

Agile Deliverables-INVO Track

AGILE DOCUMENTS

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"**Invo Track**" likely refers to the inventory and invoice management software system called INVO, designed to streamline operations for shopkeepers. It provides features like stock tracking, sales monitoring, customizable columns for billing, and a chat bot for customer interactions.

The old system is outdated and doesn't meet the needs of the stakeholders involved. Invoice tracking is the **monitoring and management of incoming and outgoing invoices** so that your business can have a healthy [cash flow](#) and good relationships with clients and suppliers.

Document 1: Definition of Done

InvoTrack - Detailed Definition of Done (DoD) Checklist

- **Produced code for presumed functionalities** - Code for all functionalities is implemented as per the user story.
- **Assumptions of User Story met**- All assumptions and dependencies outlined in the user story are validated.
- **Project builds without errors**- Project compiles and builds without any errors or unresolved warnings
- **Unit tests written and passing**- Unit tests are implemented covering all new code paths, and all tests pass.
- Code is merged into the main branch with proper version control procedures.
- **Project deployed on the test environment identical to production platform**- Project is successfully deployed to a staging/test environment identical to production.
- Post-deployment validation is planned and assigned, if required
- **Tests on devices/browsers listed in the project assumptions passed**- Feature is tested on all devices, operating systems, and browsers listed in the project assumptions.
- **Feature ok-ed by UX designer**- UX designer has reviewed and signed off on the feature for UI/UX compliance.
- Feature is demonstrated during the Sprint Review meeting.
- **QA performed & issues resolved**- Functional and exploratory testing has been completed by QA team.

- **Feature is tested against acceptance criteria-** All critical/major bugs found during testing are fixed and retested.
- **Feature ok-ed by Product Owner-** Product Owner has reviewed and accepted the user story.
- Acceptance criteria from the user story are all met and verified.
- **Refactoring completed-** Technical debt is addressed through necessary refactoring.
- **Any configuration or build changes documented-** All relevant configuration, environment, or build changes are documented.
- Any changes to infrastructure or third-party services are properly documented
- **Documentation updated-** All relevant user manuals or technical documentation are updated
- **Peer Code Review performed-** Code review has been conducted by at least one peer, and all feedback is incorporated.
- **Stakeholder Approval:** The stakeholders, including the product owner or client, have reviewed and approved the work, and any feedback or required changes have been addressed.
- **Design and Architecture:** The code adheres to the established design and architectural principles and guidelines.

Document 2- Product Vision

InvoTrack aims to streamline and automate invoice management for companies. The product will support invoice creation, processing, real-time tracking, and provide a complete record of all financial transactions for accounting purposes. It is designed for finance teams and accountants who need an efficient and user-friendly platform.

1. InvoTrack is a web-based application designed to streamline invoice processing, tracking, and management.
2. It helps businesses automate workflows, reduce manual errors, and gain insights into financial transactions.
3. The solution supports multi-user roles including accountants, finance managers, and business owners

Project Metadata-

- Project Name: InvoTrack
- Start Date: July 1, 2025
- End Date: July 28, 2025
- Scrum Master: Lalit Gupta
- Product Owner: Niharika Sharma
- Development Team: Nanu, Krish, Vartika, Kapil, Santosh
- Total Sprints: 3- Framework: Scrum (Agile Methodology)

