

# **WKforce Comprehensive User Stories**

## **Employer/Project Manager Persona**

### **Major User Stories**

#### **E-1: Sign-up & KYC**

- As an employer, I want to sign up for WKforce so that I can access the platform
- As an employer, I want to complete KYC verification so that I can post projects and hire talent
- As an employer, I want to receive confirmation when my identity is verified so that I know I can start using the platform

#### **E-2: Conversation Canvas → Post-Project Wizard**

- As an employer, I want to describe my project needs in plain language so that the system can help me create a structured brief
- As an employer, I want the AI to ask clarifying questions so that my project requirements are well-defined
- As an employer, I want to see suggested roles and budgets so that I can make informed decisions
- As an employer, I want to choose between hiring people, teams, agents/robots, or a hybrid approach so that I can get the right mix of resources
- As an employer, I want to review and publish my project so that it goes live for talent to see

#### **E-3: Match & Short-list**

- As an employer, I want to see ranked matches for my project so that I can find the best talent
- As an employer, I want to filter matches by budget, rating, and location so that I can narrow down candidates
- As an employer, I want to view detailed profiles in a drawer so that I can evaluate talent without losing my place
- As an employer, I want to short-list candidates so that I can compare my top choices

#### **E-4: Offer & Contract**

- As an employer, I want to create offers for short-listed candidates so that I can hire them
- As an employer, I want to set rates and milestone timing so that project terms are clear

- As an employer, I want to preview auto-generated contracts so that I understand what I'm agreeing to
- As an employer, I want to send offers with one button so that the process is efficient
- As an employer, I want to see offer status updates in real-time so that I know when candidates respond

#### **E-5: Fund Escrow**

- As an employer, I want to fund milestones through escrow so that work can begin
- As an employer, I want to use Stripe Checkout so that payments are secure and familiar
- As an employer, I want confirmation when escrow is funded so that I know talent can start work

#### **E-6: Delivery Hub Collaboration**

- As an employer, I want a Kanban board view so that I can track project progress
- As an employer, I want real-time chat with talent so that we can communicate effectively
- As an employer, I want to see agent messages in the activity feed so that I'm informed about automated work
- As an employer, I want file upload and sharing so that we can exchange project assets
- As an employer, I want to see burn-down and spend charts so that I can monitor project health

#### **E-7: Milestone Approval & Payout**

- As an employer, I want to review submitted work so that I can ensure quality before payment
- As an employer, I want to approve or request changes on milestones so that deliverables meet my standards
- As an employer, I want to release funds with confirmation so that talent gets paid upon approval

### **Minor User Stories**

#### **e-a: Top-up Credits**

- As an employer, I want to top up AI credits when they're low so that agents can continue working
- As an employer, I want instant credit updates after payment so that there's no work interruption

#### **e-b: Seat Management**

- As an employer, I want to add/remove team member seats so that my organization can collaborate

- As an employer, I want to assign Admin/Member roles so that permissions are appropriate

#### **e-c: View Invoices**

- As an employer, I want to view billing history and download PDFs so that I can manage expenses
- As an employer, I want automated monthly invoicing so that billing is handled systematically

#### **e-d: Edit Organization Profile**

- As an employer, I want to upload my company logo and update contact info so that my profile is professional
- As an employer, I want to manage VAT IDs and billing details so that invoicing is accurate

#### **e-e: Raise Dispute**

- As an employer, I want to raise disputes about work quality so that issues can be resolved
- As an employer, I want 24-hour SLA on dispute response so that problems are addressed quickly

#### **e-f: Notifications & Alerts**

- As an employer, I want to receive notifications about project events so that I stay informed
- As an employer, I want to choose notification channels (email/SMS) so that I get updates how I prefer

#### **e-g: Integrations Config**

- As an employer, I want to connect Slack and ClickUp so that WKforce integrates with my existing workflow
- As an employer, I want project mapping to external tools so that data stays synchronized

## **Human Talent/Team Persona**

### **Major User Stories**

#### **T-1: Talent Sign-up & KYC**

- As talent, I want to sign up for WKforce so that I can find work opportunities
- As talent, I want to complete identity verification so that I can apply for jobs

- As talent, I want confirmation when verified so that I know I can start applying

#### **T-2: Create / Join Team**

- As talent, I want to create a team so that I can work on larger projects
- As talent, I want to invite teammates via email so that we can collaborate
- As talent, I want to join teams via invite links so that I can be part of established groups

#### **T-3: Browse / Filter Job Feed**

- As talent, I want to browse available jobs so that I can find opportunities that match my skills
- As talent, I want to filter by skills, budget, location, and work type so that I see relevant jobs
- As talent, I want quick save and mute gestures so that I can efficiently manage my job feed
- As talent, I want to see AI fit scores so that I understand how well I match each job

#### **T-4: Apply / Bid on Job**

- As talent, I want to write and submit proposals so that I can bid on interesting projects
- As talent, I want to set my rates and attach my CV so that employers can evaluate me
- As talent, I want to preview my application so that I can ensure it looks professional

