

Acceptance Criteria

Note: user stories with strikethroughs were removed at request of client as of 2/10/21.

User story ID	As a <ROLE>	I want to <do something>	So that <achieve some goals>	Priority	Acceptance Criteria			
					ID	Given	When	Then
US1	User	Store Customer Information	I know details about which customers I have worked with.	HIGH	AC1.1	I am on the CRM	I open the main page	I want to see my customers names listed with their progress and priority, similar to contacts on a phone.
					AC1.2	I am on the main page	I click on a customer's name	It takes me to the customer's profile page.
					AC1.3	I want to view a customer's profile	I access a customer's profile	I can see key information about them on their profile page.

					AC1.4	I am on a customer's profile	I see their key information	I see their contact info (number and email), company info, progress and priority.
					AC1.5	I am on a customer's profile	I see their key information	I can edit their key information.
US2	User	Login to CRM using password	My CRM is secure and safe.	HIGH	AC2.1	I am logging into the CRM	I log in	I want to have a password verifying my account.
					AC2.2	I have a password for the CRM	I use the password	I want my password to be encrypted (e.g., hashed).
US3	User	Search for customers	I can find any customer that I need, past or present.	HIGH	AC3.1	I am on the main page of the CRM	I want to find a customer	There is a search function on the page I can use.

					AC3.2	I am on the main page of the CRM	I use the search feature	I can find customers based on their name.
US4	User	Store Company information for customers	I get a structured view of my customers.	HIGH	AC4.1	I access a customer's profile page	I look at their profile	I can see their company information displayed.
					AC4.2	I am on a customer's profile	I see their company information	I can see the company name, location, their position and their department at the company.
					AC4.3	I am on a customer's profile	I see their company information	I can edit their company information.
US5	User	Track progress and priorities	I am able to see which areas I am lacking in and	HIGH	AC5.1	I access the main page	I look at the customers listed	I want to view their progress and their priority.

			which areas I can improve on.		AC5.2	I am on a customer's profile	I look at their profile	I can see their progress status and priority status.
					AC5.3	I am on a customer's profile	I see their progress and priority	I can edit their progress and priority statuses.
US6	User	Be able to get notifications for client contact	I am aware of which tasks I am behind on.	MEDIUM	AC6.1	I have not contacted a client for a week	It reaches a week of no update	I receive a notification on the CRM under a notification button.
					AC6.2	I receive a notification	The notification comes through	A number appears on the notification bell indicating a new notification.

					AC6.3	I want to view notifications	I click on the notification bell	It shows me a drop-down menu of notifications and when I received them, as well as deletes
US7	User	Be able to filter by progress and priority in search	I know which tasks are nearly done and which tasks need to be delivered urgently.	MEDIUM	AC7.1	I am searching on the main page	I want to know what tasks are of priority	I can use a filter selection to filter out customers based on their priority.
					AC7.2	I am searching on the main page	I want to know what tasks are at which stage of progress	I can use a filter selection to filter out customers based on their progress.

US14	User	Be able to log out of CRM	I can securely exit the CRM, preventing others from accessing it.	MEDIUM	AC14.1	I am using the CRM	I want to finish using it	I can click a logout button that will sign me out of my account and end my session.
US15	User	Create a contact	I can easily add new clients as I wish and require.	MEDIUM	AC15.1	I want to add a new client	I click on a create contact button	I am taken to a page where I can enter information to create a new contact.
					AC15.2	I create a new contact	I save the contact	It adds the contact to my CRM's database.
US16	User	Edit my information	I can change my password, name or my email if needed.	MEDIUM	AC16.1	I want to edit my name, username, email or password	I click an "edit information" button	I am taken to a page where I can edit and save that information.

					AC16.2	I edit my password	I change my password and save the new one	I am able to log in using the new password.
US8	User	Switch to dark mode	I have better readability and usability of CRM in different settings.	LOW	AC8.1 -	I am using the CRM	I wish to change the colouring from white to dark	I change a toggle that switches the entire CRM to a dark version.
US9	User	Store profile photos for customers	I can familiarise myself with my customers.	LOW	AC9.1	I am viewing my customers on their profile pages	I want to familiarise myself with them better	I can see their photo on their profile page clearly.
US10	User	Receive notifications for upcoming meeting days	I am reminded of upcoming meetings and their day & time	LOW	AC10.1	I have a meeting coming up with a client	It reaches 24 hours before the meeting	I receive a notification that reminds me I have the meeting at respective day and time.

					AC10.2 (see 6.2)			
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US11	User	Be able to get notifications for lacking progress	I am aware of which task haven't made progress.	LOW	AC11.1	I haven't changed the progress for a client for 7 days	It reaches 7 days since progress was updated	I receive a notification that informs me it has been 7 days since I changed the progress for the client.
					AC11.2 (see 6.2)	-	-	-
					AC11.3 (see 6.3)	-	-	-

US12	User	Have ordering in my CRM based on customers & their creation date, last contact date, and longest time without progress	I can keep on top of my customers and my progress with them, referring to specific dates & times	LOW	AC12.1	I am on the main page of the CRM	I want to sort/order my customers	I can select an order button that allows me to sort clients by newest created, latest contacted and longest time without progress.
US13	User	Add other users to use CRM in future	I am able to collaborate with any colleagues or coworkers that may come on board	FUTURE	-	-	-	-