Attribute	Description
Project Name	InvoTrack
Venue	Tech Mahindra NSEZ Noida
Start Date	July 1, 2025
End Date	July 28, 2025
Client	Smiths News UK
Stakeholder List	Vinit , Neha , Khushbu,john
Scrum Master	Lalit Gupta
Duration	28 Days
Product Owner	Niharika Sharma
Development Team	Nanu, Krish, Vartika, Kapil, Santosh Scrum Developer 1: Nanu Scrum Developer 2: Krish Scrum Developer 3: Vartika Scrum Developer 4: Kapil Scrum Developer 5: Santosh
Total Sprints	3
Framework	Scrum (Agile Methodology)
Vision	InvoTrack is a robust web-based platform designed to automate and streamline the invoice processing lifecycle for businesses.
Target Group	Small to mid-sized enterprises in the finance, logistics, and retail sectors.
Target Users & Customers	Accountants, finance managers, business owners, and administrative staff.
Needs	Centralized, accurate, and timely invoice handling; eliminate paperwork and delays.
Benefits	Faster processing, increased transparency, reduced errors, and improved planning.
Product Description	Includes invoice scanning, approvals, tracking, dashboards, and reports.
Unique Features	Cloud-based, multi-device support, audit trail, role-based access, analytics.
Feasibility	Technically feasible with current tools (React, Node.js, PostgreSQL, AWS).
Value to Company	Streamlined operations, better cash flow visibility, reduced costs.
Business Goals	Build MVP in 4 weeks, 98% accuracy, reduce approval time by 50%.
Business Model	SaaS-based subscription per user/month, multi-tier pricing plans.

Vision: What is your vision, your overarching goal for creating the product?

Vision: InvoTrack is a robust web-based platform designed to automate and streamline the invoice processing lifecycle for businesses. The goal is to reduce manual workload, improve accuracy, and enable real-time visibility of financial operations.

Target Group: Small to mid-sized enterprises in the finance, logistics, and retail domains that rely on invoice-driven transactions.

Target Users & Customers: Accountants, finance managers, business owners, and administrative staff who manage accounts payable and receivable.

Needs: The product addresses the need for centralized, accurate, and timely invoice handling. It eliminates redundant paperwork, minimizes processing delays, and helps prevent missed or duplicate payments.

Benefits: Increased transparency, reduced invoice approval time, improved vendor relationships, and enhanced financial planning.

Product Description: InvoTrack enables users to upload, categorize, track, and manage invoices through a simple interface with role-based access control. Features include invoice scanning, approval workflows, real-time tracking, notifications, and financial reports.

Unique Features: Cloud-based architecture, cross-device compatibility, audit trails, and analytics dashboards.

Feasibility: Technically feasible with current tools (React, Node.js, PostgreSQL, and AWS). Functional MVP achievable in 4 weeks with agile sprints.

Value to Company: Streamlines internal finance operations, reduces processing costs, improves cash flow visibility, and supports compliance. Business Goals: Deliver an MVP in 4 weeks, improve invoice turnaround by 50%, and maintain 98% invoice accuracy.

Business Model: SaaS model with subscription-based pricing (per user/month), multi-tier access plans for different organization sizes.

Document 3: User stories

InvoTrack Project - User Stories

(Grouped by Sprint)

Sprint 1

User Story No: US-101	Tasks: Login page with validation	Priority: High
Value statement: As a user, I want to log in securely so that I can access my account.		
BV: ₹100	CP: 3	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

User Story No: US-102	Tasks: Upload interface for invoices	Priority: High
Value statement: As an accountant, I want to upload invoices so that they can be tracked.		
BV: ₹100	CP: 3	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

User Story No: US-103	Tasks: Invoice dashboard summary view	Priority: High
Value statement: As a user, I want a dashboard that shows invoice summaries so that I can view statuses quickly.		
BV: ₹100	CP: 3	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

Sprint 2

User Story No: US-201	Tasks: Approve or reject invoices	Priority: High
Value statement: As a manager, I want to approve or reject invoices so that I can control outgoing payments.		
BV: ₹100	CP: 3	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

User Story No: US-202	Tasks: Invoice status notifications	Priority: High
Value statement: As a user, I want to receive notifications when invoice statuses change so that I stay updated.		
BV: ₹50	CP: 5	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

User Story No: US-203	Tasks: Admin user role configuration	Priority: High
Value statement: As an admin, I want to manage user roles so that access control is maintained		
BV: ₹50	CP: 5	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

Sprint 3

User Story No: US-301	Tasks: Monthly expense reports	Priority: High
Value statement: As a finance officer, I want to generate monthly reports so that I can review expense trends		
BV: ₹200	CP: 8	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

User Story No: US-302	Tasks: Search invoices by criteria	Priority: High
Value statement: As a user, I want to search invoices by date/vendor so that I can find specific records.		
BV: 100	CP: ₹5	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

User Story No: US-303	Tasks: Automated backup system	Priority: High
Value statement: As an admin, I want to back up invoice data so that it is safe and recoverable.		
BV: ₹200	CP: ₹8	
Acceptance criteria:	• Feature allows expected functionality • Validation and error handling are in place • UI aligns with design requirements	

Document 4: Agile PO Experience

The Product Owner has a vision of the product keeping the domain/industry experience and the market need.

