

Statement of Work (SOW) for AI Voice-Based Invoice Generation Platform

1. Introduction

1.1 Purpose

This Statement of Work (SOW) defines the scope, objectives, and deliverables for developing an AI-driven voice-based invoice generation platform. The platform enables businesses to create invoices, track payments, and gain financial insights through an interactive AI voice agent. The system will provide seamless voice interactions, intuitive UI elements, and automated invoice generation.

1.2 Project Overview

The platform will offer the following capabilities:

- **User registration and business setup** with GST details.
 - **Item and customer management** with pricing, GST, and HSN codes.
 - **Voice-based invoice creation** with dynamic item selection, pricing adjustments, and transaction recording.
 - **Payment tracking** and balance updates via voice commands.
 - **Business and customer-level analytics** accessible through voice and UI.
 - **Multi-modal interaction** where the agent responds via voice and presents clickable UI components.
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2. Scope of Work

2.1 In-Scope Features

1. **User Authentication & Business Registration**
 - Secure signup and login.
 - Business registration with GST details.
 - User dashboard to manage business settings.
2. **Item & Customer Management**
 - Add, update, and remove items with unit, price, applicable GST, and HSN code.
 - Add and manage customers with business name and GST details.
3. **AI Voice-Based Invoice Generation**
 - Voice agent-driven interactive invoice creation.
 - Identify items via item code or item name.

- Accept quantity and allow dynamic price adjustments.
- Record transactions and generate invoices.
- Send invoices via email upon confirmation.
- 4. Payment Tracking**
 - Record customer payments via voice command.
 - Adjust outstanding balance dynamically.
- 5. Business & Customer Analytics**
 - Sales insights at the business and customer levels.
 - Key metrics:
 - Sales in the current week.
 - Sales in the current month.
 - Customers with pending balance (sorted by highest value).
 - Top customers by business value.
- 6. Multi-Modal User Experience**
 - AI voice responses for interactions.
 - Clickable UI components for user input and navigation.

2.2 Out of Scope

- Manual invoice entry without the voice agent.
 - Custom invoice templates beyond the standard format.
 - Multi-language support (initial version will be in one language).
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3. Deliverables

- 1. Functional Web & Voice Platform**
 - End-to-end solution with AI voice interaction and UI support.
 - 2. Technical Documentation**
 - API documentation for integrations.
 - User guide for onboarding and usage.
 - 3. Security & Compliance Implementation**
 - Data encryption and secure authentication.
 - Compliance with financial and data protection regulations.
 - 4. Testing & QA Reports**
 - Functional, integration, and security testing reports.
 - 5. Deployment Strategy**
 - Cloud-based deployment with scalable infrastructure.
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4. Responsibilities

4.1 Client Responsibilities

- Provide feedback on business registration, item management, and invoice workflow.

- Validate AI-generated invoices and analytics for accuracy.
- Offer insights on preferred voice interactions and UI components.

4.2 Development Team Responsibilities

- Design and develop the AI voice agent and invoice processing system.
 - Ensure accurate schema handling for GST-compliant invoices.
 - Implement role-based access control and secure payment tracking.
 - Maintain documentation and training materials.
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5. Assumptions & Constraints

- The platform will be cloud-hosted.
 - AI voice interactions will be optimized for natural conversations.
 - The user will have a stable internet connection for voice interactions.
 - The invoice format will comply with standard GST invoicing regulations.
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6. Acceptance Criteria

- Users can register their business with GST details.
- Items and customers can be added and managed seamlessly.
- The voice agent can create invoices interactively with clarifications.
- Payments can be recorded and adjusted dynamically.
- The platform provides accurate sales and balance analytics.
- Voice interactions are responsive and UI elements complement the experience.

7. Key Points of Evaluation

- Completion of the use cases mentioned
- Quality of the product, both from UI and working of the product
- Must be deployed in a cloud environment
- Product presentation and creativity