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2019 Spring EFEC Team

About us

EFort E-Commerce Team

This team is focused on the banking and compliance part of the project. This team will integrate with payment platforms to be able to extract money from bank accounts and deposit it into a single account to enable trading. The reverse process is also possible.

In addition, this team will build the functionality of billing customers for the platform services.

The team



Dr. Masoud Sadjadi



Rodolfo F. Marrero

About Rodolfo F. Marrero:

Experienced Chief Technology Officer with a history of working in the marketing and advertising industry. Knowledgeable in advanced programming, software development, Business Intelligence, Agile development, Database Management, Infrastructure Management, software testing, infrastructure planning and scaling, E-commerce, WordPress development, and interpersonal management.

Rodolfo is a passionate entrepreneur on his third business venture. He likes sports and a good challenge. He is persistent at being persistent, and he has a passion for music.

More on: <https://www.linkedin.com/in/rodolfo-f-marrero/>

Video Documentation

To access the video documentation produced for this project, please follow the following link:

https://www.youtube.com/playlist?list=PLG3lylzOg8Fiw_P3TPY7fPbNjKFmu5ZVT

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Sprint Documents

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Sprint 1

- [20190128 - Daily Scrum Meeting](#)
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20190128 - Daily Scrum Meeting

20190128 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#)

- What was done since the last scrum meeting?
 - I presented my feasibility study to the professor. We discussed the study and redefined the scope.
 - I was added to the new project formally. I discussed the project with the professor for about 1 hour.
- What is planned to be done until the next scrum meeting?
 - To be introduced to the rest of the team and to interact with them to get to understand what everyone will be doing.
- What are the hurdles?
 - Limited knowledge of the structure of each team, and their purpose.

20190129 - Daily Scrum Meeting

20190129 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:15 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I talked to [Gianfranco Moreno](#) today and he explained his plan of development and some of the reasons why the current technology was chosen. It seems rather arbitrary, but I don't have good arguments against it at the moment.
- What is planned to be done until the next scrum meeting?
 - Review everyone's responsibilities and backgrounds.
- What are the hurdles?

- None

20190130 - Daily Scrum Meeting

20190130 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I talked to [Avinash Jeewanij](#) just a little bit about what his team will be doing. The DB design will take place all at once. One other database was dropped from the project, so we are using a single DB now.
 - I reviewed all team's documents, although not the personal backgrounds of each. It is a large team so that will take some time.
- What is planned to be done until the next scrum meeting?
 - Review everyone's responsibilities and backgrounds.
- What are the hurdles?
 - The confluence pages for the teams are mostly lacking what they will be doing. I might be looking at the wrong space though, but linking from the main project I was unable to get an understanding of what everyone will be doing. Talking to Avinash helped me a bit on his side, and I already know what Gianfranco will be doing, but I haven't communicated with the other teams yet.
 - Everyone seems to have features planned, but nobody actually has a database design to work with. This is a big impediment. Not only that, but the data will be shared via APIs, and I don't see a single DB design anywhere. Nobody has asked what data my team needs. This is concerning.

20190131 - Daily Scrum Meeting

20190131 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I reviewed the background of half the population. The current skill level is super low. I reviewed some regulations online. I'm putting together a document on that.
- What is planned to be done until the next scrum meeting?
 - Finish reviewing regulations.
- What are the hurdles?
 - It is tricky to read some of the legal paperwork. The CFTC documents are very hard to understand in terms of organization and general navigation on their site.

20190201 - Daily Scrum Meeting

20190201 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?

- I reviewed a Basic Trading Scenario with the professor, irritated Gianfranco when questioning him on the tools we are using since he was complaining he would be the only one to be able to code everything, and finished reviewing the regulations to open a business like this in the US.
- What is planned to be done until the next scrum meeting?
 - Start learning the tech stack.
- What are the hurdles?
 - None.

Sprint 1 Retrospective Meeting

20190203 - Sprint 1 Retrospective Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 11:25 AM

End time: 11:40 AM

What went wrong?

- Did we do a good job estimating our team's velocity?
 - No. The velocity wasn't kept track of due to multiple shifts in priority and mostly research work being done.
- Did we do a good job estimating the points (time required) for each user story?
 - No. The planning wasn't done properly since the beginning due to lack of understanding of the priorities, the project, and the kind of job that was going to get done.
- Did each team member work as scheduled?
 - Yes, this wasn't a problem, but it was still insufficient to complete what was needed for this sprint. I had to drop some tasks that I had given myself and focus on what was considered important for this sprint, which was the feasibility document.

What went right?

- The feasibility document was completed, or at the very least revised. The feedback from the product owner was received fast enough to not become a problem.

How to address the issues in the next sprint?

- How to improve the process?
 - The biggest issue this sprint was the lack of understanding of the project. V1.0 of the feasibility document was created with a completely different business model in mind. For version 1.1, the whole investigation had to be done again in terms of legal structure, competition analysis, etc.
 - There was some friction between team members of the Architecture team that might not be resolved yet. Only time will tell.
 - There is doubt still as of how this team's interaction will be with other teams in terms of deliverables. This team needs to interact with the API team as well as develop a frontend section, but there is a frontend team. I'm not sure where in the project my code will exist.
 - I have no idea what other teams are doing. I reviewed their sprint documents, but it wasn't too clear what each of them were supposed to do, and what each of them were actually working on. This difficults the understanding of when things will get done, and when certain features will be available. I haven't pushed this point yet as this is the first sprint and it is not critical at this point.
 - There has been no communication with any team other than Avinash's and Gianfranco's. I'm not sure at this point if it is needed.
 - I have no understanding of where the software will live. Gianfranco mentioned the professor will have a Windows server setup somewhere, but this is still not properly documented.
- How to improve the product?
 - There is no product yet.

Sprint 1 Review Meeting

20190203 - Sprint 1 Review Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 11:20 AM

End time: 11:25 AM

After a show and tell presentation, the implementation of the following user stories were accepted by the product owners:

- User Story 1  **EFRT-215** - Review all teams responsibilities DONE
- User Story 2  **EFRT-219** - Regulation for FOREX DONE

The following ones were rejected and moved back to the product backlog to be assigned to a future sprint at a future Spring Planning meeting.

