INTERACTIVATED solutions

Expert Product and Team Audit

Delivering Scalable Solutions and Risk Mitigation Strategies for VC, PE, and Investment Firms

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Introduction

As part of our collaboration with a leading PE firm from the USA, Interactivated Solutions conducted a comprehensive audit for a Canada-based SaaS startup to assess their third-party development partner, mitigate technical risks, and propose the next actions to realign the product strategy and bring the MVP to market effectively, meeting market demands.

Executive Summary

The audit of the SaaS startup revealed both significant strengths and critical areas for improvement. While the team demonstrated enthusiasm and resilience, challenges stemming from gaps in leadership, documentation, and technical processes were evident. These issues impacted scalability, operational transparency, and long-term sustainability.

The engineering team's lack of senior oversight and comprehensive technical documentation created barriers to efficient collaboration and development. Additionally, critical bugs and misaligned feature priorities highlighted the need for a strategic realignment of the product roadmap. Despite these challenges, the startup possesses a foundation that, with the right interventions, can unlock substantial value and competitive advantage.

Key improvements during the audit included stabilizing the application through targeted refactoring, enhancing transparency with detailed reporting, and delivering an actionable roadmap aligned with shareholder goals. These actions mitigated risks, aligned technical efforts with strategic objectives, and set the foundation for scalable growth.

Key Questions and Answers

- **Is the team ready to scale?**
  No. While the team is motivated, gaps in leadership oversight and process management hinder readiness for scaling. The lack of role clarity and robust onboarding practices affects team cohesion and efficiency. Addressing these gaps will be critical to scaling successfully.

- **Should the team refactor the existing product?**
  Yes. The core architecture is fundamentally sound but requires significant refactoring to address structural inefficiencies and reduce technical debt. A targeted refactoring approach will preserve existing work while improving stability and scalability, avoiding the higher costs and risks associated with a complete rebuild.

- **Is the documentation sufficient to support scalability?**
  No. Documentation gaps, especially in technical and onboarding materials, limit cross-team collaboration and knowledge transfer. Introducing standardized documentation practices and version control will support scalability and operational efficiency.

- **Does the product align with market needs?**
  Partially. While the product addresses some customer pain points, feature prioritization and value propositions require realignment. The current roadmap must shift toward customer-centric development to achieve better market fit.

- **Is the technical ecosystem robust enough for growth?**
  No. The current technical infrastructure shows vulnerabilities in scalability and stability. Targeted improvements in system architecture, security protocols, and deployment processes are required to support growth and minimize operational risks.

The following report builds on the insights gained during the audit, presenting key findings and actionable strategic recommendations. These are designed to provide clarity and direction for the founding team and venture capital stakeholders, offering a comprehensive evaluation of the startup's current challenges and opportunities. This assessment serves as a roadmap to address critical gaps, mitigate risks, and unlock the organization's potential for scalable growth and competitive success.

Audit Process

Acting as a fractional CTO, we interviewed the founding team's leadership and thoroughly assessed the development pipeline, reviewing the code base, assessing and testing different processes, documentation, and technical architecture. This report represents a comprehensive evaluation of a SaaS startup, conducted to provide stakeholders with actionable insights and strategic recommendations.

Team Performing the Audit

- Roy Van Eijsselsteijn (Fractional CTO appointed)
- Polina Kostina (PM)
- Vitalii Rozhkov (Tech Lead)
- Artem Lubenskyi (DevOps)
- Mateusz Hajnysz (PO & Agility Coach)
- Bogdan Baikov (QA engineer)

Our Approach

While the primary focus of this audit is on specific technical aspects, our approach extends to a broader evaluation of the organization. Through interviews and data collection, we strive to construct a comprehensive picture of the company's culture, project management practices, and operational support systems. These interconnected elements often influence technical challenges and outcomes.

In most organizations, problems rarely exist in isolation. Instead, they are often the result of overlapping issues that collectively impact performance and efficiency. By analyzing these dynamics, we aim to identify root causes rather than symptoms. This big-picture perspective ensures stakeholders are equipped with the insights necessary to address challenges and drive sustainable improvement effectively.

