Agile Document

Document 1 Definition of Done –

Definition of Done is a technique where team agrees on , and predominantly displays , a list of criteria which must be met before a backlog item is considered done.

That is the team has to create a well defined , unambiguous , measurable , agreed upon , shared definition of done between all team members.

The best form of definition of Done representation is a checklist of activities that has to demonstrate the agreed value and quality of user story. So this checklist should include:

 Acceptance criteria ( to satisfy customer requirement for a product)

 Quality Criteria (to satisfy quality requirement for a product)

Definition of Done may be defined for different levels of project work. For example , in Agile/Scrum framework these level of work could be user story , sprint and release.

Checklist for DOD:

Produced code for presumed functionalities - Code adheres to coding standards Code follows best practices Code is modular and maintainable

2.Assumptions of User Story met - User Story is well-defined and understood Assumptions documented and validated

3.Project builds without errors - Build process is automated Build artifacts are versioned and tagged

4.Unit tests written and passing - Code coverage meets project standards Test cases cover edge cases and common scenarios0

5.Project deployed on the test environment identical to the production platform - Configuration consistency between environments. Data in the test environment is representative of production data

6.Tests on devices/browsers listed in the project assumptions passed - Cross-browser testing performed Compatibility with different devices and screen sizes ensured

7.Feature oked by UX designer - Design consistency across the application Usability testing conducted

8.QA performed & issues resolved Comprehensive testing, including functional, performance, and security testing All identified issues are documented and addressed.

9.Feature is tested against acceptance criteria - Acceptance criteria are clear and met Any deviations documented and justified

10.Feature ok-ed by Product Owner Product - Owner has reviewed and approved the implemented feature Any feedback or changes addressed

11.Refactoring completed - Code refactoring adheres to coding standards Refactoring improves code quality and maintainability

12.Any configuration or build changes documented Changes to configuration files documented Build process changes documented and communicated

13.Documentation updated - README files are updated User documentation is revised

14.Peer Code Review performed - Code reviews are documented Feedback addressed and acknowledged.

Document 2-Product Vision

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| Scrum Project Name | CRM |
| Venue | Mumbai |
| Date | Start Time – 01/03/2024 | End Time – 18/03/2025 | Duration – 1 Year |
| Client | HDFC Mutual Fund |
| Stake Holder List | Project Stakeholders: - BAProject manager Development team Tech expertTesting team Operations (Network, training)UI Designer | Business Stakeholders :- Project managerBusiness ownerBusiness SponsorOperation teamSubject Matter Expert | 3rd Party Stakeholders-AuditorsLegal teamOutsourceVendorManufacturer |
|  |  |  |  |
| Scrum Team |
| Scrum Master | Yash |  |  |
| Product Owner | Krishna |  |  |
| Scrum Developer 1 | Mohit |  |  |
| Scrum Developer 2 | Aniket |  |  |
| Scrum Developer 3 | Ram |  |  |
| Scrum Developer 4 | Raj |  |  |
| UI Designer | Hritik |  |  |
| Tester | Apurva |  |  |
| Business Analyst | Shubham |  |  |
| Vision | To make data available for Sales staff in mobile so they can access anytime. |
| Target GroupTo help sales staff to access data anywhere anytime | NeedsUser can access data anywhere any time so that they can make proper discussion with distributor | ProductHDFC MF sales staff to use this application so that data is available. | ValueMake data available so that sales staff can access data and make valuable discussion this will help improve market share |

Document 3 User Stories

User stories are short stories simple stories used to describe the functionality / requirements of the client from the user’s perspective . It shows the world how the User’s side is and it simplifies the requirement description.

Business Value (BV) BV is how important is this feature ( User Story) to the Business

Complexity Point ( CP)Complexity points are efforts used for the developers to write the code and the time spent for the requirement. It is rated as per the CP points known as Poker Cards.

Acceptance Criteria – While user stories aim at describing what exactly the user wants the system to do, the goal of acceptance criteria is to explain the conditions that a specific user story must satisfy.

Acceptance Criteria are the conditions that a software product must meet to be accepted by the user , a customer , or other system. They are unique for each user story and define the features behavior from the end user’s perspective and how we can achieve it.

