TEST REPORT · USER ACCEPTANCE TESTING

ACCEPTED WITH 2 KNOWN ISSUES

UAT · Acme Ledger 4.1

Test cycle	ACME-TE-38 (Xray) · UAT 4.1 · 98 cases
Scope	8 feature areas · 7 epics
Environment	Staging, synthetic customer data
Execution period	22 Sep 2026 – 24 Sep 2026
Business testers	Marta (Finance), Piotr (Finance), Jonas (Support), Aisha (Support), Elif (Controlling)
Coordinated by	Tomasz Kordiak (QA lead)
Report date	24 Sep 2026, data as of 15:30

Contents

1. Summary
2. Results overview
3. Acceptance criteria
4. Defects
5. Observations
6. Results by feature area
7. Results by tester
8. Triage of reports
9. Failed and blocked cases
10. A case as the tester saw it
11. All test cases
12. Acceptance

Summary

Five business testers ran 98 UAT cases written from the 4.1 tickets in plain English, each with starting data and an expected result in their own vocabulary. 95 passed, 2 failed and 1 was blocked.

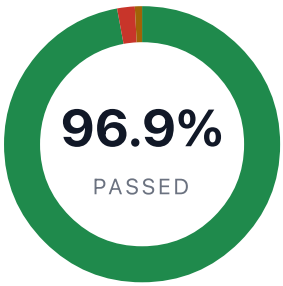
Both failures are accepted as known issues with a workaround: invoices scheduled for the 31st (ACME-398) and the year revenue report with December credit notes (ACME-401). Both are fixed in 4.1.1. A High defect found by Support — the portal charging a card three times when paying three invoices — was fixed and retested during UAT.

How the cycle was run

Each tester got their own cases in Xray, a 20-minute walkthrough and a test account with their real role.

Every report was triaged by QA before becoming a Jira bug: 23 reports → 8 bugs, 6 test data issues, 9 questions answered.

Results overview



98	95	2
Test cases	Passed	Failed
1	**3**	**4**
Blocked	Passed on retest	Open or deferred defects

Issuing invoices	20/20
Recurring invoices	11/12 · **1 failed**
Payment reminders	12/12
Credit notes	8/8
Payments	12/12
Month-end reports	11/12 · **1 failed**
Customer portal	11/12 · 1 skipped
Customers	10/10

Acceptance criteria

CRITERION	TARGET	ACTUAL	MET
All UAT cases executed	100%	97/98 (1 blocked by deployment)	Partly
No open Critical/High defect without a workaround	0	0 (ACME-398 has a workaround)	Yes
Each feature area accepted by its business owner	8 of 8	8 of 8	Yes
Every result has evidence	100%	100%	Yes
Known issues communicated to customers	Before release	Help article drafted	Yes

Defects 8 from UAT

SEVERITY	FIXED	DEFERRED	OPEN	TOTAL
High	1	1	–	**2**
Medium	1	1	1	**3**
Low	2	1	–	**3**
Total	**4**	**3**	**1**	**8**

KEY	SUMMARY	SEVERITY	STATUS	COMPONENT	FOUND BY	OWNER	CREATED
ACME-398	Recurring invoice on the 31st not created in 30-day months Workaround: 'last day of month'. Fix in 4.1.1.	High	Deferred	Recurring	UAT-024	Backend	22 Sep
ACME-401	Year revenue report doesn't subtract credit notes issued in December Controlling accepts for 4.1; fix in 4.1.1.	Medium	Deferred	Reports	UAT-071	Backend	23 Sep
ACME-399	German reminder falls back to English for the subject line	Low	Fixed	Reminders	UAT-041	Backend	22 Sep
ACME-403	Paying three invoices at once charges the card three times Found by Support; fixed same day.	High	Fixed	Customer portal	UAT-080	Frontend	22 Sep

KEY	SUMMARY	SEVERITY	STATUS	COMPONENT	FOUND BY	OWNER	CREATED
ACME-404	Bank CSV with semicolons rejected	Medium	Fixed	Payments	UAT-060	Backend	23 Sep
ACME-405	Portal question form missing on staging	Medium	Open	Deployment	UAT-085	Platform	23 Sep
ACME-406	Credit note PDF title says 'Invoice' in French	Low	Fixed	PDF	–	Backend	23 Sep
ACME-407	Customer export has no column for tags	Low	Deferred	Customers	–	Backend	24 Sep