Framework of Assessment

Our approach to technical audits is grounded in a comprehensive evaluation of five key pillars that define the health and scalability of any product or organization. These pillars are:

- **Leadership & Team Dynamics:** Evaluates team structure, collaboration, and leadership's ability to align efforts with strategic objectives.
- **Solution Fit & Innovation:** Assesses how well the product addresses user needs, aligns with market demands, and fosters innovation.
- **Technical Foundation:** Reviews the robustness, scalability, and performance of the technical infrastructure and development practices.
- **Process Optimization:** Focuses on the efficiency and adaptability of workflows, ensuring alignment between strategy and execution.
- **Transparency & Documentation:** Examines the accessibility, quality, and accuracy of documentation to support scalability and operational clarity.

These pillars serve as a framework for identifying strengths, uncovering inefficiencies, and aligning efforts with strategic objectives. You can find additional details on our assessment framework in the Appendix section.

Interviewed Members of the Founding Team

- [Redacted due to active client NDA]
- [Redacted due to active client NDA]
- [Redacted due to active client NDA]

Detailed Findings

Analysis of the Existing Product and its Development Process

On May 1, 2024, we were engaged to step in as fractional CTO and to collaborate with the external development team from Eastern Europe. The shareholders expressed concerns about needing more tangible progress toward a functional MVP. Our collaboration began with the founding team and their development partner, referred to as 'Team X'.

Key Insights and Analysis Outcomes

1. **Risk Mitigation**
    a. Identified Risks:
        i. Poorly organized architecture led to delays and instability.
        ii. Inadequate quality assurance caused frequent critical bugs.
        iii. Lack of documentation hindered development efficiency.
    b. Actions Taken:
        i. Stabilized the application by restructuring critical components.
        ii. Implemented secure practices for handling sensitive information (e.g., .env file protocols).
        iii. Delivered an actionable roadmap for long-term refactoring.
    c. Impact:
        i. Enhanced stability and reduced deployment failures.
        ii. Enhanced platform security, mitigating potential data breaches.
2. **Operational Transparency**
    a. Delivered detailed reports and dashboards, providing real-time visibility into project progress for investors and stakeholders.
    b. Established a unified vision for the product, aligning technical milestones with business objectives.
    c. Investor Value:
        i. Improved communication led to 80% faster decision-making by stakeholders.
3. **Strategic Realignment**
    a. Facilitated a pivot to a scalable marketplace model.
    b. Prioritized user-centric features, enhancing contractor satisfaction.
    c. Delivered an MVP to validate the platform's value proposition and ensure investor alignment.

5 Pillar Framework of Assessment

Leadership & Team Dynamics

Leadership and team dynamics play a foundational role in determining an organization's ability to align technical efforts with strategic goals and foster a culture of collaboration and growth. During the audit, several strengths and challenges were identified in this area.

Observations

- **Psychological Safety:** The team demonstrates strong trust and collaboration, fostering a psychologically safe environment that promotes high performance and engagement.
- **Team Structure:** The organization is divided into software and operations teams, but the absence of a senior technical leader has resulted in gaps in oversight, accountability, and strategic direction.
- **Role Clarity and Responsibilities:** While roles are generally understood, overlapping responsibilities and undefined boundaries lead to inefficiencies and delays in decision-making.
- **Feedback Mechanisms:** Feedback practices are inconsistent, with limited opportunities for structured 1:1 meetings or formal evaluations, hindering skill development and alignment.
- **Retention and Role Gaps:** The recent departure of a lead engineer due to disagreements on product direction has left critical roles unfilled, creating challenges in scalability and execution.
- **Collaboration:** Team silos and limited cross-functional interaction have reduced knowledge-sharing and hindered the organization's ability to solve complex challenges effectively.

Concerns

- **Leadership Oversight:** The absence of a dedicated technical leader has fragmented decision-making and reduced operational efficiency. This gap has led to misaligned priorities and limited accountability across teams.
- **Role and Responsibility Gaps:** Undefined and overlapping responsibilities exacerbate inefficiencies and delay progress, particularly in critical technical areas.
- **Onboarding Challenges:** A lack of a formal onboarding process for new hires has created barriers to integration, increasing ramp-up times and reducing overall productivity.
- **Reliance on Key Employees:** Limited collaboration and reliance on a few individuals with unique system knowledge create operational risks if these team members are unavailable or leave.

- **Feedback Deficiency:** Infrequent and inconsistent feedback has impacted morale, team cohesion, and opportunities for individual growth and improvement.
- **Unfilled Expertise:** The absence of a dedicated UX expert has hindered the organization's ability to create a user-centric product experience, limiting its competitive advantage.
- **Collaboration Deficits:** Minimal pair programming and collaborative practices have contributed to silos and inefficiencies, further increasing the risks associated with knowledge gaps.

