

FinLearn Product Specification

Objective

What are we planning to build?

FinLearn is a financial literacy platform for young adults who are ready to take a step towards an independent lifestyle. FinLearn introduces young adults to concepts in personal finance and portfolio management through expert-curated lessons and a sandbox environment to test their learning. This is a zero-liability learning solution for learning to manage money without the risk of incurring a financial loss.

Who are your target users? Why would these users use your product?

- **Young adults between the ages of 18-21** face a sudden challenge when they first start interacting with money on their own especially when they start earning and spending independently. They are overwhelmed by the amount of advice, valid or not when it comes to interacting with their own money in the context of saving, budgeting, investing, insuring, and debts. Currently, they use experiential learning methods, which make them prone to making mistakes and learning from them. But such methods might shape their perspective about money incorrectly and inefficiently. By delivering optimized support through simulation and learning, Finlearn can help such personas and provide them with a platform to make those mistakes early on and realize better methods to manage money.
- **Parents of young adults who understand and value the importance of money** through personal experiences or knowledge gained over adulthood need support to provide such education to their children. They face hardship in imparting this knowledge due to their limited expertise in teaching or limited availability of time and resources. Many parents rely on schools, private tutors, or on themselves to impart this knowledge but these sources could be inefficient, expensive, flawed, or even unavailable in some cases. Finlearn can help such parents in educating their children by providing them with a simulated experience at an inexpensive price which also delivers insights about their child's investing psyche and make them about the things they need to work on with their child early on.
- **High Schools and teachers with some experience handling money but limited expertise in teaching about money** because of lack of training or lack of time still need to impart some knowledge about personal finance management to their students. They do so by referring to a limited set of resources and cannot demonstrate the financial management process in real-time. For them, FinLearn can act as an aid in teaching personal finance where they can allocate learning modules to students and monitor students' understanding through the sandbox environment.

