**OfficeRnD User Testing Recommended Steps**

## **Company/Member Management**

### **Adding Companies**

* + 1. Add a dummy company.
    2. Fill out all details, including billing information.

### **Adding Members**

* + 1. Add members to your dummy company.
       1. Make sure to add a Contact Person and a Billing Person (preferably two separate members).
    2. Add a freelancer member.

## **Contract Management**

### **Add a contract agreement to your dummy company**

* + 1. Make sure to verify contract length, notice period, including resources and steps, addendums where applicable, etc.

### **Test out the contract signing process**

* + 1. Send the contract out for E-signature.
    2. Sign the contract on behalf of the company.
    3. Sign the contract on behalf of The Brew.
    4. Check if the contract was activated successfully.
    5. Under the company profile, review the memberships that were created and check if they match the details outlined in the contract.

### **Terminate a contract**

* + 1. Make sure you are familiar with the contract termination process.

### **Test out contract Renewal Flows**

## **Booking/Fee Management**

### **Booking Management**

* + 1. Create a booking on behalf of the dummy company you created.
    2. Check to see if Credits are properly used based on the available credits from the customer’s office membership.
    3. Create a booking without using credits (reserve a resource for a customer that doesn’t have available credits).
    4. Review the company profile to find the booking fee generated for the booking.

### **Fee Management**

* + 1. Add an ad-hoc fee to a customer profile.

## **Occupancy Testing (to be done after inventory training).**

* 1. Add a new test Office.
  2. Add a new test desk.
  3. Make an office unavailable through its Available From/To dates.
  4. Assign a customer to an office/desk (either through a contract or through a regular membership).
  5. Unassign a customer from a specific office.
  6. Relocate a customer.

## **User Experience Testing**

* 1. Invite your Freelancer and Company Members to the Member Portal
  2. Log-in as the contact person for a company.
     1. Review available information under Account -> Company/Personal
     2. Reserve a meeting room through the Member Portal
     3. Submit a ticket as a member through the Member Portal
        1. Make sure the ticket is assigned to the correct person
        2. Respond to the ticket as an admin
        3. Close out the ticket.
        4. **Admin Community Management (optional)**

### **Add a post to the member portal**

### **Send a message to all members (send as e-mail)**

### **Add event examples**

## **Invoice Testing**

### **Issue Invoices for a customer**

* + 1. Review line items, taxes, unit prices and quantities on the invoice.
    2. Review Invoice Period.
       1. Test out issuing invoices for different periods.
    3. Add and Send the Invoice
       1. **Note: we might need to use ORND’s default invoice PDF in the test instance, as it is not connected to Quickbooks.**
    4. Make sure the invoice is received by the customer.

### **Managing Invoices**

* + 1. Manually charge an invoice (unless a test Stripe account is connected)**.**
    2. Test out Voiding an invoice.
       1. Detaching line items from an invoice.