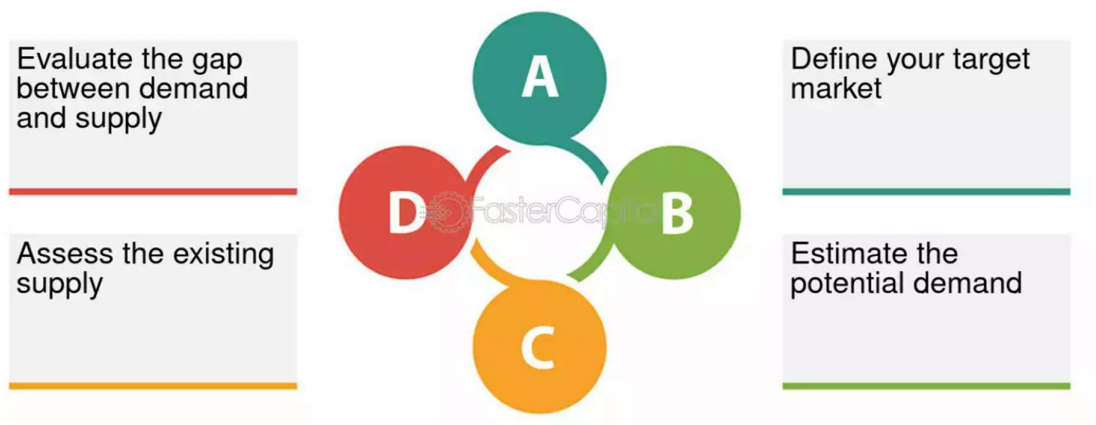
The Product Owner (PO) will lead backlog grooming, prioritize features based on stakeholder input, and work closely with the development team to clarify requirements. The PO will attend all Agile ceremonies, facilitate sprint planning, and ensure that each increment delivers business value.

❖Following are the responsibilities of PO in a project

➤ **Market Analysis** ▫ Analysis of market need/demand, Availability of similar products in the market

- Conducted market analysis to assess demand and similar solutions.
- Collect and analyze data from primary and secondary sources. You should gather relevant and reliable data from both primary and secondary sources to support your market analysis. Primary sources are data that you collect directly from your target market, such as surveys, interviews, focus groups, observations, or experiments. Secondary sources are data that are already available from external sources, such as reports, publications, websites, databases, or media. You should use both qualitative and quantitative data to gain a comprehensive and balanced view of the market.
- Evaluate the [gap between demand and supply](#).

Defining Demand and Supply in the Context of Your Project



- Performed enterprise analysis to evaluate market opportunity.