Requirements

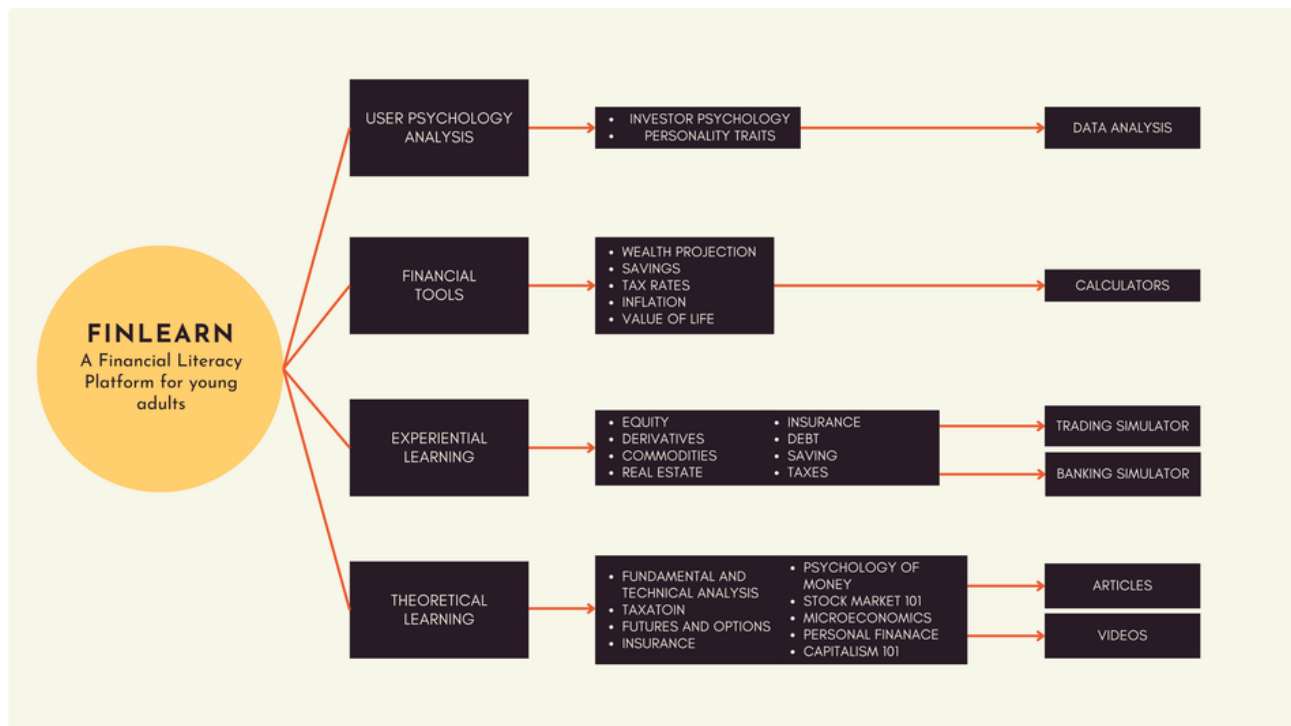
Requirement	User Story	Jira Issue	Notes
Login Page	As a student I want to login so that I can access the features offered by FinLearn	FIN-46: Account Management: Login Page <small>TO DO</small>	
Signup Page	As a student I want to signup so that I can use the features of FinLearn	FIN-47: Account Management: Sign up Page <small>TO DO</small>	
Dashboard Trading Page - Portfolio value/change	As a student I want to access the dashboard trading page so that I can get a overview of my available funds and returns	FIN-14: Dashboard Trading Page: Portfolio value/change <small>TO DO</small>	
Dashboard Trading Page - My Portfolio graph	As a student I want to view my portfolio in graphical format so that I can get visual representation of my portfolio over time	FIN-15: Dashboard Trading Page: Portfolio graph <small>TO DO</small>	
Dashboard Trading Page - Recent Trades	As a student I want to view my recent trades so that I can sell/hold/repeat them	FIN-16: Dashboard Trading Page: Recent Trades <small>TO DO</small>	
Dashboard Learning page - Courses	As a student I want to access the dashboard learning page so that I can get an overview of my current courses	FIN-17: Dashboard Learning Page: Courses <small>TO DO</small>	
Dashboard Learning page - Continue Learning	As a student I want to access the dashboard learning page so that I can continue a unit I am learning	FIN-18: Dashboard Learning Page: Continue Learning <small>TO DO</small>	
Manage Account Page	As a student I want to access the manage account page so that I can view/edit my information	FIN-3: Account Management <small>TO DO</small>	

