Project Summary

In this project, we are aiming to create an AI-powered budgeting and forecasting system designed for small to medium sized businesses. Our main goal is to automate the budgeting cycle using historical and seasonal financial data and give intelligent real-time updates, accounting for different possible scenarios. The scope of this project includes backend and frontend development, AI and Machine Learning, and Data Visualization among others. By the end of our two semesters, we hope to have an intelligent budgeting engine with an interactive dashboard and an AI-powered financial assistant ready to be implemented into the Endless Moments' AI Accounting ecosystem.

Finalized Questions for Customer/Product Owner

Project Concept or Purpose

1. **Can you tell us more about the company, its mission, main products/services, and main target audience?**
   - *Goal: To understand more about the company and their goals, to know who we're working for so we can specialize the way we work.*
2. **What is the bigger picture that this project will fit into, and what problem does it intend to solve?**
   - *Goal: To identify how the end product will be used and everything it will be connected to. This will also allow us to understand the exact objective of the project and how to approach solving the problem.*

Timeline (Sponsor Due Dates and Milestones)

What are the major deadlines especially for the first semester?
   - *Goal: To map out a general understanding of what we need to accomplish and when we need to accomplish it by .*
What are you expecting us to accomplish in the first sprint of the project?
   - *Goal: To understand what we need to accomplish in the first sprint so that we can start working as soon as possible*

Deliverables

5. **What specific deliverables do you expect us to have at each milestone and at the end of the project?**
   - *Goal: To give us an idea of what lies ahead and just getting a better general understanding of where this project is headed.*
6. **What would a fully finished project look like in your eyes, for the end of semester 1 and the end of semester 2?**
   - Goal: To help fully understand what he thinks is accomplishable in not only the short term but also in the long term as well.

Technologies Needed / Desired to be Used

7. **What softwares have been used in the past, and what would you like to see being used in the future?**
   - Goal: To identify the required software that was used and must be built around, along with what is hoped to be used for our end product.
8. **Are there any technical constraints, integration requirements, or security standards (e.g., data encryption, compliance frameworks) that we must follow when developing this system?**
   - *Goal: To identify any mandatory technical or security requirements early so that we design the system to be compliant and compatible from the start.*

Additional Questions

9. **What types of financial data will be available to us, and how do you expect this data to be integrated into the system?**
   - *Goal: To clarify what data sources we'll have access to and ensure we plan the AI/ML models and integrations around realistic and available data inputs.*
10. **What are your expectations for the system's scalability and long-term maintenance?**
    - *Goal: To understand how the system should evolve beyond the initial release, ensuring we build with scalability and maintainability in mind.*