DOCUMENT 1. DEFINITION OF DONE

Activity	Description	Yes / No
Code Complete	All coding tasks and changes have been implemented, and the code is functionally complete.	Yes
Unit Tests Passed	Unit tests have been written for the code, and they pass successfully without any failures.	Yes
Functional Requirements Met	The code meets all the defined functional requirements and acceptance criteria.	Yes
Design and Architecture	The code adheres to the established design and architectural principles and guidelines.	Yes
Code Review Completed	The code has been reviewed by at least one team member to ensure code quality, readability, and adherence to coding standards.	Yes
Documentation Updated	Documentation, including code comments, API documentation, and user manuals, has been updated and is accurate.	Yes
Integration Tests Passed	Integration tests have been performed to validate the interaction of the code with other system components, and they pass successfully.	Yes
Performance Requirements Met	The code meets the defined performance requirements and operates efficiently within acceptable limits.	Yes
Security Measures Implemented	Appropriate security measures have been implemented to protect against common vulnerabilities and adhere to security standards.	Yes
User Interface / Experience Checked	The user interface and experience have been reviewed and tested to ensure usability, consistency, and a positive user journey.	Yes
Deployment Ready	The code is ready for deployment to the target environment, including any necessary configuration changes, environment setup, and dependencies.	Yes
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.	Yes
Technical Debt Addressed	Any identified technical debt or outstanding issues have been resolved or documented for future iterations.	Yes
Peer Verification	Another team member has verified that all the criteria mentioned above have been met and signed off on the completion of the work.	Yes

DOCUMENT 2. PRODUCT VISION

Project Name	Smart CRM App	
Venue	Pune	
Date:	Start:	16-08-2025
	End:	15-07-2026
Duration:	12 months	
Client:	Encove Global Services Pvt Ltd	

SCRUM TEAM	
SCRUM MASTER	ADITYA SINGH
PRODUCT OWNER	VISHAL SINGH
SCRUM DEVELOPER 1	ANKITA SINGH
SCRUM DEVELOPER 2	JATIN
SCRUM DEVELOPER 3	GAURAV
SCRUM DEVELOPER 4	ABHISHEK
SCRUM DEVELOPER 5	MEENAL

The vision of this project is to enhance employee efficiency and maximize client satisfaction by resolving challenges such as requirement duplication, limited contact visibility, lack of case tracking, and absence of performance reporting. It aims to deliver benefits like streamlined requirement management, real-time performance tracking, transparent case monitoring, improved internal communication, and efficient time management.

TARGET GROUP:

MARKET SEGMENT: Encove Global Services developed the Smart CRM App to streamline internal communication, requirement management, and performance tracking for corporate clients. The project is positioned in the enterprise software solutions market, targeting organizations that need efficient task management, real-time case tracking, and transparent collaboration tools. By enabling seamless communication, eliminating duplicate requirements, and providing built-in reporting, the Smart CRM App helps businesses improve productivity, client satisfaction, and operational efficiency.

TARGET USERS: This Smart CRM app serves employees by streamlining daily tasks, managing client requirement data, and tracking requirements in real time. Clients can also access their requirement details, enhancing transparency and communication.

NEEDS:

PROBLEM FACED BY EMPLOYEES:

- Duplication of Requirements: Users frequently upload the same requirements multiple times, creating inefficiency and wasted effort.
- Limited Contact Visibility: Employees are unable to access colleagues' contact details, which restricts internal communication.
- No Case Tracking System: Lack of visibility into the progress of cases makes it difficult for employees to monitor status updates.
- Missing Employee Performance Reports: The application does not generate productivity or performance reports, limiting management insights.
- No Built-in Telephony: Employees cannot directly connect through the app, leading to dependency on external tools for communication.

BENEFITS OF THIS PROJECT:

- Requirement Management: Centralized storage and accessibility of requirements ensures all employees work with the same updated information.
- Performance Tracking: Employers can monitor employee contributions and provide timely feedback, incentives, and improvement suggestions.
- Reporting and Analysis: Automated reports offer real-time insights into employee productivity, task completion, and client interactions.
- Communication Enhancement: Built-in telephony and user information access enable seamless collaboration across teams.
- Time Efficiency: Eliminating duplicate uploads and improving information access saves employee time and boosts overall efficiency.
- Transparency in Case Tracking: Employees can monitor real-time case progress, ensuring accountability and better planning.

PRODUCT:

SMART CRM APP – This application helps employees and clients manage requirements, tasks, and communication efficiently. It allows users to register, upload requirements, manage tasks, track cases, and schedule meetings. The app improves transparency by enabling case progress tracking, provides performance reports for employees, and integrates built-in communication tools for seamless collaboration. Clients can also raise queries directly within the app for faster resolution.

FEATURES OF THIS PRODUCT:

- Requirement Management: Centralized system to upload, access, and manage project or client requirements, avoiding duplication and ensuring transparency.
- Performance Tracking: Provides automated reports to monitor employee productivity, task completion, and KPIs in real-time.
- Reporting and Analysis: Generates dashboards and insights on employee activities, client interactions, and case progress for informed decisions.
- Communication & Collaboration: Built-in calling and contact visibility to enable seamless communication and better teamwork among employees.
- Case Tracking: Allows employees to track the real-time progress of their assigned cases, ensuring accountability and process transparency.
- Efficiency Improvement: Eliminates duplicate uploads, streamlines workflows, and reduces delays, helping employees save time and work more effectively.

FEASIBILITY OF THIS PROJECT:

It is feasible to develop the project by considering the following points.

TECHNICAL FEASIBILITY

- User Registration & Information Management
- Requirement Management
- Case Tracking
- Built-in Telephony
- Performance Reporting

RESOURCE FEASIBILITY

- Budget
- Scrum Team
- Timeline

LEGAL FEASIBILITY

- Compliance Requirement
- Risk Mitigation

RISK ANALYSIS

- Miscommunication
- Incomplete Requirement Gathering
- Resource Risk
- Technical Risk
- Financial Risk
- Time Risk
- Third-Party Dependencies

BUSINESS GOAL:

The goal of this project is to increase employee efficiency and enhance client satisfaction by streamlining requirement management, enabling real-time case tracking, and improving internal communication. The system will also support analyzing client behavior and automatically generating performance reports, ensuring transparency and data-driven decision-making.

BUSINESS MODEL:

Encove GS targets corporate and retail clients who require CRM solutions, requirement management, communication tools, and performance tracking systems. Most of their business comes from existing clients, as Encove builds strong relationships by maintaining regular contact through emails, updates, and customized offers.

The company leverages digital strategies like optimized SEO, ensuring that whenever users search for CRM or project management-related terms, Encove's solutions appear at the top, driving repeat engagement.

Encove GS operates through multiple revenue streams including CRM subscriptions, SME-focused solutions, commercial client projects, and service charges. Their Smart CRM application enables requirement uploading, task and pipeline management, case tracking, performance reporting, and built-in telephony, making it a comprehensive tool for businesses.

By integrating Agile practices into its delivery, Encove GS ensures flexibility, faster updates, and continuous improvement to meet evolving client needs.

DOCUMENT: 3 USER STORIES

USER STORY NO. 1	TASK : CREATE EMPLOYEE REGISTRATION PORTAL	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT : TO REGISTER IN SMART CRM APP		
SO THAT : I CAN DO WORK ON IT		
BV: 500		CP:02
ACCEPTANCE CRITERIA:		
Registration Screen		
Text Boxes for Employee ID, Password, Nation ID, Mobile No		
Phone Number		
Click on Register Button		
Send Notification To User		

USER STORY NO. 2	TASK : CREATE LOGIN PAGE FOR EMPLOYEE	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO LOGIN IN SMART CRM APP		
SO THAT : I CAN DO WORK ON IT		
BV: 500		CP:02
ACCEPTANCE CRITERIA:		
Registration Screen		
Text Boxes for Employee ID, Password, Nation ID		
Phone Number		
Click on Submit Button		

USER STORY NO. 3	TASK : CREATE A SEARCH BAR	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO SEARCH CLIENT DETAIL		
SO THAT : I CAN ANALYZE THE REQUIREMENT		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
Enter Client ID or LAN Number		

USER STORY NO. 4	TASK: CREATE A REQUIREMENT SECTION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO SEARCH REQUIREMENTS		
SO THAT : I CAN ANALYZE THE REQUIREMENT		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
SHOW THE LIST OF REQUIREMENTS.		
HAVE THE OPTION OF ADD AND EDIT REQUIREMENT		