- None

Sprint 2

- 20190205 Daily Scrum Meeting
- 20190206 Daily Scrum Meeting
- 20190207 Daily Scrum Meeting
- 20190208 Daily Scrum Meeting
- 20190211 Daily Scrum Meeting
- 20190212 Daily Scrum Meeting
- 20190213 Daily Scrum Meeting
- 20190214 Daily Scrum Meeting
- 20190215 Daily Scrum Meeting
- 20190218 Daily Scrum Meeting
- Sprint 2 Planning Meeting
- Sprint 2 Retrospective Meeting
- Sprint 2 Review Meeting

20190205 Daily Scrum Meeting

20190205 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I watched all the setup videos and started downloading the software necessary to work on the project. I reviewed the existing database schema provided by Gianfranco and scheduled a meeting with Avinash and Gianfranco.
- What is planned to be done until the next scrum meeting?
 - I will start watching some tutorials to catch up with .NET Core
- What are the hurdles?
 - None

20190206 Daily Scrum Meeting

20190206 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?

- I met with Avinash and Gianfranco to discuss the creation of the database, and how to organize it. We decided that we could use Workbench just fine, as Avinash is familiar with it and Gianfranco doesn't mind installing it. I installed Visual Studio and imported the DB project. I also shared my original draft for the DB design in Bitbucket.
- What is planned to be done until the next scrum meeting?
 - Install SQL server and tools. Improve database design as discussed in the call.
- What are the hurdles?
 - None

20190207 Daily Scrum Meeting

20190207 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I enhanced the database design as discussed in our meeting the day previous. I added a couple tables to help model what Gianfranco already created. The names need to be updated to UpperCase, for tables and field names. I started the design using snake_case, but at the same time other teams were building the DB already, which lead to the discrepancy. I finished installing SQL. The dev environment is all set. I also watched a video on .NET development and got familiar with Razor.
- What is planned to be done until the next scrum meeting?
 - Learn more ASP. Do a simple ugly web page to test my knowledge.
- What are the hurdles?
 - None

20190208 Daily Scrum Meeting

20190208 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:20 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I learned ASP and C#. I also learned the EntityFramework extension. We are not using that for this project, but it was the easiest way for me to get familiar with C# since I am used to Doctrine ORM, which is the PHP equivalent of EntityFramework. I created an MVC project with three tiers, one doing just the Entity Models, one doing Services to provide the data to the controller, and another one with a full fledged C# MVC structure.
- What is planned to be done until the next scrum meeting?
 - Gain access to the Web App project, start developing Stripe's API. Implement my tables in ADO.net
- What are the hurdles?
 - The migration service is troublesome when configuring. While it mostly makes sense how it needs to be configured in hindsight, the error messages don't make a lot of sense. The tutorials I was following didn't give me a good result in some cases I tried to implement. I'm getting some errors, but I'm not sure if it is because I'm doing something wrong in terms of syntax, or if I am trying to do something impossible. Again, I was just following a tutorial.

20190211 Daily Scrum Meeting

20190211 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Gained access to the Web App project. Reviewed the code. Downloaded the Stripe .NET packages. Started implementing Stripe API.
- What is planned to be done until the next scrum meeting?
 - Continue implementing Stripe API. I'm not worrying about the user interface yet, although now I have access to the frontend to do my changes.
- What are the hurdles?
 - None

20190212 Daily Scrum Meeting

20190212 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:15 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Migrated current schemas within the local database, so my DB is up to date with Avinash's code. Worked on implementing the Stripe API.
- What is planned to be done until the next scrum meeting?
 - Continue implementing Stripe API. I should be done soon with the backend on moving money in-out of the account. The rebilling could be done from Stripe itself, so that might simplify our database a bit by not requiring a cron to do rebilling and by not needing to keep track of these things in the database.
- What are the hurdles?
 - The migration didn't work properly from Visual Studio. I figured out a way to run the code for the migration manually though. It took me a bit but that's done.

20190213 Daily Scrum Meeting

20190213 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:20 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Worked on implementing the Stripe API. I created a Paid account for a faster verification of bank accounts instead of using micro-deposits. I linked my Stripe account (used for testing purposes) with the Plaid account. This requires an actual bank account (routing and account number) to be linked with Stripe. I reviewed the Stripe webhook documentation to understand what information would be sent and where it would be sent to. I read Plaid integration documentation. I continued the development of the service interface and implementation and configured it properly from Startup.cs (refactoring what was done yesterday). The configuration parameter is on appsettings.json at the moment. This will later be refactored to an environment variable for safe keeping. Tested Stripe implementation, test was successful.
- What is planned to be done until the next scrum meeting?
 - Integrate Plaid with our system. Modify the database to include Stripe Bank Account token into the appropriate table. Create user interface for the Regular Investor to add his first bank account information and add funds to the account. Create the concept of pending funds in the database, since the funds won't be available right away to make investments with.
- What are the hurdles?
 - None. Everything went well.

20190214 Daily Scrum Meeting

20190214 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Integrated Plaid with our system. I have the frontend provided by Plaid and it is collecting the bank account info and working properly. I moved to implementing the webhook that's necessary to put all the pieces together.
- What is planned to be done until the next scrum meeting?
 - Modify the database to include Stripe Bank Account token into the appropriate table. Create user interface for the Regular Investor to add his first bank account information and add funds to the account. Create the concept of pending funds in the database, since the funds won't be available right away to make investments with. Finish implementing the webhook.
- What are the hurdles?
 - None.

20190215 Daily Scrum Meeting

20190215 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Finished implementing Plaid. Now Plaid is fully implemented and they are returning to us a Stripe Bank Account Token, which can be used to extract money from the customer's account. This required designing an API on our side, integrating with some JS code they provided, and integrating with two APIs on Plaid's side additionally.
- What is planned to be done until the next scrum meeting?
 - Modify the database to include Stripe Bank Account token into the appropriate table. Implement Stripe's API to actually transfer the money (I've been implementing the one to add the bank account so far). Create the concept of pending funds in the database, since the funds won't be available right away to make investments with. Create user interface for the Regular Investor to add his first bank account information and add funds to the account.
- What are the hurdles?
 - None.

20190218 Daily Scrum Meeting

20190218 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:20 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Modified the database to include Stripe Bank Account token into the appropriate table. Implemented Stripe's API to actually transfer the money (webhook handling is still pending). Created the concept of pending funds in the database, since the funds won't be available right away to make investments with. Created a user interface for the Regular Investor to add their bank accounts and add funds to the accounts.
- What is planned to be done until the next scrum meeting?
 - To be decided, pending on sprint planning meeting.
- What are the hurdles?
 - Doing anything in the database requires changing at least 6 files (the DB table definition, the store procedure to do the work, the DB manager that does the invocation of the store procedure, the Business object that calls the DB manager, the Entity object that represents the entry from the table, and the controller that invokes the business object. If you abstract the work from the controller to a model, that makes it 7 files [you could consider the Business Object as a model object, but whether all the logic

should live there is a bit debatable]). Now imagine refactoring a field in a table... that means modifying 6 files, plus going to the database, dropping 2-3 stored procedures (at least), and then adding 2-3 stored procedures.

