Full test flow – one shipment from start to end (all roles)

Start: the company admin, a staff user, a customer and a carrier are already registered and can log in.

Use ONE test order from start to finish. For every problem send: page, what you did, what you expected, what happened, screenshot.

`UPLOAD` = only works after the latest local fixes are uploaded.

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1. Company Admin — Setup

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. Staff, Customer and Carrier — first look and own set-up

1. **Staff:** log in → only the menus of the role appear.
2. **Customer:** log in → **Setting** → **General Setting**: the **Customer Credit** section is view only; **Customer Type** shows the fixed types plus the company's `UPLOAD`. Dashboard shows only your data.
3. **Carrier:** log in → **Setting** → **General Setting** (Approved / Rating / Internal notes should not be editable by the carrier – tell me if they are).
4. **Carrier** → **Driver Manage** → **Add Driver**: an empty form must be refused `UPLOAD`; add a driver with name, phone, vehicle and choose Country / State / City with the search boxes `UPLOAD`. Check **Driver List**.
5. **Carrier** → **Truck Manage** → **Add Truck**; check **Truck List**.

3. Admin / Staff — Lead and customer

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).

4. Customer — Requests a shipment

1. Log in as the customer → **Quotation** → **Create RFQ** → fill the shipment details → Save. **RFQ List** shows it (Pending).
2. **Order** → **Create RFQ Order** → fill → Save. **RFQ Order List** shows it (Pending).

5. Admin — Creates the quotation

1. **Quotation** → **RFQ List** → open the 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. **Customer: Quotation** → **RFQ List / Approved Quotation List** shows the price → approve it.

6. Carrier — Quotes on the load

1. Log in as the carrier → **Load Board** → **Load Board List**: the published load appears (only this company's).
2. **Add Quote**: try empty (refused), a bid above the allowed amount (the message must NOT show the customer's price `UPLOAD`), a valid bid, and a second bid on the same load (refused).
3. **Load Board** → **All Bid** shows your bid.

7. Admin — Approves the bid and creates the order

1. **Load Board** → **Carrier Bids** → open the bid → **Approve**. **Approved Bids** lists it.
2. **Carrier:** you get a "Bid Approved" notification; **Closed Bids** shows it.
3. **Load Board List** → **Action** → **Create Order** (the customer must be a real Customer) – or **Order** → **Create Order**. Check it is prefilled → Save.
4. **Order** → **Order List** and **Pending Orders** show the order. **Customer** → **Order** → **Order List** shows it too.

8. Admin — Dispatches to the carrier

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.
3. **Carrier: Order** → **Order List** shows the order; **Assign Driver** shows driver, phone, truck, trailer, PAPS/PARS from the dispatch UPLOAD → change → Assign. **Driver Manage** → **Driver Order List** shows it.
4. **Carrier:** no customer name / email / phone / customer PO / customer price anywhere (Order List, panels, Order Report, Invoice Report) UPLOAD; Order PDF and customer invoice PDF say "not found"; **Rate Confirmation** and **BOL** open (no customer PO on the BOL).
5. **Customer: Order** → **Dispatched Orders** shows the order and no carrier details.

9. Carrier — Delivers the shipment

1. **Order** → **Tracing** → **Update Tracing** on the order: try empty (must say required).
2. Choose **Pickup** + Country / State / City + a note → Update. Reopen the popup: the last saved values show UPLOAD.
3. Repeat with **In Route**, then **Delivered** + **Proof Of Delivery** (a real PDF under 5 MB). **Order In Transit** and **Delivered Orders** (with View POD) follow.
4. Tick **Send Email** on one update: the **customer gets one email** (admin in copy); no tick = no email UPLOAD.
5. **Admin: Order** → **Tracing** shows the same updates; **Delivered Orders** shows the POD. If the admin ticks Send Email: the customer gets the email and the carrier a separate copy UPLOAD.
6. **Customer: Order** → **Delivered Orders**, tracing history, POD; the "Order delivered" notification.

10. Admin — Customer invoice and payment (Customer pays the company)

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. **Customer: Invoice** → **Unpaid Invoice List** shows the invoice; open the PDF; amounts match.
3. **Admin: Receive Payment** – a part payment, then the rest. An amount **bigger than the invoice must be refused** UPLOAD. Status goes Partially Paid → Paid.
4. **Customer: Invoice** → **Paid Invoice Orders** and **Order** → **Paid Orders** show it.
5. **Admin:** check the **Paid** list, receipt and **Receivable Age**.

11. Admin — Carrier invoice and payment (Company pays the carrier)

1. **Invoice** → **Carrier Invoice (A/P)** → **Invoice not received** (delivered with POD): **Receive Invoice** (carrier invoice no. and amount).
2. **Carrier: Invoice & Payments** → **Unpaid Invoice List** shows your invoice.
3. **Admin: Make Payment** (part, then full; over-payment refused). Check the **Paid** list and **Payable Age**.
4. **Carrier: Paid Invoice Orders**, **Order** → **Paid Orders** and **Report** → **Invoice Report** agree.

12. Admin / Staff — Expenses

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).

13. Admin — Reports (and the portal reports)

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.
2. **Customer:** Order Report and Invoice Report. **Carrier: Report** → Order, Bids, Invoice, Driver Report. Each shows only its own data; the carrier sees no customer details.

14. Isolation check (the most important one)

1. **Staff on My Data:** dashboard, every list, every filter drop-down, grouped payments and Closed Bids show ONLY the customers assigned to the staff user; an order the admin created for his customer appears for him.
2. **A brand-new customer / carrier with no data:** dashboard and every list are empty; nothing from other companies.
3. **Carrier:** Delivered Orders and Load Board show only your companies. **Customer:** no carrier details.
4. Type another company's order / invoice id in the address bar → "not found".

15. Notifications, Mass Email and the rest

1. **Admin** → **Notifications:** all company notifications with filters (For, Status, Type, dates, search) and normal Previous / Next links UPLOAD. **Staff** 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). **Customer / Carrier:** the bell updates by its own background check; the page never reloads.
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**. **Customer:** the cancelled order shows as cancelled.
5. **Settings:** Admin **General Setting** (logo; foreign phone numbers are allowed); **Admin Profile**: an empty username must be refused UPLOAD. **Customer / Carrier:** Profile and **Agreement** pages open.

16. After each upload

Run `route:clear` and `view:clear` (and the migration for the notification permission), then repeat only the steps marked UPLOAD.