

**Salesforce CTI Connector 3.1**

**Customer’s Company Name - UAT Document**

# About This Document

## Version History

| Version No. | Issue Date | Status | Reason for Change |
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## Review

| Reviewer’s Details | Version No. | Date |
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**Change Forecast:** LOW

**This document will be kept under revision control. A printed copy of this document is considered uncontrolled.**

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# Overview

The purpose of this document is to outline the User Acceptance Testing (UAT) process for the Salesforce CTI Connector. Project stakeholders from all participating departments are intended to review this document. Approval of this document implies that reviewers are confident that following the execution of the test plan, the resulting system will be considered fully tested and eligible for migration onto the production system.

UAT is to be completed by the Technical & Business Departments (UAT Team to be nominated) that will be utilizing the software and/or support departments. The testing is conducted to enable a user to validate that the software meets the agreed-upon acceptance criteria.

# Objective

## Primary Objective

User Acceptance Testing is conducted to ensure that the system satisfies the needs of the customer business/ technical teams as specified in the functional requirements and provides confidence in its use. Any Modifications in the requirements (captured and detailed in the signed functional specifications document) will be captured and to be considered as **(new requirements)** for this project.

## Secondary Objective

To identify and expose defects and associated risks, communicate all known issues to the project team, and ensure that all issues are addressed appropriately before the final migration.

# Scope of the UATs

Define the scope of UATs

# Dependencies

Define any dependencies

#

#

# Test Cases

Note: Excecute the test cases in sequence

| **Test Case – 1** |
| --- |
| Test Case: **Login Agent** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Access the Salesforce CTI Connector |  |  |
| 2. | Provide credentials of an Agent | These fields must be filled1. Agent Id
2. Password
3. Extension
 |  |
| 3. | Click on a Login Button | Agent is logged In |  |

| **Test Case – 2** |
| --- |
| Test Case: **Change State to Ready** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Not Ready State, change the state of an Agent to Ready | Agent State is Ready |  |

| **Test Case – 3** |
| --- |
| Test Case: **Answer Call** |
| Prereq: |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Ready state  |  |  |
| 2. | Agent receives a call |  |  |
| 3. | The Agent clicks on an answer button  | Call is answered by an Agent |  |

| **Test Case – 4** |
| --- |
| Test Case: **End Call** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Ready state and Answered the call |  |  |
| 2. | Agent clicks on End Call button to end the call | Call is ended by an Agent |  |

| **Test Case – 5** |
| --- |
| Test Case: **Apply Wrapup reason code** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | After the end of acall with the Wrapup state appear |  |  |
| 2. | Agent is able to selects a wrapup reason code | Wrapup is selected by an agent |  |

| **Test Case – 6** |
| --- |
| Test Case: **Consult Call** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent A in a Ready state and answered call |  |  |
| 2. | Agent A consults a call to another Agent B | Consult call is initiated |  |
| 3. | Agent B answers the consulted call | Consult call must be answered by Agent B |  |

| **Test Case – 7** |
| --- |
| Test Case: **Consult Transfer Call** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent A state is Ready to answer the call |  |  |
| 2. | Agent A consults a call to another Agent B and the call to answered by Agent B |  |  |
| 3. | Agent A clicks on a Transfer and button, and now the call is transferred to Agent B  | Call is transferred to Agent B |  |

| **Test Case – 8** |
| --- |
| Test Case: **Conference Call** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent A in a Ready state and answered call |  |  |
| 2. | Agent A consults a call to another Agent B, the call is answered by Agent B |  |  |
| 3. | Agent A clicks the Conference button, and now the call is between Agent A, Agent B, and Customer | Call is the conference between Agent A, Agent B, and Customer |  |

| **Test Case – 9** |
| --- |
| Test Case: **Dial an Outbound Call** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Ready or Not Ready State |  |  |
| 3. | Agent dials the outbound call through Dial pad or by selecting a contact from a phonebook | Outbound call is initiated  |  |

| **Test Case – 10** |
| --- |
| Test Case: **Outbound Campaign Direct Preview** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | The Agent in a Ready State |  |  |
| 2. | Agent receives an Outbound Campaign Direct Preview Call |  |  |
| 3. | Agent accepts the Outbound preview call  |  |  |
| 4. | The call is dialing for a customer |  |  |
| 5. | The customer answers call  |  |  |
| 6. | Outbound preview call is connected with an agent | Outbound preview call connected with an agent and the customer |  |

| **Test Case – 11** |
| --- |
| Test Case: **Outbound Campaign Progressive** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Ready state |  |  |
| 2. | Agent state changed to reserve and call is dialing for a customer |  |  |
| 3. | The customer accepts the call |  |  |
| 4. | The call is dialing again for an agent |  |  |
| 5. | The agent answers the call now the call is connected with the customer | Outbound Campaign Progressive call is connected with an agent and the customer |  |

| **Test Case – 12** |
| --- |
| Test Case: **Outbound Campaign Predictive** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Ready state |  |  |
| 2. | Agent state changed to reserve and call is dialing for a customer |  |  |
| 3. | The customer accepts the call |  |  |
| 4. | The call is dialing again for agent |  |  |
| 5. | The agent answers the call now the call is connected with the customer | Outbound predictive campaign call connected with an agent and the customer |  |

