TeamACE CRM-ERP Platform

Phase 1: Sprint Plan (90-Day Lean Delivery)

Document Version: 3.0 **Date:** December 1, 2025 **Prepared by:** Rozitech (Pty) Ltd **Methodology:** Agile Scrum (2-week sprints) **Timeline:** 90 Days (6 Sprints) **Capacity Model:** Lean Team (60% allocation)

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1. Sprint Overview

1.1 Lean Team Capacity Model

Resource	Allocation	Weekly Hours	Sprint Hours
Tech Lead (PM/BA/Dev)	60%	24	240
Intermediate Developer	60%	24	240
Total	**60%**	**48**	**480**

AI-Assisted Development: Claude MAX (2 seats) providing +40% productivity boost

1.2 Sprint Schedule (90 Days)

Sprint	Days	Dates*	Module Focus	Story Points	Milestone
1	1-14	Dec 2-13, 2025	Core CRM Foundation	40	
2	15-28	Dec 16-27, 2025	CRM Enhancement + Engagements	42	**Day 30: M1**
3	29-42	Dec 30-Jan 10, 2026	BD: Lead Management	38	
4	43-56	Jan 13-24, 2026	BD: Pipeline Basics	40	**Day 60: M2**
5	57-70	Jan 27-Feb 7, 2026	Finance: Invoicing	42	
6	71-90	Feb 10-28, 2026	Finance: Payments + UAT	48	**Day 90: M3**
Total	**90 days**			**250 SP**	

*Dates are indicative and subject to project start date confirmation.

1.3 Velocity Assumptions

- **Team Velocity:** 38-48 story points per sprint (reduced capacity)
- **Sprint Duration:** 2 weeks (10 working days)
- **Ceremonies:** Planning (2h), Daily Standups (15min), Review (1h), Retro (1h)
- **Code Reuse Boost:** 60% average reuse from Rozitech Central accelerates delivery
- **AI Productivity:** +40% coding efficiency with Claude MAX

1.4 Story Point Scale

Points	Complexity	Typical Duration	Reuse Impact
1	Trivial	< 2 hours	Config only
2	Simple	2-4 hours	80%+ reuse
3	Moderate	4-8 hours	60% reuse
5	Complex	1-2 days	40% reuse
8	Very Complex	2-3 days	20% reuse

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2. Epic Summary

Module 1.1: Core CRM & Client Management (Sprints 1-2)

Epic ID	Epic Name	Total SP	Reuse Source
E-CRM-01	Client Management	25	Workforce patterns
E-CRM-02	Contact Management	18	Workforce patterns
E-CRM-03	Engagement Management	20	Custom
E-CRM-04	Document Management	12	ExpenseTrack
E-CRM-05	Activity Logging	10	Workforce audit logs

Module 1.2: Business Development Basics (Sprints 3-4)

Epic ID	Epic Name	Total SP	Reuse Source
E-BD-01	Lead Management	22	Custom
E-BD-02	Opportunity Pipeline (Basic)	25	AgileFlow kanban
E-BD-03	BD Dashboard	12	TimeTrack reports

Module 1.3: Finance Basics (Sprints 5-6)

Epic ID	Epic Name	Total SP	Reuse Source
E-FIN-01	Invoice Management	30	InvoiceFlow
E-FIN-02	Payment Tracking	22	InvoiceFlow
E-FIN-03	Finance Dashboard	10	InvoiceFlow

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3. Sprint 1: Core CRM Foundation

Sprint Goal: Establish core client and contact management with CRUD operations and basic UI.

Days: 1-14 | **Capacity:** 40 Story Points | **Reuse:** 65%

User Stories

US-1.1: Client List View **Story Points:** 3 | **Reuse:** Workforce list patterns

As an Account Manager, I want to view a list of all clients with key information at a glance.

#	Acceptance Criteria
AC1	Paginated list of clients with company name, type, industry, status
AC2	Column sorting and search by company name
AC3	Filter by client type and status

US-1.2: Create New Client **Story Points:** 5 | **Reuse:** Workforce CRUD patterns

As an Account Manager, I want to create a new client record with company details.

#	Acceptance Criteria
AC1	Client creation form with required fields (company name, client type)
AC2	Validation and duplicate registration number check
AC3	Auto-generated client number (CLI-YYYYMM-XXXX)
AC4	Redirect to client detail view on success

US-1.3: View/Edit Client Details **Story Points:** 5 | **Reuse:** Workforce detail views

As an Account Manager, I want to view and edit comprehensive client details.