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| --- | --- | --- |
| User Story No:1 | Tasks: 1 | Priority |
| Value Statement:AS A REGISTERED USERI WANT TO LOGIN TO MY ACCOUNTSO THAT I CAN ACCESS MY DETAILS. |
| BV:500 | CP:1 |
| Acceptance Criteria :User can enter details like User ID and Password.System validates the User ID and password.System displays an authentication code.User enters Authentication code in the mobile.System displays home page. |

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| --- | --- | --- |
| User Story No:2 | Tasks: 2 | Priority |
| Value Statement:AS A USER I WANT TO LOOK FOR MY TARGET,ACHIEVEMENT SIP SHARE EQUITY AND DEBT SHARESO THAT I CAN GET CLARITY |
| BV:20 | CP:2 |
| Acceptance Criteria :System displays dashboardUser clicks on view summary |
|  |
| User Story No:3 | Tasks: 3 | Priority |
| Value Statement:AS A USERI WANT TO LOOK FOR PARTNERS DETAILSSO THAT I CAN LOOK FOR MY MEETING AGENDA |
| BV:130 | CP:4 |
| Acceptance Criteria :User click on expansion optionSystem displays various optionUser clicks on partner button. |

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| --- | --- | --- |
| User Story No:4 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO REGISTER MY PERDSONAL VISITSSO THAT I CAN MAINTAIN THE ACTIVITY |
| BV:500 | CP:8 |
| Acceptance Criteria :User clicks on calendar button in expansion option.System displays different datesUser clicks on a date and fills fields availableUser clicks submit button. |

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| --- | --- | --- |
| User Story No:5 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO REGISTER MY TELEPHONIC VISITSSO THAT I CAN MAINTAIN THE ACTIVITY |
| BV:200 | CP:2 |
| Acceptance Criteria :User clicks on dateUser fills the detailsUser clicks selects call mode as Telephonic call |

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| --- | --- | --- |
| User Story No:6 | Tasks: 2 | Priority |
| Value Statement:As a UserI want to Login So That I can view My Dashboard |
| BV:500 | CP:4 |
| Acceptance Criteria :User enters valid user id and passwordSystem validates details and displays dashboard |

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| --- | --- | --- |
| User Story No:7 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO REGISTER MY VIRTUAL VISITSSO THAT I CAN MAINTAIN THE ACTIVITY |
| BV:140 | CP:8 |
| Acceptance Criteria :User clicks on dateUser fills the detailsUser clicks selects call mode as virtual call |

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| User Story No:8 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO ENTERS KM TRAVELLEDSO THAT I CAN CLAIM TRAVEL EXPENSE |
| BV:50 | CP:13 |
| Acceptance Criteria :User enters call details System displays summaryUser clicks on expense button. |

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| User Story No: 9 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO LOOK FOR PERFORMANCE SO THAT I CAN LOOK FOR MY AVERAGE VISITS |
| BV:200 | CP:4 |
| Acceptance Criteria :User clicks on performance tab in expansion listUser clicks on criteria he is looking for. |

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| --- | --- | --- |
| User Story No: 10 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO REGISTER JOINT CALLSO THAT I CAN UPDATE ON CALL VISIT |
| BV:200 | CP:8 |
| Acceptance Criteria :User clicks on dateUser enters details of person visitedUser clicks on joint callUser selects user which are available in joint call. |

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| User Story No: 11 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO DOWNLOAD CONVEYANCE REPORTSO THAT I CAN DOWNLOAD AND CLAIM TOTAL EXPENSE FOR THE MONTH  |
| BV:500 | CP:2 |
| Acceptance Criteria :User clicks on expense tab in expansion list .User clicks on period |

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| User Story No:12 | Tasks: 2 | Priority |
| Value Statement:AS A USERI WANT TO UPDATE CONTACT PERSON IN THE TAGGED RELATIONSO THAT WE CAN LOOK FOR UPDATED CONTACT DETAILS |
| BV:200 | CP:4 |
| Acceptance Criteria :User clicks on partners tab User enter or edits the contact person details |