All Courses Page	As a student, I want to be able to easily find a course so that I can access the course	FIN-48: Learning: All Courses Page TO DO	
All Units Page	As a student I want to access the all units page so that I access the units inside a course	FIN-49: Learning: All Units Page TO DO	
All Units Page	As a student, I want to be able to track my progress on all the units in a course through a visual indicator.	FIN-55: All Units Page: Progress Pane - Left Side TO DO	
Unit Page - List of videos and articles	As a student I want to access the unit page so that I can access the content inside a unit	FIN-50: Learning: Unit Page TO DO	
Content - Article	As a student I want to access an article so that I can read it and improve my learning	FIN-51: Learning: Content - Article TO DO	
Content - Video	As a student I want to access a video so that I can learn from it	FIN-52: Learning: Content - Video TO DO	Record scroll progress
Content - Monitor Video Progress	As a student I want to track my progress so that I can resume the video where I stopped	FIN-53: Learning: Content - Monitor Video Progress TO DO	Use the YT API fields
Trading Page: Search	As a student I want to filter and choose the specific asset (stocks/commodities) so that I can order it	FIN-19: Trading Page: Search Symbol TO DO	
Trading Page: Real-time Info	As a student I want to be able to see a stock's pricing information so that I can place an order	FIN-20: Trading Page: Real-time Info TO DO	
Trading Page: Stocks - Action	As a student I want to choose different actions for the stock (Buy, Sell, Short, Buy to cover) s	FIN-21: Trading Page: Stocks - Action TO DO	
Trading Page: Stocks - Quantity	As a student I want to input a quantity of a stock, and based on the action view a max and min	FIN-22: Trading page: Stocks - Quantity TO DO	
Trading Page: Stocks - Order Type	As a student I want to select an Order Type for a stock (Limit, Market, Stop Limit) so that I can place an order of that kind	FIN-54: Trading Page: Stocks - Order Type TO DO	
Trading Page: Stocks - Duration	As a student I want to be able to select how long the trade is valid (Day Only, Good Until Cancelled)	FIN-23: Trading Page: Stocks - Duration TO DO	
Trading Page: Stocks - Preview Order	As a student I want to be able to see an overview my order before going through with the purchase	FIN-24: Trading Page: Stocks - Preview Order TO DO	
Trading Page: Stocks - Submit Order	As a student I want to be able to place an order for a stock	FIN-25: Trading Page: Stocks - Submit Order TO DO	
Trading Page: Stocks - Edit Order	As a student I want to be able to go back edit my order	FIN-26: Trading Page: Stocks - Edit Order TO DO	
Trading Page: Order Status - Open Trades	As a student I want to be able to view and cancel my pending transactions	FIN-27: Trading Page: Order Status - Open Trades TO DO	
Trading Page: Order Status - Failed Trades	As a student I want to be able to view my failed trades	FIN-28: Trading Page: Order Status - Failed Trades TO DO	
Trading History Page	As a student I want to view my past trades	FIN-29: Trading History Page TO DO	
Trading History Page: Search	As a student I want to search for a specific stock, to view past trade information	FIN-30: Trading History Page: Search TO DO	
Trading History Page: Filter	As a student I want to filter by specific date, date range, trade type, quantity, price, and total value to view past trade information	FIN-31: Trading History Page: Filter TO DO	
Trading History Page: Sort	As a student I want to sort by date, quantity, price, and total value to view past trade information	FIN-32: Trading History Page: Sort TO DO	
Research Page: Search	As a student I want to be able to search for a specific stock/commodity	FIN-33: Research Page: Search TO DO	
Research Page: More Info	As a student I want to be able to view a stock's fundamental data, company profile, and in-depth indicators	FIN-34: Research Page: More Info TO DO	
Research Page: More Info - Trade button	As a student I want to be able to trade a stock after researching it	FIN-35: Research Page: More Info - Trade Button TO DO	
Research Page: Top 10 Stocks	As a student I want to be able to view a selection of the top 10 stocks in a specific category with their graphs	FIN-36: Research Page: Top 10 Stocks TO DO	
Research Page: Stock Screener	As a student I want to be able to view a selection of stocks in a compact manner with more details	FIN-37: Research Page: Stock Screener TO DO	
Research Page: Stock Screener - custom filter	As a student I want to be able to save custom filters so that I can use them in the future	FIN-38: Research Page: Stock Screener - custom filter TO DO	
Research Page	As a student I want to access the stock research page so that I can conduct in-depth research before I place an order	FIN-12: Research TO DO	

Account Management: Update Password	As a student I want to edit my password so that I can update it to a new password of my choice	FIN-40: Update Password <small>TO DO</small>	
Account Management: Update bio	As a student I want to update my bio so that I can share my introduction with other users on the platform	FIN-41: Update bio <small>TO DO</small>	
Account Management: Update username	As a student I want to update my username so that I can personalize my account	FIN-42: Update username <small>TO DO</small>	
Account Management: Update Avatar	As a student I want to update my avatar so that I can personalize my appearance on the platform	FIN-43: Update Avatar <small>TO DO</small>	
Account Management: Save Changes	As a student I want to save the changes I make on the Account Management page so that the updated information is reflected on my account across the platform	FIN-44: Save changes to Account Information <small>TO DO</small>	

Courses → Units → Content (Articles, Videos)

Product Vision



FinLearn Objectives