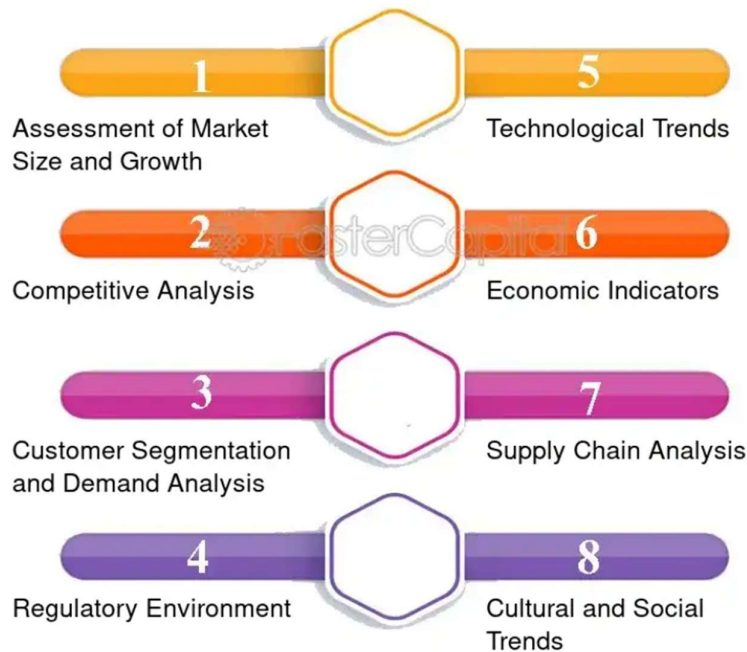
- **Gathering Data and Information**

Conducting market research is a crucial step in understanding the [demand and supply dynamics](#) of your project. It involves gathering [data and information from various sources](#) to [gain insights into the market](#) landscape.

➤ **Enterprise Analysis** ▫ Due diligence on the market opportunity

is not just a step in the process; it's a continuous effort that informs strategic decision-making at every level. It's about piecing together a puzzle where each piece represents a different aspect of the market, and only when combined, do they provide a clear picture of the [opportunities and challenges ahead](#).

Understanding the Role of Market Analysis in Due Diligence



➤ **Product Vision and Roadmap** ▫ Product vision keeping the need analysis in mind ▫ Product roadmap with high-level features and timeline.

- Created a clear product vision and roadmap aligned with business needs.
- (InvoTrack aims to streamline and automate invoice management for companies.)
- InvoTrack is a web-based application designed to streamline invoice processing, tracking, and management.
- It helps businesses automate workflows, reduce manual errors, and gain insights into financial transactions

➤ **Managing Product Features** ▫ managing stakeholder expectations and prioritizing needs ▫ Prioritization of the epics, stories, and features based on criticality and ROI involved.

- Managed product features by aligning priorities with stakeholder needs.

➤ **Managing Product Backlog** ▫ Prioritization of user stories ▫ Reprioritization based on stakeholders' needs ▫ Epics planning

A backlog is a prioritized list of what your development team will work on to improve your product. It is maintained by the product manager or product owner and can include new features, improvements to existing features, and bug fixes.

- Organized and prioritized the product backlog using epics and user stories.

➤ **Managing Overall Iteration Progress** ▫ Sprint progress review ▫ Reprioritization of sprints and epics if needed ▫ Sprint retrospectives with Business Analyst

- Monitored iteration progress with sprint reviews and retrospectives.
- Set reasonable goals
- effective Communication Is Crucial
- Holding Regular Project Meetings

❖ **from this project I have learned how to handle sprint meetings such as.**

- Conducted all sprint ceremonies: planning, daily standups, reviews, retrospectives.
- Collaborated with business analysts and developers to refine backlog items.
- **Sprint planning meeting** - Defined sprint goals and selected backlog items.
- **Daily Scrum meeting:** Tracked task status, blockers, and team alignment.
- **Sprint Review meeting:** Demonstrated completed stories and collected feedback.
- **Sprint Retrospective meeting:** Evaluated what went well, what didn't, and how to improve.
- **Backlog refinement meeting:** Agile practice where the Scrum team reviews, prioritizes, and prepares product backlog items for upcoming sprints.
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❖ **Also, User stories creation and what things will be included in user stories such as**

- **Story no**
- **Tasks**
- **Priority**
- **Acceptance criteria**

➤ **BV & CP value**

US-101 | User Login | Login page with validation | High | 5 | 3 | Sprint 1

US-102 | Invoice Upload | Upload interface for invoices | High | 5 | 3 | Sprint 1

US-103 | Dashboard Summary | Invoice dashboard summary view | Medium | 4 | 2 | Sprint 1

US-201 | Invoice Approval | Approve or reject invoices | High | 5 | 3 | Sprint 2

US-202 | Notification System | Invoice status notifications | Medium | 3 | 2 | Sprint 2

US-203 | Role Management | Admin user role configuration | Medium | 4 | 2 | Sprint 2

❖ In Scrum, a product owner serves as the liaison between multiple areas of an organization. This person communicates with business stakeholders and collaborates closely with Scrum teams to keep all areas of the business informed on a project's development.