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| User Story No: 13 | Tasks: 12 | Priority |
| Value Statement:AS A USER I WANT TO UPDATE CODE BELONGING TO ONE PERSON IN FAMILY CODESO THAT I CAN TRACK ALL CODES IN SINGLE CLICK |
| BV:150 | CP:13 |
| Acceptance Criteria :User clicks on partner detailsUser clicks on add parent code |

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| User Story No: 14 | Tasks: 2 | Priority |
| Value Statement:AS A USER I WANT TO LOOK FOR COMAPRISON WITH DIFFERENT COMPANYSO THAT I CAN GET WHICH PRODUCT IS IN DEMANT AND WHAT TO PITCH |
| BV:200 | CP:3 |
| Acceptance Criteria :User clicks on partner’s detailsUser clicks on industry details. |

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| User Story No:15 | Tasks: 1 | Priority |
| Value Statement:AS A USERI WANT TO ADD REMINDER FOR MEETINGSO THAT I CANNOT MISS MY COMMITMENTS |
| BV:200 | CP:6 |
| Acceptance Criteria :User clicks on calender dateUser clicks on any upcoming dateUser clicks set reminder |

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| User Story No:16 | Tasks: 2 | Priority |
| Value Statement:AS A USER I WANT SYSTEM TO RECOMMEND ME VISITSSO NO ONE GETS UN TOUCHED |
| BV:20 | CP:12 |
| Acceptance Criteria :User clicks on recommended visitsSystem displays data of mfd not visted in last 60 days |

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| --- | --- | --- |
| User Story No:17 | Tasks: 1 | Priority |
| Value Statement:AS A USER I WANT TO UPDATE LEAVES,SO THAT I CAN GET MY AVERAGE CALCULATED IN RIGHT MANNER |
| BV:150 | CP:4 |
| Acceptance Criteria :User clicks on + symbolSystem displays listUser selects leave or holiday tab  |

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| --- | --- | --- |
| User Story No:18 | Tasks: 2 | Priority |
| Value Statement:AS A USERI NEED TO UPDATE MY LEAD OR OPEN CALLSSO THAT I CAN TRACK THEM EASILY |
| BV:200 | CP:8 |
| Acceptance Criteria :User clicks on expansion tabUser clicks on prospects distributor |

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| --- | --- | --- |
| User Story No:19 | Tasks: 2 | Priority |
| Value Statement:AS A USERI NEED TO UPDATE MY LEAD OR OPEN CALLSSO THAT I CAN TRACK THEM EASILY |
| BV:100 | CP:2 |
| Acceptance Criteria :I NEED TO UPDATE MY LEAD OR OPEN CALLSSO THAT I CAN TRACK THEM EASILY |

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| User Story No:20 | Tasks: 2 | Priority |
| Value Statement:AS A USER (MANAGER)I NEED TO ACCESS DATA OF MY TEAMS SO THAT I CAN TRACK THEIR PERFORMANCE  |
| BV:500 | CP:12 |
| Acceptance Criteria :User clicks on employees dataSystem displays total branch dataUser clicks on employee name |

Document 4: Agile PO Experience

The Product Owner has a vision of the product keeping the domain/industry experience and the market need.

❖ Following are the responsibilities of PO in a project

 ➢ Market Analysis - Market analysis is a detailed assessment of your business's target market and the competitive landscape within a specifc industry. This analysis lets you project the success you can expect when you introduce your brand and its products to consumers within the market.

➢ Enterprise Analysis - Enterprise Analysis is the identification of business opportunities, development and maintenance of a business architecture, and the determination of optimum project investment. The most significant result that can come from effective enterprise analysis would be a business meeting its strategic goals

➢ Product Vision and Roadmap -“Product Vision specifes the What and Why of the product, while Product Strategy elaborates how to realize the vision with a specifc approach, and provides a roadmap showing a timeline for executing the strategy.

➢ Managing Product Features

Market research & user research.

Idea management.

Technical specifications.

Road mapping.

Prioritization.

Product development.

MVP release and customer feedback collection and iterations.

➢ Managing Product Backlog

* Review the backlog before the iteration planning meeting to ensure that the prioritization of tasks is correct and that the previous feedback has been implemented.
* When the backlog gets larger, you must categorize the backlog items intoshort-term/ near-term and long-term.
* Delete items that aren’t required and keep the ones that aren’t ready to be off the backlog.
* Do not add tasks unless planned.
* Make prioritization of the backlog tasks a priority!