#	Acceptance Criteria
AC1	Detail page with all client information
AC2	Tabs: Overview, Contacts, Documents, Activities
AC3	Edit functionality with audit logging
AC4	Soft delete/archive functionality

US-1.4: Client Database Schema & API **Story Points:** 5 | **Reuse:** Workforce schema patterns

As a Developer, I want the client infrastructure implemented.

#	Acceptance Criteria
AC1	Clients table with multi-tenant support (organization_id)
AC2	RESTful API: GET, POST, PUT, DELETE with JWT auth
AC3	Proper indexes and soft delete support

US-1.5: Contact List & Create **Story Points:** 5 | **Reuse:** Workforce contacts

As an Account Manager, I want to manage contacts for each client.

#	Acceptance Criteria
AC1	Contact list within client context
AC2	Create contact with name, email, phone, role
AC3	Primary contact flag
AC4	Contact API endpoints

US-1.6: Contact Edit & Delete **Story Points:** 3 | **Reuse:** Workforce contacts

As an Account Manager, I want to edit and remove contacts.

#	Acceptance Criteria
AC1	Edit contact details
AC2	Soft delete with confirmation
AC3	Activity logging on changes

US-1.7: Activity Logging System **Story Points:** 5 | **Reuse:** Workforce audit logs

As a User, I want significant actions automatically logged.

#	Acceptance Criteria
AC1	Automatic logging on entity create/update/delete
AC2	Activity timeline view
AC3	Activity API with entity reference

US-1.8: Document Upload Basic **Story Points:** 5 | **Reuse:** ExpenseTrack uploads

As an Account Manager, I want to upload documents to clients.

#	Acceptance Criteria
AC1	File upload (PDF, DOC, XLS, images) up to 10MB
AC2	Document list with name, type, date
AC3	Download functionality

US-1.9: UI Component Library Setup **Story Points:** 4 | **Reuse:** Rozitech design system

As a Developer, I want reusable UI components configured.

#	Acceptance Criteria
AC1	Tailwind CSS configured with Rozitech theme
AC2	Common components: tables, forms, modals, badges
AC3	Responsive layout patterns

Sprint 1 Total: 40 Story Points

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4. Sprint 2: CRM Enhancement + Engagements

Sprint Goal: Complete CRM polish and implement engagement tracking.

Days: 15-28 | **Capacity:** 42 Story Points | **Milestone:** M1 (Day 30)

User Stories

US-2.1: Client Search Enhancement **Story Points:** 3 | **Reuse:** Workforce search

As an Account Manager, I want improved search capabilities.

#	Acceptance Criteria
AC1	Search matches company name, trading name, email
AC2	Combined filters with AND logic

US-2.2: CRM Dashboard Widgets **Story Points:** 5 | **Reuse:** TimeTrack dashboard

As an Account Manager, I want CRM metrics on my dashboard.

#	Acceptance Criteria
AC1	Clients Overview widget (total, active, new this month)
AC2	My Recent Activity
AC3	Clickable widgets navigate to filtered lists

US-2.3: Engagement List View **Story Points:** 5 | **Reuse:** 40% (custom logic)

As an Account Manager, I want to view engagements.

#	Acceptance Criteria
AC1	Engagement list with status badges
AC2	Filter by client and status
AC3	Search by engagement name

US-2.4: Create Engagement **Story Points:** 5 | **Reuse:** 30% (custom)

As an Account Manager, I want to create engagements for clients.

#	Acceptance Criteria
AC1	Create engagement with name, type, dates, value
AC2	Link to client and primary contact
AC3	Auto-generated engagement number (ENG-YYYYMM-XXXX)

US-2.5: Engagement Detail View **Story Points:** 5 | **Reuse:** 30% (custom)

As an Account Manager, I want to view engagement details.

#	Acceptance Criteria
AC1	Detail view with contract info, financials
AC2	Status display with color coding
AC3	Activity timeline

US-2.6: Engagement Status Workflow **Story Points:** 5 | **Reuse:** 30% (custom workflow)

As an Account Manager, I want to manage engagement lifecycle.

