

Project Description

The project will allow users to connect their bank accounts using Plaid API and receive financial feedback. The site will show expenditures based on multiple categories (e.g., food, bills, clothes) and use a database to store user data. Using the ChatGPT API, we will implement an AI "advisor" which will advise on how to reduce their spending based on the financial data. Users will be able to log in/sign up via Google.

Product Requirements

- Goal: Create an easy-to-use website that gives personalized financial advice using ChatGPT + Plaid
- Non-Goal: Use personal financial information to suggest stock investments
 - Non-Functional Requirement 1: Financial Information Storage + Retrieval
 - Functional Requirements
 - Use Plaid API to get users' bank information
 - Use Firebase Cloud Firestore to user financial information
 - Non- Functional Requirement 2: Offer financial advice to user about their spending information
 - Functional requirements
 - Restrict access to user data solely to user
 - Integrate ChatGPT to offer advice + review

Product Management

- Theme: Suggest financial advice to users in relation to personal spending
- Epic: Stable Release
- User Story 1: As a new user, it should be easy for me to start using the service, I don't want to manage extra accounts and passwords. I want to use the service as soon as possible
 - Task: Increase Accessibility
 - Ticket 1: Use Firebase Authentication to provide 3rd party authentication abilities w/Google, Apple, Facebook, Twitter & Github
 - Ticket 2: Integrate Plaid so users can import their financial information and not have to manually input everything
- User Story 2: As a repeat user, I want to make sure that I can look back at my previous expenditures (previous months of spending)
 - Task: Securely store users' financial information in Firebase Cloud Firestore so that they don't have to import everything on re-log on
 - Ticket 1: Define rules for reading and writing to and from Firestore so that only users can read/write their own data

- Ticket 2: Securely use the Firestore API to save users' financial information