Observations

ID	AREA	OBSERVATION	IMPACT	SUGGESTED ACTION
OBS-01	Process	Testers asked 9 questions in the UAT channel; 7 were about where to find a setting.	UX	Pass to product; see the usability report.
OBS-02	Test data	6 reports were test data issues (customers without a VAT number, an expired test card).	Effort	Add the missing data to the seed script.
OBS-03	Timing	Testers completed 96% of cases in the first two days; the last day was retests.	Positive	Keep the 3-day UAT window.
OBS-04	Evidence	Every result has a screenshot or note; 3 notes were too short to reproduce and were completed in a 5-minute call.	Low	Add an example note to the instructions.
OBS-05	Wording	Finance testers call credit notes 'corrections'; the app says 'credit note'.	UX	Consider a help text; no change required.

Results by feature area

FEATURE AREA	EPIC	CASES	PASSED	FAILED	BLOCKED	STATUS
Issuing invoices	`ACME-380`	20	20	–	–	Accepted
Recurring invoices	`ACME-391`	12	11	1	–	Accepted with known issue
Payment reminders	`ACME-402`	12	12	–	–	Accepted
Credit notes	`ACME-380`	8	8	–	–	Accepted
Payments	`ACME-410`	12	12	–	–	Accepted
Month-end reports	`ACME-417`	12	11	1	–	Accepted with known issue
Customer portal	`ACME-420`	12	11	–	1	Accepted, 1 blocked
Customers	`ACME-425`	10	10	–	–	Accepted

Results by tester

TESTER	CASES	PASSED	FAILED	BLOCKED	TIME SPENT
Marta (Finance)	28	27	1	–	6.5 h
Piotr (Finance)	24	24	–	–	5 h
Jonas (Support)	17	16	–	1	6 h
Aisha (Support)	17	17	–	–	4.5 h
Elif (Controlling)	12	11	1	–	4 h

Triage of reports

REPORTED BY	REPORTS	BECAME BUGS	TEST DATA	QUESTIONS
Marta (Finance)	7	3	2	2
Piotr (Finance)	4	1	1	2
Jonas (Support)	6	2	2	2
Aisha (Support)	3	1	0	2
Elif (Controlling)	3	1	1	1
Total	**23**	**8**	**6**	**9**

Not every failure is a bug. Triaging before Jira kept the bug list short and the developers focused.

Failed and blocked cases

CASE	TITLE	TESTER	RESULT	REASON / DEFECT
`UAT-024`	Monthly invoice on the 31st	Marta (Finance)	Fail	**ACME-398**: No invoice created in 30-day months
`UAT-071`	Totals match my spreadsheet	Elif (Controlling)	Fail	**ACME-401**: Year total differs by credit notes from December
`UAT-085`	Customer sends a question about an invoice	Jonas (Support)	Blocked	**ACME-405**: Question form not deployed to staging

A case as the tester saw it

STEP	WHAT TO DO	WHAT YOU SHOULD SEE
1	Log in as `marta.uat` and open **Customers → Northwind Traders**.	The customer page with 3 open invoices.
2	Click **New invoice**, add 2 × 'Consulting day' at €800.	Net €1,600.00, VAT 23% €368.00, total €1,968.00.
3	Click **Send**.	Status changes to **Sent**; the PDF opens and shows the same totals.

STEP	WHAT TO DO	WHAT YOU SHOULD SEE
4	Open the email in the test inbox (link in the case).	The email has the PDF attached and a 'Pay now' link.
5	Take a screenshot of the PDF and attach it to the result.	Result saved with your screenshot.

No endpoints, IDs or field names. Technical checks for the same feature are in a separate technical case.

