Test flow – Company Admin

Your role: Company Admin

You run the whole shipment: set up the company, create the quotation, approve the bid, create and dispatch the order, invoice the customer, pay the carrier, and check the reports.

> **Start:** The company admin can log in. A staff user, a customer and a carrier are registered (they log in for their own parts).
> - Use ONE test order from start to finish; the other roles in the team use the same order.
> - For every problem send: **page, what you did, what you expected, what happened, screenshot**.
> - [upload] = only works after the latest local fixes are uploaded.

Whole shipment: Setup → Lead / Customer → RFQ → Quotation → Load Board bid → Order → Dispatch → Delivery (POD) → Customer invoice → Carrier invoice → Reports

1. Setup (shipment stage 1)

Creates master data, currency rates, staff roles and users; checks the new customer and carrier registrations.

1. Log in as the company admin → **Master Manage**.
2. Add **Equipment** (2), **Mode Of Transport**, **Unit**, **Tax**, **Discount**, **Terms & Conditions**.
3. Add **Customer Type** and **Carrier Type**; check/add **Lead Source, Lead Status, Followup Status, Quote Status, Tracing Status**.
4. Set the **ID series** (Order, Quote, Lead, Customer, Carrier): prefix and start number.
5. **Currency**: set the rate for your currency → Update (needed before paying an expense).
6. Add **Expense Category**, **Vendor**, **Bank Master** (one account number cannot be used twice inside a company).
7. **HRM** → **Role List** → **Add Role**: "Sales" with some permissions, and for Users / Carriers / Expenses choose **My Data**; a second role "Manager" with **All Data**. Tick **notification view** in one role [upload].
8. **HRM** → **Add User**: a staff user with the "Sales" role (password min 8; an email already used must show an error). Check **User List**.
9. **CRM** → **Customer** and **Carrier** → **Carrier List**: the registered customer and carrier appear with the right email and phone.
10. **Carrier List** → **Edit** the carrier: set **Liability and Cargo Insurance End Dates in the FUTURE** (otherwise dispatch says "Insurance is Expired"). Save, reopen – documents are still there.

- Check: records show in lists, edit/delete work, duplicates are refused where they should be.

2. Lead and customer (shipment stage 3)

1. **CRM** → **Add Lead**: name, company, email, phone, address → Save. Also try **Bulk Upload Leads** with a small file.
2. Open the lead → add a **Follow Up** (status, date, note). Check **Follow Up Leads**, **Missed Followups**, **Quotation Leads**.
3. **CRM** → **Customer** → **Add** (or convert the lead): customer type, credit section, primary address; tick **"same as primary address"** for mailing – red errors disappear and state/city fill [upload].
4. **Customer List** → **Assign** the customer to the staff user (needed for the "My Data" test).

3. Quotation and Load Board (shipment stage 5)

1. **Quotation** → **RFQ List** → open the customer's request → **Update Quote**: set the price, tick **Admin Approved**, save (a request that is not approved goes back to the RFQ List, an approved one to the Quotation List) [upload].
2. **Quotation** → **Quotation List**: change the status badge to **Approved**. Try **Quote PDF** and **Send Email**.
3. **Quotation** → **Approved Quotation List** → Action → **Send to Load Board**.
4. **Load Board** → **Load Board List** → **Bid Limit**: it is the **maximum NUMBER of bids**; save, reopen – the saved value shows [upload]. Set the days and **Publish**.
5. Also test **Quotation** → **Create Quotation** (direct, without a customer request): customer, FTL/LTL, equipment, pickup + delivery, shipping details, charges/discount/tax, final price.
6. The **customer** approves the price (customer role); then continue below.

4. Approve the bid and create the order (shipment stage 7)

1. **Load Board** → **Carrier Bids** → open the carrier's bid → **Approve**. **Approved Bids** lists it.
2. **Load Board List** → **Action** → **Create Order** (the customer must be a real Customer) – or **Order** → **Create Order**. Check it is prefilled → Save.
3. **Order** → **Order List** and **Pending Orders** show the order.

5. Dispatch to the carrier (shipment stage 8)

1. **Order** → **Order List** → **Action** → **Dispatch**: choose the carrier you approved, equipment, carrier rate (the bid amount), truck unit, trailer unit, PAPS/PARS, driver. Picking the carrier fills **Contact**, picking the driver fills the phone.
2. Save. **Order** → **Dispatch List** shows it.

6. Delivery – what you check (shipment stage 9)

1. **Order** → **Tracing** shows the carrier's updates; **Delivered Orders** shows the POD.
2. If you tick **Send Email** on a tracing update: the customer gets the email and the carrier a separate copy [upload].

7. Customer invoice and payment (customer pays the company, stage 10)

1. **Invoice** → **Customer Invoice (A/R)** → **Invoice Not Sent**: create / preview the invoice → tick it and **Send Invoice** (moves to Receivable). The email must reach the customer.
2. **Receive Payment** – a part payment, then the rest. An amount **bigger than the invoice must be refused** [upload]. Status goes Partially Paid → Paid.
3. Check the **Paid** list, receipt and **Receivable Age**.

8. Carrier invoice and payment (company pays the carrier, stage 11)

1. **Invoice** → **Carrier Invoice (A/P)** → **Invoice not received** (delivered with POD): **Receive Invoice** (carrier invoice no. and amount).
2. **Make Payment** (part, then full; over-payment refused). Check the **Paid** list and **Payable Age**.

9. Expenses (stage 12)

1. **Expenses** → **Add Expense** (category, amount, invoice no.): a negative amount and a duplicate invoice number must be refused [upload].
2. **Add Vendor Expense**, **Expense List**, **Vendor Expense List**.
3. **Paid Expenses** → make the payment (needs the Currency rate from step 1).

10. Reports (stage 13)

1. **Reports:** Order, Invoice, Quotation, Carrier Dispatch, Expense, Commission, Profitability, Accounts Receivable / Payable, All Revenue, Profit & Loss, Bids, Tax – totals must match your test order; try the filters and dates.

11. Isolation check – the most important one (stage 14)

1. Type another company's order / invoice id in the address bar → "not found".
2. Look at the lists of the **staff user on My Data**, a **brand-new customer** and a **brand-new carrier** (they are tested in their own flows); nothing of another company may appear anywhere.

12. Notifications, Mass Email and the rest (stage 15)

1. **Admin** → **Notifications:** all company notifications with filters (For, Status, Type, dates, search) and normal Previous / Next links [upload]. A **staff** user with the permission sees it; without it "forbidden" [upload].
2. **The bell:** after reading the last notification the list shows "No new notifications" and the dot hides. Admin pages do NOT refresh the bell by themselves (on purpose).
3. **Admin** → **Mass Email** to a group that has only your own address: the campaign becomes "completed" and the email arrives.
4. **Admin** → **Order List** → **Cancel** an order, and from **Pending Orders**; **Repeat Order**; **Claim/Dispute Orders**.
5. **Settings: General Setting** (logo; foreign phone numbers are allowed); **Admin Profile**: an empty username must be refused [upload].

13. After each upload

Run `route:clear` and `view:clear` (and the migrations for the new permissions), then repeat only the steps marked [upload].

Sea Link – test flow for this role, taken from the combined software-flow document (FULL_TEST_FLOW.md). Numbers in brackets show where the step sits in the shipment.