Impact

The lack of cohesive leadership, undefined roles, and inconsistent feedback mechanisms has hindered the team's ability to scale effectively and align with organizational goals. These challenges have resulted in fragmented decision-making, delays in execution, and limited knowledge-sharing.

Without immediate improvements in leadership structure, onboarding practices, and collaboration, the organization risks continued inefficiencies, employee turnover, and missed opportunities for growth and innovation. Employees have expressed the need for clearer guidance, structured support, and better alignment with strategic objectives.

Recommendations

1. **Define Leadership Roles**: Appoint a dedicated technical leader, such as a CTO or Technical Director, to oversee strategy, provide technical direction, and foster team accountability.
2. **Clarify Roles and Responsibilities**: Establish clear definitions for each team member's role, ensuring alignment with organizational goals and reducing overlap or gaps in responsibilities.
3. **Enhance Onboarding Practices**: Develop a structured onboarding program to streamline the integration of new hires, equipping them with the knowledge and resources necessary to contribute effectively from the start.
4. **Encourage Collaboration**: Implement regular cross-functional team meetings and shared goals to reduce silos and improve collaboration between technical and non-technical teams.
5. **Foster a Feedback Culture**: Encourage open communication and provide leadership training to equip managers with the skills to guide and support their teams effectively.

Solution Fit & Innovation

A product's success depends on its ability to address user needs and market demands effectively. This pillar examines how well the solution aligns with strategic goals, its innovation potential, and the organization's capacity to adapt and evolve the product to maintain long-term competitiveness.

Observations

- **Market Alignment**: The platform is designed to meet contractor needs with tools for project management, lead generation, and client management.
- **Phased Rollout**: Phase 2 aims to incorporate contractor feedback to refine core features and improve usability.
- **Value Proposition**: The product provides tools for managing leads and projects, offering tangible value to small and medium businesses.

Concerns

- **Misaligned Priorities**: Features are not prioritized based on long-term user feedback or market demands, reducing the platform's competitive edge.
- **Underutilized Innovation**: The platform's roadmap lacks bold, innovative features, limiting its ability to stand out.
- **Feedback Integration**: Insufficient incorporation of contractor feedback risks misalignment with user needs and expectations.

Research & Impact

Current Business Flow

The client maintains a database of partners seeking job opportunities (leads) using Google Sheets. As job opportunities arise, they are assigned to partners, who are then charged a fee upon reaching a predetermined number of leads.

Current Goals

To scale the existing workflow into a marketplace by developing a platform that offers value to users through:

1. **Enhanced Business Management Tools**: Providing contractors with tools for project and client management.
2. **Expanded Contractor Base**: Attracting more potential job service providers.
3. **Increased Job Opportunities**: Boosting the flow of job opportunities available to contractors.
4. **Wider Coverage**: Expanding the geographic area covered by service providers.

Value Proposition for Contractors

To attract and retain contractors, the platform will offer:

- **Convenient Business Tools**: Features for managing clients, teams, payments, and more.
- **Lead Generation Assistance**: Connecting contractors with potential leads to convert into projects.

Target Customer Groups

The platform aims to serve:

1. Small businesses.
2. Medium businesses.
3. Large businesses.

Recommendations

Phase 2: Goals

1. Develop an app with basic functionality, enabling small business owners (contractors) to test core features in their daily workflows. Feedback from contractors will guide improvements to increase the platform's value.
2. Provide platform owners with lead management and assignment functionality to attract more contractor users.
3. Test and analyze the system flow to identify necessary adjustments for enhancing platform usability.

User Roles

Platform Owner (Admin)

- Responsible for managing leads, assigning them to contractors, and overseeing platform operations.

Contractors (Users)

- End users who leverage the platform to improve business operations and find job opportunities.

Platform Owner (Admin) Functionality

1. Lead Management

- Capture and manage detailed information about leads, including:
    - Lead data.
    - List of services offered.
    - Manual sharing of leads (MVP Phase 2).

