

 Add parent /  ZM-749

Locked Account Restriction Removal

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Description

As a Administrator or Team_Lead user I want all account restrictions removed from the setup screen so I can make corrections to the Chart of Accounts off our clients with issues.

1. Locked account restrictions are removed for Administrator's and Team_Lead roles in Zoho.
2. Administrator and Team_Lead profiles can move Cash and Credit Card Accounts.
3. Administrator and Team_Lead profiles can move all locked accounts to other Ledgers.
4. Administrator and Team_Lead profiles can Delete empty locked account like a normal account.

Environment

None

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✓ Done



⚡ Actions ▾

⚙ Improve Bug

Details

Assignee  Carolyn Jules  co
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Reporter  B  d

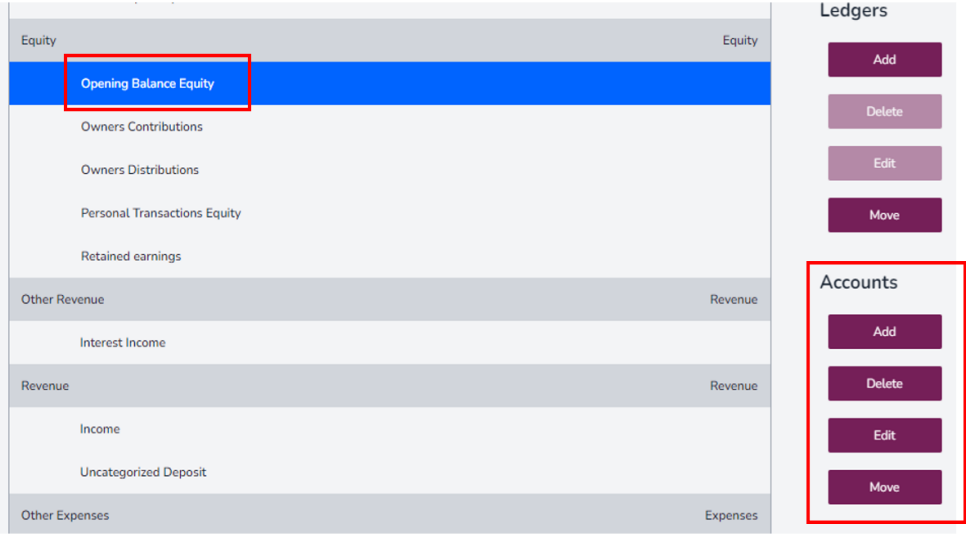
Development  [Create branch](#) ▾
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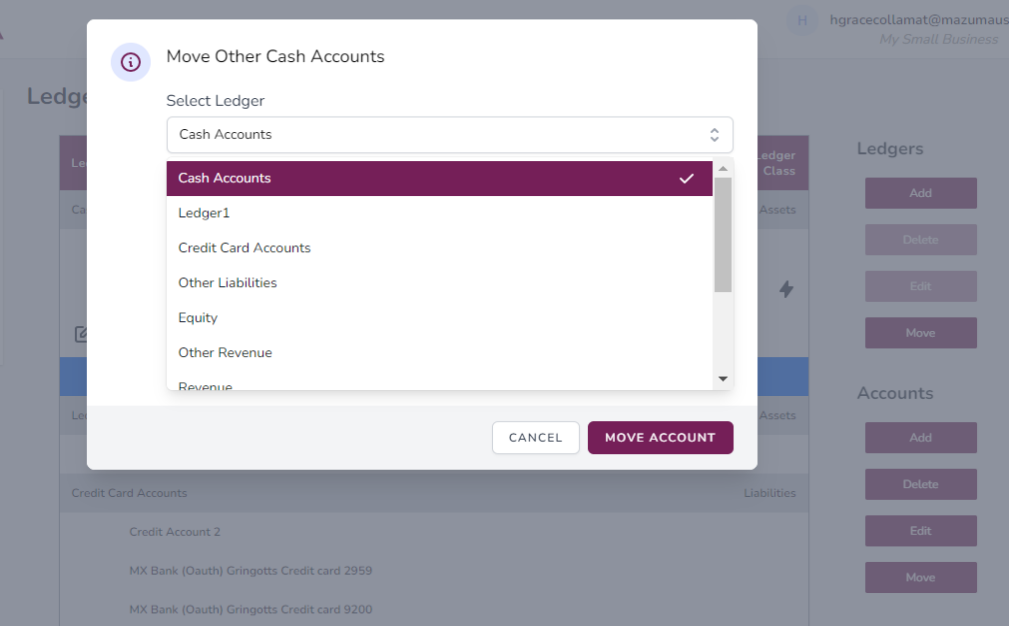
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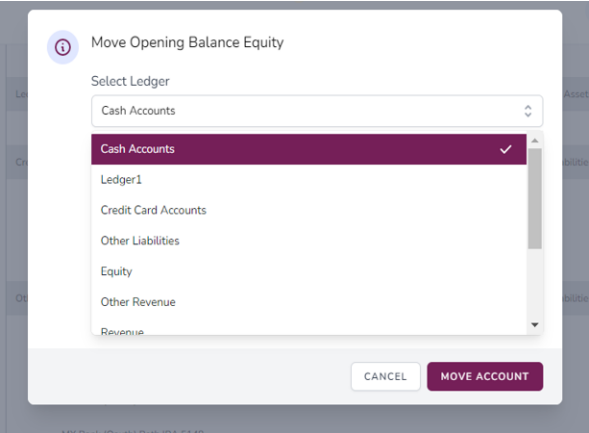
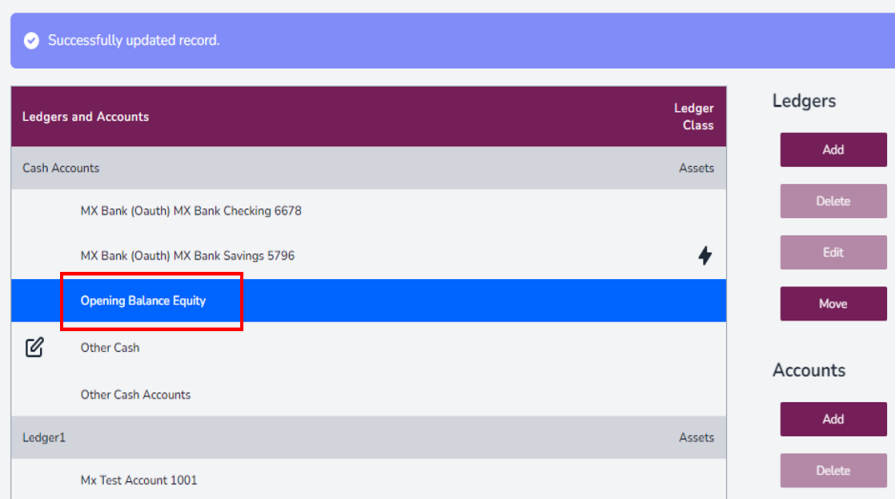
Story Points 3