All test cases 98 cases

Issuing invoices 20 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-001	Send an invoice to a regular customer	Marta (Finance)	Pass	–
UAT-002	Send an invoice in US dollars	Piotr (Finance)	Pass	–
UAT-003	Invoice a customer in Germany (reverse charge)	Marta (Finance)	Pass	–
UAT-004	Add a discount to one line	Piotr (Finance)	Pass	–
UAT-005	Add a discount to the whole invoice	Marta (Finance)	Pass	–
UAT-006	Invoice with 30 lines	Piotr (Finance)	Pass	–
UAT-007	Change the due date	Marta (Finance)	Pass	–
UAT-008	Attach a timesheet PDF	Piotr (Finance)	Pass	–
UAT-009	Save a draft and finish it later	Marta (Finance)	Pass	–
UAT-010	Copy last month's invoice	Piotr (Finance)	Pass	–
UAT-011	Cancel an invoice sent by mistake	Marta (Finance)	Pass	–
UAT-012	Check the PDF matches the screen	Piotr (Finance)	Pass	–
UAT-013	Invoice a new customer created on the fly	Marta (Finance)	Pass	–
UAT-014	Use a product from the catalogue	Piotr (Finance)	Pass	–
UAT-015	Use a custom line without a product	Marta (Finance)	Pass	–

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-016	Check the invoice number sequence	Piotr (Finance)	Pass	–
UAT-017	Send to two email addresses	Marta (Finance)	Pass	–
UAT-018	Resend an invoice	Piotr (Finance)	Pass	–
UAT-019	Download the PDF	Marta (Finance)	Pass	–
UAT-020	See the invoice in the customer's history	Piotr (Finance)	Pass	–

Recurring invoices 12 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-021	Set up a monthly invoice	Marta (Finance)	Pass	–
UAT-022	Set up a quarterly invoice	Marta (Finance)	Pass	–
UAT-023	Set up a yearly invoice	Marta (Finance)	Pass	–
UAT-024	Monthly invoice on the 31st	Marta (Finance)	Fail	ACME-398
UAT-025	Monthly invoice on the 28th	Marta (Finance)	Pass	–
UAT-026	Stop a schedule at an end date	Marta (Finance)	Pass	–
UAT-027	Pause and resume a schedule	Marta (Finance)	Pass	–
UAT-028	Change the price for future invoices	Marta (Finance)	Pass	–
UAT-029	Check the next three dates	Marta (Finance)	Pass	–
UAT-030	Turn on automatic sending	Marta (Finance)	Pass	–
UAT-031	See schedules on the customer page	Marta (Finance)	Pass	–
UAT-032	Schedule for an archived customer stops	Marta (Finance)	Pass	–

Payment reminders 12 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-033	First reminder 3 days before due date	Jonas (Support)	Pass	–
UAT-034	Reminder on the due date	Aisha (Support)	Pass	–

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-035	Reminder 7 days overdue	Jonas (Support)	Pass	–
UAT-036	Reminder 30 days overdue	Aisha (Support)	Pass	–
UAT-037	No reminder after payment	Jonas (Support)	Pass	–
UAT-038	Customer who opted out gets nothing	Aisha (Support)	Pass	–
UAT-039	Reminder text uses our trading name	Jonas (Support)	Pass	–
UAT-040	Preview the reminder text	Aisha (Support)	Pass	–
UAT-041	Reminder in German for a German customer	Jonas (Support)	Pass (retest)	ACME-399
UAT-042	Reminder includes the PDF	Aisha (Support)	Pass	–
UAT-043	See sent reminders on the invoice	Jonas (Support)	Pass	–
UAT-044	Maximum of four reminders	Aisha (Support)	Pass	–

Credit notes 8 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-045	Credit one line of an invoice	Piotr (Finance)	Pass	–
UAT-046	Credit the whole invoice	Piotr (Finance)	Pass	–
UAT-047	Try to credit more than the invoice	Piotr (Finance)	Pass	–
UAT-048	Credit note PDF looks right	Piotr (Finance)	Pass	–
UAT-049	Customer receives the credit note	Piotr (Finance)	Pass	–
UAT-050	Balance goes down after the credit note	Piotr (Finance)	Pass	–
UAT-051	Credit note shows in the VAT report	Piotr (Finance)	Pass	–

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-052	Credit note numbering	Piotr (Finance)	Pass	–