Sprint 2 Planning Meeting

20190204 : Sprint 2 Planning Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 6:00 PM

End time: 6:50 PM

After discussion, the velocity of the team were estimated to be 28.

The product owner chose the following user stories to be done during the next sprint. They are ordered based on their priority.

- User Story EFRT-305 - Learn how to code in ASP.net  **EFRT-305** - Learn How to Code DONE
- User Story EFRT-304 - Setup dev environment  **EFRT-304** - Setup Dev Env DONE
- User Story EFRT-212 - Transfer funds from checking account  **EFRT-212** - Transfer Funds from Checking Account DONE

The team members indicated their willingness to work on the following user stories.

- [Rodolfo F. Marrero](#)
 -  **EFRT-305** - Learn How to Code DONE
 -  **EFRT-304** - Setup Dev Env DONE
 -  **EFRT-212** - Transfer Funds from Checking Account DONE

Sprint 2 Retrospective Meeting

20190218 - Sprint 2 Retrospective Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 11:05 PM

End time: 11:25 PM

What went wrong?

- Did we do a good job estimating our team's velocity?
 - Yes, we were able to develop at around the estimated velocity.
- Did we do a good job estimating the points (time required) for each user story?
 - No. We grossly underestimated the amount of work that goes into moving money using Stripe on our current system. The complexity of working with the database makes development much slower than it would normally be using an ORM. Refactoring tables is particularly painful.
- Did each team member work as scheduled?
 - I had to put a lot of extra work over the weekend to get the user story closer to completion; nevertheless, some stories were not completed.

What went right?

- Keeping the DB work for myself and not using the web API saved me many hours of work and communication with the external team. While this requires refactoring, it is minor and it gave me much needed flexibility. Fortunately the tables I work with are mostly only for my team's use.

How to address the issues in the next sprint?

- How to improve the process?
 - The architectural decisions have no fixing now.
 - Let's multiple any DB work x5 what it normally would take to complete to try to deal with the added complexity of the DB structure. See my stand-up document for 2/18 for details on the pains of the current DB structure.
- How to improve the product?
 - Everywhere where the User information of the logged in user was needed, an Id was hard-coded for simplicity and speed. All places are marked with @todo notation. This needs refactoring once the Web App team figures out how this is done.
 - The Stripe controller needs to be secured by a firewall. Once the Web App team figures out how to do this, this will be done.
 - The Stripe controller could be renamed to Account controller.
 - The API URL definitions of the Stripe controller, while properly annotated, are not behaving as expected and are taking the default /Controller/ViewName URL structure. This should be fixed to present a prettier API interface.
 - The API structure for Stripe lives in the Stripe controller. That's perhaps a bad idea, since an API for User for example would live under /User/api/..., this does not provide a unified URL structure for APIs. This might need restructuring.

Sprint 2 Review Meeting

20190219 - Sprint 2 Review Meeting Minutes

Attendees: [Rodolfo F. Marrero Masoud Sadjadi](#)

Start time: 8:00 PM

End time: 8:30 PM

After a show and tell presentation, the implementation of the following user stories were accepted by the product owners: All.

- User Story 304 - Setup dev environment  **EFRT-304 - Setup Dev Env** DONE
- User Story 305 - Learn how to code in C#  **EFRT-305 - Learn How to Code** DONE
- User Story 212 - Transfer Funds from Checking Account  **EFRT-212 - Transfer Funds from Checking Account** DONE

The following ones were rejected and moved back to the product backlog to be assigned to a future sprint at a future Spring Planning meeting.

- None

Sprint 3

- [20190220 Daily Scrum Meeting](#)
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20190220 Daily Scrum Meeting

20190220 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Completed the sprint planning, created all the user stories to help the product owner, investigated how to withdraw money via API using Stripe.
- What is planned to be done until the next scrum meeting?
 - Work on finishing the stripe webhook to get the "deposit money" story completed.
- What are the hurdles?
 - None.

20190221 Daily Scrum Meeting

20190221 - Daily Scrum Meeting Minutes

Attendees: Rodolfo F. Marrero

Start time: 10:00 PM

End time: 10:10 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Completed the implementation of the Deposit Money action to handle webhooks.
- What is planned to be done until the next scrum meeting?
 - Merge with the main branch. Review  **EFRT-443** - Integrate Frontend Security on Stripe Controller **DONE** and  **EFRT-444** - Fix hardcoded User Id **DONE**
- What are the hurdles?
 - Testing webhooks from a local environment is rather challenging, especially since Stripe needs HTTPS endpoints. I worked around this by installing NGROK, which provides a public URL for Local dev environments. Additionally, I created a proxy to avoid paying with NGROK, since they don't let you change the local URL unless you pay (default URL is <http://localhost>, and I needed HTTPS, plus a special port). The proxy was created using Node.

20190222 Daily Scrum Meeting

20190222 - Daily Scrum Meeting Minutes

Attendees: Rodolfo F. Marrero

Start time: 10:00 PM

End time: 10:05 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Merged the web project with feature/development. Looked into  **EFRT-443** - Integrate Frontend Security on Stripe Controller **DONE** and  **EFRT-444** - Fix hardcoded User Id **DONE** but both cannot be done at this time since the web development team have not implemented it on their project yet. I will push this to next week to see if they get to develop the template. Polished the webhooks to prevent replay attacks. Looked into how to sign the webhooks to prevent others from hitting the webhook endpoint with fake payloads.
- What is planned to be done until the next scrum meeting?
 - Migrate the to use the web API instead of calling the DB directly.
- What are the hurdles?
 - None

20190225 Daily Scrum Meeting

20190225 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Migrated the code to use the web API instead of calling the DB directly.
 - Started creating videos documenting my work so far.
 - Talked to Lianet about merging my code with hers.
- What is planned to be done until the next scrum meeting?
 - Deliver code to Lianet.
 - Continue documenting the work.
- What are the hurdles?
 - Lianet didn't have access to my fork, or I to hers. Gianfranco is looking into it.

20190226 Daily Scrum Meeting

20190226 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked with Lianet to merge my code with hers.
 - Worked with Gianfranco to get Lianet access to my code.
 - Uploaded documentation videos to Youtube
- What is planned to be done until the next scrum meeting?
 - Continue working with Lianet. Merge code with hers.
- What are the hurdles?
 - None other than getting the right access for Lianet.