❖ The product owner develops a vision of a product's function and operation, which in turn allows this Scrum team member to define product features and break those features into product backlog items.

US-101 | Login Page | Kapil | In Progress | 6 hrs

US-102 | Invoice Upload UI | Vartika | To Do | 8 hrs

US-103 | Dashboard Graph | Krish | Completed | 4 hrs

Document 5: Product and sprint backlog and product and sprint burndown charts

Product backlog:

User story ID	User story	Tasks	Priority	BV ₹	CP	Sprint
US-101	As a user, I want to log in securely so that I can access my account.	Login page with validation	High	100	3	Sprint 1
US-102	As a user, I want to receive notifications when invoice statuses change so	Upload interface for invoices	High	100	3	Sprint 1

	that I can stay updated.					
US-103	As a user, I want to dashboard that shows invoice summaries so that I can view statuses quickly.	Invoice dashboard summary view	Medium	100	3	Sprint 1
US-201	As a manager, I want to approve or reject invoices so that I can control outgoing payments.	Approve or reject invoices	high	100	3	Sprint 2
US-202	As a user, I want to receive notifications when invoice statuses change so that I can stay updated.	Invoice status notifications	Medium	50	5	Sprint 2
US-203	As a admin, I want to manage user roles so that I can access control is maintained.	Admin user role configuration	Medium	50	5	Sprint 2
US-301	As a finance officer, I want to generate monthly reports so that I can review expense trends.	Monthly expense reports	High	200	8	Sprint 3
US-302	As a user, I want to search invoices by date/vendor so that I can find specific records.	Search invoices by criteria	Medium	100	5	Sprint 3

US-303	As a user, I want to search invoices by date/vendor so that I can find specific records.	Automated backup system	Medium	200	8	Sprint 3
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Sprint backlog:

Sprint 1 Backlog

User story ID	User story	Tasks	Owner	Status	Estimated effort
US-101	As a user, I want to log in securely so that I can access my account.	Login Page	Kapil	In Progress	6 hrs
US-102	As a accountant, I want to upload invoices so that I can they can be tracked.	Invoice Upload UI	Vartika	To do	8 hrs
US-103	As a user, I want to dashboard that shows invoice summaries so that I can view statuses quickly.	Dashboard Graph	Krish	Completed	4 hrs

Sprint 2 Backlog

User Story ID	User story	Task	Owner	Status	Effort Estimate
US-201	As a manager, I want to approve or reject invoices so that I can control outgoing payments.	Approval Workflow UI	Nanu	To Do	8 hrs
US-202	As a user, I want to receive notifications when invoice	Notification System Setup	Santosh	In Progress	7 hrs

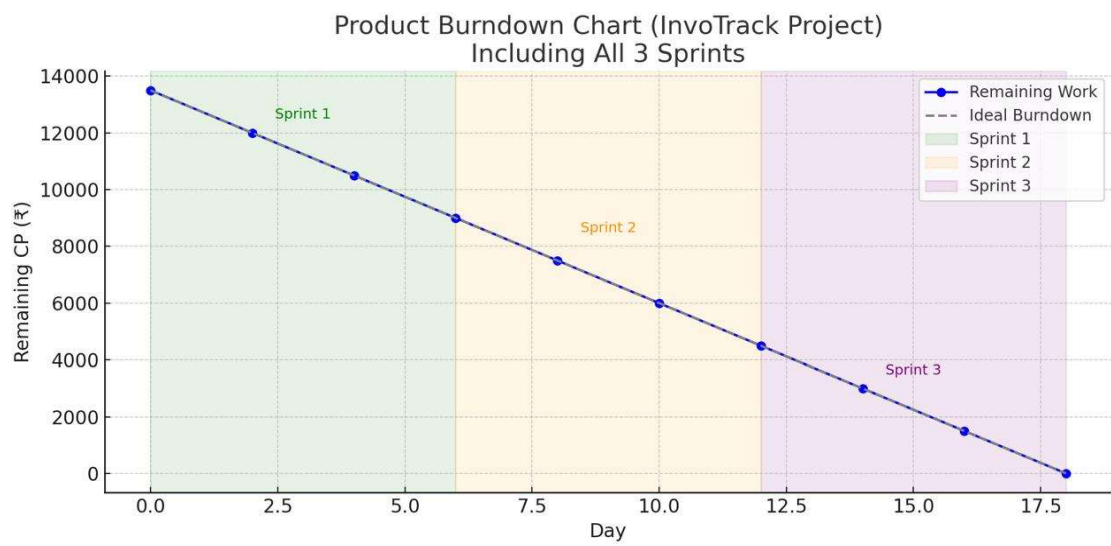
	statuses change so that I can stay updated.				
US-203	As a admin, I want to manage user roles so that I can access control is maintained.	User Role Access Control	Krish	To Do	6 hrs

