

IT314 – Software Engineering

Group 22 – Fingenie

AI – Powered Balance Sheet Analysis Tool

User Stories

Team Members:

Name	Student ID
TANDEL DHRUVINEE DINESHKUMAR	202301203
MEET RUPESH GANDHI	202301219
PRIYANKA GARG	202301262
JAYADITYA SHAH	202301254
CHHABHAYA MANAN KETANBHAI	202301222
GAADHE JAYANSH MANUBHAI	202301232
VORA KRESHA MANOJBHAI	202301231
RATHOD AJAYKUMAR VALLABHBHAI	202301221
CHAUDHARI RUTU RAHUL	202301235
NAKUM AYUSH VIJAYBHAI	202301233

Object Oriented Design

1. User Management

Class: User

Attributes:

- id: int
- username: string
- email: string
- password: string
- first_name: string
- last_name: string
- is_active: boolean
- date_joined: datetime
- last_login: datetime

Methods:

- register(username: string, email: string, password: string) → bool
- login(identifier: string, password: string) → bool
- logout() → None
- checkPassword(password: string) → bool
- setPassword(new_password: string) → None

Class: UserProfile

Attributes:

- id: int
- user: User
- phone_number: string
- country_code: string
- date_of_birth: date
- bio: string
- profile_picture: string
- theme_preference: string
- email_notifications: boolean
- is_google_user: boolean
- google_id: string
- email_verified: boolean
- created_at: datetime
- updated_at: datetime

Methods:

- updateProfile(phone_number: string, country_code: string, date_of_birth: date, bio:

- `string) → bool`
- `updateSettings(theme_preference: string, email_notifications: boolean) → bool`

Class: UserActivity

Attributes:

- `id: UUID`
- `user: User`
- `activity_type: string`
- `title: string`
- `description: string`
- `content_type: string`
- `object_id: string`
- `created_at: datetime`

Methods:

- `logActivity(user: User, activity_type: string, title: string, description: string) → None`
- `getUserHistory(user: User, limit: int) → List[UserActivity]`

Class: Feedback

Attributes:

- `id: UUID`
- `user: User`
- `feedback_type: string`
- `subject: string`
- `message: string`
- `status: string`
- `admin_notes: string`
- `created_at: datetime`

Methods:

- `submitFeedback(user: User, subject: string, message: string, feedback_type: string) → UUID`
- `getUserFeedbacks(user: User) → List[Feedback]`
- `updateStatus(feedback_id: UUID, status: string) → bool`
- `addAdminNotes(feedback_id: UUID, note: string) → bool`

Class: SupportTicket

Attributes:

- `id: UUID`
- `user: User`
- `subject: string`
- `message: string`
- `priority: string`

- status: string
- admin_response: string
- created_at: datetime
- updated_at: datetime

Methods:

- createTicket(user: User, subject: string, message: string, priority: string) → UUID
- getUserTickets(user: User) → List[SupportTicket]
- updateStatus(ticket_id: UUID, status: string) → bool
- addAdminResponse(ticket_id: UUID, response: string) → bool

Class: GoogleOAuthService

Methods:

- verifyGoogleToken(token: string) → dict
- verifyGoogleTokenFallback(token: string) → dict
- createUserUsernameFromGoogleInfo(google_info: dict) → string
- getOrCreateGoogleUser(google_info: dict) → (User, boolean)

2. Company & Financial Data Management

Class: CompanySearch

Attributes:

- symbol: string
- name: string
- search_count: int
- last_searched: datetime
- created_at: datetime
- is_active: boolean
- exchange: string
- currency: string
- last_data_refresh: datetime

Methods:

- incrementSearchCount() → None
- getDaysSinceLastSearch() → int
- getPopularSearches(limit: int) → List[CompanySearch]
- cleanupOldSearches(days_old: int) → int

Class: FinancialStatementCache

Attributes:

- symbol: string
- statement_type: string

- period: date
- data: JSON
- last_updated: datetime
- created_at: datetime
- is_valid: boolean
- expires_at: datetime
- data_source: string
- data_version: string

Methods:

- markInvalid() → None
- getLatestCachedData(symbol: string, statement_type: string) → FinancialStatementCache
- cleanupExpiredEntries() → int
- invalidateSymbolCache(symbol: string) → int

3. Financial Report & Analysis

Class: FinancialReport

Attributes:

- report_id: UUID
- company_name: string
- ticker_symbol: string
- user: User
- uploaded_pdf: File
- pdf_original_name: string
- summary: JSON
- ratios: JSON
- created_at: datetime

Methods:

- getSummary() → dict
- getRatios() → List[dict]
- setSummary(data: dict) → None
- setRatios(data: List[dict]) → None
- pros() → List[string]
- cons() → List[string]
- financialHealthSummary() → string
- hasUploadedPdf() → boolean
- displayName() → string
- timeAgo() → string
- toApiResponse() → dict

4. Chatbot & AI Interaction

Class: ChatbotService

Methods:

- buildContext(report_id: UUID) → string
- answerQuery(question: string, report_id: UUID) → string

Object Diagram