➢ Managing Overall Iteration Progress

An iteration manager manages the work done by one team within an iteration, although there might be some coordination with other teams. An iteration manager helps to optimize the efficiency of the team. People on software development teams tend to like to focus on their tasks

* Set iteration goals. The future iteration's goal or a new feature may come from a user request, from the customer, or a priority order/list. ...
* Estimate user stories. ...
* Establish capacity. ...
* Planning steps – internal priority. ...
* From stories to tasks.

 From this project I have learned how to handle sprint meetings such as

* Sprint planning meeting - Which requirements to be undertaken and can be delivered withing the scrum time framework
* Daily scrum meeting - This usually lasts for less than 10 min where each team member in forms what they did and what they are working on.
* Sprint review meeting - Finished work is shown to the stakeholders, customers and or the users who provide the Feedback. Based on the response to the finished work, the product owner will add, remove or adjust prioritizes of product backlog items. (Scrum master, Product owner, development team)
* Sprint retrospective meeting - Ensure team gathers in a room and discusses the burn down chart and what went right and what went wrong
* Backlog refinement meeting- During this meeting, the product owner and the Scrum team look at the remaining product backlog items. The product owner may re-prioritize product backlog items. Scrum team members then plan a new sprint based on which item is at the top of the list.

Also, User stories creation and what things will be included in user stories such as

1.User StoryAs a [type of user],

I want [an action or feature]

So that [benefit or value]

For example:

As a website visitor,

I want to be able to reset my password,

So that I can regain access to my account.

2.Task

List of specific tasks required to complete the user story. These are the individual steps or actions that need to be taken to implement the feature.

For example: Implement "Forgot Password" button on login page

Create a secure password reset mechanism

Send conformation email to the user

3.Priority

 Indicates the importance of urgency of the user story in the context of the overall project.

Priorities are usually categorized as high, medium, or low.

For example: High priority: Critical for the next release.

Medium priority: Important but can wait for the next iteration.

Low priority: Nice to have, can be considered later

4.Acceptance Criteria

A set of conditions or criteria that must be met for the user story to be considered complete.

These criteria help ensure that the implemented feature meets the user's expectations.

For example: User receives a password reset email Clicking the reset link takes the user to a secure page

User can successfully set a new password

5.Business Value

Describes the value that the user story brings to the business or end-user.

It helps prioritize features based on their impact.

For example: High business value: Increases user engagement and satisfaction.

Medium business value: Adds a useful feature but not critical.

Low business value: Nice-to-have, minimal impact on users

6.Complexity Points

An estimation of the complexity or difficulty of implementing the user story.

 Complexity points are often used in Agile methodologies for capacity planning and sprint commitments

For example:1-3 points: Low complexity, straightforward implementation

5-8 points: Medium complexity, may require some effort

13+ points: High complexity, may involve significant challenges

In Scrum, a product owner serves as the liaison between multiple areas of an organization. This person communicates with business stakeholders and collaborates closely with Scrum teams to keep all areas of the business informed on a project's development.

The product owner develops a vision of a product's function and operation, which in turn allows this Scrum team member to define product features and break those features into product backlog items.

Document 5:

Product and sprint backlog and product and sprint burn down charts

Product backlog: A product backlog is a list of the new features, changes to existing features, bug fixes, infrastructure changes, or other activities that a team may deliver in order to achieve a specific outcome.

It should be cheap and fast to add a product backlog item to the product backlog, and it should be equally as easy to remove a product backlog item that does not result in direct progress to achieving the desired outcome or enable progress toward the outcome.

Product backlog items take a variety of formats, with user stories being the most common. The team using the product backlog determines the format they chose to use and looks to the backlog items as reminders of the aspects of a solution they may work on.

