# User Story Creation RM Planner

1. Create a page for login (admin / RM / RMTL)
2. Create a user profile page for RM through admin
3. Mockup of Export and Upload Reports

ADMIN - ACtor 1

1. Login Page
2. Registration for RM
3. A page for uploading and downloading reports

RM:

1. Login Page
2. Notification Calendar Page
   1. 12 months with count
   2. Hover feature

Activities to consider:

* + - 1. Deposits (100 pending)
      2. Loans
      3. Birthday
      4. KYC Review

1. Notification Dashboard (Status and Audit Details)
   1. Client list (maybe sort according to status - pending, completed, etc)
2. Extract Report

RMTL:

1. Login Page
2. Same as RM functionalities
3. Dashboard - RM progress reports.
   1. Charts

MOCKUPS:

1. Login Page (common)
2. RM Profile creation

SPRINT 1:

Story 1: Mockup of login page with forgot password ?

Story 2: Mockup of RM registration

Story 3: Mockup for uploading for admin which includes validation of each field.

Story 4: Mockup for showing summary notification as a calendar page with hovering functionality

Story 5: Mockup of notification dashboard with sorting and filtering options (for each client show corresponding activity’s status).

Story 6: Mockup RMTL Dashboard with charts and RM status defined (download and dropdown for report to higher up / contact the RM).

Story 7: Decide excel sheet format which admin will upload (all the fields in the sheet)

Sprint 2:

Story 1: Create react component of login page with forgot password ?

Story 2: Create react component of RM registration

Story 3: Create react component for uploading for admin which includes validation of each field.

Story 4: Create react component for showing summary notification as a calendar page with hovering functionality

Story 5: Create react component of notification dashboard with sorting and filtering options (for each client show corresponding activity’s status).

Story 6: Create react component RMTL Dashboard with charts and RM status defined (download and dropdown for report to higher up / contact the RM).

Sprint 3:

(backend)

Story 1: Database for admin , RM , RMTL credentials

Story 2: Database for activities (with client information)

Story 3: Database for RM relation with RMTL

Story 4: Database for RM relation with client

Story 5: Database for storing Notifications (? do we need this > probably not. It can be stored into activities table? > might require for faster performance > ok)

Story 6: Database for RM progress (? do we need this > this can also be derived from activities table (story 2) > might require for faster performance > ok)

Sprint 4:

Create APIs for checking credentials of login

Create APIs for CRUD of activities status of a particular client

Create APIs for updating / creating / deleting and receiving notifications (if database exists)

Create APIs for Registering RM in the database

Create APIs for Admin uploaded information (Client activity relation / RM client relation)

Create APis for RMTL fetching of RM progress information

Sprint 5 & 6:

(Integrate personal project and then integrate with team -- final presentation)

Questions to ask

1. What login credentials for each role?
2. What security (2 factor / etc..)?
3. Mouse over showing too many notification if we consider each client’s notification.
   1. Suggestion: Just show all pending notifications with respect to the activity.
   2. And on click go to the notification dashboard which further shows each clients status and notification (maybe grouped per status)
4. RMTL functionality details apart from charts (for example triggering the RM)?
5. Do we consider separate database for client and activity or do we consider that the excel sheet will have fields that automatically fills the client in relation to the activity?