## Story: Customizing Client Brief Sections

**As a** coverage banker preparing for a client meeting

**I want to** select, add, and organize sections/subsections in a client brief — and save my preferred configuration as a reusable template

**So that** I can quickly generate a client brief tailored to the specific needs of each meeting without rebuilding the structure from scratch

### Dependencies

* Existing client brief rendering service to generate the output
* Backend storage service for saving and retrieving templates
* UI components for section selection, reordering, and customization
* Permissions model for saving personal vs. shared templates

### Acceptance Criteria

1. **Section Selection Behavior**
   * Banker can toggle individual sections/subsections on/off
   * Changes are reflected instantly in preview/output
2. **Add Section Behavior**
   * Banker can create custom sections via “Add Section” dialog
   * Must include section name; optional subsections
3. **Template Actions**
   * Banker can save current configuration as a template with name and description
   * Banker can apply an existing template to a new brief, updating the selection instantly
4. **Error Handling**
   * Non-blocking warning if template includes retired sections
   * Retry prompt on failed save

### Business Requirements

* **Add Section**
  + “Add Section +” button opens dialog to enter section name, optional subsections, and data source mapping
  + Added section appears immediately in the current list and is included in output
  + Limit 5 custom sections per brief; names must be unique
  + Custom sections persist if saved as a template
* **Save Template**
  + “Save as Template” button prompts for name (max 50 chars) and optional description
  + Captures all toggles, order, and custom sections
  + Max 20 templates per user; duplicate names not allowed
* **Use Template**
  + “Use Template” dropdown lists saved templates with descriptions
  + Applying updates section/subsection configuration instantly, allowing manual edits after
  + Templates are user-specific unless shared
* **UI & Output Constraints**
  + Works in both web and native app UI
  + Must preserve section order and visibility states when saving/loading

### Definition of Done

* Meets functional acceptance criteria for adding sections, saving templates, and applying templates
* Passes QA for latency, accuracy, and offline fallback behavior
* Includes final readiness checklist prior to release