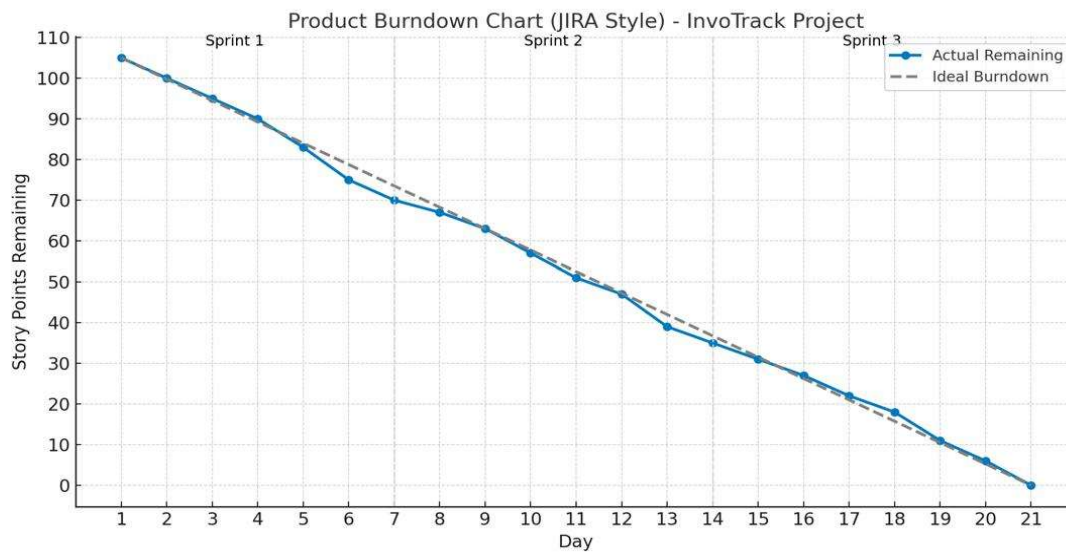
Sprint 3 Backlog

User Story ID	User Story	Task	Owner	Status	Effort Estimate
US-301	As a finance officer, I want to generate monthly reports so that I can review expense trends.	Generate Monthly Reports	Vartika	To Do	7 hrs
US-302	As a user, I want to search invoices by date/vendor so that I can find specific records.	Search Invoice Feature	Kapil	To Do	6 hrs
US-303	As a admin, I want to back up invoice data so that I can it is safe and recoverable.	Implement Backup Logic	Santosh	To Do	5 hrs

Product Burndown Chart –

The product burndown chart shows total scope (user stories) planned versus completed over the 3 sprints.