Fix versions 0.5.27

Priority  Medium

USER STORY: PR#699 ZM-749 Locked Account Restriction https://mazumausa.atlassian.net/browse/ZM-749		Test Env.: Local Testing	Number of bugs:	Ticket Status: Testing
Testing Date: 2/10/2023	Estimated Time: 1 hr	Started: 6:00am	Ended: 7:00am	Actual time spent: 1hr
Objective:	This ticket aims to remove locked account restriction for Administrator and Team_Lead.			
ACCEPTANCE CRITERIA	TEST CASES	RESULT	REMARKS	STATUS
1. Locked account restrictions are removed for Administrator's and Team_Lead roles in Zoho.	<p>Login to zumbooks as a Administrator or Team_Lead. Go to Setup →Ledgers and Accounts.</p> <p>a. Select any of the locked accounts and select 'Edit', 'Move' and 'Delete':</p> <ul style="list-style-type: none">• Retained Earnings• Opening Balance Equity• Personal Transaction Equity• Uncategorized Deposit• Contract Labor• Uncategorized Expense• Unclassified	<p><i>image 1:</i></p> 	Locked restrictions are already removed for Administrators and Team_Lead	Passed

<p>2. Administrator and Team_Lead profiles can move Cash and Credit Card Accounts.</p>	<p>Select accounts under Cash or Credit Card Accounts ledger and click the 'move' button.</p>	<p><i>image 2:</i></p> 	<p>Administrator and Team_lead are able to move Cash and Credit Card Accounts.</p>	<p>Passed</p>
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<p>3. Administrator and Team_Lead profiles can move all locked accounts to other Ledgers.</p>	<p>Select a locked account and move it to other ledger. Ex. move the 'Opening Balance Equity' to Cash Accounts.</p>	<p><i>image 3:</i></p>  <p><i>image 4:</i></p> 	<p>Locked account has been successfully been moved to other ledger.</p>	<p>Passed</p>
<p>4. Administrator and Team_Lead profiles can Delete empty locked account like a</p>	<p>Select an empty locked account and click the 'delete' button.</p>	<p><i>image 5:</i></p>	<p>Empty locked account is deleted.</p>	<p>Passed</p>

normal account.

A screenshot of a web application interface showing a confirmation dialog box. The dialog box is white with a red border and contains a red warning icon (a triangle with an exclamation mark) on the left. The text inside the dialog box reads "Delete Record" followed by "Are you sure you want to delete this record?". At the bottom right of the dialog box, there are two buttons: a white "CANCEL" button and a red "DELETE RECORD" button. The background of the application is a blurred view of a ledger or account list with various entries like "Revenue", "Income", and "Uncategorized Deposit".

image 6:

A screenshot of a web application interface. At the top, there is a blue banner with a white checkmark icon and the text "Account successfully removed.". Below the banner, the main content area is divided into two sections. The left section is titled "Ledgers and Accounts" and has a dark purple header. It contains a table with two columns: "Ledgers and Accounts" and "Ledger Class". The table has several rows, including "Cash Accounts" (Assets), "MX Bank (Oauth) MX Bank Checking 6678", "MX Bank (Oauth) MX Bank Savings 5796" (with a lightning bolt icon), "Opening Balance Equity", "Other Cash" (with a pencil icon), and "Other Cash Accounts". Below this, there is a section for "Ledger1" (Assets) with a row for "Mx Test Account 1001". The right section is titled "Ledgers" and contains four buttons: "Add", "Delete", "Edit", and "Move". Below this, there is a section for "Accounts" with two buttons: "Add" and "Delete".