#### **T-5: Accept Offer & Contract**

- As talent, I want to review contract offers so that I understand the terms
- As talent, I want to e-sign contracts with one tap so that I can quickly accept good opportunities
- As talent, I want confirmation when contracts are active so that I know work can begin

#### **T-6: Delivery Hub Collaboration**

- As talent, I want to see my assigned tasks on a Kanban board so that I can manage my work
- As talent, I want to communicate via chat with employers and agents so that we can coordinate effectively
- As talent, I want to upload work artifacts so that I can share deliverables
- As talent, I want to mark tasks complete so that progress is tracked

#### **T-7: Submit Milestone for Approval**

- As talent, I want to mark milestones complete when work is finished so that I can get paid
- As talent, I want confirmation that work is submitted for review so that I know the status
- As talent, I want to lock further edits during review so that the scope is clear

## **T-8: Receive Payout**

- As talent, I want to receive notifications when milestones are approved so that I know payment is coming
- As talent, I want to see payout status in my wallet so that I can track earnings
- As talent, I want bank deposits to be automatic so that I get paid without extra steps

## **Minor User Stories**

### **t-a: Edit Profile & Skills**

- As talent, I want to update my profile and skills so that I'm accurately represented
- As talent, I want skills autocomplete so that I use standardized terms
- As talent, I want profile changes to affect my match ranking so that better profiles get better opportunities

### **t-b: Withdraw Application**

- As talent, I want to withdraw applications before employer response so that I can manage my pipeline
- As talent, I want clear warnings about irreversible actions so that I don't make mistakes

### **t-c: Invite Member to Team**

- As a team owner, I want to invite new members so that we can grow our capabilities
- As a team owner, I want invite expiration so that pending invites don't remain indefinitely

### **t-d: Set Availability Calendar**

- As talent, I want to set my availability so that matching considers my schedule
- As talent, I want availability to affect match scoring so that I get jobs when I'm free

### **t-e: Connect External Tools**

- As talent, I want to connect my GitHub so that my code contributions show in the delivery hub
- As talent, I want webhook integration so that external work is automatically tracked

### **t-f: View Invoices / Earnings**

- As talent, I want to see my earnings history so that I can track income
- As talent, I want to export financial summaries so that I can handle taxes and accounting

### **t-g: Notifications & Alerts**

- As talent, I want to receive notifications about job opportunities and project updates so that I don't miss important events

- As talent, I want to control notification channels so that I'm reached appropriately

#### **t-h: Dispute Handling**

- As talent, I want to raise disputes about unfair treatment so that issues can be resolved
- As talent, I want to upload evidence and participate in dispute resolution so that my side of the story is heard

## **AI/Robot Operator Persona**

### **Major User Stories**

#### **A-1: Operator Sign-up & KYC**

- As an AI/robot operator, I want to sign up for WKforce so that I can monetize my agents
- As an AI/robot operator, I want to complete business verification so that I can publish agents
- As an AI/robot operator, I want confirmation when verified so that I can start earning

#### **A-2: Publish Agent / Robot**

- As an AI/robot operator, I want to publish my agent with name and description so that employers can find it
- As an AI/robot operator, I want endpoint health checks so that I know my agent is properly connected
- As an AI/robot operator, I want instant preview of my listing so that I can see how it appears to employers
- As an AI/robot operator, I want my agent to go live immediately after publishing so that I can start earning

#### **A-3: Set Pricing & Usage Caps**

- As an AI/robot operator, I want to set credits per task so that I'm fairly compensated
- As an AI/robot operator, I want to set daily usage caps so that I can control my agent's workload
- As an AI/robot operator, I want real-time earnings projections so that I can optimize pricing

#### **A-4: Receive Hire Request & Accept**

- As an AI/robot operator, I want to receive hire notifications so that I know when my agent is requested
- As an AI/robot operator, I want to accept or decline hire requests so that I can control which projects my agent works on

- As an AI/robot operator, I want quick swipe gestures for accept/decline so that I can respond efficiently

#### **A-5: Execute Task & Emit Status**

- As an AI/robot operator, I want my agent to receive task payloads automatically so that work can proceed
- As an AI/robot operator, I want real-time progress updates sent to the delivery hub so that employers can track work
- As an AI/robot operator, I want error handling and retry logic so that failed tasks can be recovered

#### **A-6: Credit Payout**

- As an AI/robot operator, I want automatic credit accumulation for successful tasks so that I'm paid for work
- As an AI/robot operator, I want nightly fiat conversion when I reach payout thresholds so that I can access earnings
- As an AI/robot operator, I want payout notifications and confirmations so that I can track payments

#### **A-7: Monitor Usage & Throttling**

- As an AI/robot operator, I want usage analytics and success rate metrics so that I can optimize my agent's performance
- As an AI/robot operator, I want cap warnings so that I can adjust limits before hitting them
- As an AI/robot operator, I want the ability to pause my agent for maintenance so that I can handle updates

### **Minor User Stories**

#### **a-a: Pause / Resume Agent**

- As an AI/robot operator, I want to pause my agent during maintenance so that it doesn't accept new work
- As an AI/robot operator, I want to resume my agent so that it becomes discoverable again