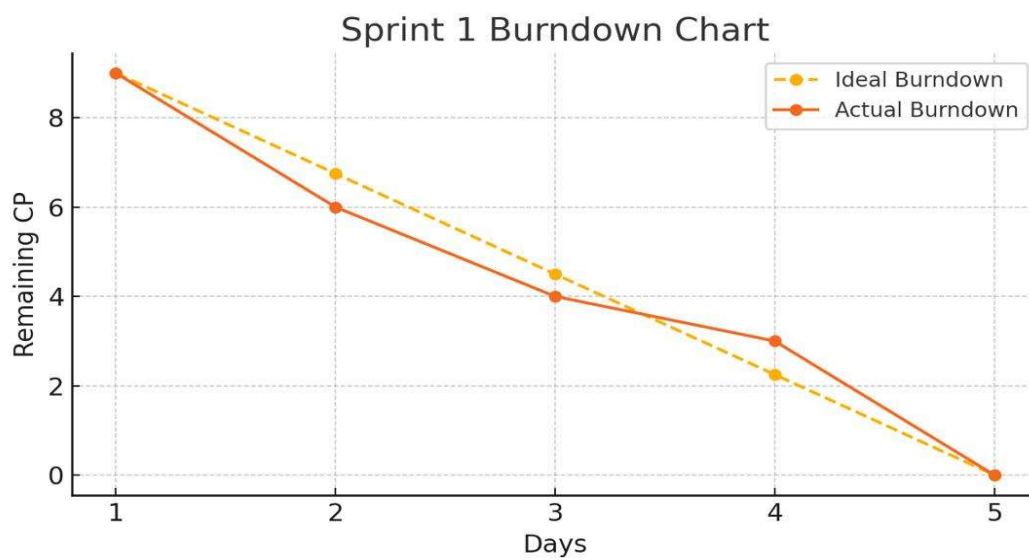




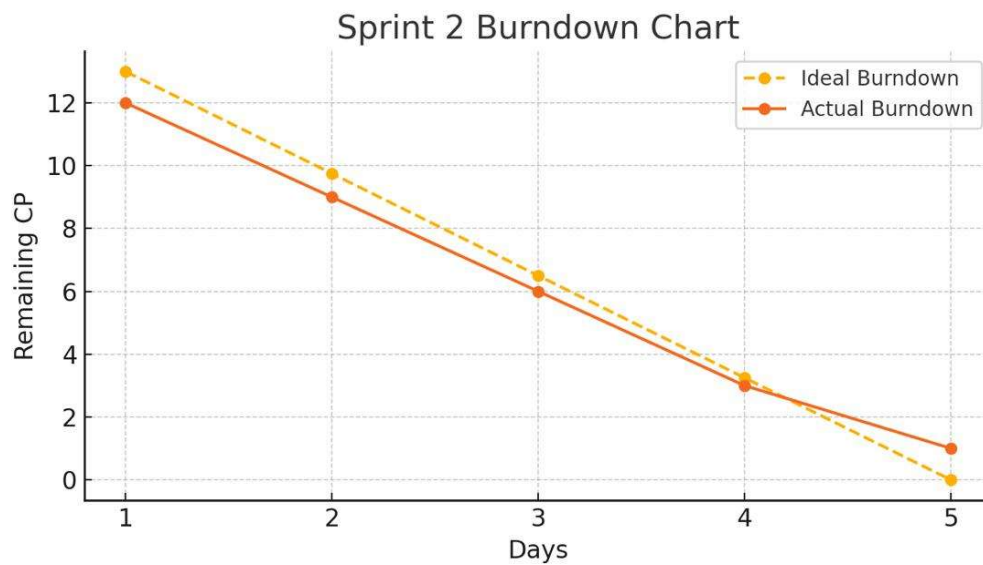
Sprint Burndown Chart-

This chart reflects daily effort remaining during Sprint 1. Teams should update estimates daily.