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| --- | --- | --- | --- | --- | --- | --- |
| User Story ID | User Story | Task | Priority | BV | CP | Sprint |
| US01 | AS A REGISTERED USERI WANT TO LOGIN TO MY ACCOUNTSO THAT I CAN ACCESS MY DETAILS. | Create Login UIImplement AuthenticationTest login functionality | high | 500 | 1 | 1 |
| 1US02 | AS A USERI WANT TO LOOK FOR PARTNERS DETAILSSO THAT I CAN LOOK FOR MY MEETING AGENDA | Create Partners Details UIFetch and Display Partners informationTest partners details functionality. | Medium | 130 | 2 | 1 |
| US03 | AS A USERI WANT TO REGISTER MY TELEPHONIC VISITSSO THAT I CAN MAINTAIN THE ACTIVITY | Implement the visit selection feature as telephonic.Implement query and save data. | High | 200 | 2 | 2 |
| US04 | AS A USERI WANT TO REGISTER MY VIRTUAL VISITSSO THAT I CAN MAINTAIN THE ACTIVITY | Implement the visit selection feature as Virtual.Implement query and save data. | Medium | 130 | 2 | 2 |
| US05 | AS A USERI WANT TO LOOK FOR PERFORMANCE SO THAT I CAN LOOK FOR MY AVERAGE VISITS | User Performance UI which saves visits done averaging by day.Retrive and Display visits data. | High | 200 | 2 | 1 |
| US06 | AS A USERI WANT TO REGISTER JOINT CALLSO THAT I CAN UPDATE ON CALL VISIT | Design a UI for adding multiple members Implement validation for persons data | High | 500 | 2 | 1 |
| US07 | AS A USERI WANT TO DOWNLOAD CONVEYANCE REPORTSO THAT I CAN DOWNLOAD AND CLAIM TOTAL EXPENSE FOR THE MONTH | Design a reporting systemImplement queries to retrieve relevant data | High | 500 | 2 | 2 |
| US08 | AS A USER I WANT TO UPDATE CODE BELONGING TO ONE PERSON IN FAMILY CODESO THAT I CAN TRACK ALL CODES IN SINGLE CLICK | Implement the code grouping feature.Validate and store the selected data.  | Medium | 150 | 2 | 1 |

Sprint backlog: The Sprint Backlog is composed of the Sprint Goal (why), the set of Product Backlog items selected for the Sprint (what), as well as an actionable plan for delivering the Increment(how).

The Sprint Backlog is a plan by and for the Developers. It is a highly visible, real-time picture of the work that the Developers plan to accomplish during the Sprint in order to achieve the Sprint Goal. Consequently, the Sprint Backlog is updated throughout the Sprint as more is learned. It should have enough detail that they can inspect their progress in the Daily Scrum.

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| --- | --- | --- | --- | --- | --- |
| User Story ID | User Story | Task | Owner | Status | Estimated effort |
| US01 | AS A USER I WANT TO LOOK FOR MY TARGET, ACHIEVEMENT SIP SHARE EQUITY AND DEBT SHARESO THAT I CAN GET CLARITY | Create Dashboard UIFetch and display informationTest details functionality.  | Mohit | Done | 6 |
| US02 | AS A USERI WANT TO REGISTER MY PERSONAL VISITSSO THAT I CAN MAINTAIN THE ACTIVITY | Implement the visit selection feature as Personal.Implement query and save data. | Aniket | Pending | 8 |
| US03 | AS A USERI WANT TO ENTERS KM TRAVELLEDSO THAT I CAN CLAIM TRAVEL EXPENSE | Implement the visit travelling dataImplement query and save data. | Pushkar | Done | 5 |
| US04 | AS A USERI WANT TO UPDATE CONTACT PERSON IN THE TAGGED RELATIONSO THAT WE CAN LOOK FOR UPDATED CONTACT DETAILS | Design UI for updating contact personRetrive and display contact details | Mohit | Pending | 2 |
| US05 | AS A USER I WANT TO LOOK FOR COMAPRISON WITH DIFFERENT COMPANYSO THAT I CAN GET WHICH PRODUCT IS IN DEMANT AND WHAT TO PITCH | Design UI which displays Industry and companies data.Retrive and display fund and available data | Ram | Done | 4 |
| US06 | AS A USERI NEED TO UPDATE MY LEAD OR OPEN CALLSSO THAT I CAN TRACK THEM EASILY | Design UI for updating new lead personRetrieve and display contact details | Aniket | Done | 2 |
| US07 | AS A USER I WANT SYSTEM TO RECOMMEND ME VISITSSO NO ONE GETS UN TOUCHED | Design a UI for which reminds of person not visited in last 60 days. Implement query and save data  | pushkar | Pending | 6 |
| US08 | AS A USER I WANT TO UPDATE LEAVES,SO THAT I CAN GET MY AVERAGE CALCULATED IN RIGHT MANNER | Implement the leave selection feature as Personal.Implement query and save data. | ram | Pending | 4 |
| US09 | AS A USER (MANAGER)I NEED TO ACCESS DATA OF MY TEAMS SO THAT I CAN TRACK THEIR PERFORMANCE | Implement the team display feature.Implement query and save data. | Mohit | Done | 8 |