USER STORY NO. 5	TASK: CREATE ADD NEW CLIENT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO ADD THE NEW CLIENT DETAIL		
SO THAT: WE CAN DIFFERENTIATE THE CLIENTS		
BV: 500		CP:02
ACCEPTANCE CRITERIA:		
NAME, ADDRESS, MOBILE		
ORGANISATION NAME AND ADDRESS		

USER STORY NO. 6	TASK: CREATE ADD BASIC DETAIL OF CLIENT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO ADD THE BASIC DETAIL OF CLIENT		
SO THAT : WE CAN DIFFERENTIATE THE CUSTOMERS		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
NAME, ADDRESS, MOBILE		
PAN NUMBER AND AADHAR NUMBER		

USER STORY NO. 7	TASK: UPDATE EXISTING CLIENT INFORMATION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO UPDATE EXISTING CLIENT DETAIL		
SO THAT: WE CAN TRACK COMPLETE CLIENT HISTORY		
BV: 500		CP:04
ACCEPTANCE CRITERIA:		
INQUIRY DETAIL, CLIENT PROFILE, CONTACT UPDATE, HISTORY LOG		

USER STORY NO. 8	TASK: CREATE PROPOSAL FOR A CLIENT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A PRFESSIONAL PROPOSAL FOR THE CLIENT		
SO THAT: WE CAN PRESENT SOLUTIONS, OFFERINGS & PRICING TO SECURE THE PROJECT		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
PROPOSAL READY		

USER STORY NO. 9	TASK: UPDATE IN EXISTING PROPOSAL	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO UPDATE THE EXISTING PROPOSAL WITH REVISED DETAILS		
SO THAT: WE CAN ENSURE THE CLIENT HAS THE MOST ACCURATED & UPDATED INFORMATION		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
PROPOSAL UPDATED		

USER STORY NO. 10	TASK: CREATE A NEW VENDOR DETAILS	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE & SAVE NEW VENDOR DETAILS		
SO THAT: VENDOR ONBOARDING BECOMES FASTER & FUTURE TRANSACTIONS CAN BE PROCESSED SMOOTHLY		
BV: 500		CP:03
ACCEPTANCE CRITERIA:		
VENDOR CREATED, DATA SAVED FIELDS VALIDATED, RECORD VISIBLE		

USER STORY NO. 11	TASK: ADD BASIC DETAILS OF VENDORS	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO ADD BASIC DETAILS OF VENDORS IN THE SYSTEM		
SO THAT: WE CAN STORE VENDOR INFORMATION FOR FUTURE REFERENCE & TRANSACTIONS		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
VENDOR ADDED, RECORD CREATED		

USER STORY NO. 12	TASK: UPDATE INFORMATION OF VENDORS	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO UPDATE VENDOR INFORMATION IN THE SYSTEM		
SO THAT: WE CAN MAINTAIN ACCURATE VENDOR RECORDS FOR SMOOTH OPERATIONS		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
DATA UPDATED, ENTRY VALIDATED, CHANGES LOGGED		

USER STORY NO. 13	TASK: CREATE SOFTWARE LICENSE VALIDITY	PRIORITY: HIGHEST
AS AN ADMIN		
I WANT: TO DEFINE & MANAGE THE VALIDITY PERIOD OF SOFTWARE LICENSES		
SO THAT: I CAN ENSURE CONTROLLED ACCESS & COMPLIANCE WITH LICENSE AGREEMENTS		
BV: 500		CP:03
ACCEPTANCE CRITERIA:		
LICENSE DATE, VALIDITY, RENEWAL AVAILABLE, STATUS UPDATED		

USER STORY NO. 14	TASK: CHANGES IN LICENSE VALIDITY	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT : TO GENERATE EVERY EMPLOYEE PERFORMANCE REPORT		
SO THAT : I CAN ANALYZE THEM		
BV: 100		CP:04
ACCEPTANCE CRITERIA:		
VALIDITY UPDATED, DATE MODIFIED, CHANGE REFLECTED		

USER STORY NO. 15	TASK: CREATE PAYMENT SECTION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A SECURE PAYMENT SECTION		
SO THAT: USERS CAN COMPLETE TRANSACTIONS SEAMLESSLY		
BV: 500		CP:03
ACCEPTANCE CRITERIA:		
TRANSACTION SECURE, PAYMENT SUCCESSFUL, RECEIPT GRANTED		

USER STORY NO. 16	TASK: CREATE ADMIN REGISTRATION PORTAL	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE AN ADMIN REGISTRATION PORTAL		
SO THAT: ADMINISTRATORS CAN SECURELY REGISTER & ACCESS THE SYSTEM		
BV: 100		CP:02
ACCEPTANCE CRITERIA:		
PORTAL CREATED, SECURE LOGIN, ERROR HANDLED		

USER STORY NO. 17	TASK: CREATE AUTOMATED TASK MANAGEMENT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE & TRACK AUTOMATED TASKS		
SO THAT: I CAN SAVE THE TIME & IMPROVE PRODUCTIVITY		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
TASK CREATED, AUTO ASSIGNED, DATA SYNCED, STATUS UPDATED		

USER STORY NO. 18	TASK: CREATE RAISE TICKETING FOR ANY ISSUES	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO RAISE A TICKET FOR AN ISSUES		
SO THAT: WE CAN SOLVED THE ISSUES EFFICIENTLY & CAN BE TRACKED		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
TICKET CREATED, STATUS UPDATED, ISSUE LOGGED, RESPONSE TRACKED		

USER STORY NO. 19	TASK: CREATE SELF SERVICE PORTAL	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO ACCESS AND MANAGE HR & IT SERVICES THROUGH A SELF-SERVICE PORTAL		
SO THAT: WE CAN RESOLVE REQUESTS INDEPENDENTLY WITHOUT DEPENDENCY ON SUPPORT TEAMS		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
USER LOGIN, TICKET TRACKING, DATA SECURITY		

USER STORY NO. 20	TASK: CREATE LIVE CHAT & MESSAGING	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO COMMUNICATE INSTANTLY WITH COLLEAGUES THROUGH LIVE CHAT & MESSAGING		
SO THAT: I CAN COLLABORATE EFFICIENTLY AND REPONSE QUERIES IN REAL TIME		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
USER ONLINE, REAL-TIME DELIVERY, CHAT HISTORY, MESSAGE SENT & RECEIVED		

USER STORY NO. 21	TASK: CREATE CASE TRACKING	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE AND TASK CASES IN THE SYSTEM		
SO THAT: I CAN MONITOR PROGRESS, RESOLVE ISSUES EFFICIENTLY, AND ENSURE ACCOUNTABILITY		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
CASE CREATED, PROGRESS VISIBLE, STATUS UPDATED		

USER STORY NO. 22	TASK: CREATE LEAD MANAGEMENT		PRIORITY: HIGHEST
AS AN EMPLOYEE			
I WANT: TO CREATE & MANAGE LEADS IN THE SYSTEM			
SO THAT: I CAN TRACK PROSPECTS & CONVERT THEM INTO OPPORTUNITIES			
BV: 200			CP:04
ACCEPTANCE CRITERIA:			
LEAD CREATED, DUPLICATE CHECKED, RECORD ACCESSIBLE			

USER STORY NO. 23	TASK: CREATE SALES PIPELINE		PRIORITY: HIGHEST
AS AN EMPLOYEE			
I WANT: TO CREATE A STRUCTURED SALES PIPELINE			
SO THAT: I CAN TRACK LEADS EFFICIENTLY AND IMPROVE CONVERSION RATES			
BV: 500			CP:03
ACCEPTANCE CRITERIA:			
LEADS CAPTURED, STAGES DEFINED, DATA SYNCED, STATUS UPDATED			

USER STORY NO. 24	TASK: CREATE SALES FORECASTING	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE AN ACCURATE SALES FORECASTING MODEL		
SO THAT: I CAN PREDICT FUTURE SALES TRENDS AND SUPPORT DECISION-MAKING		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
FORECAST GENERATED, INSIGHTS PROVIDED, TREND ANALYSIS		

USER STORY NO. 25	TASK: CREATE BILLING SECTION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A DEDICATED BILLING SECTION IN THE SYSTEM		
SO THAT: I CAN MANAGE INVOICES & STREAMLINE PAYMENT PROCESSING EFFICIENTLY		
BV: 100		CP:04
ACCEPTANCE CRITERIA:		
INVOICE GENERATED, PAYMENT PROCESSED, ACCESS GRANTED		

USER STORY NO. 26	TASK: UPDATE BILLING SECTION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO UPDATE THE BILLING SECTION WITH ACCURATE DETAILS		
SO THAT: CLIENTS ARE BILLED CORRECTLY & FINANCIAL RECORDS REMAIN ACCURATE		
BV: 500		CP:03
ACCEPTANCE CRITERIA:		
DATA UPDATED, INVOICE CORRECTED, PAYMENTS SYNCED, BILLING VALIDATED		