#	Acceptance Criteria
AC1	Status transitions: draft→active→on_hold→completed/cancelled
AC2	Required fields for status changes
AC3	Activity logging on status changes

US-2.7: Engagement Database Schema & API **Story Points:** 5 | **Reuse:** 50% (patterns)

As a Developer, I want engagement infrastructure.

#	Acceptance Criteria
AC1	Engagements table with multi-tenant support
AC2	RESTful API with status validation
AC3	Link to clients and contacts

US-2.8: Document Categories **Story Points:** 3 | **Reuse:** ExpenseTrack

As an Account Manager, I want to categorize documents.

#	Acceptance Criteria
AC1	Document categories: contract, proposal, report, other
AC2	Filter documents by category

#	Acceptance Criteria

US-2.9: Global Contact Search **Story Points:** 3 | **Reuse:** Workforce

As an Account Manager, I want to search contacts across all clients.

#	Acceptance Criteria
AC1	Global contact search by name or email
AC2	Results show associated client

US-2.10: Manual Activity Entry **Story Points:** 3 | **Reuse:** Workforce

As an Account Manager, I want to log manual activities.

#	Acceptance Criteria
AC1	Add activity: call, meeting, note
AC2	Set date, description
AC3	Link to client or engagement

Sprint 2 Total: 42 Story Points

M1 Deliverable: Core CRM fully functional (Clients, Contacts, Engagements, Documents, Activities)

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5. Sprint 3: Business Development - Leads

Sprint Goal: Implement lead capture and management.

Days: 29-42 | **Capacity:** 38 Story Points

User Stories

US-3.1: Lead List View **Story Points:** 3 | **Reuse:** 40% (custom)

As a BD Manager, I want to view and filter leads.

#	Acceptance Criteria
AC1	Paginated lead list with company, contact, source, status
AC2	Status color-coded badges
AC3	Filter by status

US-3.2: Capture New Lead **Story Points:** 5 | **Reuse:** 40% (custom)

As a BD Manager, I want to capture new leads with source tracking.

#	Acceptance Criteria
AC1	Lead form with company, contact, email, phone, source
AC2	Source options: website, referral, event, cold call, other
AC3	Auto-generated lead number (LEAD-YYYYMM-XXXX)

US-3.3: Lead Detail View **Story Points:** 3 | **Reuse:** 40% (custom)

As a BD Manager, I want to view lead details.

#	Acceptance Criteria
AC1	Detail view with all lead information
AC2	Activity timeline
AC3	Edit functionality

US-3.4: Lead Status Workflow **Story Points:** 5 | **Reuse:** 40% (custom)

As a BD Manager, I want to track lead progress.

#	Acceptance Criteria
AC1	Status transitions: new→contacted→qualified→converted/lost
AC2	Required lost_reason for lost leads
AC3	Activity logging on all changes

US-3.5: Convert Lead to Client **Story Points:** 5 | **Reuse:** 30% (custom)

As a BD Manager, I want to convert qualified leads to clients.

#	Acceptance Criteria
AC1	Conversion dialog to create client
AC2	Pre-fill data from lead
AC3	Lead status changes to "converted"

US-3.6: Lead Assignment **Story Points:** 3 | **Reuse:** Workforce assignment

As a BD Manager, I want to assign leads to team members.

#	Acceptance Criteria
AC1	Assign lead to team member
AC2	"My Leads" filter view

#	Acceptance Criteria

US-3.7: Lead Database Schema & API **Story Points:** 5 | **Reuse:** 50% (patterns)

As a Developer, I want lead infrastructure implemented.

#	Acceptance Criteria
AC1	Leads table with multi-tenant support
AC2	RESTful API with conversion endpoint
AC3	Status validation

US-3.8: BD Dashboard - Lead Metrics **Story Points:** 5 | **Reuse:** TimeTrack reports

As a BD Manager, I want lead metrics on my dashboard.

#	Acceptance Criteria
AC1	Total Leads, New This Month
AC2	Leads by Status breakdown
AC3	Conversion rate

US-3.9: Lead Notes **Story Points:** 4 | **Reuse:** TeamSpace

As a BD Manager, I want to add notes to leads.

#	Acceptance Criteria
AC1	Add notes with timestamp
AC2	Notes displayed in timeline

Sprint 3 Total: 38 Story Points

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6. Sprint 4: Business Development - Pipeline

Sprint Goal: Implement opportunity pipeline with basic kanban view.

