

Scope Document: Agreement & Invoice Tracking System

1. Project Overview: The system will be a web-based application for tracking agreements and invoices. It will feature role-based access, dashboards for users to manage agreements and invoices, and automated reminder notifications.

2. Modules & Features:

A. Agreement Tracking Module

1. Agreement Management

- Users can add, edit, and view agreements.
- Agreement Types:
 - General Vendor
 - IT Vendor
 - Finance Vendor
 - Admin
- Each agreement will have the following attributes:
 - Agreement Title
 - Agreement Type
 - Status (Ongoing/Expired)
 - Start Date
 - Expiry Date
 - Party Name
 - Reminder Time (automatically 6 months prior to the expiry date, then in each month)
 - Assigned Users (who will receive notifications)
 - Attachments (PDF, max 2MB)

2. Role-Based Access Control

- Admins can manage all agreements.
- Role-based visibility:
 - Admin Department → General Vendor Agreements
 - IT Manager → IT Vendor Agreements
 - Business Development → Client Agreements
 - Finance → Finance Vendors

- Only assigned users can modify the agreement status.

3. Dashboard & Notifications

- A dashboard displaying:
 - Active Agreements
 - Expiring Agreements
 - Expired Agreements
 - Automated reminders to assigned users:
 - **6 months before expiry**
 - **Every month after that until the status is updated**
 - Notifications via **email and SMS**.
-

B. Invoice Tracking Module

1. Invoice Management

- Users can add, edit, and view invoices.
- Each invoice will have the following attributes:
 - Invoice Number
 - Client/Vendor Name
 - Amount
 - Invoice Date
 - Due Date
 - Status (Pending/Paid)
 - Payment Method
 - Assigned Users
 - Attachments (PDF, max 200KB)

2. Dashboard & Notifications

- A dashboard displaying:
 - Pending Invoices

- Paid Invoices
 - Overdue Invoices
 - Automated reminders:
 - **1 week before the due date**
 - **Every week after that until the status is changed to Paid**
 - Notifications via **email and SMS**.
-

3. Technology Stack & Hosting

- **Backend:** PHP/Laravel or Node.js/Express
 - **Frontend:** React.js or Vue.js
 - **Database:** MySQL or PostgreSQL
 - **Hosting:** Hostinger Shared Hosting
 - **Notifications:** SMTP for email, Twilio/API for SMS
-

4. User Roles & Permissions

Role	Agreement Access	Invoice Access	Notifications
Admin	Full Access	Full Access	All
IT Manager	IT Vendor Agreements	No Access	IT Agreements
Business Dev.	Client Agreements	Client Invoices	Client Items
Accounts Manager	Vendor Agreements	Full Invoice Access	Finance Items

6. Future Enhancements

- API integrations with accounting software
- Multi-currency support
- Advanced reporting & analytics