USER STORY NO. 27	TASK: CREATE DASHBOARD	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE AN INTERACTIVE DASHBOARD		
SO THAT: I CAN VISUALIZE & TRACK KEY PERFORMANCE METRICS EFFICIENTLY		
BV: 500		CP:04
ACCEPTANCE CRITERIA:		
DATA VISIBLE, CHARTS INTERACTIVE, FILTERS WORKING, USER FRIENDLY		

USER STORY NO. 28	TASK: CREATE PERFORMANCE REPORT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A DETAILED PERFORMANCE REPORT		
SO THAT: I CAN ANALYZE TEAM EFFICIENCY & IDENTIFY IMPROVEMENTS AREAS		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
REPORT GENERATED, RESULTS VERIFIED		

USER STORY NO. 29	TASK: DELETE AND ADD SECTION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO DELETE & ADD SECTIONS IN THE DOCUMENT/PROPOSAL		
SO THAT: I CAN MAINTAIN UP-TO-DATE & RELEVANT CONTENT		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
SECTION UPDATED, CHANGES SAVED, DATA VALIDATED, LAYOUT ADJUSTED		

USER STORY NO. 30	TASK: CREATE E-MAIL VERIFICATION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO IMPLEMENT AN EMAIL VERIFICATION PROCESS FOR USERS		
SO THAT: I CAN ONLY VERIFIED USERS CAN ACCESS THE PLATFORM SECURELY		
BV: 100		CP:02
ACCEPTANCE CRITERIA:		
E-MAIL ID, USER VERIFIED, OTP VALIDATED, STATUS UPDATED		

USER STORY NO. 31	TASK: APPROVAL STATUS	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO VIEW & UPDATE THE APPORVAL STATUS OF PROPOSALS		
SO THAT: I CAN TRACK PROGRESS AND ENSURE TIMELY DECISION-MAKING		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
STATUS UPDATED, APPROVAL, CHANGES SAVED, REQUEST APPROVED, DECISION		

USER STORY NO. 32	TASK: CREATE DELETE CLIENT TAB	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A TAB THAT ALLOWS DELETION OF CLIENTS RECORDS		
SO THAT: I CAN MANAGE OUTDATED OR INCORRECT CLIENT DATA EFFICIENTLY		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
CLIENT DELETION, DATA UPDATED, ACTION LOGGED, TAB VISIBLE		

USER STORY NO. 33	TASK: CREATE DOCUMENT SECTION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A DEDICATED DOCUMENT SECTION		
SO THAT: I CAN MANAGE & ORGANIZE ALL RELATED PROJECT DOCUMENTS EFFICIENTLY		
BV: 100		CP:03
ACCEPTANCE CRITERIA:		
SECTION CREATED, UPLOAD ENABLED, EDIT ALLOWED, VERSION TRACKED		

USER STORY NO. 34	TASK: REJECTION OF THE REQUIREMENT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO REJECT UNNECESSARY OR IRRELEVANT REQUIREMENTS		
SO THAT: I CAN MAINTAIN PROJECT SCOPE AND AVOID RESOURCE WASTAGE		
BV: 100		CP:03
ACCEPTANCE CRITERIA:		
REJECTION LOGGED, REASON CAPTURED, RECORD SAVED		

USER STORY NO. 35	TASK: DEVIATION	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO RECORD & TRACK DEVIATION DETAILS IN THE SYSTEM		
SO THAT: I CAN ENSURE COMPLIANCE & MAINTAIN ACCURATE PROJECT DOCUMENTATION		
BV: 200		CP:02
ACCEPTANCE CRITERIA:		
STATUS UPDATED, DATA SAVED, ALERT TRIGGERED, REPORT GENERATED		

USER STORY NO. 36	TASK: DUE AMOUNT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO VIEW & MANAGE THE DUE AMOUNT DETAILS		
SO THAT: I CAN ENSURE TIMELY PAYMENTS AND AVOID PENALTIES		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
AMOUNT NOTIFIED, DUE, DISPLAYED, PAYMENT UPDATED,		

USER STORY NO. 37	TASK: PRODUCT LIST	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO VIEW AND MANAGE THE PRODUCT LIST		
SO THAT: I CAN TRACK AVAILABLE, ITEMS AND UPDATE THEM AS NEEDED		
BV: 100		CP:04
ACCEPTANCE CRITERIA:		
LIST DISPLAYED, ITEMS UPDATED, SEARCH ENABLED, DATA SYNCED		

USER STORY NO. 38	TASK: CREATE PRODUCT PRICING LIST	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A COMPREHENSIVE PRODUCT PRICING LIST		
SO THAT: I CAN PROVIDE ACCURATE & UPDATED PRICE DETAILS TO CLIENTS & STAKEHOLDERS		
BV: 200		CP:04
ACCEPTANCE CRITERIA:		
PRICES LISTED, DATA VERIFIED, LIST APPROVED, FORMAT FINALIZED		

USER STORY NO. 39	TASK: LOGIN PAGE FOR CLIENT	PRIORITY: HIGHEST
AS AN EMPLOYEE		
I WANT: TO CREATE A SECURE CLIENT LOGIN PAGE		
SO THAT: CLIENTS CAN ACCESS THEIR PERSONALIZED DASHBOARD SECURELY		
BV: 200		CP:03
ACCEPTANCE CRITERIA:		
CREDENTIALS VERIFIED, SECURE ACCESS, PASSWORD ENCRYPTION		

DOCUMENT 4: AGILE PO EXPERIENCE

I conducted a market analysis for Smart CRM and identified the following key areas:

- **Customer Enquiry Management:** Increased adoption of CRM systems to streamline inquiry tracking and improve resolution using automated ticketing and AI chatbots.
- **Requirement & Document Management:** Manual document uploads led to duplication; AI-powered duplicate detection and centralized repositories are essential for efficiency.

- **Payment & Case Tracking:** Timely collections and performance monitoring required automation to avoid revenue delays and enhance compliance.
- **System Reliability & Disaster Recovery:** Downtime impacted operations and compliance; secure backups and integrated recovery systems became mandatory.

Availability of Similar Product

ZOHO CRM: Inquiry Tracking, Basic Reporting

Salesforce CRM: Inquiry Management, Advanced Analytics

Tally ERP: Finance & Accounting, Invoice & Payment Processing

SAP/CRM: Order-to-Cash (O2C), Payment Reconciliation, Partner Management

Enterprise Analysis – Market Opportunity

Integrated Approach: Combines customer inquiries, document handling, invoice processing, reconciliation, and O2C workflows in one platform.

Cost-Effective for SMBs: Targeted at small to mid-sized enterprises needing affordable alternatives to high-end solutions.

Automated Compliance & Security: Built-in compliance for financial transactions and data protection standards.

Cloud-Based & Scalable: SaaS-ready, supports business expansion with flexible deployment.

Vision and Roadmap

Vision Statement:

"To develop an integrated system that streamlines invoice processing, reconciliation, O2C, and customer management, enhancing financial control and operational efficiency."

Roadmap Highlights:

Phase 1: Registration, Customer & Requirement Data Capture

Phase 2: Invoice Processing & Payment Tracking

Phase 3: Reconciliation, Compliance, and Reporting

Phase 4: Performance Tracking & Incentive Management

Backlog Management

The Product Owner (PO) creates and prioritizes backlog items based on business value, including:

- Registration
- Customer Detail
- Invoice Processing
- Payment Status
- Financial Reconciliation

Stakeholder Collaboration

Includes Finance Managers, Sales Teams, O2C Team, IT Admins, and Business Leaders. Regular feedback ensures alignment with evolving requirements.

Sprint Planning and Daily Follow-Up

- Define sprint goals with the development team.
- Conduct daily stand-ups to track invoice process, O2C tasks, and reconciliation workflows.

Performance Tracking

Monitor employee efficiency in processing invoices, managing O2C cycles, and completing reconciliations. Provide actionable insights for performance-based incentives.

Compliance Management

Ensure adherence to corporate financial controls, audit requirements, and regulatory compliance.

Tools Used

In this project, I have used JIRA and MS Excel for reporting and tracking performance

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.