20190227 Daily Scrum Meeting

20190227 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked with Lianet to merge my code with hers. My code is in conflict since I was working, per instructions from my peers, with a branch based on feature/development, while they were working on release/production.
 - Worked on collaborating with the API documentation efforts.
- What is planned to be done until the next scrum meeting?
 - Fix all the conflicts and deliver the API to Lianet.
 - Continue collaborating with the API documents.
- What are the hurdles?

- My code is not up to date since I was working on the wrong branch on the database fork. Lianet was working with her own release/production branch in her own fork, not on the base fork, thus I never got any info from that branch. Also, I never heard that I should use that branch to get the latest changes, since to me the latest changes are always on feature/development. This seems to be squared out now, but it pushed me back.

20190228 Daily Scrum Meeting

20190228 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked on collaborating with the API documentation efforts.
- What is planned to be done until the next scrum meeting?
 - Fix all the conflicts and deliver the API to Lianet.
- What are the hurdles?
 - None.

20190301 Daily Scrum Meeting

20190301 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:20 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked on collaborating with the API documentation efforts.
 - Fixed conflicts and migrated my schema to the latest version. Also, updated the latest version with my changes, as the original version was very outdated with regards to my tables.
 - Worked on implementing the Payouts API on Stripe to move money FROM the main account and INTO the investor's account. This attempt failed for this API was not intended to be used for this.
 - Implemented the Stripe Connect integration. This allows us to manage investor's accounts as Connected Accounts, thus we can transfer money to their accounts using this integration.
 - Implemented the Stripe Connect Transfer API. This allows to move money FROM our main account and INTO the investor's account.
 - Worked on the Deployment diagram to add all my resources to it.
 - Added video on why we didn't go with Zelle as a payment resource.
 - Talked to Lianet to integrate my changes to hers.
- What is planned to be done until the next scrum meeting?
 - Meet with product owner. Start sprint planning. Complete other sprint ceremonies.
- What are the hurdles?
 - The confusion with which branches are in use and on what fork things should live makes life difficult. I spent many hours merging conflicts due to miscommunication with regards to where the changes in the DB live. Also, Lianet is hunting down changes in countless branches in countless forks. This is very inefficient.

20190304 Daily Scrum Meeting

20190304 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Talked to Lianet and solved problems on the integration with the web API. My code is finally merged with the release/production branch.
 - Completed the integration and testing of the withdrawal of money from the primary account.
 - Documented the withdrawal of money.
 - Recorded and uploaded video on the setup of Stripe and Plaid.
- What is planned to be done until the next scrum meeting?
 - Meet with product owner. Start sprint planning. Complete other sprint ceremonies.
- What are the hurdles?
 - None.

Sprint 3 Planning Meeting

20190219: Sprint 3 Planning Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 8:30 PM

End time: 9:00 PM

After discussion, the velocity of the team was estimated to be 28.

The product owner chose the following user stories to be done during the next sprint. They are ordered based on their priority.

- User Story EFRT-442 - Finish Stripe webhook integration  **EFRT-442** - Finish Stripe webhook integration DONE
- User Story EFRT-443 - Integrate Frontend Security on Stripe Controller  **EFRT-443** - Integrate Frontend Security on Stripe Controller DONE
- User Story EFRT-444 - Fix hardcoded User Id  **EFRT-444** - Fix hardcoded User Id DONE
- User Story EFRT-447 - Stripe Withdrawals  **EFRT-447** - Stripe Withdrawals DONE
- User Story EFRT-445 - Migrate to web api  **EFRT-445** - Migrate to web api DONE
- User Story EFRT-446 - Stripe Controller Videos and Documentation  **EFRT-446** - Stripe Controller Videos and Documentation DONE

The team members indicated their willingness to work on the following user stories.

- [Rodolfo F. Marrero](#)
 -  **EFRT-442** - Finish Stripe webhook integration DONE
 -  **EFRT-443** - Integrate Frontend Security on Stripe Controller DONE
 -  **EFRT-444** - Fix hardcoded User Id DONE
 -  **EFRT-447** - Stripe Withdrawals DONE
 -  **EFRT-445** - Migrate to web api DONE
 -  **EFRT-446** - Stripe Controller Videos and Documentation DONE

Sprint 3 Retrospective Meeting

20190304 - Sprint 3 Retrospective Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 12:11 PM

End time: 12:25 PM

What went wrong?

- Did we do a good job estimating our team's velocity?
 - No. I got bogged down quite a bit by miscommunication on what branch was used in the DB project, and had to work many hours on fixing conflicts, adhering to new naming conventions, and change in schemas.
- Did we do a good job estimating the points (time required) for each user story?
 - Yes. This time around the issue was that I implemented the wrong API first, and I had to correct course with a different, more involved API.
- Did each team member work as scheduled?
 - I had to put a lot of extra work over the weekend to get the user story closer to completion; nevertheless, some stories were not completed. Some of the work that was scheduled was dependent on other teams (web development team) to get certain features worked out, like security. This didn't happen in time, so the work that was scheduled on that front couldn't be completed as planned.

What went right?

- The work with C# went fairly straightforward. The collaboration with Lianet went well.

How to address the issues in the next sprint?

- How to improve the process?
 - There are issues with permissions still. I have to be asking for access to files here and files there. This slows me down and puts burden in whoever is gate-keeping.
 - The work with these many forks and countless branches is mostly an unnecessary mess. I would recommend everyone working from the same place, on separate branches of course, and merging the code to unified, clearly defined branches. Creating a branch for a ticket is overkill, especially without proper cleanup afterwards. The access to the forks is a mess. I can merge my own code on my own fork as I want, but I can't create a pull request for Lianet to simply review and approve. This is very inefficient for her.
- How to improve the product?
 - Right now I'm using Stripe Connect with "Standard Accounts", which do not incur in extra cost, but do provide a less than desirable workflow for extracting money from the account (withdrawals). While this might be good business-wise, it is a terrible user experience. A more costly "Custom Account" can be created, but it incurs in extra cost, and extra compliance steps. It does provide for a fantastic, completely custom user experience which is great, but at a cost, both on the development side as well as the business side. I recommend looking into it though. Also, this won't be too bad if other payment methods are incorporated into the product as well.
 - Right now I'm incurring into a fair amount of technical debt, especially in the form of absence of comments and fairly non-standard naming convention for variables. While I'm sticking to the naming convention for methods and their parameters, the local variables are a bit all over the place. Some time should be scheduled to provide some much needed cleanup.
 - There are no unit tests being built! This software should be tested! More technical debt!
 - Many configuration params need to be moved to environmental variables. Keeping tokens in the source code is a very bad idea.

