### 1. User Story

**As a banker**, I want to select from multiple trusted financial data sources (e.g., CapIQ, FactSet, Bloomberg, Dealogic, SEC Filings) so that I can benchmark my client’s financial performance against relevant peers using accurate, up-to-date information.

### 2. Business Requirements

* The system must allow users to view a list of **approved external data sources** (CapIQ, FactSet, Bloomberg, Dealogic, PitchBook, SEC Filings, etc.) and **internal sources** (CRM, Excel Backups, Aiden Notetaker).
* Users must be able to **select one or more data sources** (single or multi-select).
* The system should **validate access/entitlements** before enabling data retrieval from each source.
* Data must be **pulled in a normalized format** so that benchmarking metrics (Gross Margin, EBITDA Margin, Revenue Growth, etc.) are consistent across sources.
* The system must provide **feedback or error handling** if a source is inaccessible (e.g., missing credentials, API downtime).
* Data selection should **integrate with chart options** (bar, column, stacked, etc.) in the benchmarking slide generator.

### 3. Dependencies

* **APIs / Connectors** for each external data source (CapIQ, FactSet, Bloomberg, etc.).
* **Authentication / Entitlement system** to validate banker access rights to a given data source.
* **Data normalization engine** to align financial metrics across heterogeneous sources.
* **UI component** in the pitchbook generator for data source selection.
* **Benchmarking module** that consumes the selected data and populates slides.

### 4. Acceptance Criteria

✅ Banker can view all available data sources in a **selectable list**.  
 ✅ Banker can **multi-select** sources and confirm selection.  
 ✅ System validates **user entitlements** and either confirms or gracefully rejects unauthorized sources.  
 ✅ Data pulled from sources is **standardized** and mapped correctly to metrics (e.g., EBITDA Margin always reflects the same definition).  
 ✅ Selected sources feed seamlessly into the **benchmarking charts** in the pitchbook.  
 ✅ If a source is unavailable, system provides **clear error messaging** without breaking the workflow.

### 5. Definition of Done

* Code changes for UI, API integration, and data normalization are **implemented, tested, and peer-reviewed**.
* Banker can **successfully select and use at least one internal and one external source** in generating a benchmarking slide.
* Entitlement checks are in place and verified with **mock users with and without access**.
* Unit tests, integration tests, and **UAT sign-off by bankers** are complete.
* Documentation (how to connect/select sources, error handling, troubleshooting) is updated.
* Feature is **deployed in staging and production** environments.