## 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

**Story: Save & Continue — Client Brief Display**

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

**I want to** save my selected client brief sections and proceed to a consolidated view of the brief content

**So that** I can review a complete, formatted client brief with all the chosen sections populated, ready for final adjustments, sharing, or export

### Dependencies

* Backend service to save selected section configuration
* Content retrieval pipeline to pull real-time data into each section (e.g., stock prices, metrics, market insights)
* Formatting and rendering service for the consolidated view

### Acceptance Criteria

1. **Trigger Behavior** – Clicking "Save & Continue" should save the section configuration and load the populated brief.
2. **Content Population** – All selected sections are populated with the latest data from relevant data sources.
3. **Formatting** – Output is structured with section headers, charts, and narratives aligned to the template format.
4. **Navigation** – User can scroll and review all sections, with the ability to go back and edit if needed.

### Business Requirements

* Must support both pre-defined templates and user-customized section orders.
* Data must refresh at time of rendering to ensure accuracy.
* Brief view should allow for direct actions (e.g., "Send as Email", "Open in Word") without losing saved configuration.
* Ensure consistent styling between section editor view and final rendered brief.

### Definition of Done

* Saved brief reflects user’s chosen sections and sequence.
* All data in the brief is current as of the save action.
* Brief is immediately shareable/exportable in supported formats.
* No missing data blocks or rendering errors across all sections.

**Story:** View Key Financial Metrics for a Company

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

**I want to** quickly view a concise, visual summary of the company’s latest key financial and operational metrics (e.g., revenue, EBITDA, capex, operating margin, YoY growth, debt levels, stock performance) in one place

**So that** I can rapidly assess financial health, performance trends, and market position without switching between multiple data sources (Bloomberg, FactSet, SEC filings, internal research)

**Dependencies**

* Connection to financial data providers (Bloomberg, FactSet, Refinitiv, or internal data warehouse)
* APIs or integrations for pulling stock price, ratios, and fundamentals
* Currency and date normalization service for consistent display

**Acceptance Criteria**

1. Metrics displayed match the latest available period and source timestamp
2. All financial figures labeled with period (e.g., FY2024, Q2 2025) and currency
3. Stock performance chart shows at least the past 12 months
4. Drill-down link to source document or dashboard for deeper analysis

**Business Requirements**

* Metrics include: Revenue, EBITDA, Operating Margin, Net Income, EPS, Capex, YoY growth, Total Debt, Cash & Equivalents, Stock Price trend
* Peer comparison toggle (e.g., vs. top 3 competitors)
* Refresh frequency configurable (default: daily)

**Definition of Done**

* Data matches primary sources with <0.5% variance
* No missing labels, units, or period references
* Stock chart loads within 2 seconds

**Quality & Telemetry**

* Track load time, data freshness, and API error rate
* Log which metrics users view most often to inform future prioritization
* Automated alert for stale or failed data pulls