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

PRODUCT BACKLOG

User Story ID	User Story	Task	Priority	BV	CP	Sprint
1	AS AN EMPLOYEE I WANT TO REGISTER IN SMART CRM APP SO THAT I CAN DO WORK ON IT	CREATE EMPLOYEE REGISTRATION PORTAL	HIGHEST	500	2	REGISTRATION
2	AS AN EMPLOYEE I WANT TO LOGIN IN SMART CRM APP SO THAT I CAN DO WORK ON IT	CREATE LOGIN PAGE FOR EMPLOYEE	HIGHEST	500	2	REGISTRATION
13	AS AN ADMIN I WANT TO DEFINE & MANAGE THE VALIDITY PERIOD OF SOFTWARE LICENSES SO THAT I CAN HAVE ADMIN RIGHT	CREATE SOFTWARE LICENSE VALIDITY	HIGHEST	500	4	REGISTRATION
3	AS AN EMPLOYEE I WANT TO SEARCH CLIENT DETAIL SO THAT I CAN ANALYZE THE REQUIREMENT	CREATE A SEARCH BAR	HIGHEST	200	3	CLIENT DETAIL

4	AS AN EMPLOYEE I WANT TO SEARCH REQUIREMENTS SO THAT I CAN ANALYZE THE REQUIREMENT	CREATE A DOCUMENT SECTION	HIGHEST	200	3	CLIENT DETAIL
5	AS AN EMPLOYEE I WANT TO ADD THE NEW CLIENT DETAIL	CREATE ADD NEW DETAIL SECTION	HIGHEST	500	2	CLIENT DETAIL
6	AS AN EMPLOYEE I WANT TO ADD THE BASIC DETAIL OF CLIENT	CREATE ADD BASIC DETAIL OF CLIENT SECTION	HIGHEST	200	3	CLIENT DETAIL
7	AS AN EMPLOYEE I WANT TO UPDATE EXISTING CLIENT DETAIL	UPDATE EXISTING CLIENT INFORMATION	HIGHEST	500	4	CLIENT DETAIL
8	AS AN EMPLOYEE I WANT TO CREATE A PRFESSIONAL PROPOSAL FOR THE CLIENT	CREATE PROPOSAL FOR THE CLIENT SECTION	HIGHEST	300	3	REQUIREMENT DETAIL
9	AS AN EMPLOYEE I WANT TO UPDATE THE EXISTING PROPOSAL WITH REVISED DETAILS	CREATE UPDATE IN EXISTING PROPOSAL SECTION	HIGHEST	300	4	REQUIREMENT DETAIL
10	AS AN EMPLOYEE I WANT TO CREATE & SAVE NEW VENDOR DETAILS	CREATE A NEW VENDOR DETAILS SECTION	HIGHEST	500	3	REQUIREMENT DETAIL
11	AS AN EMPLOYEE I WANT TO ADD BASIC DETAILS OF VENDORS IN THE SYSTEM	ADD BASIC DETAILS OF VENDORS	HIGHEST	300	3	REQUIREMENT DETAIL
12	AS AN EMPLOYEE I WANT TO CHECK LOAN STATUS SO THAT WE CAN COMPLETE ON TIME	LOAN APPROVAL STATUS BAR	HIGHEST	200	2	REQUIREMENT DETAIL
14	AS AN EMPLOYER I WANT TO GENERATE EVERY EMPLOYEE PERFORMANCE REPORT SO THAT I CAN ANALYZE THEM	CREATE PERFORMANCE REPORT	HIGHEST	100	4	STATUS
16	AS AN EMPLOYEE I WANT TO SEE THE LIST OF DSA SO THAT I CAN MANAGE IT PROPERLY	CREATE LOAN ORIGINATION SECTION	HIGHEST	100	4	STATUS
17	AS AN EMPLOYEE I WANT TO SEE THE DISBURSE AMOUNT AND BALANCE AMOUNT SO THAT I CAN TRACK THE PAYMENT	CREATE LOAN AMOUNT SECTION	HIGHEST	200	3	STATUS
18	AS AN EMPLOYEE I WANT TO RAISE A TICKET FOR AN ISSUES	CREATE RAISE TICKETING FOR ANY ISSUES	HIGHEST	200	4	STATUS
19	AS AN EMPLOYEE I WANT TO ACCESS AND MANAGE HR & IT SERVICES THROUGH A SELF-SERVICE PORTAL	CREATE SELF SERVICE PORTAL	HIGHEST	300	4	BASIC DETAIL
15	AS AN EMPLOYEE I WANT TO CREATE A SECURE PAYMENT SECTION	CREATE PAYMENT SECTION	HIGHEST	500	4	BASIC DETAIL
20	TO COMMUNICATE INSTANTLY WITH COLLEAGUES THROUGH LIVE CHAT & MESSAGING	CREATE LIVE CHAT & MESSAGING	HIGHEST	200	3	BASIC DETAIL

SPRINT BACKLOG

REGISTRATION

User Story ID	User Story	Task	Owner	Status	Estimated Efforts
1	AS AN EMPLOYEE I WANT TO REGISTER IN SMART CRM APP SO THAT I CAN DO WORK ON IT	CREATE EMPLOYEE REGISTRATION PORTAL	ADITYA	COMPLETED	5 DAYS
2	AS AN EMPLOYEE I WANT TO LOGIN IN SMART CRM APP SO THAT I CAN DO WORK ON IT	CREATE LOGIN PAGE FOR EMPLOYEE	ADITYA	COMPLETED	4 DAYS
13	AS AN ADMIN I WANT TO WITH THE APP SO THAT I CAN HAVE ADMIN RIGHT	CREATE ADMIN REGISTRATION PORTAL	ADITYA	COMPLETED	4 DAYS

CLIENT DETAIL

User Story ID	User Story	Task	Owner	Status	Estimated Efforts
3	AS AN EMPLOYEE I WANT TO SEARCH CLIENT DETAIL SO THAT I CAN ANALYZE THE REQUIREMENT	CREATE A SEARCH BAR	KUNAL	COMPLETED	7 DAYS
4	AS AN EMPLOYEE I WANT TO SEARCH REQUIREMENT SO THAT I CAN ANALYZE THE REQUIREMENT	CREATE A REQUIREMENT SECTION	KUNAL	COMPLETED	7 DAYS
5	AS AN EMPLOYEE I WANT TO ADD OR DELETE THE CLIENT DETAIL SO THAT WE CAN DIFFERENTIATE THE CUSTOMERS	CREATE A CLIENT BASIC INFORMATION SECTION	KUNAL	COMPLETED	7 DAYS
6	AS AN EMPLOYEE I WANT TO ADD OR DELETE THE COAPPLICANT DETAIL SO THAT WE CAN DIFFERENTIATE THE CUSTOMERS	CREATE COAPPLICANT SECTION	KUNAL	COMPLETED	7 DAYS

REQUIREMENT DETAIL

User Story ID	User Story	Task	Owner	Status	Estimated Efforts
7	AS AN EMPLOYEE I WANT TO CHECK CLIENT DETAIL SO THAT WE CAN KNOW THE CLIENT PAYMENT HISTORY	CREATE PAYMENT HISTORY	JATIN	COMPLETED	6 DAYS
8	AS AN EMPLOYEE I WANT TO CHECK BANK DETAIL OF CLIENT SO THAT WE CAN KNOW THE CLIENT HISTORY FOR THR PAYMENT	CREATE BANKING SECTION	AJAY	COMPLETED	5 DAYS

9	AS AN EMPLOYEE I WANT TO ADD REQUIREMENT DETAIL SO THAT WE CAN EASILY TO KNOW THEIR REQUIREMENT	CREATE REQUIREMENT DETAIL SECTION	JATIN	COMPLETED	4 DAYS
10	AS AN EMPLOYEE I WANT TO KNOW THEIR DUPLICATE REQUIREMENT SO THAT WE CAN ANALYZE ACCORDING TO IT	DEDUP SECTION	AJAY	IN PROGRESS	6 DAYS
11	AS AN EMPLOYEE I WANT TO CHECK PAN CARD VALIDATION SO THAT WE CAN MINIMIZE THE RISK OF FRAUD	PAN CARD VALIDATION	AJAY	IN PROGRESS	6 DAYS