Sprint 3 Review Meeting

20190305 - Sprint 3 Review Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 8:20 PM

End time: 9:00 PM

After a show and tell presentation, the implementation of the following user stories were accepted by the product owners:

- User Story EFRT-447 Stripe Withdrawals  **EFRT-447 - Stripe Withdrawals** DONE

- User Story EFRT-446 Stripe Controller Videos and Documentation

 **EFRT-446** - Stripe Controller Videos and Documentation DONE

- User Story EFRT-445 Migrate to web API  **EFRT-445** - Migrate to web api DONE

- User Story EFRT-442 Finish Stripe webhook integration  **EFRT-442** - Finish Stripe webhook integration DONE

The following ones were rejected and moved back to the product backlog to be assigned to a future sprint at a future Spring Planning meeting.

- User Story EFRT-444 Fix hardcoded User Id  **EFRT-444** - Fix hardcoded User Id DONE (the web development team didn't complete this on their side of the web app, and this was a prerequisite to this task getting done)
- User Story EFRT-443 Integrate Frontend Security  **EFRT-443** - Integrate Frontend Security on Stripe Controller DONE (the web development team didn't complete this on their side of the web app, and this was a prerequisite to this task getting done)

Sprint 4

- [20190306 Daily Scrum Meeting](#)
- [20190311 Daily Scrum Meeting](#)
- [20190312 Daily Scrum Meeting](#)
- [20190313 Daily Scrum Meeting](#)
- [20190314 Daily Scrum Meeting](#)
- [20190315 Daily Scrum Meeting](#)
- [20190318 Daily Scrum Meeting](#)
- [Sprint 4 Planning Meeting](#)
- [Sprint 4 Retrospective Meeting](#)
- [Sprint 4 Review Meeting](#)

20190306 Daily Scrum Meeting

20190306 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 11:00 PM

End time: 11:15 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I spoke with the professor and completed the review meeting for the previous sprint, as well as the planning for this sprint.
 - I talked with Lianet with respect to a bug that she found on the bug. It turned out after an hour+ of debugging that it was just her using an old table definition on her server, thus the discrepancy in behavior between her API version and mine.
- What is planned to be done until the next scrum meeting?
 - Complete sprint ceremonies. Finish organizing work for this sprint. Start investigating EFORT's competitors.
- What are the hurdles?
 - None.

This sprint was done at a different time than usual due to an unscheduled meeting with Lianet to take care of the bug she noticed on the software I developed.

20190311 Daily Scrum Meeting

20190311 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:07 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I spoke with the professor and Lianet about a quick refactoring that's being carried out to make the DB schema cleaner.

- I started looking into Forex.com disclaimers to find out what rules apply to them.
- I created a Forex.com account and took note of all the fields they require. It seems like there is plenty of fields in there to meet our current compliance needs, including the SSN.
- What is planned to be done until the next scrum meeting?
 - Deposit money on my new Forex.com account and see what the process looks like.
 - Create an account on OANDA and look into their compliance requirements.
- What are the hurdles?
 - None.

20190312 Daily Scrum Meeting

20190312 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:15 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I funded the FOREX.com account and checked my bank. The transaction wasn't done yesterday, so I created a trade to hopefully force the ACH to show. So far no luck on the bank account.
 - I created an OANDA account and I'm working on funding it.
 - Investigated funding solutions provided by Forex.com.
- What is planned to be done until the next scrum meeting?
 - Deposit money on my new OANDA.com account and see what the process looks like.
 - Create document with my findings.
- What are the hurdles?
 - None.

20190313 Daily Scrum Meeting

20190313 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:15 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Investigated OANDA.com money movement behavior.
 - Removed money from FOREX.com.
 - Started documenting findings.
- What is planned to be done until the next scrum meeting?
 - Complete document with my findings.
 - Remove money from OANDA to analyze their withdrawal process.
- What are the hurdles?
 - None.

20190314 Daily Scrum Meeting

20190314 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Completed document on Forex.com and OANDA.com money options and movements.
 - Started investigating MQL5.com money transfer options.
- What is planned to be done until the next scrum meeting?
 - Complete documentation on MQL5.com money transfer options.
- What are the hurdles?
 - None.

20190315 Daily Scrum Meeting

20190315 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Completed investigation and documentation about MQL5.com payment solutions.
 - What is planned to be done until the next scrum meeting?
 - Start investigating Forex.com and OANDA.com APIs with respects to using those platforms for meta-brokerage from EFORT
-  **EFRT-615** - Brokerage APIs (Forex.com and OANDA) DONE
- What are the hurdles?
 - None.

20190318 Daily Scrum Meeting

20190318 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:06 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Investigated OANDA.com and FOREX.com APIs. Their APIs let us make investments on the customer's behalf, but do not let us fund their accounts.
 - Worked on refining the backlog.
 - Implemented the basic security features that were missing on the Stripe controller.
 - Removed all hardcoded values that were there waiting on the session management of the frontend to get done. Replaced those values with the correct dynamic values according to the users' fields.
- What is planned to be done until the next scrum meeting?
 - Complete the sprint retrospective, review, and meet the professor to do the planning.
- What are the hurdles?
 - None.

Sprint 4 Planning Meeting

20190305: Sprint 4 Planning Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 8:20 PM

End time: 9:00 PM

After discussion, the velocity of the team was estimated to be 14.

The product owner chose the following user stories to be done during the next sprint. They are ordered based on their priority.

- User Story EFRT-614 - Forex.com Money Transfer Audit  **EFRT-614** - Forex.com Money Transfer Audit DONE
- User Story EFRT-615 - Brokerage APIs (Forex.com and OANDA)  **EFRT-615** - Brokerage APIs (Forex.com and OANDA) DONE
- User Story EFRT-616 - Review MQL5.com Payment System (Research)  **EFRT-616** - Review MQL5.com Payment System (Research) DONE

The team members indicated their willingness to work on the following user stories.

- [Rodolfo F. Marrero](#)
 -  **EFRT-614** - Forex.com Money Transfer Audit DONE
 -  **EFRT-615** - Brokerage APIs (Forex.com and OANDA) DONE
 -  **EFRT-616** - Review MQL5.com Payment System (Research) DONE

Sprint 4 Retrospective Meeting

20190318 - Sprint 4 Retrospective Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:06 PM

End time: 10:20 PM

What went wrong?