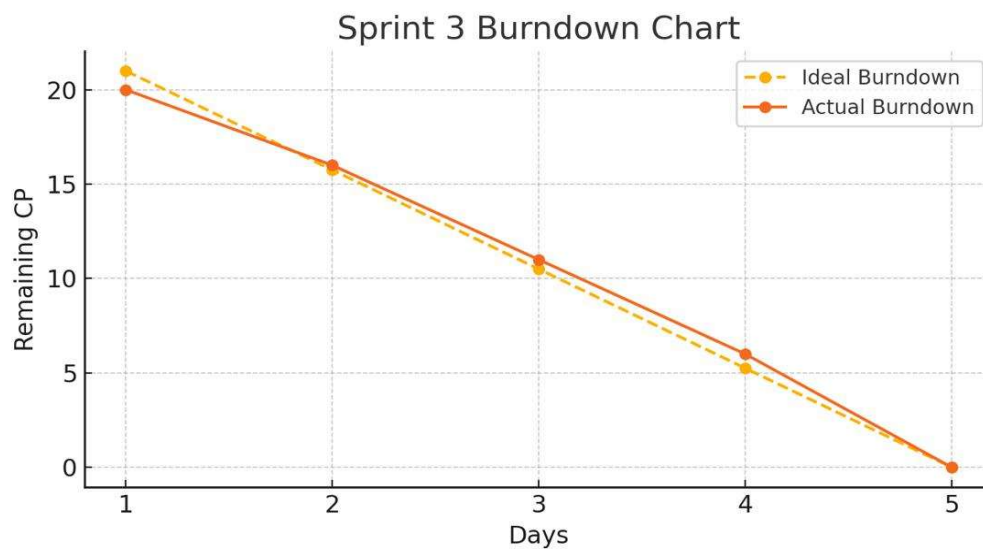
Sprint 1 Burndown chart



Sprint 2 Burndown Chart



Sprint 3 Burndown Chart



Document 6: Sprint meetings

Meeting Type 1: Sprint planning meeting

- **Sprint Planning meeting:** Define sprint goals and assign user stories to the sprint.

Date	03/07/2025
Time	3:30 PM
Location	Noida NSEZ,ODC 302
Prepared By	Product Owner(Niharika Sharma)
Attendees	scrum master(Lalit Gupta), Nanu, Krish, Vartika, Kapil, Santosh

Agenda Topics

Topic	Presenter	Time allotted
Login Page	Kapil	6 hrs
Invoice Upload UI	Vartika	8 hrs
Dashboard Graph	Krish	4 hrs

Other Information

Observers	Santosh
Resources	Krish, Vartika, Kapil
Special Notes	To do all the assigned work before timelines

Meeting Type 2: Sprint review meeting

Sprint Review: Demonstrate completed features to stakeholders for feedback.

Date	04/07/2025
Time	10:00AM
Location	Noida NSEZ,ODC 302
Prepared By	Scrum Master(Lalit Gupta)
Attendees	scrum team, internal and external stakeholders, and anyone involved in the product management process .Nanu, Krish, Vartika, Kapil, Santosh

Sprint status	Things to demo	Quick updates	What's next
In Progress, to do or	Invoice Upload UI	The work is done or	Dashboard Graph

completed		not	
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Meeting Type 3: Sprint retrospective meeting

- **Sprint Retrospective:** Discuss what went well, what didn't, and how to improve.

Date	08/07/2025
Time	3:30 PM
Location	NSEZ Noida
Prepared By	product owner
Attendees	Scrum master, development team

Agenda	What went well	What didn't go well	Questions	Reference
Setting the goal	Invoice processing is good	Errors some invoices	How to do it better?	Previous invoices
Gathering essential data	Collected all the invoice	Login page is not working	How this is worked?	Login

Meeting Type 4: Daily Stand-up meeting

- **Daily Stand-up:** 15-minute meeting to share progress and blockers.

Question	Name/Role	Week “1” (from 01-07-2025 to 06-07-2025)						
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

What did you do yesterday?	Developer 1-Nanu	User Login	Invoice Approval	Reports	Login Page	Review all the work	-	-
	Developer 2-Krish							
	Developer 3-Vartika							
What will you do today?	Developer 1-Nanu	Invoice Upload	Notification System	Invoice Search	Invoice Upload	Review all the work pending	-	-
	Developer 2-Krish							
	Developer 3-Kapil							
What (if any) is blocking your progress?	Developer 1-Kapil	Dashboard Summary	Role Management	Data Backup Login Page	Dashboard Graph	Confirm all the work is done or not	-	-
	Developer 2-Santosh							
	Developer 3-Krish							