| **Test Case – 13** |
| --- |
| Test Case: **Schedule a Callback(Preview, Progressive, and Predictive)** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | During Direct Preview or Predictive or Progressive Outbound Call |  |  |
| 2. | Click on a Schedule Callback button |  |  |
| 3. | The form appears to fill all the fields Phone number, callback time, and date |  |  |
| 4. | Click on the save button |  |  |
| 5. | A green sign appears on the icon of schedule callback | Agent can successfully schedule a callback |  |

| **Test Case – 14** |
| --- |
| Test Case: **Reclassify Direct Preview Campaign Call** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | There is an Outbound direct preview call between the customer and agent |  |  |
| 2. | An agent can Reclassify the call on the basis of “Voice, Answering Machine, Busy, Fax, Invalid Number” |  |  |
| 3. | A green tick appears on the icon of Reclassify  | Agent successfully selects the reclassify option, and a green tick appears on the icon |  |

| **Test Case – 15** |
| --- |
| Test Case: **Search Phonebook** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Click on the dial icon |  |  |
| 2. | There is a Phonebook tab click on it |  |  |
| 3. | The Phonebook list is available |  |  |
| 4. | You can search for a phonebook from the list | Phonebook is searchable |  |

| **Test Case – 16** |
| --- |
| Test Case: **Search Phonebook’s Contact** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Click on the dial icon |  |  |
| 2. | There is a Phonebook tab click on it |  |  |
| 3. | Select a Phonebook from a list of Phonebooks |  |  |
| 4. | Contacts appear for a particular phonebook |  |  |
| 5. | You can search for a contact from the List of contacts | Contact is searchable |  |

| **Test Case – 17** |
| --- |
| Test Case: **Dial Outbound through Phonebook** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Click on the dial icon |  |  |
| 2. | There is a Phonebook tab click on it |  |  |
| 3. | Select a Phonebook from a list of Phonebooks, list of contacts appear |  |  |
| 4. | Click on contact this will dial the Outbound call | Agent is able to dial an Outbound call |  |

| **Test Case – 18** |
| --- |
| Test Case: **Dial Consult through Phonebook** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | There is an inbound call between the customer and the agent |  |  |
| 2. | The agent clicks on a consult call icon |  |  |
| 3. | There is a Phonebook tab click on it |  |  |
| 4. | Select a Phonebook from a list of Phonebooks, list of contacts appear |  |  |
| 5. | Click on contact of another Agent this will dial the Consult call | Agent is able to dial a Consult Call |  |

| **Test Case – 19** |
| --- |
| Test Case: **Direct Transfer through Phonebook** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | There is an inbound call between the customer and the agent |  |  |
| 2. | The agent clicks on a direct transfer icon |  |  |
| 3. | There is a Phonebook tab click on it |  |  |
| 4. | Select a Phonebook from a list of Phonebooks, list of contacts appear |  |  |
| 5. | Click on the contact of another Agent and the call is transferred to another agent | Agent is able to Transfer a call |  |

| **Test Case –20** |
| --- |
| Test Case: **Screen pop Single Matched/Multi Matched/ No Matched** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | When a call arrives on the logged-in agent, Account/Contact/Lead is popped up according to the caller number and information stored in Salesforce |  |  |
| 2. | If one record is matched, then that record will automatically pop up | There is a Single Matched Record |  |
| 3. | If there is more than one matching record, a contact's window will be displayed, listing all matching records. If you want to open a particular record from the list, simply select that record and it will be popped up in the background window. | There is a Multimatched Record |  |
| 4. | If there is no match, a **Contact** will be saved with the name set to ‘Anonymous’, and the number set to the caller number.  | There is a No Matched Record |  |

| **Test Case – 21** |
| --- |
| Test Case: **Team Performance → Select a Team** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | Supervisor is able to select a team from the dropdown of teams | Supervisor is able to select a team |  |

| **Test Case – 22** |
| --- |
| Test Case: **Team Performance → Change Agent Sate to Ready**  |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor is able to select a team from the dropdown of Teams |  |  |
| 4. | Agents appear for a selected team |  |  |
| 5. | Agent A in a Not Ready State |  |  |
| 6. | Supervisor selects an Agent and changes the state to Ready from state dropdown | Supervisor can change the State of an Agent to Ready |  |

| **Test Case – 23** |
| --- |
| Test Case: **Team Performance → Change Agent State to Not Ready** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor is able to select a team from the dropdown of Teams |  |  |
| 4. | Agents appear for a selected team |  |  |
| 5. | Agent A in Ready State |  |  |
| 6. | Supervisor selects an Agent and changes state to Not Ready from state dropdown | Supervisor can change the State of an Agent to Not Ready |  |

