# LAW FIRM MANAGEMENT SYSTEM TESTING REPORT

1. **Billing Snapshot**

- The spacing between financial amounts and their labels should be improved.
- Financial figures should be displayed clearly without overlapping.

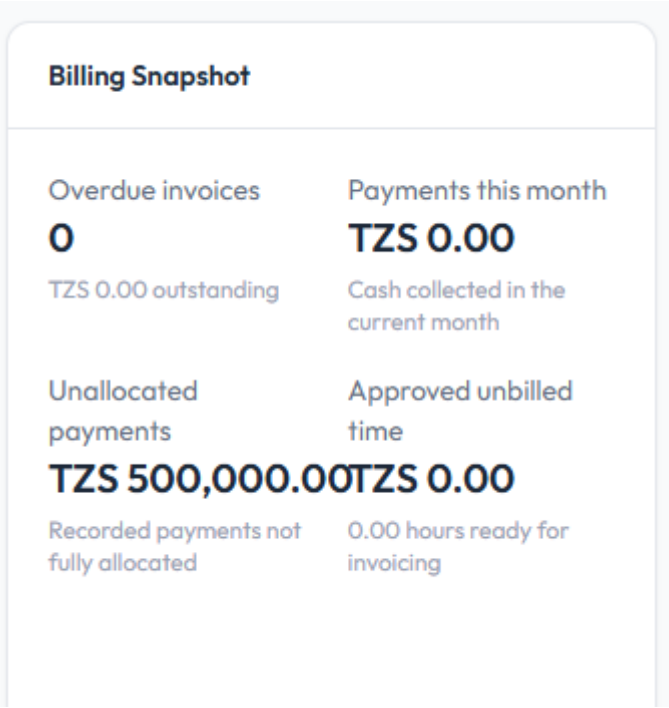



**Figure 1**

1. **Administrator dropdown menu**
    - The dropdown menu should close automatically when the user clicks outside it.
    - The dropdown menu should be positioned appropriately to avoid obstructing important dashboard information.

2. **Security**

**a) Two-Factor Authentication (2FA)**

- The system allows users to set up Two-Factor Authentication (2FA) by scanning a QR code or manually entering a setup key.
- When I manually enter the setup key and click Confirm, the system displays the error message **"The authentication code was not accepted."**

**NOTE:** In my testing, I could not see the Generate Recovery Codes option. Further testing is required to determine whether this is because 2FA has not been successfully enabled or because the option is missing from the system.

**b) Password**

The system should clearly inform users of the password requirements when creating or changing a password.

**3. Settings**

**a) Court Docket Reminder Intervals**

The field should provide a format example showing days, hours, and the deadline time to help users understand what values to enter.

