

PROJECT REQUIREMENT FORM

Project title

InvoiceXR

Client name

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Project advisor

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Project description

Issuing invoices and quotes is a task many freelancers and independent contractors have to do several times in a day. Many of them find this task challenging as they often rely on Microsoft Excel, Microsoft Word or other non-custom tools to help with this task. Although there are some custom invoicing solutions, they often require the user to subscribe to a monthly plan.

This project aims to develop a software system to help freelancers and independent contractors and small businesses easily issue invoices, track outstanding invoices and follow up on late payments.

The tool can be either web or desktop application.

Features list

What are the key features of the software? Please list at least 8

1. The application shall allow a business to register its staff as users in various roles such as Invoice manager and owner.
2. The application shall allow the owner and invoice manager to create invoices for new and existing clients.
3. The application shall make it possible for invoices to be sent via email and also exported as PDF.
4. The application shall make it possible to record and track payments against invoices
5. The application shall make it possible for the owner to generate various reports such as - report of all invoices in a specified period, unpaid invoices, all invoices against a client and all payments based on a specified period.
6. It shall be possible to create recurring invoices that are sent monthly, quarterly or yearly to clients automatically.
7. The application shall ensure that only the owner can delete invoices that payments have been recorded against.
8. The application shall make it possible for quotes to be created. It should also be possible to convert a quote to invoice in one click.

9. On login, the application shall present the user with a dashboard showing total amount invoiced, number of invoices, outstanding invoice amount and number of partly paid invoices.
10. The application shall make it possible to issue and send receipts via email.
11. The application shall send payment reminders automatically to clients with outstanding invoices based on a reminder interval specified on the invoice.
12. The application shall make it possible to accept payments on the invoice via paypal and stripe (sandbox only).

Application users

Who are the primary users of the application?

The primary users of the application are the owner and staff members of the small and medium enterprise.

Programming language required

What programming language does the customer require students to use?

Python, Java or PHP

Database required

Does the system require a database?

What database does the customer require students to use?

Yes, it will likely require a database. Ideally, MYSQL/MariaDB should be used.

Data provided

What data (or document) is the customer providing?

N/A

Out of scope

What is considered out of scope?

The focus of the application is to help freelancers, independent contractors and small businesses issue and manage invoices and receipts. Complex multi-currency invoicing will be considered out of scope.