- Did we do a good job estimating our team's velocity?
 - Yes, the work was completed in due time.
- Did we do a good job estimating the points (time required) for each user story?
 - Mostly yes. Some tasks took a bit longer, some took a bit shorter, but it balanced out nicely. We were accurate enough.
- Did each team member work as scheduled?
 - Yes, there were no scheduling problems.

What went right?

- The collaboration with Lianet went well. We are getting more familiar with the code and the structure, so we are spending less time debugging.

How to address the issues in the next sprint?

- How to improve the process?
 - Everyone seems to be developing on their own branches with their own naming convention. It is hard to make sense where the latest code is at any point.
 - Clearly refactoring schemas is a time consuming process. While this is sometimes a necessary process, it should be kept to a minimum.
- How to improve the product?
 - Time needs to be dedicated before the project is turned in for documenting the code in the form of comments.
 - There are no unit tests being built. This is a major drawback to the long term speed of future development.

- Some protections must be put in place with respects to the webhook listener. Stripe has some protections we can use, but this needs to be researched and implemented. While this doesn't add new features to the product owner, it does provide protections and peace of mind.
- Some protections need to be put in place with respects to the Stripe controller and some of the APIs being used to prevent XSS attacks.
- The API endpoint seems to be unprotected at the moment. This needs to be addressed.
- The password for users is still being saved unencrypted in the database, as well as on a cookie. This needs to be addressed by the web development team.

Sprint 4 Review Meeting

20190319 - Sprint 4 Review Meeting Minutes

Attendees: [Rodolfo F. Marrero Masoud Sadjadi](#)

Start time: 8:30 PM

End time: 9:05 PM

After a show and tell presentation, the implementation of the following user stories were accepted by the product owners:

- User Story EFRT-614 [Forex.com](#) Money Transfer Audit
- User Story EFRT-616 Review [MQL5.com](#) Payment System (Research)
- User Story EFRT-615 Brokerage APIs ([Forex.com](#) and OANDA)

Extra stories developed on this sprint:

- User Story EFRT-444 Fix hardcoded user ids
- User Story EFRT-443 Integrate Frontend Security on Stripe Controller
- User Story EFRT-617 Move "Types" from VARCHAR field to its own Table

The following ones were rejected and moved back to the product backlog to be assigned to a future sprint at a future Spring Planning meeting.

- None

Sprint 5

- [20190320 Daily Scrum Meeting](#)
- [20190321 Daily Scrum Meeting](#)
- [20190322 Daily Scrum Meeting](#)
- [20190325 Daily Scrum Meeting](#)
- [20190326 Daily Scrum Meeting](#)
- [20190327 Daily Scrum Meeting](#)
- [20190328 Daily Scrum Meeting](#)
- [20190329 Daily Scrum Meeting](#)
- [Sprint 5 Planning Meeting](#)
- [Sprint 5 Retrospective Meeting](#)
- [Sprint 5 Review Meeting](#)

20190320 Daily Scrum Meeting

20190320 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - I reviewed information about the legal requirements of opening a Forex.com-like business.
 - I collaborated with Lianet on a couple scripts and stored procedures she needed from my ACCOUNTING tables.
- What is planned to be done until the next scrum meeting?

- Continue with investigation on opening a Forex.com-like business.
- What are the hurdles?
 - None.

20190321 Daily Scrum Meeting

20190321 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Continued reviewing information about the requirements of opening a Forex.com-like business.
- What is planned to be done until the next scrum meeting?
 - Continue with the investigation.
- What are the hurdles?
 - None.

20190322 Daily Scrum Meeting

20190322 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Reviewed documentation online regarding opening a Forex.com-like business.
- What is planned to be done until the next scrum meeting?
 - Continue with the investigation.
- What are the hurdles?
 - None.

20190325 Daily Scrum Meeting

20190325 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Sent correspondence to the NFA and the CFTC asking for guidance with the regulatory requirements for the business.
 - Talked to Anna Clemens from the NFA regarding the regulatory requirements for the business. We're still discussing the details of the business and trying to find the correct legal definition for the business we are trying to conduct.
- What is planned to be done until the next scrum meeting?
 - Work with the NFA/CFTC to define the business legally.
- What are the hurdles?
 - None.

20190326 Daily Scrum Meeting

20190326 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked with Lianet to resolve some conflicts she was experiencing. Helped her install TortoiseGit and walked her through resolving her conflicts.
 - Worked with the NFA clarifying some questions regarding the business. We are still defining the best classification for the business.
- What is planned to be done until the next scrum meeting?
 - Work with the NFA/CFTC to define the business legally.
- What are the hurdles?
 - None.

20190327 Daily Scrum Meeting

20190327 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Clarified a couple definitions with the professor to ensure I was communicating with the NFA effectively. Wrote to the agency regarding further clarification, since the definitions they provided do not seem to match our business model.
 - Studied the NFA definitions again to clarify on their terminology. Worked through the options provided by the NFA to ensure I provide extra flexibility to the business from the regulatory side.
- What is planned to be done until the next scrum meeting?
 - Coordinate with the NFA to define the business from a legal standpoint.
- What are the hurdles?
 - None.

20190328 Daily Scrum Meeting

20190328 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Sent an email to a lawyer to setup a meeting and clarify some of the questions that need answers.
 - Followed up with the NFA to get clarifications.
 - Continued developing business plan.
 - Started developing business continuity plan.
- What is planned to be done until the next scrum meeting?
 - Complete business continuity plan.
 - Start developing disaster management plan, since those auxiliary documents will be needed when creating the business.
- What are the hurdles?

- None.

20190329 Daily Scrum Meeting

20190329 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Completed business continuity plan.
 - Completed disaster recovery plan.
 - Started putting together some laws that will manage the rules of the business, like TCPA, CAN-SPAM and CCPA.
 - Continue developing business plan/framework.
- What is planned to be done until the next scrum meeting?
 - Continue works on the business framework.
- What are the hurdles?
 - None.

Sprint 5 Planning Meeting

20190319: Sprint 5 Planning Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 9:06 PM

End time: 9:20 PM

After discussion, the velocity of the team was estimated to be 28.

The product owner chose the following user stories to be done during the next sprint. They are ordered based on their priority.

- User Story EFRT- EFRT-353 - Forex.com-like business structure  **EFRT-353** - Forex.com-like business structure DONE
- User Story EFRT-213 - Pay by Credit/Debit card (if possible to implement during this sprint)

 **EFRT-213** - Pay by Credit/Debit Card DONE

The team members indicated their willingness to work on the following user stories.

