SBI Mitra App

Project handover plan

Version 1.0

Release history

| **Date** | **Version** | **Comment** | **Author**  **(Developer)** | **Approved By**  **(TL)** |
| --- | --- | --- | --- | --- |
| 30-04-2022 | 2.8.0 | Email, mobile validations, folio creation changes, bug fixes | Apurva Naik |  |
| 11-02-2022 | 2.7.0 | NFO changes | Apurva Naik |  |
| 04-02-2022 | 2.6.0 | Kyc bug fixes | Apurva Naik |  |
| 31-01-2022 | 2.5.0 | Mitra SIP, fingerprint plugin update | Apurva Naik |  |

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Project handover plan

# Project background

*Mitra is a digital relationship manager for State Bank of India (SBI) employees for information on SBI Mutual Funds. Mitra also helps SBI employees service customers of SBI with mutual fund investments.*

## 1.1 Client

*SBI Mutual Fund deals with the Mutual Fund Investment domain. It has multiple mobile apps and websites to handle the business. Some of the applications- SBI Mitra, Investapp, SBIMF Partner, Investeasy.*

## 1.2 Purpose

*To onboard SBI bank’s customers into Mutual funds investments, handle their portfolio, assist them in investing into schemes according to their needs.*

## 1.3 Scope

*Handling the portfolio of SBI bank customers, related applications are SBI Mitra Portal, SBIMF website.*

## 1.4 Work role

*Understanding the Business requirements given by client, handling the mobile application, converting requirements into solution in the app, coordination with services and backend team. Fixing bugs.*

# Project description

## 2.1 Core work flow

*Login- 4 Roles(Ace, BM, Controller, Mitra RM),*

*KYC module- includes In Person Kyc(EIPV) and Aadhaar Kyc.*

*Folio Creation- includes Individual, Minor, HUF, NRI*

*Transactions-includes LumpSum, SIP, Redeem, Switch, STP, SWP, Mitra SIP*

*Upload Wet Signature*

*Homepage insights- Kyc, Zero investments folio, Only 1 scheme investment folio*

## 2.2 Architecture

## Work item

*Completed the requirements given till date.*

## Project Team

*PM- Anupam Sarsar*

*Team Lead - Mitesh Mehta  
Designer- Ajay Yadav*

*Backend Developer- Hemendra Yadav, Nilam Kadam  
Graphics- Tesbin Baby, Robin Devdas*

# Handover plan

## 3.1 Handover timeline

*Whole Duration: 1 Month 20 days. The handover object : SBI Mitra App. Handover duration per day: 3 hrs . Handover taken by: Bhavesh Rao*

## 3.2 Handover method

*Recorded the handover sessions, available on Teams of Client.*

# Notice

## 4.1 Cooperation model

*Being punctual for login time, login in Peoplehum, always be active on Teams*

## 4.2 Frequently Asked Questions

# Account information

## 5.1 Site

*https://www.sbimf.com/en-us*

## 5.2 Source code

## Resources

## App iTunes/Play Store URL

*https://play.google.com/store/apps/details?id=com.app.mitra*

*https://apps.apple.com/in/app/sbi-mitra/id1129186942*

# Work Status

## 6.1 Current Status

*On Going*

## 6.2 Status project on last day of contract

*Completed the given requirements and pushed the latest code. No changes remaining.*