Payments 12 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-053	Record a bank transfer	Marta (Finance)	Pass	–
UAT-054	Record a card payment	Piotr (Finance)	Pass	–
UAT-055	Record a partial payment	Marta (Finance)	Pass	–
UAT-056	Two partial payments close the invoice	Piotr (Finance)	Pass	–
UAT-057	Warning on overpayment	Marta (Finance)	Pass	–
UAT-058	Back-dated payment	Piotr (Finance)	Pass	–
UAT-059	Remove a wrong payment	Marta (Finance)	Pass	–
UAT-060	Import a bank statement CSV	Piotr (Finance)	Pass (retest)	ACME-404
UAT-061	Unknown reference goes to review	Marta (Finance)	Pass	–
UAT-062	Refund a payment	Piotr (Finance)	Pass	–
UAT-063	Partial refund	Marta (Finance)	Pass	–
UAT-064	Customer sees the refund	Piotr (Finance)	Pass	–

Month-end reports 12 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-065	Revenue for last month	Elif (Controlling)	Pass	–
UAT-066	Revenue for the quarter	Elif (Controlling)	Pass	–
UAT-067	Revenue for the year	Elif (Controlling)	Pass	–
UAT-068	Aged receivables	Elif (Controlling)	Pass	–
UAT-069	VAT summary	Elif (Controlling)	Pass	–
UAT-070	Export to Excel	Elif (Controlling)	Pass	–
UAT-071	Totals match my spreadsheet	Elif (Controlling)	Fail	ACME-401

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-072	Filter by currency	Elif (Controlling)	Pass	–
UAT-073	Credit notes reduce revenue	Elif (Controlling)	Pass	–
UAT-074	Report for a single customer	Elif (Controlling)	Pass	–
UAT-075	Scheduled report email	Elif (Controlling)	Pass	–
UAT-076	Report for a month with no invoices	Elif (Controlling)	Pass	–

Customer portal 12 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-077	Customer opens the invoice link	Jonas (Support)	Pass	–
UAT-078	Customer opens it on a phone	Aisha (Support)	Pass	–
UAT-079	Customer pays by card	Jonas (Support)	Pass	–
UAT-080	Customer pays three invoices	Aisha (Support)	Pass (retest)	ACME-403
UAT-081	Customer downloads the PDF	Jonas (Support)	Pass	–
UAT-082	Customer sees past payments	Aisha (Support)	Pass	–
UAT-083	Link stops working after 90 days	Jonas (Support)	Pass	–
UAT-084	Portal in French	Aisha (Support)	Pass	–
UAT-085	Customer sends a question about an invoice	Jonas (Support)	Blocked	ACME-405
UAT-086	Pay button disappears after payment	Aisha (Support)	Pass	–
UAT-087	Customer sees a credit note	Jonas (Support)	Pass	–

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-088	Portal shows our logo and colours	Aisha (Support)	Pass	–

Customers 10 cases

CASE	TITLE	TESTER	RESULT	DEFECT
UAT-089	Add a company customer	Jonas (Support)	Pass	–
UAT-090	Add an individual customer	Aisha (Support)	Pass	–
UAT-091	Check a VAT number	Jonas (Support)	Pass	–
UAT-092	Edit a customer's address	Aisha (Support)	Pass	–
UAT-093	Archive a customer	Jonas (Support)	Pass	–
UAT-094	Find a customer by name	Aisha (Support)	Pass	–
UAT-095	Find a customer by VAT number	Jonas (Support)	Pass	–
UAT-096	Export customers to Excel	Aisha (Support)	Pass	–
UAT-097	Merge two duplicates	Jonas (Support)	Pass	–
UAT-098	See a customer's open balance	Aisha (Support)	Pass	–

Acceptance

Accepted for release

Finance, Support and Controlling accept release 4.1 on 24 Sep 2026, with ACME-398 and ACME-401 as known issues and the workarounds communicated to customers who use recurring invoices and year reports.

Finance	Support	Controlling
Marta (Acme)	**Jonas (Acme)**	**Elif (Acme)**

Sample report. Acme Ledger, its data, people and defects are fictional. Your report shows your product, your tickets and your tools.

More sample reports · Book a 15-minute call