- [Rodolfo F. Marrero](#)
 -  **EFRT-353** - Forex.com-like business structure DONE
 -  **EFRT-213** - Pay by Credit/Debit Card DONE

Sprint 5 Retrospective Meeting

20190401 - Sprint 5 Retrospective Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 6:00 PM

End time: 6:30 PM

What went wrong?

- Did we do a good job estimating our team's velocity?
 - Yes, time that was allocated was used towards the project.
- Did we do a good job estimating the points (time required) for each user story?
 - No. Perhaps due to scope creep from my side, or due to the complexity of the task, completing the business framework has taken much more time than allocated. Also, collaborating with third-parties (NFA, CFTC, lawyer firm) does not come in a fixed time-frame. Those agencies and regulators work at their own pace.
- Did each team member work as scheduled?
 - Yes, there were no scheduling problems.

What went right?

- I made significant progress in terms of understanding the business requirements and putting it down on paper. We have a great deal of understanding of the regulatory complexities of the business at this point.

How to address the issues in the next sprint?

- How to improve the process?
 - The only improvement I can think of is that of narrowing the scope of a large task and break it down into sub-sections so that the progress can be tracked more granularly.
- How to improve the product?
 - We are now waiting on the regulatory agencies to reach out to us with some answers and that should finalize the requirement-gathering process. Also, we are waiting on Forex.com to reach out to us with regards to pricing.

Sprint 5 Review Meeting

20190401 - Sprint 5 Review Meeting Minutes

Attendees: [Rodolfo F. Marrero Masoud Sadjadi](#)

Start time: 6:30 PM

End time: 7:10 PM

After a show and tell presentation, the implementation of the following user stories were accepted by the product owners:

- User Story EFRT-353 [Forex.com](#)-like business structure

The following ones were rejected and moved back to the product backlog to be assigned to a future sprint at a future Spring Planning meeting.

- User Story EFRT-213 Pay by Credit/Debit Card. This story was sent back to the backlog since it wasn't developed this sprint.

Sprint 6

- [20190402 Daily Scrum Meeting](#)
- [20190403 Daily Scrum Meeting](#)
- [20190404 Daily Scrum Meeting](#)
- [20190405 Daily Scrum Meeting](#)
- [20190408 Daily Scrum Meeting](#)
- [20190409 Daily Scrum Meeting](#)
- [20190410 Daily Scrum Meeting](#)
- [20190411 Daily Scrum Meeting](#)
- [20190412 Daily Scrum Meeting](#)
- [Sprint 6 Planning Meeting](#)
- [Sprint 6 Retrospective Meeting](#)
- [Sprint 6 Review Meeting](#)

20190402 Daily Scrum Meeting

20190402 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Completed the necessary scrum ceremonies.
 - Followed up with the NFA regarding our unanswered questions about the business structure.
 - Started reviewing the subscription APIs of Stripe. We cannot integrate it exactly like the other payment method since the Credit card payment cannot be used to fund the account. Quite possibly the section I did will not be used due to regulations.
 - Talked to a lawyer at the Investment Law Group of Davis Gillett Mottern & Sims LLC regarding the legal challenges of the business to clarify the classification of CTA and to avoid being classified as a FCM.
- What is planned to be done until the next scrum meeting?
 - Work on the Stripe integration for credit/debit card.
 - Continue talking to OANDA regarding a possible partnership.
- What are the hurdles?
 - None.

20190403 Daily Scrum Meeting

20190403 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked with the NFA to complete the regulatory guidelines of the business.
 - Worked on the Stripe integration for credit/debit card payments.
- What is planned to be done until the next scrum meeting?
 - Continue works on the Stripe integration for credit/debit card.
 - Continue talking to OANDA regarding a possible partnership.
- What are the hurdles?
 - None.

20190404 Daily Scrum Meeting

20190404 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Worked on the Stripe integration for credit/debit card payments. Created the tables, stored procedures and UI to add and display cards.
- What is planned to be done until the next scrum meeting?
 - Continue the work on the Stripe integration for credit/debit card.
- What are the hurdles?

- None.

20190405 Daily Scrum Meeting

20190405 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Tested the user interface for adding/removing cards.
 - Added a user interface for handling subscriptions (subscribing/unsubscribing).
 - Added comments in a couple methods.
 - Renamed the StripeController to the AccountController.
 - Added the entities ExternalCard and ExternalSubscription to ACCOUNTING. Added a few stored procedures to handle subscriptions and cards.
- What is planned to be done until the next scrum meeting?
 - Build the missing webhook listener for handling subscription updates.
- What are the hurdles?
 - None.

20190408 Daily Scrum Meeting

20190408 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Completed the Business Plan/Template without OANDA/Forex.com details on the partnership. Waiting on them to provide details on that.
 - Completed and sent an application for OANDA to disclose their affiliate partnership details. Waiting to hear more details from them.
 - Followed up with GAIN/Forex.com to learn more about their affiliate partnership.
- What is planned to be done until the next scrum meeting?
 - Build the missing webhook listener for handling subscription updates.
 - Follow up with OANDA and GAIN.
- What are the hurdles?
 - None.

20190409 Daily Scrum Meeting

20190409 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:15 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Talked to Gain/Forex.com and completed gathering the requirements for the affiliate program.

- Discussed the findings with the professor.
- Worked on the webhook for subscription events.
- What is planned to be done until the next scrum meeting?
 - Continue building the missing webhook listener for handling subscription updates.
- What are the hurdles?
 - None.

20190410 Daily Scrum Meeting

20190410 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Completed the webhook listener for handling subscription updates (code-wise).
- What is planned to be done until the next scrum meeting?
 - Test the webhook implementation.
- What are the hurdles?
 - None.

20190411 Daily Scrum Meeting

20190411 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Tested and debugged the webhook implementation for handling subscriptions.
 - Added foreign keys to my two new tables (card and subscription).
- What is planned to be done until the next scrum meeting?
 - Create video and send the subscription section for review.
 - Document the card and subscription tables on Confluence.
 - Start finalizing the business template package.
- What are the hurdles?
 - None.

20190412 Daily Scrum Meeting

20190412 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Revamped the whole process of saving customers in Stripe to add more clarity, such as adding the first/last name to Stripe as metadata, and also adding the email of the customer on the Email field. This allows to search customers easier on Stripe, and prevents adding extra customer records.

