Release Plan

Product Name: CrowdVest
Team Name: UCSC StockApp Group
Release Name: Nickels and Dimes
Release Date: July 8
Revision Number: 1
Revision Date: July 1

High Level Goals - *Create a platform for students to connect with peers/interested investors and build partnerships/groups to micro-invest in stocks*

- Create a user profile and specify interests in certain stocks/companies listed from the S&P 500 along with expected personal investment
- View a dashboard with a visualization of what stock groups the user is a part of and recommended groups to join
- Automatically match users with investment groups based on the stock of interest and budget (ensuring that total sum of users' budgets is less than or equal to total value of stock)

User Stories for Release:
- As an interested investor, I want to de-risk my investments so I don't stand to lose as much when I buy stocks.
- As someone without much capital, I want to share my stock investments in large stocks so that I don't have to buy a whole stock.
- As someone who wants access to stock market investing, I want to be able to pick stocks from the NYSE so I can diversify my investment portfolio.
- As an investor, I want to be able to understand my investment history so I can figure out what to invest in next.
- As someone without much experience investing in stocks, I want to know which stocks are best to invest in so I know where to put my money and I can have guidance from my group that I chose.
- As a user, I want to be able to create an account and/or login so that I can access a network of other mutually interested investors
- As a user, I want to be able to create/update a profile so that I can input my information and select stocks I am interested in investing in.
- As a user, I want to be able to view a dashboard of my group stock portfolio so that I can easily view the investing groups I am a part of.
- As a user, I want to receive recommendations for potential groups to join so that I can diversify my portfolio and meet/network with similarly interested investors.

Story Rank:

M: Must Have
S: Should Have
C: Could Have
W: Won't Have

Sprint 1

M: Must Have

- As a user, I want to be able to create an account and/or login so that I can access a network of other mutually interested investors
- As a user, I want to be able to join groups that accept micro-investments in particular stocks so that I don't have to buy a whole stock on my own.
- As a user, I want to be able to create/update a profile so that I can input my information and select stocks I am interested in investing in.
- As a user, I want to be able to view a dashboard of my group stock portfolio so that I can easily view the investing groups I am a part of.
- As a user, I want to see a recommended groups portion on my dashboard so that I can diversify my portfolio.

S: Should Have

- As a user, I want to be able to view other people's profiles so that I can see who I am joining a group with.
- As a user, I want to be able to join a group that operates under a specific sell framework (simple majority vote, 3/4ths majority vote, unanimous vote) so that I can have more control over my investments.
- I want a web framework that allows me to access the application from a website

C: Could Have

- As an investor, I want to be able to understand my investment history so I can figure out what to invest in next.
- As an Investor without much experience investing in stocks, I want to know which stocks are best to invest in so I know where to put my money.
- As an Investor, I want a mobile application framework to view and access my investments.

W: Won't Have

Sprint 2

M: Must Have

- As a user, I want to be able to view other people's profiles and their investment portfolios so that I can see who I am joining a group with.
- As a developer, I want to be able to calculate the percentage of ownership and price that a user has within a stock and display it to them so that they can see how much their portion of a stock would be worth
- As a user, I want to be automatically matched up with another group of investors so that I can meet/network with other interested investors.

S: Should Have

- As a developer, I want to make sure the databases are storing the correct context of the users within the groups and have it categorized neatly.

C: Could Have

- As a developer, I want to add as many possible features to direct the user to joining groups suited best towards them. For ex: have as many categories as possible to organize the dashboard well.

W: Won't Have

Sprint 3

M: Must Have

- As a developer, I want to improve UI/UX so that users can efficiently navigate through the website and easily buy stocks
- As a user, I want to be able to view my investment history so I can understand my previous investment habits.

S: Should Have

- As a user, I want to be able to have effective communication and understanding of my group and be able to want to invest and all have a mutual agreement.
- As a developer, I want to make sure the databases are storing the correct context of user profiles.

C: Could Have

- As a user, I want to be able to view my investment history so I can understand my previous investment habits.
- As a user, I want to be able to search who is in my group so I can possibly pair up with my friends.
- As a developer, I want as little bugs running before presentation. A clean and polished interface. Any last minute details that the user may want implemented.

W: Won't Have

Product Backlog:
- As a user, I want to be able to graphically visualize my past investment history and portfolio so that I can make informed decisions about my future investments.
- As as a user, I want to see potential start-ups that I can invest in so that I can participate in equity crowd-funding.
- As a user, I want to be able to see and search through a variety of stocks to invest in so that I can pick a stock to buy.
- As a user, I want to be able to access real-time data on stock information and prices so I can make snap decisions regarding whether or not I want to join a group focused on that specific stock.
- As a developer, I want to be able to calculate the percentage of ownership and price that a user has within a stock so that they can see how much their portion of a stock is worth
- As a developer, I want to trigger the "selling" of a stock when the voting of a group reaches majority rule so that users would be paid their ownership of a stock based on the price and percentage
- As a developer, I want to improve UI/UX so that users can efficiently navigate through the website and easily buy stocks

Project Presentation
https://docs.google.com/presentation/d/1bNMBdakDqC7NDUS-0e2C_6k1ZYF7Li11/edit#slide=id.p6