequence 3: Proposal Signature (10 min)

Step	Role	Test	Signal
1	Sales Rep	TEST-PROP-003	"Proposal sent, link in chat"
2	External	TEST-PROP-004	-
3	External	TEST-PROP-005	"Signed"
4	Sales Rep	TEST-PROP-006	-

Defect Severity Definitions

Severity	Definition	Resolution Requirement
Critical	Workflow blocked, data loss, security issue	Must fix before Go-Live

Severity	Definition	Resolution Requirement
Major	Feature works incorrectly, calculation error	Must fix before Go-Live
Minor	UI/cosmetic, typo, inconvenience	Can defer post-launch

Key Dates

Date	Milestone
Jan 26-30	Phase 2: Core UAT
Feb 2-20	Phases 3-5: Role Testing
Feb 23-27	Phase 6: Pre-Launch
Feb 26	Go/No-Go Decision (2:00 PM PST)
Feb 28	Cutover Day
Mar 2	Go-Live

Document: CUS-UAT-002 | Circle Unified System Platform