- Debugged and tested the whole system from beginning to end with a brand new database. Caught a couple rounding errors.
- Added comments to every single method on the AccountController.
- Revamped the way external bank account are added into the system.
- Forced the controller to create the primary customer account when no account exists (the customer had to do that before by clicking a button)
- Tested everything a few times.
- What is planned to be done until the next scrum meeting?
 - Development stops on this sprint. No further development is expected.
- What are the hurdles?
 - None.

Sprint 6 Planning Meeting

20190401: Sprint 6 Planning Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 7:00 PM

End time: 7:10 PM

After discussion, the velocity of the team was estimated to be 28.

The product owner chose the following user stories to be done during the next sprint. They are ordered based on their priority.

- User Story EFRT-929 - Complete Business Template/Framework
 **EFRT-929** - Complete Business Template/Framework DONE
- User Story EFRT-213 - Pay by Credit/Debit card  **EFRT-213** - Pay by Credit/Debit Card DONE

The team members indicated their willingness to work on the following user stories.

- [Rodolfo F. Marrero](#)
 -  **EFRT-929** - Complete Business Template/Framework DONE
 -  **EFRT-213** - Pay by Credit/Debit Card DONE

Sprint 6 Retrospective Meeting

20190412 - Sprint 6 Retrospective Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:10 PM

End time: 10:25 PM

What went wrong?

- Did we do a good job estimating our team's velocity?
 - Yes, time that was allocated was used towards the project.
- Did we do a good job estimating the points (time required) for each user story?
 - No. The integration with the credit/debit card too much longer than expected due to the complexities of handling subscriptions appropriately, and having to create the new tables, all the new stored procedures, etc.
- Did each team member work as scheduled?
 - Yes, there were no scheduling problems.

What went right?

- Everything went according to plan, except the estimation of the efforts required.

How to address the issues in the next sprint?

- How to improve the process?
 - The architecture of the project is the ugliest part in regards to speed of development. No improvements for the processes come to mind at the moment due to the factors at play on this sprint.
- How to improve the product?
 - Review all the @todo notices on the code and implement them
 - Users have limited information regarding their subscription. We should give them more options like:
 - When will the subscription renew again?
 - Allow them to change the credit card to which the subscription is linked to
 - Send them emails when there are problems with the subscription
 - Trading should be stopped when the subscription is cancelled or expired.

Sprint 6 Review Meeting

20190415 - Sprint 6 Review Meeting Minutes

Attendees: [Rodolfo F. Marrero Masoud Sadjadi](#)

Start time: 6:10 PM

End time: 6:35 PM

After a show and tell presentation, the implementation of the following user stories were accepted by the product owners:

- User Story EFRT-929 - Complete Business Template/Framework

 **EFRT-929** - Complete Business Template/Framework **DONE**

- User Story EFRT-213 - Pay by Credit/Debit Card

 **EFRT-213** - Pay by Credit/Debit Card **DONE**

The following ones were rejected and moved back to the product backlog to be assigned to a future sprint at a future Spring Planning meeting.

- None

Sprint 7

- [20190416 Daily Scrum Meeting](#)
- [20190417 Daily Scrum Meeting](#)
- [20190419 Daily Scrum Meeting](#)
- [20190422 Daily Scrum Meeting](#)
- [20190423 Daily Scrum Meeting](#)
- [20190424 Daily Scrum Meeting](#)
- [20190425 Daily Scrum Meeting](#)
- [Sprint 7 Planning Meeting](#)

20190416 Daily Scrum Meeting

20190416 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Prepared and submitted the poster.
 - Started preparing the PowerPoint presentation for the showcase.
- What is planned to be done until the next scrum meeting?
 - Continue with the PowerPoint presentation for the showcase.
- What are the hurdles?
 - None.

20190417 Daily Scrum Meeting

20190417 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Worked on the PowerPoint presentation for the showcase.
- What is planned to be done until the next scrum meeting?
 - Attend the showcase.
- What are the hurdles?
 - None.

20190419 Daily Scrum Meeting

20190419 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Presented my work at the showcase.
 - Worked on my final document and on creating some sequence diagrams to document my work.
- What is planned to be done until the next scrum meeting?
 - Work on the required videos for the hand-off.
- What are the hurdles?
 - None.

20190422 Daily Scrum Meeting

20190422 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:10 PM

Rodolfo F. Marrero:

- What was done since the last scrum meeting?
 - Created a PowerPoint presentation for each one of the videos.
 - Installed Camtasia to record the videos and audio.

- Recorded all the videos (PowerPoint wise). Voice to come next.
 - Started editing the Intro video.
- What is planned to be done until the next scrum meeting?
 - Start recording the voice for the videos.
- What are the hurdles?
 - None.

20190423 Daily Scrum Meeting

20190423 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Finished editing and uploaded the Intro video.
 - Recorded the voice for the User Manual video.
 - Started editing the User Manual video.
- What is planned to be done until the next scrum meeting?
 - Finish editing the User Manual video.
 - Upload the User Manual video.
- What are the hurdles?
 - None.

20190424 Daily Scrum Meeting

20190424 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Continued editing the User Manual video.
- What is planned to be done until the next scrum meeting?
 - Finish editing the User Manual video.
 - Upload the User Manual video.
- What are the hurdles?
 - None.

20190425 Daily Scrum Meeting

20190425 - Daily Scrum Meeting Minutes

Attendees: [Rodolfo F. Marrero](#)

Start time: 10:00 PM

End time: 10:05 PM

[Rodolfo F. Marrero](#):

- What was done since the last scrum meeting?
 - Recorded the other two videos (Maintenance and wishlist).
 - Continued editing the User Manual video.

- What is planned to be done until the next scrum meeting?
 - Finish editing the User Manual video.
 - Edit the Maintenance video.
 - Upload the User Manual video.
- What are the hurdles?
 - None.

Sprint 7 Planning Meeting

20190415: Sprint 7 Planning Meeting Minutes

Attendees: [Rodolfo F. Marrero](#) [Masoud Sadjadi](#)

Start time: 6:30 PM

End time: 6:40 PM

After discussion, the velocity of the team was estimated to be 28.

The product owner chose the following tasks to be done during the next sprint. They are ordered based on their priority.

- Develop the poster for the showcase
- Prepare slideshow to help with the demo
- Prepare and rehearse for the demo
- Create sequence diagrams to explain any complex ideas necessary to hand-off to the next developer
- Complete the Final Documentation summarizing the user stories created
- Complete the 4 videos required for hand-off

The team members indicated their willingness to work on the following tasks:

- [Rodolfo F. Marrero](#)
 - All of the above