| **Test Case – 24** |
| --- |
| Test Case: **Team Performance → Silent Monitor** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor is able to select a team from the dropdown of Team |  |  |
| 4. | Agents appear for a selected team |  |  |
| 5. | Agent A in a Talking State |  |  |
| 6. | The supervisor selects an Agent row and clicks on a Silent Monitoring icon |  |  |
| 7. | The supervisor can Silently Monitor a Customer and an Agent | Supervisor can perform silent monitoring  |  |

| **Test Case – 25** |
| --- |
| Test Case: **Team Performance → BargeIn** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Silent Monitor is performed by a Supervisor  |  |  |
| 2. | Supervisor clicked on a BargeIn icon |  |  |
| 3. | Now the Agent, Supervisor, and Customer in a BargeIn state | The supervisor can perform BargeIn |  |

| **Test Case – 26** |
| --- |
| Test Case: **Team Performance → Drop Participant** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Now the Agent, Supervisor, and Customer in a BargeIn state |  |  |
| 2. | Supervisor clicks on a Drop Participant dropdown and drops the Agent from a Call | Supervisor can drop the participant from a call |  |

| **Test Case – 27** |
| --- |
| Test Case: **Team Performance → Sorting (State, Name, Time, or Extension) Ascending** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor can see the following columns for an agent* State
* Name
* Time
* Extension

Supervisor can sort them on the basis of ascending order for each column | Supervisor can sort the data of the Team on the basis of Ascending order of any of these * State
* Name
* Time
* Extension
 |  |

| **Test Case – 28** |
| --- |
| Test Case: **Team Performance → Sorting (State, Name, Time, or Extension) Descending** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor can see the following columns for an agent* State
* Name
* Time
* Extension

Supervisor can sort them on the basis of descending order for each column | Supervisor can sort the data of the Team on the basis of Descending order of any of these * State
* Name
* Time
* Extension
 |  |

| **Test Case – 29** |
| --- |
| Test Case: **Team Performance → View Logged out Agents** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor is able to select a team from the dropdown of Team |  |  |
| 4. | Agents appear for a chosen team |  |  |
| 5. | Supervisor clicks on the logged-out agents toggle button |  |  |
| 6. | Now the supervisor is able to see the Logged-Out Agents | Supervisor can View the Logged out Agents |  |

| **Test Case – 30** |
| --- |
| Test Case: **Team Performance → Logout an Agent** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Team Performance |  |  |
| 3. | The supervisor selects a team from the dropdown of Teams |  |  |
| 4. | Agents appear for a selected team |  |  |
| 5. | Agent A in a Not Ready State |  |  |
| 6. | The supervisor selects Agent A and selects the Logout option from the agent’s state dropdown | Supervisor can Log-out Agent  |  |

| **Test Case – 31** |
| --- |
| Test Case: **Queue Stats → Sorting Descending (Queue Name, Busy, LoggedIn, Number of Calls, Max Time, Ready, Not Ready, Wrapup Ready (Pending) or Wrap up Not Ready (Pending))** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Queue Stats |  |  |
| 3. | The supervisor can sort the following attributes in descending order * Queue Name
* Busy
* LoggedIn
* Number of Calls
* Max Time
* Ready
* Not Ready
* Wrapup Ready (Pending)
* Wrap up Not Ready (Pending)
 | The supervisor should sort the following attributes in descending order * Queue Name
* Busy
* LoggedIn
* Number of Calls
* Max Time
* Ready
* Not Ready
* Wrapup Ready (Pending)
* Wrap up Not Ready (Pending)
 |  |

| **Test Case – 32** |
| --- |
| Test Case: **Queue Stats → Sorting Ascending(Queue Name, Busy, LoggedIn, Number of Calls, Max Time, Ready, Not Ready, Wrapup Ready (Pending) or Wrap up Not Ready (Pending))**  |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Queue Stats |  |  |
| 3. | The supervisor can sort the following attributes in ascending order * Queue Name
* Busy
* LoggedIn
* Number of Calls
* Max Time
* Ready
* Not Ready
* Wrapup Ready (Pending)
* Wrap up Not Ready (Pending)
 | The supervisor should sort the following attributes in ascending order * Queue Name
* Busy
* LoggedIn
* Number of Calls
* Max Time
* Ready
* Not Ready
* Wrapup Ready (Pending)
* Wrap up Not Ready (Pending)
 |  |

| **Test Case – 33** |
| --- |
| Test Case: **Queue Stats → Refresh based on configurable time** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Login with a supervisor |  |  |
| 2. | Click on Queue Stats |  |  |
| 3. | Queue stats refreshed based on the time given in the configuration | Queue stats refresh based on the time given in the configuration |  |

| **Test Case – 34** |
| --- |
| Test Case: **Make Agent Not Ready** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Ready State, change the state of an Agent to any Not Ready (Reason code) | Agent State is Not Ready( Reason Code) |  |

| **Test Case – 35** |
| --- |
| Test Case: **Logout Agent** |
| Tested By: Iqra Shahid/LHR/Expertflow  |
| Date: 23/05/2023 |
| **Step No.** | **Test Case** | **Expected Output** | **Pass/fail Comment** |
| 1. | Agent in a Not Ready State |  |  |
| 2. | Select the Log out (Reason Code) from the states dropdown icon | Agent logged-out |  |