User Stories (both front and back of the card):

▸ User Story 01: User Login

Front of the Card

- As an end-user,
- I want to log in to the system,
- So that I can effectively access and use the platform.

Back of the Card

Confirmation:

1. Success:
   - The user is logged into the system successfully.
   - The main dashboard is displayed.
2. Failure:
   - The email address is in the wrong format.
   - The username is invalid.
   - The password is incorrect.
   - The user account has expired.

▸ User Story 02: Uploading Financial Statements

Front of the Card

- As an end-user,
- I want to upload financial statements as a PDF or Excel file,
- So that I can get a simple, understandable summary without needing to read complex tables.

Back of the Card

Confirmation:

1. Success:
   - The user successfully uploads a supported file type (PDF, XLS, XLSX).
   - A loading or progress bar is displayed to show the upload is in progress.

○　The system confirms the file has been received and is being processed.
　　2.　Failure:
　　　　○　The user attempts to upload an unsupported file type (e.g., JPEG, DOCX).
　　　　○　The uploaded file is corrupt or unreadable.
　　　　○　The uploaded file is too large.
　　　　○　There is a network connection error during upload.

▶ User Story 03: Viewing an AI-Generated Summary

Front of the Card

- As an end-user,
- I want to see a clear, plain-language summary of my uploaded financial data,
- So that I can quickly understand my business's financial health and key trends.

Back of the Card

Confirmation:

1. Success:
    ○ The system displays a summary of the key financial data.
    ○ The summary uses simple, non-technical language.
    ○ Key takeaways (e.g., "Profit increased by 15% this quarter") are highlighted.
    ○ Important KPIs like profit margin, debt-to-equity ratio, and cash flow are clearly explained.
2. Failure:
    ○ The AI is unable to process the data due to a lack of valid information in the uploaded file.
    ○ The summary is incomplete or contains confusing, jumbled text.
    ○ The system returns an error message indicating that the summary could not be generated.

▶ User Story 04: Viewing Visual Charts

Front of the Card

- As an end-user,
- I want to see my financial data presented in easy-to-read visual charts,
- So that I can easily identify trends and compare different periods.

Back of the Card

Confirmation:

1. Success:
   - The system generates charts (e.g., line, bar, pie charts) based on the financial data.
   - The charts are clearly labeled and easy to understand.
   - Charts are interactive, allowing the user to hover over data points for more detail.
   - Visuals highlight important trends over time, such as revenue growth or changes in expenses.
2. Failure:
   - The charts are not generated.
   - The charts are distorted or display incorrect data.
   - The labels or axes on the charts are unreadable or missing.

▶ User Story 05: Identifying Potential Risks

Front of the Card

- As an individual investor,
- I want to be alerted to potential risks and red flags in the financial statements,
- So that I can make more informed investment decisions.

Back of the Card

Confirmation:

1. Success:
   - The system automatically highlights or flags potential risks (e.g., high debt, negative cash flow, decreasing profit margins).
   - A clear, simple explanation is provided for each identified risk.
   - The system suggests key areas for the user to investigate further.
2. Failure:
   - The system fails to identify a clear and present risk that is evident in the financial data.
   - The risk analysis is confusing or provides irrelevant information.
   - The user does not receive any alerts or notifications about potential risks.

▶ User Story 06: Viewing a Blog Post

Front of the Card

- As a person interested in finance and business,
- I want to view a blog page with articles and updates,
- So that I can learn more about financial literacy, market trends, or platform updates.

Back of the Card

Confirmation:

1. Success:
    - The blog page loads successfully and displays a list of articles.
    - Each article has a clear title, a brief description, and a publication date.
    - The user can click on an article to navigate to its full content.
    - The article content is well-formatted and easy to read.
2. Failure:
    - The blog page fails to load due to a server error.
    - An article link leads to a "page not found" error.
    - The articles are not sorted logically (e.g., by date).
    - The article content is difficult to read due to poor formatting or a small font size.

▶ User Story 07: Interacting with the Chatbot

Front of the Card

- As a user,
- I want to ask the chatbot a question about my financial summary,
- So that I can get quick, conversational answers to specific data points.

Back of the Card

Confirmation:

1. Success:
    - The chatbot responds to a user's question with a relevant and accurate answer.
    - The answer is provided in clear, conversational language.
    - The chatbot can correctly retrieve specific figures from the financial summary, such as "What was my profit in Q3?"
    - The chatbot can provide definitions for financial terms upon request (e.g., "What is a P/E ratio?").
2. Failure:

- The chatbot does not understand the user's question and provides an irrelevant response.
- The chatbot provides an incorrect or hallucinated data point.
- The chatbot is unable to access or process the financial data from the user's summary.
- The chatbot gives a generic "I can't help with that" message for a question it should be able to answer.