2. Admin Pages

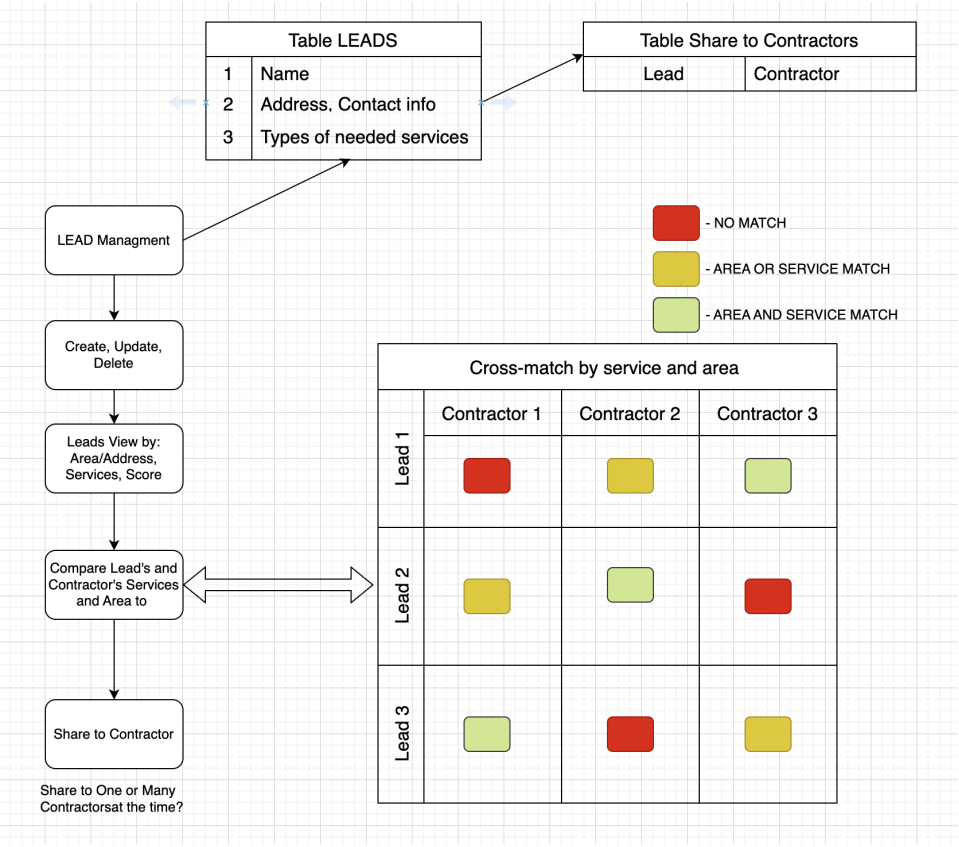
- **Leads Page**: Displays a table of all leads.
- **Contractors Page**: Displays a table of contractors.

3. Contractor Views

- **Leads Page for Contractors**:
    - View 1: A button labeled “Activate me.”
    - View 2: A list of shared leads.

4. Reporting

- Tools and data for generating reports to monitor system and contractor performance



Contractors (Users) Functionality (in order of priority):

1. Leads Management
2. Clients Management
3. Estimation Tools
4. Invoicing
5. Sales Management

Further information is made unavailable due to active client NDA.

Technical Foundation

A strong technical foundation is essential for scalability, reliability, and performance. This pillar evaluates the architecture, development practices, and system infrastructure to ensure robustness, stability, and alignment with business growth requirements.

Observations

- **Architecture Weaknesses**: The product's architecture lacks cohesion, with poorly structured entity relationships making modifications and scaling difficult.
- **Development Instability**: Frequent bugs and unstable releases indicate issues with the development pipeline and quality assurance processes.
- **Security Improvements**: Credentials are now stored outside the repository, improving security, but further refinements are needed to protect sensitive data.

Concerns

- **Persistent Technical Debt**: Flawed architecture increases maintenance costs and limits the platform's ability to scale effectively.
- **Error-Prone Systems**: Bugs in areas like pagination and event handling disrupt core functionality and impact user experience.
- **Security Gaps**: Despite recent improvements, security protocols still fall short of industry standards and need further enhancement.

Research & Impact

Based on input from the team, customer, and our work with the application, we believe that a lack of clear product vision, MVP priorities, and technical expertise led to the following issues:

1. **Disjointed Functionality**: Individual features did not contribute to a cohesive user flow, undermining the product's core value for end customers.
2. **Unstable Releases**: Deployments frequently broke environments, despite being marked as "done" by the team.

3. **Inaccurate Progress Reporting**: Status updates from 'Team X' were neither accurate nor reflective of actual progress.
4. **Uninformative Updates**: The "status updates" provided to us by the development team after our involvement lacked actionable details.