Days: 43-56 | **Capacity:** 40 Story Points | **Milestone:** M2 (Day 60)

User Stories

US-4.1: Opportunity List View **Story Points:** 3 | **Reuse:** 50% (patterns)

As a BD Manager, I want to view opportunities.

#	Acceptance Criteria
AC1	List with opportunity name, client, value, stage, owner
AC2	Stage color-coded badges
AC3	Filter by stage and owner

US-4.2: Create Opportunity **Story Points:** 5 | **Reuse:** 50% (patterns)

As a BD Manager, I want to create opportunities.

#	Acceptance Criteria
AC1	Link to existing client
AC2	Set name, estimated value, expected close date
AC3	Auto-generated opportunity number (OPP-YYYYMM-XXXX)

US-4.3: Opportunity Detail View **Story Points:** 5 | **Reuse:** 50% (patterns)

As a BD Manager, I want to manage opportunity details.

#	Acceptance Criteria
AC1	Detail view with client, contact, value, stage
AC2	Edit functionality
AC3	Activity timeline

US-4.4: Pipeline Kanban Board **Story Points:** 8 | **Reuse:** AgileFlow kanban

As a BD Manager, I want a visual pipeline board.

#	Acceptance Criteria
AC1	Kanban columns: Qualification, Proposal, Negotiation, Won, Lost
AC2	Column counts and value totals
AC3	Drag-and-drop stage changes
AC4	Opportunity cards show company, value, owner

US-4.5: Stage Transitions **Story Points:** 5 | **Reuse:** 40% (custom rules)

As a BD Manager, I want stage transitions tracked.

#	Acceptance Criteria
AC1	“Won” requires won_date and actual_value
AC2	“Lost” requires lost_date and lost_reason
AC3	Stage history tracking

US-4.6: Opportunity Database Schema & API **Story Points:** 5 | **Reuse:** 60% (patterns)

As a Developer, I want opportunity infrastructure.

#	Acceptance Criteria
AC1	Opportunities table with stage_history
AC2	Stage transition API with validation
AC3	Pipeline data endpoint with stage grouping

US-4.7: Pipeline Summary Dashboard **Story Points:** 5 | **Reuse:** TimeTrack reports

As a BD Manager, I want pipeline metrics.

#	Acceptance Criteria
AC1	Total pipeline value by stage
AC2	Win rate percentage
AC3	Opportunities closing this month

US-4.8: Link Opportunity to Engagement **Story Points:** 4 | **Reuse:** Custom

As a BD Manager, I want to link won opportunities to engagements.

#	Acceptance Criteria
AC1	Create engagement from won opportunity
AC2	Pre-fill engagement data from opportunity

Sprint 4 Total: 40 Story Points

M2 Deliverable: CRM complete + BD module (Leads, Pipeline) functional

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7. Sprint 5: Finance Basics - Invoicing

Sprint Goal: Implement invoice creation and management.

Days: 57-70 | **Capacity:** 42 Story Points

User Stories

US-5.1: Invoice List View **Story Points:** 5 | **Reuse:** InvoiceFlow list

As a Finance Manager, I want to view and filter invoices.

#	Acceptance Criteria
AC1	List with invoice number, client, amount, status, due date
AC2	Status tabs: All, Draft, Sent, Paid, Overdue
AC3	Summary totals, overdue highlighting

US-5.2: Create Invoice **Story Points:** 5 | **Reuse:** InvoiceFlow create

As a Finance Manager, I want to create invoices.

#	Acceptance Criteria
AC1	Select client and optionally engagement
AC2	Set invoice date and payment terms
AC3	Auto-calculated due date
AC4	Auto-generated invoice number (INV-YYYYMM-XXXX)

US-5.3: Invoice Line Items **Story Points:** 5 | **Reuse:** InvoiceFlow editor

As a Finance Manager, I want to manage line items.

#	Acceptance Criteria
AC1	Add line items with description, quantity, unit price
AC2	Auto-calculated line totals and subtotal
AC3	Add/remove line items

US-5.4: Invoice Detail View **Story Points:** 3 | **Reuse:** InvoiceFlow

As a Finance Manager, I want to view invoice details.

#	Acceptance Criteria
AC1	Detail view with all invoice information
AC2	Line items with totals
AC3	Payment history

US-5.5: Invoice Edit **Story Points:** 3 | **Reuse:** InvoiceFlow

As a Finance Manager, I want to edit draft invoices.

