

## Acceptance Criteria

Note: user stories with strikethroughs were removed at request of client as of 2/10/21. User story 12 was also modified as per client request.

| 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.   |

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|     |      |                             |   |      | 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.                                 |

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|     |      |   |  |      | 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 which | HIGH | AC5.1 | I access the main page             | I look at the customers listed  | I want to view their progress and their priority.   |

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|     |      |   | 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. |

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|     |      |  |   |        | 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.              |

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| 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.                    |

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|      |      |   |   |     | 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<br>- | 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. |

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|      |      |   |   |     | AC10.2<br>(see<br>6.2) |  |  |  |
|      |      |   |   |     | AC10.3<br>(see<br>6.3) |  |  |  |
| 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<br>(see<br>6.2) | -  | -  | -  |
|      |      |   |   |     | AC11.3<br>(see<br>6.3) | -  | -  | -  |



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| US12 | User | Have alphabetical ordering in my CRM | I can organise my customers within my CRM.                                       | 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 alphabetically by their name. |
| 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 | -      | -                                | -                                 | -   |