Detailed feedback on the conducted Technical Assessment can be found in the Appendix.

Specific recommendations and proposals shared with the team were made unavailable due to active client NDA.

Process Optimization

Efficient and adaptable processes underpin operational excellence. This pillar focuses on the transparency and efficiency of workflows, identifying bottlenecks and inefficiencies that may slow down execution and hinder responsiveness to changing business priorities.

Observations

- **Workflow Challenges**: Processes lack clarity and transparency, leading to delays in feature delivery and difficulty meeting MVP deadlines.
- **Onboarding Issues**: The absence of formal onboarding structures causes longer ramp-up times for new hires.
- **Alignment Gaps**: Limited communication between management and development teams hinders decision-making and execution.

Concerns

- **Workflow Inefficiencies**: Poorly defined processes reduce productivity and slow development timelines.
- **Onboarding Delays**: New team members struggle to integrate, delaying overall progress.
- **Execution Misalignment**: Disconnects between management's strategy and operational execution result in missed deadlines and inefficiencies.
- **Security:** The .env file in the repository was replaced with a .env.example file to enhance security. Credentials are now stored outside the Git repository. The same adjustment is recommended for the front-end repository.
    - Replacing .env with .env.example is a simple yet critical step toward securing sensitive information. It ensures credentials are kept private, aligns with industry best practices, and helps prevent accidental leaks, fostering a more secure development environment.

Impact & Recommendations

Information is unavailable due to active client NDA. The audit provided attached:

- The proposal and estimates provided by 'Team X' to the customer.
- Two PDF files containing designs developed by 'Team X.'

Transparency & Documentation

Clear and thorough documentation ensures knowledge-sharing, scalability, and operational clarity across teams. This pillar examines the availability, accuracy, and accessibility of documentation, emphasizing its importance in onboarding, collaboration, and long-term sustainability.

Observations

- **Documentation Gaps**: Core system documentation is incomplete, making it difficult for teams to share knowledge or onboard effectively.
- **Version Control Issues**: Lack of proper version control leads to inconsistencies in documentation and reduces its reliability.
- **Transparency Efforts**: The audit introduced detailed reporting, which has improved operational visibility, but gaps still exist.

Concerns

- **Incomplete Records**: Inadequate documentation increases reliance on individual team members and limits scalability.
    - Due to app performance problems and invalid credentials, we gained full access to project systems and code only on May 8, 2024.
- **Onboarding Hurdles**: Insufficient and outdated onboarding materials make it harder to scale the team efficiently.
- **Transparency Gaps**: Unclear reporting and workflows continue to hinder stakeholder decision-making.

Research & Impact

1. **Documentation Gaps**
   No documentation is available outlining the user flow, logic, or functionality specifications. As a result, it is unclear what the previous team committed to delivering as part of the MVP.
2. **Quality Assurance**
   While the 'Team X' proposal mentions the involvement of a QA engineer, we found no evidence of QA reports or testing feedback. After work was reported as “done” by 'Team X,' our testing revealed:
    - Numerous critical bugs.
    - Incomplete pages.
    - Errors at both the user level and within the application’s code structure.
3. **Our Contribution**

    - Since May 15, 2024, our team has worked to stabilize the application and align it with the client's MVP priorities.
    - On July 9, 2024, we delivered the first version of the MVP, albeit with limited functionality.
4. **Development Hours Logged**
    - Detailed time logs for developers and QA specialists, addressing inherited bugs and issues, are provided to the customer.
5. **Future Refactoring Needs**
    - Significant refactoring will be required to address architectural errors.
    - Due to the extent of the necessary improvements, it is currently not possible to provide a reliable cost estimate.

Final Conclusions

Our engagement with this Canada-based SaaS startup has highlighted critical gaps in technical execution, strategic planning, and product delivery. Despite the challenges, our interventions have significantly improved the startup's trajectory, offering both immediate and long-term value to the stakeholders. Below are the key conclusions:

Leadership & Team Dynamics

- **Leadership Gaps**: The absence of a clear product vision and dedicated technical oversight resulted in fragmented functionality and unstable product development.
- **Strategic Realignment**: Recommendations facilitated a strategic pivot, aligning development efforts with market fit and stakeholder expectations, though significant gaps in team accountability remain.
- **Team Collaboration**: While internal trust is strong, cross-functional collaboration remains limited, reducing efficiency in addressing complex technical challenges.

