

Testing the followup system

1. choose a test crm customer which has a valid email
2. Set the status to Quote Sent.

The screenshot shows the 'Customer Details' form. The 'Status' dropdown is set to 'Quote sent'. The 'last_status_change_date' field is set to '22/01/2019'. Other fields include 'First Name *' (Manuel), 'Surname *' (Greenwood), 'Company name', 'Address 1', 'Town/City', 'Postcode', and 'Phone numbers *' (test2).

3. Set the Last Status change date to more than 7 days ago.
4. Save

5. go to the follow ups page
6. Find the test crm customer you just altered
7. tick the checkbox for this single crm customer, then click the process follow ups button

The screenshot shows the 'Viewing Follow ups' page. The 'Process Follow ups' button is circled in red. The table below lists customer follow-up records. The row for 'Manuel Greenwood' is highlighted with a red line, and its checkbox is checked. A red arrow points to the checkbox.

Customer	Last status change	Last Update	Current Status	Send 7 day follow up to Quote Sent	Send 7 day follow up to More Info	Open
Lieni Georgiou			Quote sent	<input type="checkbox"/>	<input type="checkbox"/>	open
Samantha Gibbs	00:00 08-01-19	11:14 08-01-19	Quote sent	<input type="checkbox"/>	<input type="checkbox"/>	open
Jennifer Gicquel	00:00 23-01-19	12:07 23-01-19	More information requested	<input type="checkbox"/>	<input type="checkbox"/>	open
David Giles	00:00 08-01-19	11:14 08-01-19	Quote sent	<input type="checkbox"/>	<input type="checkbox"/>	open
Tim Grady	00:00 08-01-19	11:14 08-01-19	Quote sent	<input type="checkbox"/>	<input type="checkbox"/>	open
Kev Gray	00:00 08-01-19	11:14 08-01-19	Quote sent	<input type="checkbox"/>	<input type="checkbox"/>	open
Manuel Greenwood	00:00 22-01-19	09:57 30-01-19	Quote sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	open
Ian Griffith	00:00 08-01-19	11:14 08-01-19	Quote sent	<input type="checkbox"/>	<input type="checkbox"/>	open
Jocelyn Gronow	00:00 07-01-19	10:42 07-01-19	More information requested	<input type="checkbox"/>	<input type="checkbox"/>	open

8. Within 5-6 minutes the email address associated with this crm customer will receive the "automated quote sent 7 day" email