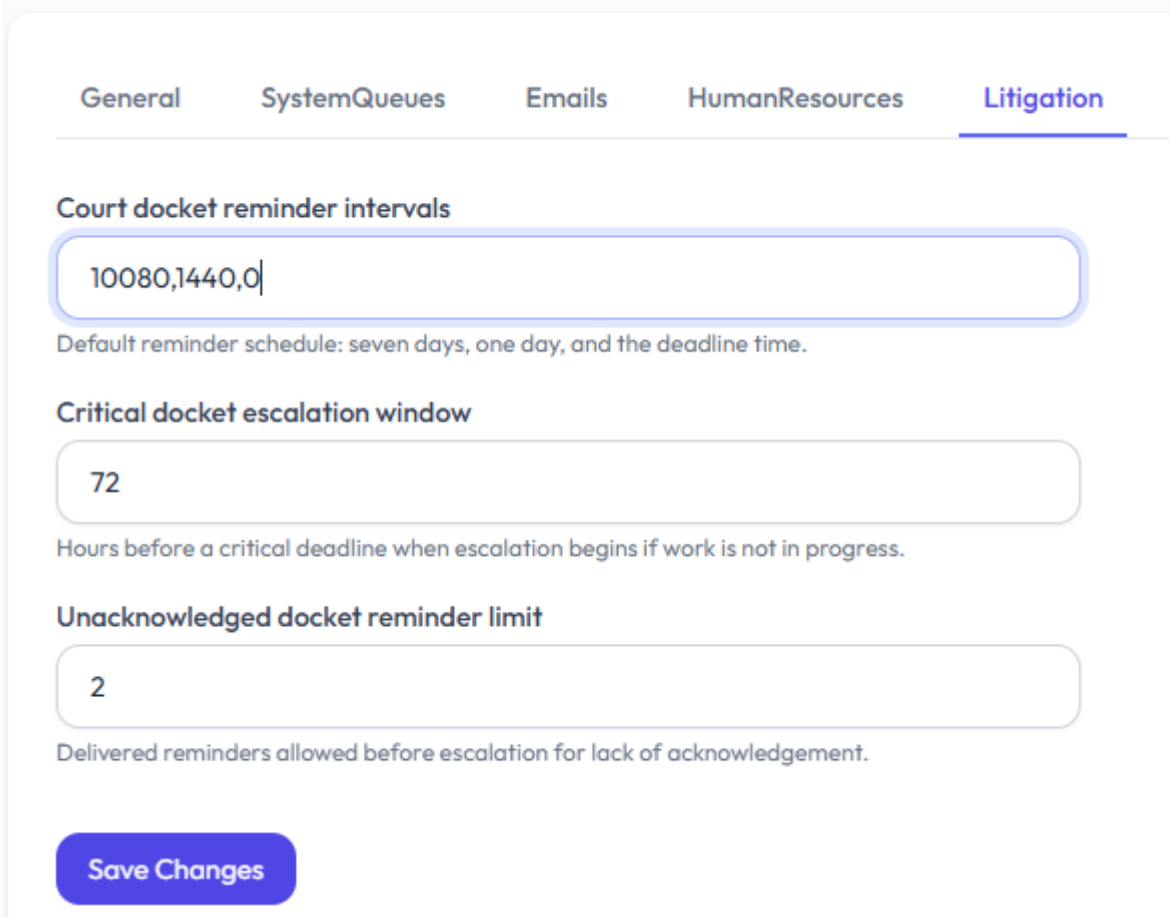



**Figure 2**

The Court Docket Reminder Intervals field should accept only valid numeric values in the required format and reject text or invalid characters. The system should also clearly indicate the expected format and explain the units used to help users enter the correct reminder intervals.

b) **Branches**

The Branch Management section works correctly. When a new branch is created and designated as the Head Office (HQ), the previously designated Head Office automatically becomes a regular branch, ensuring that only one branch is designated as the Head Office at a time.

Branch Deletion. The system prevents a branch from being deleted when users are still assigned to it, ensuring that branches with associated users cannot be deleted accidentally.

4. **Email logs, Audit logs & SMS logs**

The Email Logs, Audit Logs, and SMS Logs sections are functioning properly.

**However,** the Audit Logs export feature should provide optional export formats, allowing users to download audit logs in either CSV or PDF format.

5. **User access**

When creating a new user, the system displays a message that a temporary password has been generated, but the password is not visible, and there is no clear indication of where it can be accessed. The system should clearly display the temporary password or provide a secure way to retrieve or share it with the user.

6. **Client Portal**

The Client Portal section is functioning properly, and all its features work as expected

7. **Client intake**

The system should provide an optional field when creating a Client Intake to select an existing prospect, allowing the user to create an intake directly from a prospect's record or proceed without selecting a prospect.

8. **All matters**

The All Matters section is functioning properly

9. **Communications**

The Communications section is functioning properly and all its features work as expected.

10. **Documents**

a) **E_filling**

The E-Filing section requires a document to be attached before submission, but there is no visible option to upload or attach a document. The system should provide a clear option for users to attach the required documents before submitting an e-filing request.

b) **Documents**

The system should provide a Save option when users edit documents, allowing them to save their changes without having to upload the document again.

