**Chhaya Patel**

**Project handover plan**

**Version <1.0>**

**Release history**

| **Date** | **Version** | **Comment** | **Author**  **(Developer)** | **Approved By**  **(TL)** |
| --- | --- | --- | --- | --- |
| 06/05/2024 | 1.0 | Release Hand Over Notes | Chhaya Patel | Mayur Salvi |
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**Project handover plan**

# **Project background**

InvestApp was developed for a client seeking a user-friendly mobile application that empowers users to manage their investment portfolios effectively.

## **1.1 Client**

1. Client : SBIMF  
 Project : InvesTap  
 Project : InvestEasy

2. Client : Medpenny

## **1.2 Purpose.**

1. InvestApp's primary purpose is to provide a comprehensive platform for users to track their investments, analyse market trends, and make informed investment decisions.  
  
2. A mobile app lets users save spare change from transactions to use for co-payments at health service providers. Health providers access a web panel to receive co-payments from users.

## **1.3 Scope**

## 1.SBIMF

* Portfolio management with customisable watchlists
* In-depth market analysis tools and technical indicators
* News and market updates for informed decision-making
* Secure account management and transaction processing

2.Medpenny

* Mobile app for individual customers to save spare change after purchases
* Use saved amount to co-pay health service providers (HSP)
* Web panel for HSPs to receive co-payments from individual customers

## **1.4 Work role**

* Software development using Swift programming language
* Integration of financial data APIs and market analysis libraries
* Implementation of UI components and user interactions
* Testing and bug resolution

# **Project description**

## **2.1 Core workflow**

InvestApp's core work flow revolves around providing users with a seamless experience for managing their investment portfolios. Users can effortlessly track, analyze market trends, make informed investment decisions, and securely manage their accounts.

## **2.2 Architecture**

1. SBIMF - MVC
2. Medpenny - MVVM

## **Work item**

1.SBIMF -

* User profile account management
* personalized portfolio tracking
* Folio creation with prefield data
* past and favorite translation

2.Medpenny

* user login journey
* dashboard handling

## **Project Team**

1.SBIMF -

* Kalpana Rane - Team Manager
* Sushant Toraskar - iOS Developer
* Shubham jaiswal - iOS Developer

2. .Medpenny

* Tanmay Khopkar - iOS Developer

# **Handover plan**

## **3.1 Handover timeline**

1.SBIMF -

Whole Handover Duration : 15 days

Handover Duration/day : 4 hour

HandOver To : Sushant Toraskar / Shubham Jaiswal

2. Medpenny

Whole Handover Duration : 7 days

Handover Duration/day : 4 hour

HandOver To : Tanmay Khopkar

## **3.2 Handover method**

Knowledge transfer done via Teams call to person Shubham Jaiswal / Sushant Toraskar/ Tanmay Khopkar

# **Notice**

## **4.1 Cooperation model**

Client Following Jira to Assign Task for developers

Daily Stand Up meeting to get the status of previous Days

## **4.2 Frequently Asked Questions**

1. About Folio Creation journey

2. About STP/SWP translation

3. About Manage profile

4. About InestEasy same code base different App  
  
**Mistakes:**

1.Prefield Folio creation implementation

2. While pod Installation. Prefer Help for old Developers

3.Git Branch Management

# **Account information**

## **5.1 Site**

Website Link :- <https://www.sbimf.com>

## **5.2 Source code**

The source code for InvestApp is maintained in a private repository. Access credentials and version control history will be provided during the handover process.

## **Resources**

Provided by client

## **App iTunes/Play Store URL**

InvesTap - <https://apps.apple.com/in/app/sbi-mutual-fund-investap/id1076080515>  
InvestEasy - <https://apps.apple.com/in/app/sbimf-investeasy/id1501155625>

# **Work Status**

## **6.1 Current Status**

1.SBIMF - On Going

2. medpenny - Completed

## **6.2 Status project on last day of contract**

Given task by iOS Lead completed. Transferred the project New developer