STATUS

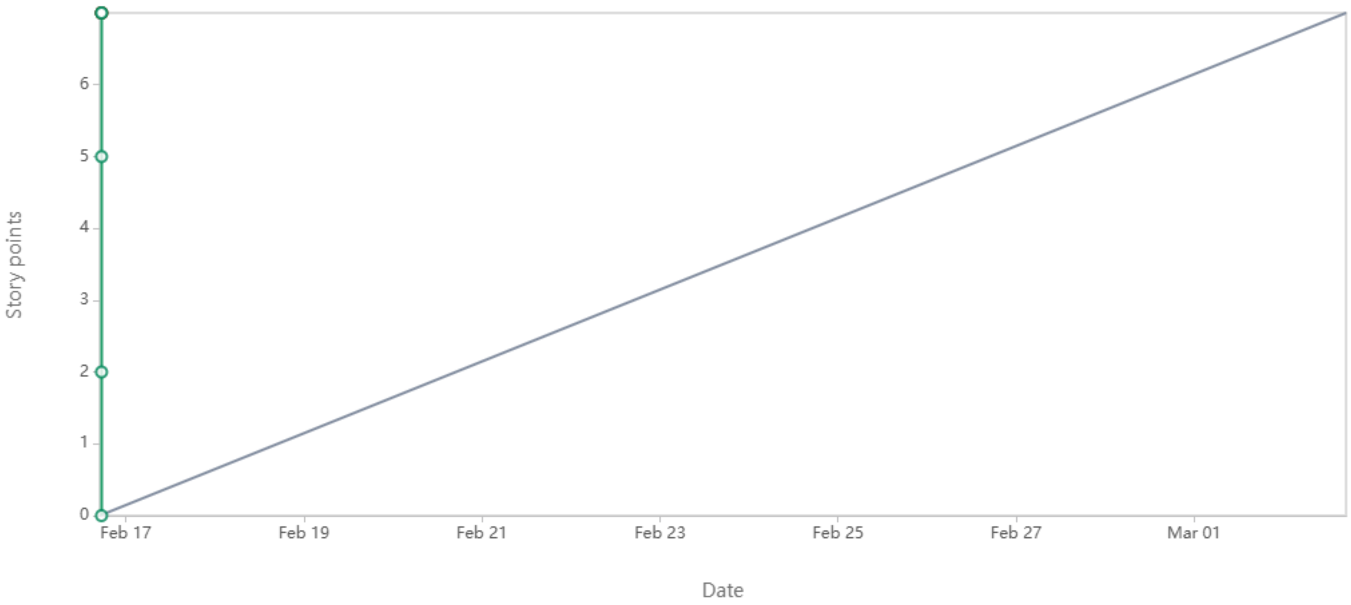
User Story ID	User Story	Task	Owner	Status	Estimated Efforts
12	AS AN EMPLOYEE I WANT TO CHECK REQUIREMENT STATUS SO THAT WE CAN COMPLETE ON TIME	REQUIREMENT APPROVAL STATUS BAR	NISHA	COMPLETED	5 DAYS
14	AS AN EMPLOYER I WANT TO GENERATE EVERY EMPLOYEE PERFORMANCE REPORT SO THAT I CAN ANALYZE THEM	CREATE PERFORMANCE REPORT	NISHA	COMPLETED	6 DAYS
16	AS AN EMPLOYEE I WANT TO SEE THE LIST OF VENDORS SO THAT I CAN MANAGE IT PROPERLY	CREATE REQUIREMENT ORIGINATION SECTION	NISHA	IN PROGRESS	5 DAYS
17	AS AN EMPLOYEE I WANT TO SEE THE REQUIREMENT AMOUNT AND BALANCE AMOUNT SO THAT I CAN TRACK THE PAYMENT	CREATE REQUIREMENT AMOUNT SECTION	NISHA	IN PROGRESS	5 DAYS

BASIC DETAIL

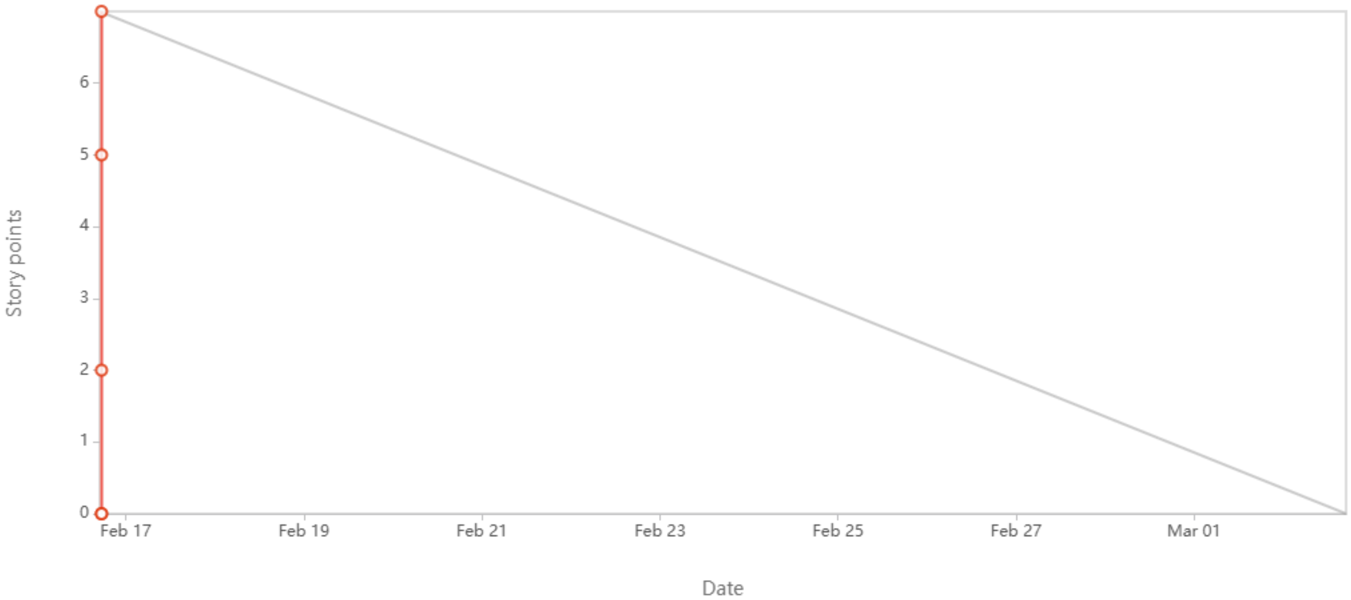
User Story ID	User Story	Task	Owner	Status	Estimated Efforts
18	AS AN EMPLOYEE I WANT TO TRACK THE PAYMENT STATUS SO THAT I CAN KNOW THE BALANCE AMOUNT	CREATE PAYMENT TRACKING SECTION	ADITYA	COMPLETED	7 DAYS
19	AS AN EMPLOYEE I WANT TO SEND NOTIFICATION TO CLIENT SO THAT THEY CAN PAY THE BALANCE ON TIME	PAYMENT NOTIFICATION	KUNAL	IN PROGRESS	7 DAYS
15	AS AN EMPLOYEE I WANT TO TRACK REQUIREMENT ORIGINATION SO THAT I CAN MANAGE IT PROPERLY	CREATE REQUIREMENT ORIGINATION SECTION	ADITYA	TO DO	7 DAYS
20	AS AN EMPLOYEE I WANT TO DELETE AND UPDATE CUSTOMER DATA SO THAT I CAN UPDATE DATA ON TIME	DELETE AND ADD SECTION	KUNAL	TO DO	7 DAYS

REGISTRATION:

PRODUCT BURN DOWN

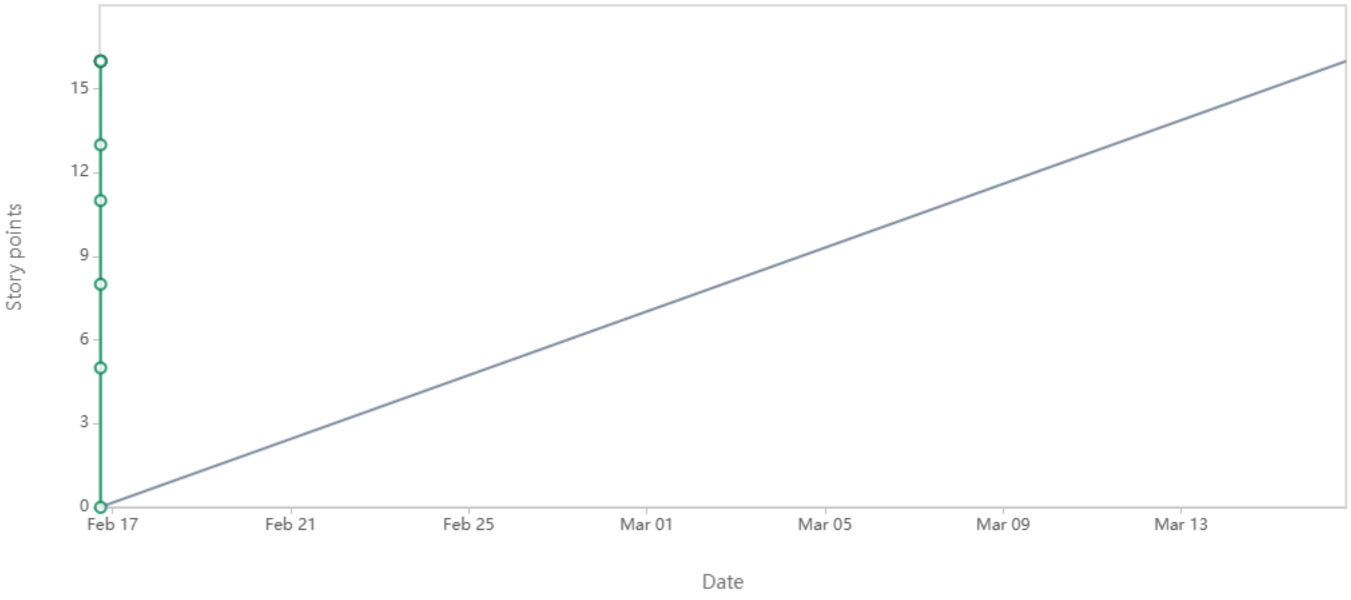


SPRINT BURN DOWN

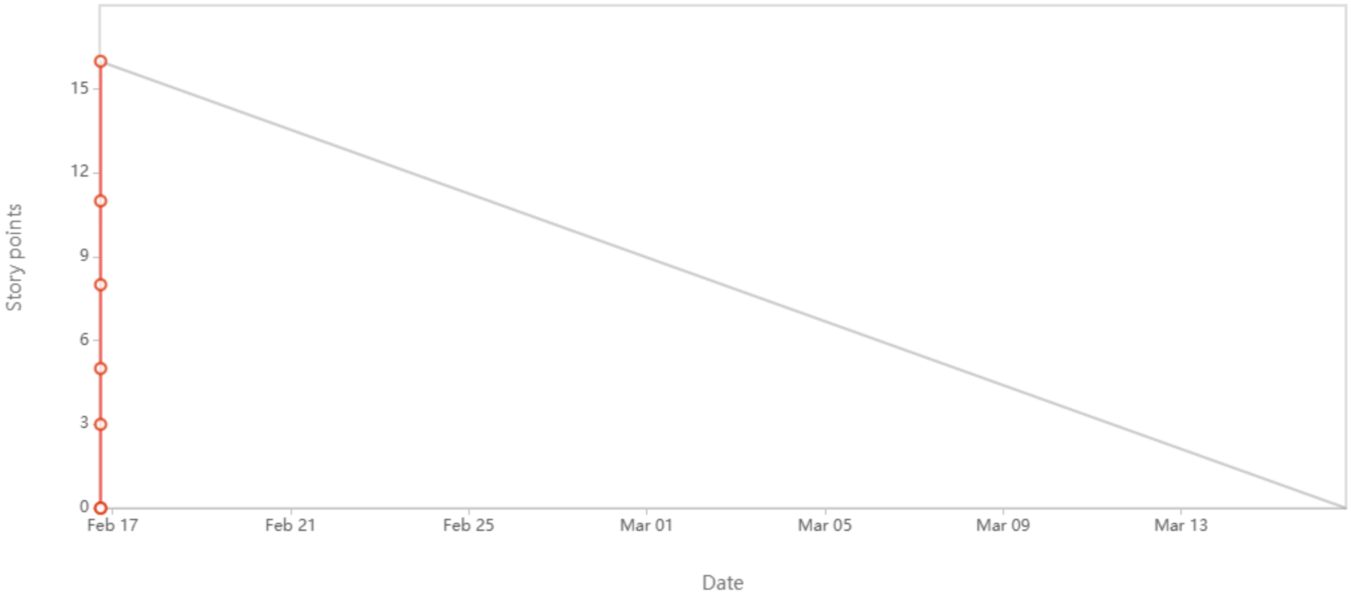


CLIENT DETAIL:

PRODUCT BURN DOWN

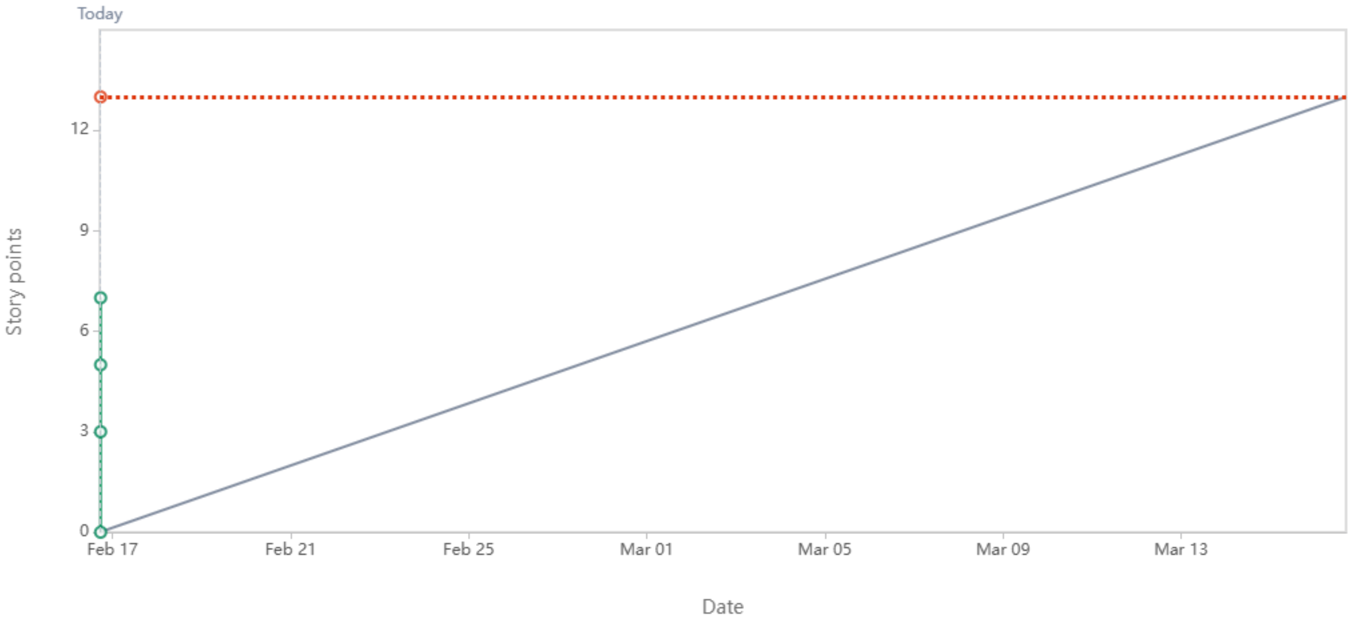


SPRINT BURN DOWN

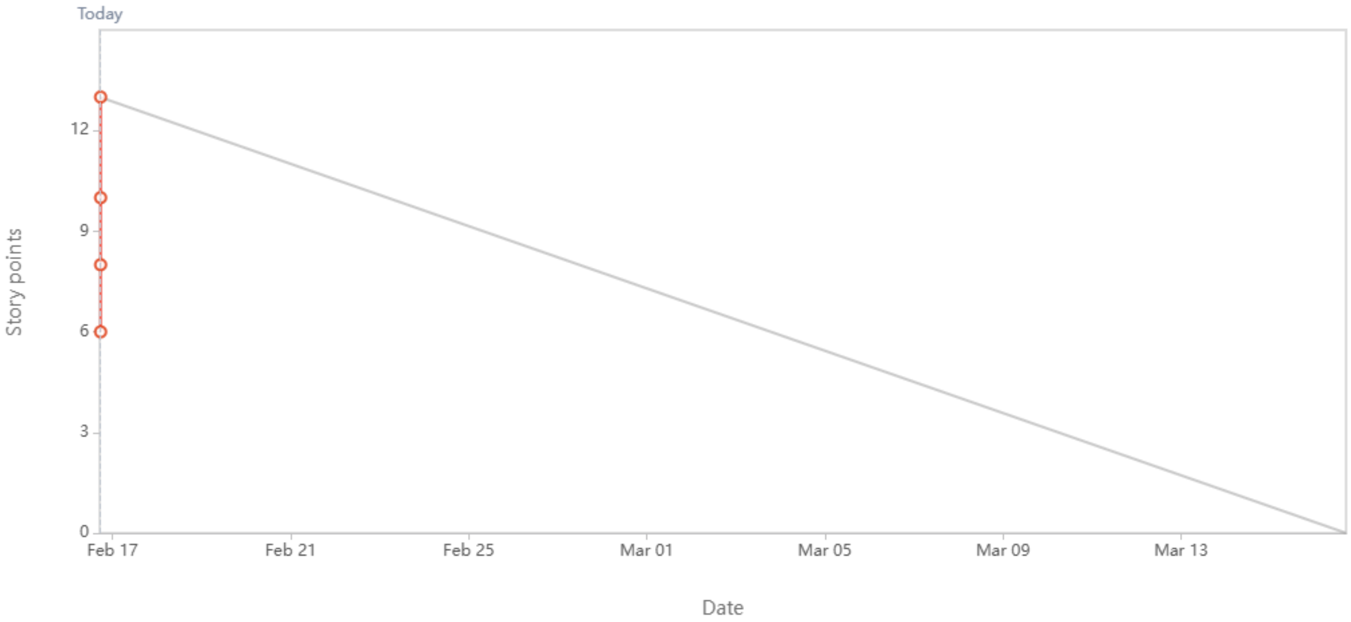


REQUIREMENT DETAIL:

PRODUCT BURN DOWN

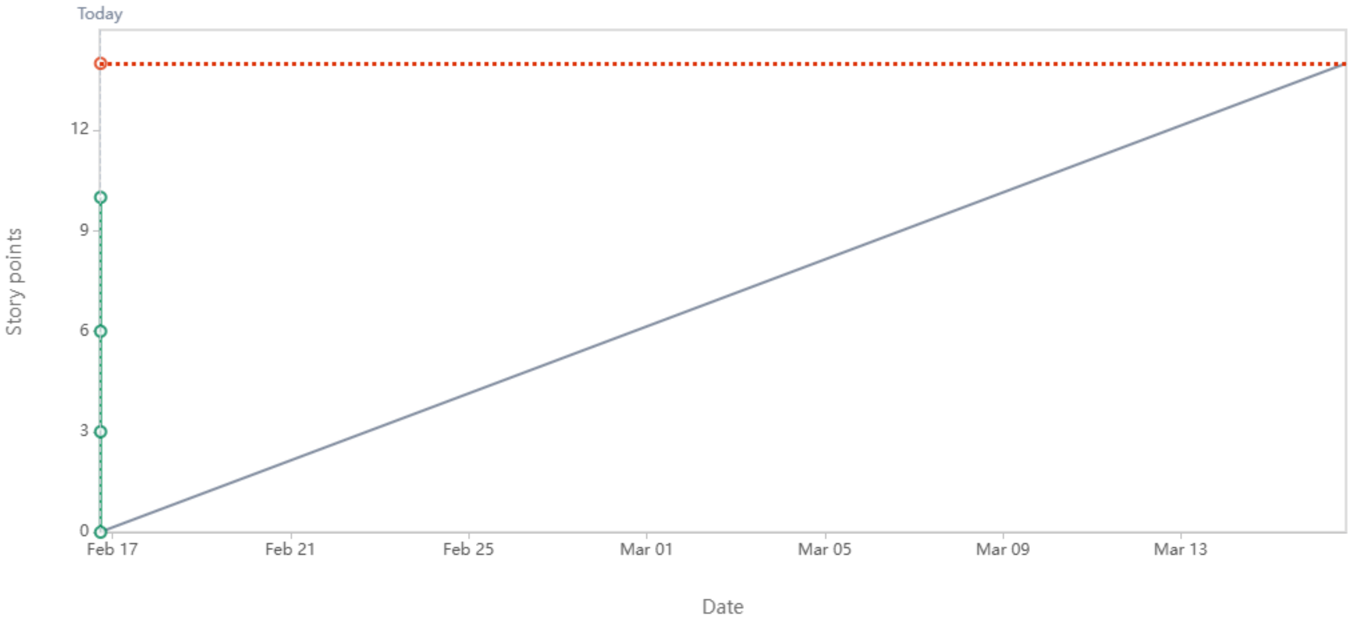


SPRINT BURN DOWN

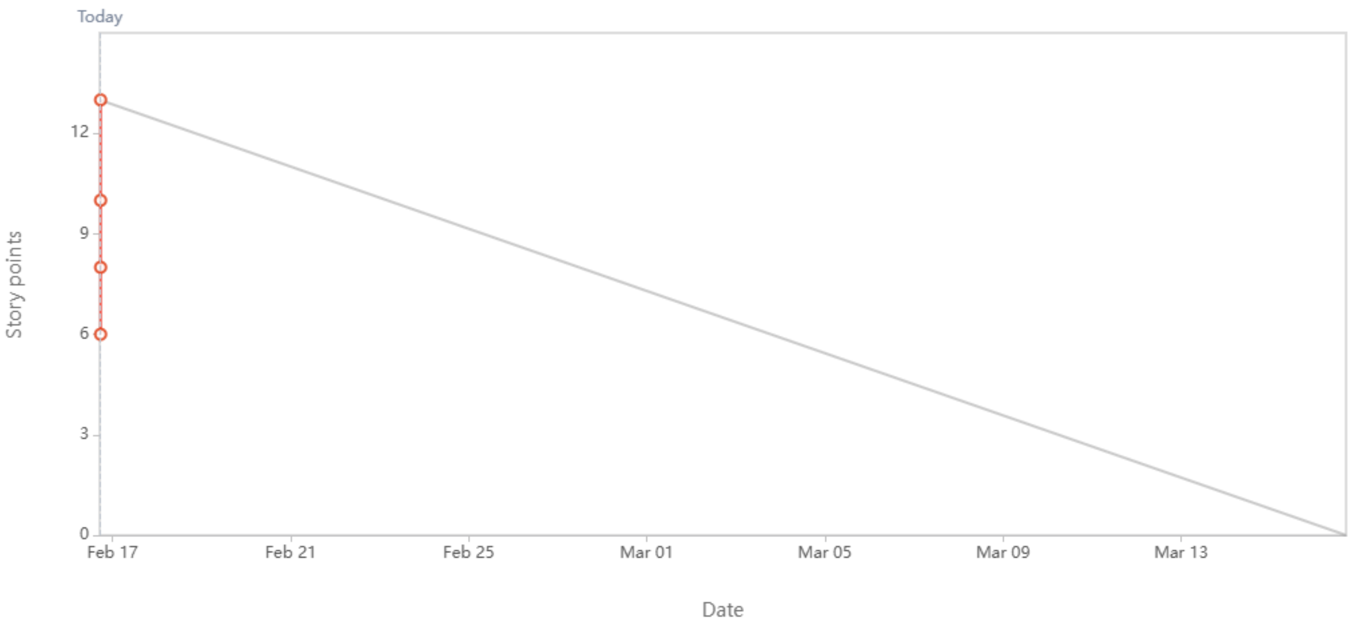


STATUS:

PRODUCT BURN DOWN

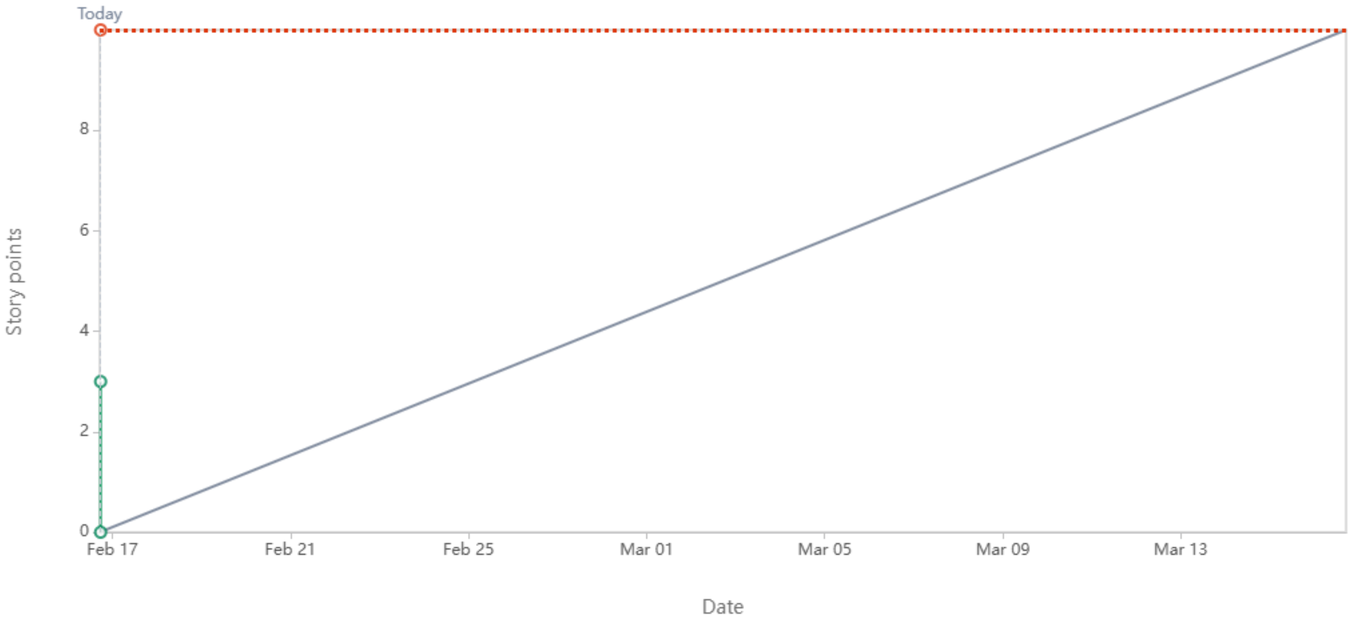


SPRINT BURN DOWN

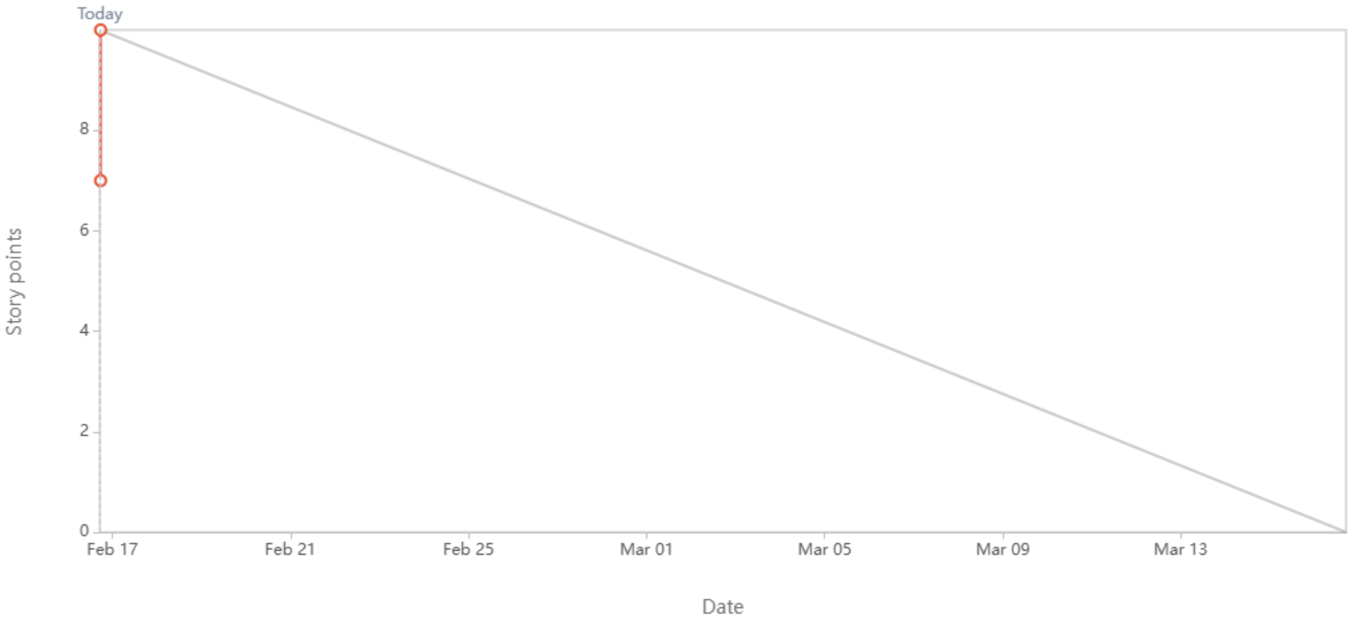


BASIC DETAIL:

PRODUCT BURN DOWN



SPRINT BURN DOWN



DOCUMENT: 6 SPRINT MEETING

SPRINT PLANNING MEETING

DATE	07-Sep-25
TIME	11:00 AM
LOCATION	PUNE
PREPARED BY	AMIT
ATTENDES	VISHAL, RAKESH, KUNAL, VIRAT, AVINASH

TOPIC	PRESENTER	TIME ALLOTTED
CHANGES IN SMRT CRM APP	ADITYA	1 HOUR

CHALLENGES FACED

- Requirement Duplication: Frequent uploads of the same project or task requirements lead to inefficiency and waste employee effort; system detection and prompts for duplicates are needed.
- Limited Contact Visibility: Lack of easy access to employee contact details makes internal communication and collaboration difficult.
- No Case Tracking System: Absence of real-time case progress tracking creates challenges for monitoring and planning tasks.
- Missing Performance Reports: Inability to auto-generate and access employee productivity and task completion reports restricts management decision-making.
- Disaster Recovery & Business Continuity: Systems must be robust to ensure data integrity and seamless availability, minimizing downtime in case of technical incidents.

RESOURCES:

People:

- Business Analyst
- Project Manager
- Developer
- Tester

Time Frame: 12 Months

- Requirement Gathering- 1 month
- Design- 1-2 months
- Development- 4-5 month
- Testing-2-3 month
- Deployment- 1 month

Budget: - 50 LAKHS

Meeting Type 2: Sprint review meeting

REGISTRATION

DATE	20-10-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	8

SPRINT STATUS	THINGS TO DO	QUICK UPDATES	WHATS NEXT
Completed	Prepare for delivery	Once we have to make it final	Client Detail

CLIENT DETAIL

DATE	25-11-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

SPRINT STATUS	THINGS TO DO	QUICK UPDATES	WHATS NEXT
Completed	Prepare for delivery	Once we have to make it final	Requirement Detail

REQUIREMENT DETAIL

DATE	28-12-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

SPRINT STATUS	THINGS TO DO	QUICK UPDATES	WHATS NEXT
In Progress	Two user story are pending	Requirements are not cleared	Delivery of the product

STATUS

DATE	02-02-2026
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

SPRINT STATUS	THINGS TO DO	QUICK UPDATES	WHATS NEXT
In Progress	Two user story are pending	Requirement Origination and Approval	Delivery of the product

BASIC DETAIL

DATE	02-03-2026
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

SPRINT STATUS	THINGS TO DO	QUICK UPDATES	WHATS NEXT
In Progress	Three user story are pending	Notification, origination, and update section	Delivery of the product

Meeting Type 3: Sprint retrospective meeting

REGISTRATION

DATE	20-10-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	8

AGENDA	WHAT WENT WELL	WHAT DIDN'T GO WELL	QUESTION	REFERENCE
Status of Registration Sprint	Completed on time	Communication between team members	How to solve the communication problem	It can be solved by giving a clear role

CLIENT DETAIL

DATE	25-11-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

AGENDA	WHAT WENT WELL	WHAT DIDN'T GO WELL	QUESTION	REFERENCE
Status of Client Detail	Completed on time	Change request	How to accept change request	Clear understanding of changes

REQUIREMENT DETAIL

DATE	28-12-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

AGENDA	WHAT WENT WELL	WHAT DIDN'T GO WELL	QUESTION	REFERENCE
Status of Requirement Detail	All resources are available	Not able to complete on time	Communication of change request	Analysis of change request

STATUS

DATE	02-02-2025
TIME	10:30 AM
LOCATION	PUNE
PREPARED BY	ADITYA SINGH
ATTENDEES	7

AGENDA	WHAT WENT WELL	WHAT DIDN'T GO WELL	QUESTION	REFERENCE
Status of Status Tab	All resources are available	Not able to complete on time	Communication change request	Analysis of change request

BASIC DETAIL

AGENDA	WHAT WENT WELL	WHAT DIDN'T GO WELL	QUESTION	REFERENCE
Status of Basic Detail	All resources are available	Not able to complete on time	Communication change request	Analysis of change request

Meeting Type 4: Daily Stand-up meeting

Question	Role	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
What did you do yesterday?	Developer 1	Analyzed requirements	Completed UI design	Started API integration	Continued API integration	Fixed bugs in API	-	-
	Developer 2	Set up database schema	Implemented authentication	Worked on user authorization	Integrated database with backend	Debugged and optimized queries	-	-
	Developer 3	Created front-end components	Styled UI elements	Connected UI with API	Added validation and error handling	Performed UI testing	-	-
What will you do today?	Developer 1	Design UI mockups	Start API integration	Continue API integration	Test API endpoints	Finalize API and documentation	-	-
	Developer 2	Implement authentication	Work on user authorization	Integrate backend with frontend	Optimize database queries	Final testing and bug fixes	-	-
	Developer 3	Style UI elements	Connect UI with API	Add validation and error handling	Conduct UI testing	Fix UI bugs and finalize design	-	-
What (if any) is blocking your progress?	Developer 1	None	Delay in requirement clarification	API dependency delays	Bug in third-party API	None	-	-

	Developer 2	None	Database connection issues	Sync issues with frontend	Complex query optimization	None	-	-
	Developer 3	None	Inconsistent UI requirements	API response delays	Validation logic conflicts	None	-	-