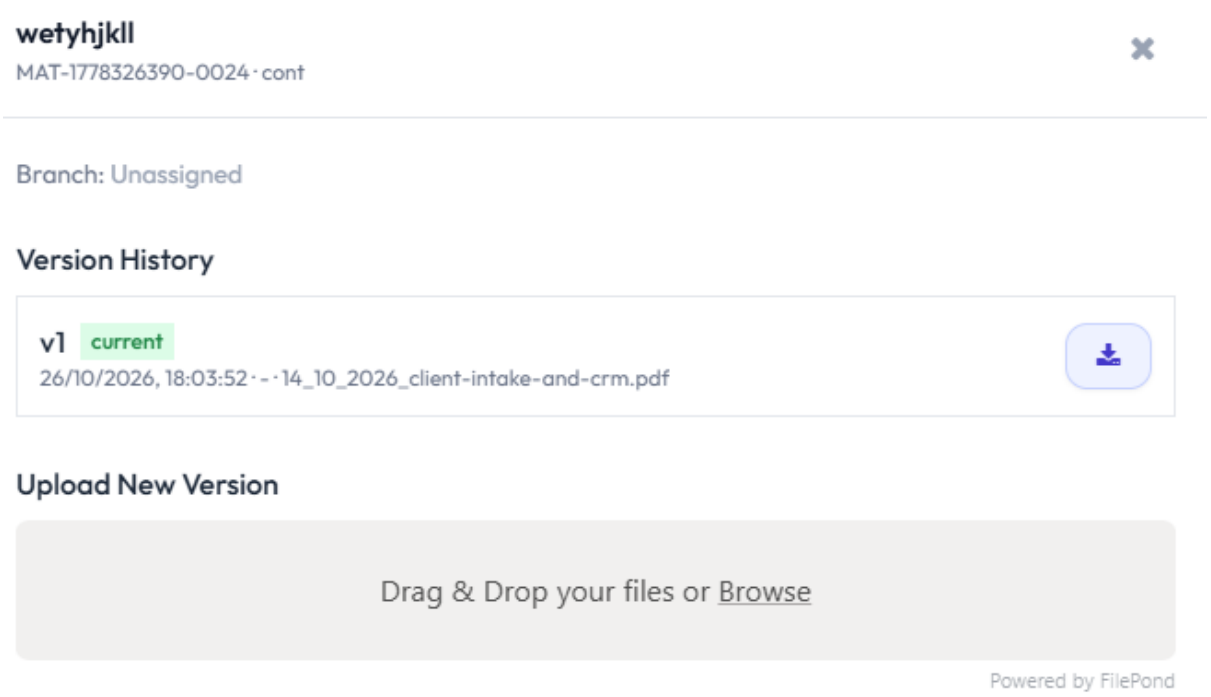



**Figure 3**

### 11. Time Tracking, Expenses, Invoices, Payments &Trust

Time Tracking, Expenses, Invoices, Payments &Trust are function properly

### 12. Reports

The Reports section does not provide options to view or download reports. The system should allow users to view generated reports and download them in the appropriate formats, such as PDF and CSV.

### 13. Calendar

The system automatically assigns attendees when creating a new calendar event, without providing an option to select the desired attendees. The system should allow users to manually select or remove attendees when creating an event, rather than assigning them automatically.

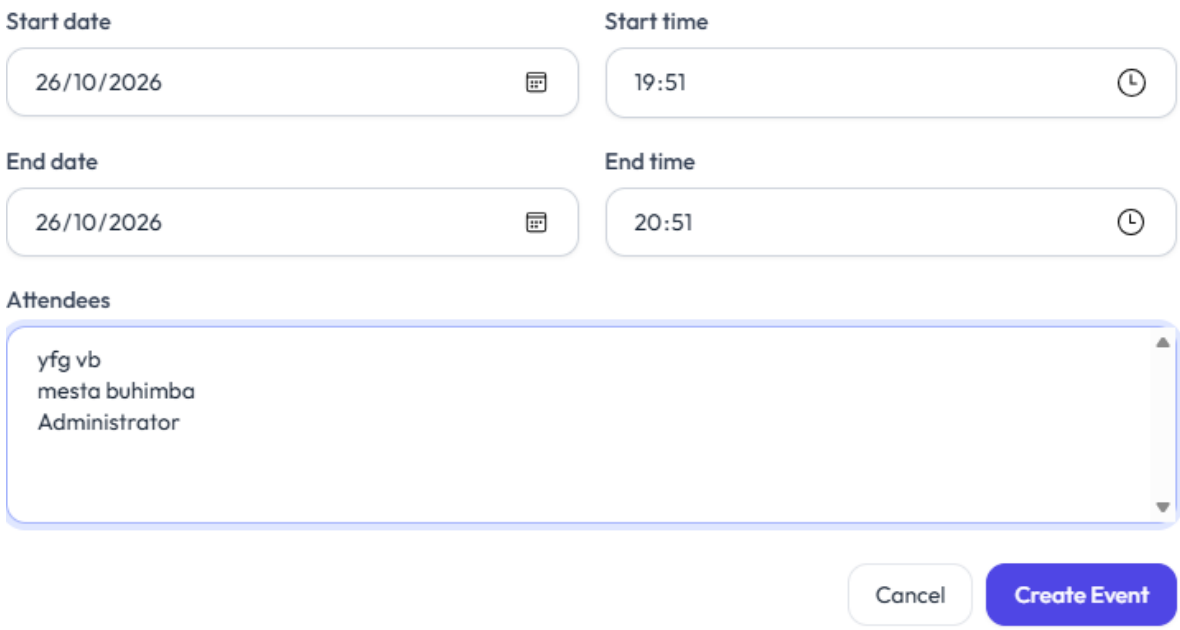



Figure 4

**14. HR and Payroll**

**a) Leave**

The system should automatically calculate and display the remaining annual leave days for each employee based on their annual leave entitlement and the number of approved leave days taken

**b) Staff**

The system should provide an optional field when creating a staff record to select an existing user account, allowing the staff record to be linked to the corresponding user account or created without selecting a user.