Solution Fit & Innovation

- **Value Proposition**: The platform shows potential to deliver enhanced business management tools and lead-generation assistance, meeting contractor needs and improving user satisfaction.
- **Roadmap Adjustments**: Recommendations included prioritizing contractor-centric features and user feedback to enhance product alignment with market demands.
- **Innovation Gaps**: While some innovative features have been implemented, limited focus on long-term objectives risks underutilization of the platform's full potential.

Technical Foundation

- **Architectural Challenges**: Addressed significant architectural flaws during the audit, enabling functional MVP delivery but highlighting a need for long-term refactoring to ensure stability.
- **Technical Debt**: Persistent technical debt limits the system's ability to scale effectively and adapt to evolving user needs.
- **Security Protocols**: Enhanced security measures, such as better handling of sensitive data, but additional improvements are necessary for robust protection.

Process Optimization

- **Deployment Challenges**: Addressed bottlenecks related to deployment stability through intensive debugging and restructuring efforts, aligning practices with industry standards.
- **Operational Risk Mitigation**: Provided detailed audits and actionable feedback, creating clarity for both founding teams and investors, but processes still require further adaptability to ensure responsiveness to shifting priorities.
- **Scalability Gaps**: Although the MVP was delivered, achieving full scalability and efficiency will require further refinement of workflows and execution cycles.

Transparency & Documentation

- **Foundational Gaps**: A lack of comprehensive documentation and clear specifications hindered the development process and knowledge transfer between teams.
- **Transparency Improvements**: Introduced detailed reporting structures to enhance operational visibility and stakeholder communication, addressing risks associated with incomplete records.
- **Onboarding Weaknesses**: Documentation remains insufficient to support onboarding and scale new team members effectively.

Next Steps

- **Immediate**: Continue stabilizing the MVP while focusing on delivering core functionality to end users.
- **Short-Term**: Develop Phase 2 features based on contractor feedback, ensuring alignment with the platform's strategic goals.
- **Long-Term**: Implement comprehensive refactoring and scalability improvements to support broader market adoption.

In conclusion, our collaboration has not only mitigated risks, but also unlocked the potential for significant value creation. With ongoing technical improvements, strategic planning, and stakeholder alignment, this platform is well-positioned to achieve its goals and deliver a competitive edge in the marketplace.

Appendix

Framework of Assessment

Our approach to technical audits is grounded in a comprehensive evaluation of five key pillars that define the health and scalability of any product or organization. These pillars—Technical Foundation, Process Optimization, Solution Fit & Innovation, Transparency & Documentation, and Leadership & Team Dynamics — serve as a framework for identifying strengths, uncovering inefficiencies, and aligning efforts with strategic objectives.

Leadership & Team Dynamics: People are the cornerstone of any organization. A cohesive team, guided by effective leadership, ensures productivity and alignment. This audit examines the clarity of roles and responsibilities within the team, the effectiveness of onboarding processes, and the strategies in place to minimize turnover. Leadership's ability to communicate a clear vision and foster collaboration across departments is also assessed. By focusing on these areas, the evaluation identifies gaps in alignment, highlights opportunities to improve leadership strategies, and explores ways to strengthen team cohesion.

Solution Fit & Innovation: Every successful product addresses a clear and defined problem. This audit assesses how effectively the current solutions meet user and market needs while prioritizing features that align with strategic objectives. It also examines the organization's capacity for innovation, its ability to solve problems creatively, and the flexibility of solutions to evolve alongside business requirements. Focusing on solution fit and fostering innovation ensures that the organization remains relevant, competitive, and positioned for long-term success.

Technical Foundation: The technical foundation of the product is vital for scalability and reliability. This audit evaluates the scalability, reliability, and security of the current technical infrastructure, as well as the architecture of systems and their ability to integrate seamlessly with evolving business needs. Development practices, including code quality and deployment pipelines, are examined alongside approaches to managing technical debt and ensuring system resilience. By strengthening the technical ecosystem, organizations can ensure they remain robust and adaptable in the face of growth and operational challenges.

Process Optimization: Efficient and adaptable processes are the cornerstone of operational excellence. This audit evaluates the transparency of workflows and their effectiveness across the organization, identifying bottlenecks or inefficiencies that may hinder progress. The relationship between management and operational teams is scrutinized to ensure alignment in strategy execution. Additionally, the audit examines how processes are adapted in response to challenges, aiming to uncover ways to enhance efficiency, reduce operational strain, and support sustainable growth.