Product burn down Chart - A product burndown chart shows how much work remains for the entire project, whereas as print burndown chart shows how much work remains in a specific iteration. A product burndown chart collects a larger amount of data.

Sprint burndown Chart It can be used to track the total work remaining in the sprint, and to project the likelihood of achieving the sprint goal. By tracking the remaining work throughout the sprint, a team can manage its progress, and respond to trends accordingly.



Document 6 - Sprint Meetings

Sprint Planning Meeting

|  |  |
| --- | --- |
| Date | 28/02/2025 |
| Time | 11.00 am to 2.00 pm |
| Location | Aurangabad, Mumbai |
| Prepared | Shubham Baheti |
| Attendees | Yash | Scrum master |
| Krishna | Product owner |
| Mohit | Dev 1 |
| Aniket | Dev 2 |
| Ram | Dev 3 |
| Pushkar | Dev 4 |
| Shubham Baheti | BA |
| Hritik | UI designer |
| Apurva | Tester |

Agenda Topic

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| --- | --- | --- |
| Topic | Presenter | Time allotted |
| Scopes | Shubham Baheti | 11.00am to 11.15am |
| Strategy and planning | SM, BA, PO | 11.15am to 11.35 |
| Resource Management | Scrum Master | 11.35am to 11.50  |
| Billing and invoices | BA | 11.50am to 12.00pm |
| GD | Product owner | 12.00 pm to 01.00pm |

Other Information

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| --- | --- |
| Observers | Tester team, SME |
| Resources | Manpower: business stakeholder from HDFC AMC, BA , developer & developer & another project teamTime: 1 yearBudget: Rs. 1crOther: Database, Internet, Past transaction History, Reports |
| Special Notes | Clients would be onboarded virtually from the legacy tool. |

Sprint Review meeting

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| --- | --- |
| Date | 12/03/2025 |
| Time | 11.00 am to 1.00 pm |
| Location | Aurangabad, Mumbai |
| Prepared | Shubham Baheti |
| Attendees | Yash | Scrum master |
| Krishna | Product owner |
| Mohit | Dev 1 |
| Aniket | Dev 2 |
| Ram | Dev 3 |
| Pushkar | Dev 4 |
| Shubham Baheti | BA |
| Hritik | UI designer |
| Apurva | Tester |

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| --- | --- | --- | --- | --- |
| Agenda | What went well | What didn’t go well | Question | Reference |
| Sprint analysis | All sprint backlog covered in time. Sign off taken for first iteration | Had issues while approval module | UAT, and unit testing has to complete | SME,PO |

Daily Stand-up meeting

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| --- | --- | --- |
| Question | Name/ Role | Week “6” from 10/03/25 to 16/03/25 |
| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
| What did you do yesterday |

|  |
| --- |
| Developer 1 |
| Developer 2 |
| Developer 3 |

 | Have worked in login page | Completed login page | Login Page completed | Completed Searching Page | Serach option completed |  |  |
| What will you do Today |

|  |
| --- |
| Developer 1 |
| Developer 2 |
| Developer 3 |

 | Have worked in login page | Recoding loging has some errors | Code on searching parners | Recoding error codes | Recording call visits option |  |  |
| What (if any) is blocking your progress? |

|  |
| --- |
| Developer 1 |
| Developer 2 |
| Developer 3 |

 | Few Bugs | No | Few bugs | Nope | Few bugs |  |  |