PROJECT CONTEXT

Best Offer Package

Sample delivery and acceptance pack for a real estate offer-management SaaS platform.

ILLUSTRATIVE DELIVERY DOCUMENT - NOT A COMPLETED TEST REPORT

Confirmed project facts

Project	Documented context
Client and users	Arbor; realtors, loan officers, administrators and delegated assistants.
Delivery	Cloud-based SaaS platform; confirmed delivery duration: 24 months.
Core workflow	Buyer intake, lender pre-approval, offer preparation, package generation, tracked delivery and activity records.
Reported outcome	Offer preparation reduced from 48 hours to 2 hours after users began completing a form that generates the offer automatically. This is owner-confirmed, not independently audited here.

Architecture in brief

Angular and Angular Material provide role-specific interfaces. ASP.NET Core and REST APIs enforce application and workflow rules. SQL Server and Entity Framework Core hold transaction records; Amazon S3 holds documents. Stripe supports subscription billing. Docker, Jenkins and GitLab CI/CD support builds and deployments.

How to use this pack

The project facts above come from the published staging case study and confirmations in this conversation. Pages 2-4 are newly prepared samples: they do not reconstruct the original project plan, establish contractual scope or record completed testing. Actual owners, build identifiers, dates, evidence and approvals must be supplied before use as a completed delivery record.

Source: Best Offer Package case study on staging. The 48-to-2-hour outcome has no measurement period or original evidence record attached to this pack.

SAMPLE ROADMAP

Delivery gates and review outputs

An illustrative sequence based on the documented workflow. These are not the original milestones or dates from the 24-month engagement.

Gate	Review output	Proposed decision owner
1. Scope and roles	Agree buyer, lender, realtor and assistant journeys; permission boundaries; required documents; integration dependencies; acceptance criteria.	Client product owner with SDLC delivery lead
2. Core transaction	Review buyer intake, lender assignment, approval/denial and the rule preventing offer creation before pre-approval.	Client business owner with technical reviewer
3. Package and delivery	Review document generation, merge order, package versions, recipient link delivery and recorded opening events.	Client product owner with QA lead
4. Release readiness	Review functional/integration results, access-control checks, unresolved defects, deployment and recovery plans. Confirm any required security or performance evidence.	Client technical owner with SDLC release lead
5. Handover	Confirm repository and account access, deployment assets, configuration notes, operating instructions, training and support boundaries.	Client operating owner with SDLC delivery lead

Planning rules

Calendar dates, effort, dependencies and approval turnaround are set for the actual release. A gate remains open until the responsible owners record the decision and supporting evidence. Scope changes should record the effect on cost, dates, testing and release risk.

Record for each gate

Field	Entry to complete
Release / build	Not supplied
Planned and actual review dates	Not supplied
Evidence reference and decision	Not supplied
Owner and approver	Not supplied

SAMPLE ACCEPTANCE CHECKLIST

Workflow checks before release

Suggested checks derived from the documented features. No test execution, pass/fail result or client sign-off is represented.

ID	Acceptance check	Evidence to attach
A01	A realtor can create a buyer/co-buyer record and assign the intended loan officer.	Test steps, build, test-data reference and result
A02	Offer creation is blocked until the assigned loan officer completes pre-approval; denial keeps the action unavailable.	Positive and negative workflow results
A03	Role and delegation rules prevent unauthorized financing decisions, record access and administrative actions.	Role matrix and access-test results
A04	Generated lender letters and offer documents use the intended approved record values and branding.	Redacted expected-versus-actual comparison
A05	Required-document checks and merge order produce the intended offer package and version.	Redacted package and validation results
A06	Delivery and opening events are associated with the correct offer and visible to permitted users.	Redacted event and transaction references
A07	Stripe billing scenarios in scope are reconciled with application account/subscription status.	Sandbox transaction and reconciliation results
A08	Email/API failures and duplicate or repeated actions are handled as specified for the release.	Failure/retry test results and defect links
A09	Deployment, rollback and any migration checks are reviewed for the target environment.	Approved release checklist and reconciliation where applicable

Status for all checks: NOT EXECUTED IN THIS SAMPLE. Record actual result, evidence link, tester, date, build and defect reference separately. Release approval follows the agreed acceptance criteria and unresolved-defect disposition.

Review fields: release/build _____ | QA owner _____ | client reviewer _____ | decision/date _____

SAMPLE HANDOVER AND ASSURANCE

Evidence needed to close delivery

Use this register to assemble a redacted handover pack and a factual security summary. No completed security or recovery record was supplied for this document.

Handover area	Material to verify
Code and deployment	Agreed repository access, release tag, build/deployment instructions, environment configuration and account ownership.
Data and integrations	Database schema/migration notes, document-storage configuration, API contracts and billing/notification setup. Transfer secrets through an approved secure channel.
Operations and support	Monitoring/log locations, known issues, backup/restore procedure, escalation contacts, support scope and training record.

Security and recovery evidence register

Evidence area	Minimum record fields	Current status
Access-control testing	Build, roles/routes tested, negative cases, findings, remediation, retest and reviewer.	Not supplied
Vulnerability assessment	Date, system/environment, tester/method, scope limitations, severity summary, remediation and retest status.	Not supplied
Backup/restore verification	Backup reference, restore target, execution date, data-integrity checks, recovery objectives and measured recovery outcome.	Not supplied
Release decision	Open findings, risk disposition, responsible owners and client approval reference.	Not supplied

Public summary and approval

A public summary may state the tested scope, date, method, high-level findings and verified remediation/recovery outcome once supported by the source records. Remove personal data, credentials, internal hostnames, sensitive architecture details and exploitable vulnerability information. Confirm client permission and any third-party disclosure restrictions before publication.

Public-use approval: _____ Date: _____ Source record references: _____

Organization-level certifications do not replace project-specific test records. Do not mark this sample as accepted, passed, independently audited or client-approved without the corresponding evidence.