Transparency & Documentation: Clear and effective documentation ensures consistency and knowledge-sharing across teams. The audit investigates the availability, accuracy, and accessibility of internal documentation, ranging from technical specifications to onboarding materials and operational manuals. Special attention is paid to whether documentation is maintained and updated to reflect evolving processes and systems. By improving transparency and ensuring thorough documentation, organizations can reduce onboarding times, minimize errors, and foster collaboration across teams.

By analyzing these five pillars, we uncover critical insights that provide clarity for stakeholders, mitigate risks, and realign strategies to achieve both immediate and long-term goals. This structured approach allows us to deliver actionable recommendations that drive investment value and product success.

Technical Assessment - Detailed Feedback

Given the application's instability, we created a fresh staging environment on our infrastructure and deployed the application on May 14. The same system issues present in the 'Team X '-provided staging server were encountered.

Upon working to fix bugs and implement MVP-required features, we identified the following technical challenges:

1. **Poorly Organized Architecture**: The application's fundamental structure and entity relationships are improperly designed, leading to:
    - Significant time was required to stabilize or modify the system.
    - Frequent introduction of new user-facing bugs when attempting updates.
2. **Error-Prone Development**:
    - Critical bugs likely arose when changes requested by the client broke the application. The previous team was unable to stabilize these issues for two weeks.
3. **Specific Code Issues**:
    - **Pagination Functionality**: Bugs in the pagination code caused the app to crash when navigating pages on the front end.
    - **Error Handling**: Errors on the back end were masked, showing a "success" page to the user instead of addressing failures.
    - **Database Management**: The database structure made setting up new environments cumbersome. Manual changes added directly to the database caused conflicts and errors that were difficult to trace, which ultimately impacted functionality.

User Flow Test Report

Expected Result
The client and 'Team X' agreed that “all features must be fully working.”

Testing Date
May 13, 2024

Test Environment

- URL: Link made unavailable due to active client NDA.
- Observations: The same bugs were reproduced on the new staging environment created by our team.

Pre-requisites

- A new Admin Account was created.
- Test data was added to the empty Admin panel.

Test Results

Main Page

- **Issue**: Blank page.
- **Expected Result**: Display editable registration data, including:
    - Edit name.
    - Edit invoice data.
    - Edit Message Center data.
    - Change password.

Schedule Page

Main elements and functionality are present.

Bugs:

1. Navigation buttons (month, week, day, agenda modes) consistently show the day view instead of switching modes.
2. Start and end dates of an event are not displayed upon clicking the event.
3. Changes to event titles and notes are not saved after editing.
4. Adding more than one event is not possible.
5. Only one event is displayed, regardless of the selected client name.
6. Existing events cannot be deleted.
7. Calendar closes when selecting AM/PM in event data.
8. Client or employee assignment is not displayed.

Leads Page

- **Issue**: Blank page.

Clients Page

Main elements and functionality are present.

Bugs:

1. **Archive** feature is not working.
2. **Active** feature is not working.
3. **Delete** feature is not working.
4. Client "Default" status cannot be changed.
5. Client info lacks address details.
6. **Pagination Issue**: Changing pagination from 10 to 5 (grid with 6 lines of data):
    - On switching to the 2nd page and returning to the 1st page, the grid appears empty.

Estimates Page

Main elements are present.

Bugs:

1. Grid does not display created estimates (visible only in Client Info).
2. **Pagination Issue**: Same behavior as Clients Page.

Sales Zone Page

Main elements are present. Bugs:

1. Cannot add cards due to an empty grid with estimates.

Invoices Page

Base elements and functionality are present.

Bugs:

- **Pagination Issue**: Same behavior as client page.

Projects Page

Main elements and functionality are present.

Bugs:

1. "TIME LEFT" does not display the actual "Due in" time.

2. The progress bar does not show accurate data.
3. **Pagination Issue**: Same behavior as client page.

Employees Page

Main elements are present.

Bugs:

1. Notification is empty when saving an employee without a phone number.
2. Employees cannot be added to the grid.
3. **Pagination Issue**: Same behavior as client page.

Time Tracking Page

Base elements and functionality are present. Bugs:

- Unable to add lines to the grid.

Message Center Page

- **Issue**: Blank page.

Reports Page

- **Issue**: Blank page.