

PROJECT PLAN DOCUMENT

(Due: 31st January)

| | |
|----------------|---|
| Project number | 2 (Team number) |
| Project Title | Finease |
| Document | Project Plan |
| Creation date | 12/02/2025 |
| Created By | Kushagra Trivedi and Swam Singla |
| Client | Sarath Chandra Mankineni (Kaizen platforms) |

Brief problem statement

Businesses face challenges in efficiently handling tax compliance, financial reporting, and document reconciliation. Finease aims to streamline operations by integrating automated solutions for ITR, GST, PF, and ESI filings through WhatsApp and a custom chatbot. It also facilitates E-Waybill and delivery challan generation while providing reconciliation and reporting tools.

Team Members

1. Swam Singla
2. Kushagra Trivedi
3. Nidhi Vaidya
4. Ronak Gaur
5. Ayush Kumar Gupta

Team Communication

Based on inputs of team members, offline and online both modes of communication can be used for team meeting.

Development Environment

1. Backend: Node.js, Express.js, MongoDB
2. Frontend: React.js for web app, WhatsApp API for chatbot
3. APIs & Integrations: GST E-Waybill API, IT Portal APIs, EPFO & ESIC submission workflows
4. Tools: Postman, Firebase for authentication
5. Collaboration: GitHub, Google Docs for documentation

Milestone Schedule

| Milestone | Due Date | Release | Deliverable? |
|--|----------|---------|---|
| <i>Define workflows, database setup, chatbot prototype creation</i> | Month 1 | R1 | No (Internal setup, not a user-facing deliverable) |
| <i>Develop core modules for reconciliation, reporting, E-Waybill API integration</i> | Month 2 | R1 | Yes (Working backend API, initial chatbot functionality) |
| Finalize and test E-Waybill, delivery challan, and compliance filing modules | Month 3 | R2 | Yes (Fully functional E-Waybill and compliance filing system) |