#### **a-b: Version Update**

- As an AI/robot operator, I want to create new versions of my agent so that I can deploy improvements
- As an AI/robot operator, I want version history so that I can track changes and rollback if needed

### **a-c: Webhook Secret Rotate**

- As an AI/robot operator, I want to rotate webhook secrets for security so that my agent stays secure
- As an AI/robot operator, I want 24-hour grace periods so that rotation doesn't break active connections

### **a-d: Sandbox Test Call**

- As an AI/robot operator, I want to test my agent with sample data so that I can verify it works correctly
- As an AI/robot operator, I want limited free test calls so that I can debug without charges

### **a-e: View Dispute Ticket**

- As an AI/robot operator, I want to see disputes about my agent's output so that I can respond to quality issues
- As an AI/robot operator, I want to upload logs and participate in dispute threads so that I can defend my agent's work

### **a-f: Request Credit Withdrawal**

- As an AI/robot operator, I want to withdraw credits when I reach thresholds so that I can access my earnings
- As an AI/robot operator, I want monthly batch payouts so that transaction costs are minimized

### **a-g: Notifications & Alerts**

- As an AI/robot operator, I want notifications about task failures and usage caps so that I can respond to issues
- As an AI/robot operator, I want real-time alerts via WebSocket so that I can react quickly to problems

## **Admin/Compliance Persona**

### **Major User Stories**

#### **AD-1: KYC Review & Approve**

- As an admin, I want to see pending KYC applications so that I can verify user identities
- As an admin, I want document viewer with zoom controls so that I can examine ID documents closely
- As an admin, I want to approve or reject applications with one click so that the process is efficient

- As an admin, I want automatic user notification so that applicants know their status
- As an admin, I want SLA tracking so that we meet our 24-hour commitment

#### **AD-2: Escrow Ledger Oversight**

- As an admin, I want to see all escrow transactions so that I can monitor financial flows
- As an admin, I want to identify unreconciled transactions so that I can investigate discrepancies
- As an admin, I want to mark transactions as reconciled so that the ledger stays accurate
- As an admin, I want to export CSV reports so that I can provide financial summaries

#### **AD-3: Dispute Triage & Resolution**

- As an admin, I want to see new disputes with SLA timers so that I can prioritize urgent cases
- As an admin, I want to review evidence from both parties so that I can make fair decisions
- As an admin, I want to choose outcomes (refund/partial/deny) so that disputes are resolved
- As an admin, I want automatic refund processing so that approved refunds happen quickly

#### **AD-4: Content & Agent Moderation**

- As an admin, I want to see flagged content and agent outputs so that I can maintain quality standards
- As an admin, I want to mute or ban agents that violate policies so that bad actors are removed
- As an admin, I want to see severity levels so that I can prioritize the most serious issues
- As an admin, I want automatic operator notification so that they know about moderation actions

#### **AD-5: Compliance Report Generation**

- As an admin, I want to generate GDPR and regulatory reports so that we meet legal requirements
- As an admin, I want pre-built templates for common reports so that I don't start from scratch
- As an admin, I want automatic archiving to S3 so that reports are stored securely
- As an admin, I want progress indicators for long-running reports so that I know when they'll be ready

#### **AD-6: System Status & Incident Response**

- As an admin, I want real-time alerts about system issues so that I can respond to incidents

- As an admin, I want to acknowledge alerts and update status pages so that users are informed
- As an admin, I want incident coordination tools so that team response is organized
- As an admin, I want SLA tracking (MTTA < 5 min) so that we meet our response commitments

## Minor User Stories

### ad-a: Manual KYC Re-request

- As an admin, I want to request additional KYC documents so that borderline cases can be resolved
- As an admin, I want retry count tracking so that we don't endlessly re-request documents

### ad-b: Refund Escrow

- As an admin, I want one-click refund processing so that dispute resolutions can be executed quickly
- As an admin, I want partial refund options so that nuanced dispute outcomes are possible

### ad-c: Credit Burn Adjustment

- As an admin, I want to adjust agent credit charges so that billing errors can be corrected
- As an admin, I want adjustment logging so that all changes are auditable

### ad-d: Bulk User Suspension

- As an admin, I want to suspend multiple users at once so that fraud rings can be stopped quickly
- As an admin, I want suspension to block login immediately so that banned users can't continue operating

### ad-e: Audit Log Search

- As an admin, I want to search audit logs so that I can investigate specific incidents
- As an admin, I want flexible query options so that I can find relevant information quickly

### ad-f: Download Data Subject Report

- As an admin, I want to generate GDPR data exports so that users can exercise their data rights
- As an admin, I want time-boxed report availability so that sensitive data doesn't persist indefinitely

### ad-g: Set Feature Flag

- As an admin, I want to toggle feature flags so that I can control rollout of new functionality
- As an admin, I want flag status to be written to database so that changes persist across deployments

#### **ad-h: Webhook Secret Rotate (Admin)**

- As an admin, I want to rotate system webhook secrets so that integrations stay secure
- As an admin, I want automatic notification to integrators so that they can update their configurations