#	Acceptance Criteria
AC1	Edit invoice details (draft only)
AC2	Modify line items
AC3	Recalculate totals

US-5.6: Nigeria Tax Calculations **Story Points:** 5 | **Reuse:** 60% (configurable)

As a Finance Manager, I want VAT calculated.

#	Acceptance Criteria
AC1	Configurable VAT rate (default 7.5%)
AC2	Total = Subtotal + VAT
AC3	Clear tax breakdown display

US-5.7: Invoice Status Workflow **Story Points:** 5 | **Reuse:** InvoiceFlow

As a Finance Manager, I want to manage invoice status.

#	Acceptance Criteria
AC1	Status: draft → sent → paid/overdue
AC2	Mark as sent with date
AC3	Auto-mark overdue based on due date

US-5.8: Invoice Database Schema & API **Story Points:** 5 | **Reuse:** InvoiceFlow schema

As a Developer, I want invoice infrastructure.

#	Acceptance Criteria
AC1	Invoices and invoice_items tables
AC2	RESTful API with status validation
AC3	Multi-tenant support

US-5.9: Link Invoice to Client/Engagement **Story Points:** 3 | **Reuse:** InvoiceFlow

As a Finance Manager, I want invoices linked to clients.

#	Acceptance Criteria
AC1	Invoice linked to client
AC2	Optional link to engagement
AC3	View invoices from client detail page

US-5.10: Void Invoice **Story Points:** 3 | **Reuse:** InvoiceFlow void

As a Finance Manager, I want to void incorrect invoices.

#	Acceptance Criteria
AC1	Void with confirmation and required reason
AC2	Status changes to "cancelled"
AC3	Cannot be edited or paid after void

Sprint 5 Total: 42 Story Points

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8. Sprint 6: Finance + Integration + UAT

Sprint Goal: Complete payment tracking, integrate all modules, and conduct UAT.

Days: 71-90 | **Capacity:** 48 Story Points | **Milestone:** M3 (Day 90)

User Stories

US-6.1: Record Payment **Story Points:** 5 | **Reuse:** InvoiceFlow payments

As a Finance Manager, I want to record payments.

#	Acceptance Criteria
AC1	Enter amount, date, payment method, reference
AC2	Payment methods: bank transfer, cheque, cash
AC3	Auto-update invoice status (paid/partial)

US-6.2: Payment History **Story Points:** 3 | **Reuse:** InvoiceFlow history

As a Finance Manager, I want to view payment history.

#	Acceptance Criteria
AC1	Payment history with chronological list
AC2	Total paid and balance remaining
AC3	Edit/delete with audit trail

US-6.3: Finance Dashboard Widgets **Story Points:** 5 | **Reuse:** InvoiceFlow dashboard

As a Finance Manager, I want financial metrics.

#	Acceptance Criteria
AC1	Total Outstanding amount

#	Acceptance Criteria
AC2	Overdue Amount with count
AC3	Collected This Month
AC4	Invoiced This Month

US-6.4: Receivables Summary **Story Points:** 5 | **Reuse:** InvoiceFlow

As a Finance Manager, I want to see receivables summary.

#	Acceptance Criteria
AC1	Amounts grouped: Current, 1-30, 31-60, 60+ days
AC2	Breakdown by client
AC3	Click-through to invoices

US-6.5: Unified Dashboard **Story Points:** 5 | **Reuse:** 60% (patterns)

As a User, I want a unified dashboard with all modules.

#	Acceptance Criteria
AC1	CRM, BD, Finance widgets combined
AC2	Role-based widget visibility
AC3	Configurable widget arrangement

US-6.6: Cross-Module Navigation **Story Points:** 5 | **Reuse:** 60% (patterns)

As a User, I want seamless navigation between modules.

#	Acceptance Criteria
AC1	Hyperlinks between related entities
AC2	Breadcrumb navigation
AC3	Consistent back navigation

US-6.7: Basic Search **Story Points:** 5 | **Reuse:** Workforce

As a User, I want to search across the application.

#	Acceptance Criteria
AC1	Search bar in header
AC2	Search clients, contacts, invoices
AC3	Grouped search results

US-6.8: User Profile Settings **Story Points:** 3 | **Reuse:** Auth patterns

As a User, I want to manage my profile.

