# **Playbooks for SFDC Test Plan**

# Email Template Test

| **Step** | **Action/Description** | **Expected Results** | **Actual Results** | **Pass/Fail** |
| --- | --- | --- | --- | --- |
| **Email template format**  | - Send each email template from Playbooks- Open each email in your inbox | When viewed in the recipient’s inbox, the font and size of each email is uniform and in the desired font and size. |  | P: [x] F: [ ]  |
| **Email template content quality, typos, & ease of use** | - Send each email template from Playbooks- Open each email in your inbox | Each email template is free of miss-spelled words and typographical errors. Each template is ready for use by the sales team. |  | P: [x] F: [ ]  |

# Record Import and SFDC Fields

| **Step** | **Action/Description** | **Expected Results** | **Actual Results** | **Pass/Fail** |
| --- | --- | --- | --- | --- |
| **Lead / Contact import****(one at a time)**  | -Go to a Lead or Contact in Salesforce -Open Playbooks, andgo to the Dashboard section,-Click "Add New People" -Click “Import from Salesforce" | -The green [Add to Playbooks] button shows up on the lead or contact page-The records is imported into Playbooks and assigned to a Play |  | P: [x] F: [ ]  |
| **Import multiple records from a list view or report** | -Go to Lead or Contact List View -Check off a few records -Click the green "Add to Playbooks" button -Assign it to a Play | -The green [Add to Playbooks] button shows up on the list view or report-The selected records are imported into Playbooks and assigned to a Play |  | P: [ ] F: [ ]  |
| **Playbooks fields on the Lead or Contact** | -Go to a record you imported to Playbooks-Check the fields Playbooks Play Name, Play Step, and Play Status  | The following fields populate with info automatically: 1. Playbooks Play Name
2. Playbooks Play Status
3. Playbooks Step Number
4. Playbooks Next Step Due Date
 |  | P: [x] F: [ ]  |

# Calling through Playbooks

| **Step** | **Action/Description** | **Expected Results** | **Actual Results** | **Pass/Fail** |
| --- | --- | --- | --- | --- |
| **Place a call from a Play** | -Go to a record assigned to a Play with a phone call step-Click “Dial Now” | -The Playbooks system calls user’s Agent Number-Upon picking up, it should ring the customer’s phone-The user is able to click [End], disposition the call, and click [Save]. |  | P: [x] F: [ ]  |
| **The Phone call activity ion SFDC** | -Check the Activity History in Salesforce and make sure you see a completed activity there | -A completed task should appear under the Activity History |  | P: [x] F: [ ]  |
| **Phone call activity fields** | -Click into the completed task for the phone call-Check all the Playbooks fields | The following Playbooks fields are populated: * Playbooks Step Number
* Playbooks Play Name
* Playbooks Step Type
 |  | P: [x] F: [ ]  |
| **Click-to-Call with Playbooks** | -Go to a lead record-Ensure the phone numbers to dial are hyperlinked-Click on the number | -User should be able to click on any phone number on a Lead or Contact record-ISDC system calls the user’s agent number-Call is placed to person’s phone |  | P: [x] F: [ ]  |

# Emails through Playbooks

| **Step** | **Action/Description** | **Expected Results** | **Actual Results** | **Pass/Fail** |
| --- | --- | --- | --- | --- |
| **Send an email from a Play** | -Go to a person assigned to a Play with an email step in playbooks and click send.  | - The email is sent and received successfully |  | P: [x] F: [ ]  |
| **The email Activity in SFDC** | **-**After sending an email, check the activity history in Salesforce  | -A completed task should appear under the Activity History |  | P: [x] F: [ ]  |

# Custom scenarios

| **Step** | **Action/Description** | **Expected Results** | **Actual Results** | **Pass/Fail** |
| --- | --- | --- | --- | --- |
|  |  |  |  | P: [x] F: [ ]  |
|  |  |  |  | P: [x] F: [ ]  |
|  |  |  |  |  |