#	Acceptance Criteria
AC1	Update name, email, phone
AC2	Set timezone
AC3	Immediate effect on save

US-6.9: Integration Testing **Story Points:** 5 | **Reuse:** Rozitech testing patterns

As a Developer, I want integration tests.

#	Acceptance Criteria
AC1	API endpoint tests
AC2	Cross-module workflow tests
AC3	Tests run in CI pipeline

US-6.10: UAT Execution & Bug Fixes **Story Points:** 7 | **Reuse:** N/A

As a Project Team, we want UAT completed.

#	Acceptance Criteria
AC1	UAT environment provisioned
AC2	All UAT test cases executed
AC3	Critical bugs resolved
AC4	Basic user documentation complete

Sprint 6 Total: 48 Story Points

M3 Deliverable: All Phase 1 modules (CRM, BD, Finance basics) complete, UAT signed off

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9. Definition of Done

User Story Level

A user story is considered DONE when:

- ☐ All acceptance criteria are met
- ☐ Code is peer-reviewed
- ☐ Unit tests are written and passing
- ☐ No critical bugs remain
- ☐ Code is merged to development branch
- ☐ Feature is deployed to staging environment

Sprint Level

A sprint is considered DONE when:

- ☐ All committed user stories meet Definition of Done
- ☐ Sprint review completed with stakeholders
- ☐ Sprint retrospective completed
- ☐ No critical defects remain open

Milestone Level (30/60/90 Days)

A milestone is considered DONE when:

- ☐ All sprint-level DoD criteria met
- ☐ Milestone acceptance criteria verified
- ☐ Stakeholder sign-off obtained
- ☐ Payment milestone triggered

Release Level (Day 90)

A release is considered DONE when:

- ☐ All milestone criteria met
- ☐ Basic regression testing passed
- ☐ UAT sign-off obtained
- ☐ Production deployment successful
- ☐ Basic support documentation complete

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10. Phase 2 Deferred Items

The following items are deferred to Phase 2 due to lean capacity model:

HR Outsourcing Module (Full Sprint 4 from v2.0)

- Assignment Management
- Deployment Tracking
- Service Log Management
- HR Dashboard

Advanced Business Development

- Proposal Management with PDF generation
- Revenue Forecasting
- BD Reporting & Analytics

Advanced Finance

- Invoice PDF Generation
- Email Invoice Sending
- Client Statements
- Payment Reminders
- Aging Reports with Excel Export

Workflow & Collaboration

- Approval Workflows (multi-step)
- Notification System (in-app + email)
- Task Management
- Notes & Comments with @mentions
- Approval Delegation

Advanced Features

- Advanced Reporting
- Excel/PDF Exports
- Email Integration
- Calendar Views

Appendix A: Story Point Summary by Sprint

Sprint	Module Focus	Committed SP	Reuse %
1	Core CRM Foundation	40	65%
2	CRM Enhancement + Engagements	42	55%
3	BD: Lead Management	38	45%
4	BD: Pipeline Basics	40	55%
5	Finance: Invoicing	42	70%
6	Finance: Payments + UAT	48	60%
Total		**250 SP**	**~58%**

Appendix B: Sprint Velocity Tracking Template

Sprint	Committed SP	Completed SP	Velocity	Notes
1	40			
2	42			Day 30 Milestone
3	38			
4	40			Day 60 Milestone
5	42			
6	48			Day 90 Milestone

Appendix C: Milestone Acceptance Criteria

M1 (Day 30) - Core CRM Complete

- ☐ Client CRUD operations functional
- ☐ Contact management operational
- ☐ Engagement tracking working
- ☐ Document uploads functional
- ☐ Activity logging operational
- ☐ CRM Dashboard displaying metrics

M2 (Day 60) - CRM + BD Complete

- ☐ All M1 criteria maintained
- ☐ Lead capture and management working
- ☐ Lead conversion to client functional
- ☐ Opportunity pipeline with kanban view
- ☐ Stage transitions with validation
- ☐ BD Dashboard with metrics

M3 (Day 90) - Full Phase 1 Delivery

- ☐ All M2 criteria maintained
- ☐ Invoice creation and management working
- ☐ Payment recording functional
- ☐ Finance Dashboard with metrics
- ☐ Cross-module navigation working
- ☐ UAT completed and signed off
- ☐ Production deployment successful

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