Software Requirements Specification (SRS) Document

Team 23
Team Members: Chirag Dhamija, Prakhar Singhal, Sohan Gupta, Asish Bharadwaj

Brief problem statement

Numerous startups are funded annually by investors such as venture capitalists, angel investors, etc. Without an appropriate, organized software platform to help, managing, monitoring, communicating, and strategizing for all those portfolio startups becomes more and more Challenging. Because of this, the main objective of our project is to develop a strong startup investment portfolio management software for investors, which includes features such as - data management, analytics, market trends, predictive insights, etc.

System requirements

1. MERN Stack
2. Python
3. API for OTP management to verify a Email Address
4. Third party to verify company credentials
5. API to generate an invite link

Users profile

The system will be used by Angel Investors, Venture Capitalists, Syndicates, and Private Equity Firms. Each of these user categories has distinct characteristics and requirements:

1. Angel Investors:
   - Profile: Angel investors are typically individuals who invest their own funds into startups, often in the early stages of development.
   - Familiarity with Computers and Software: Varied levels of familiarity, ranging from proficient to basic. Some may have extensive experience with financial software and investment platforms, while others may require more guidance.
2. Venture Capitalists/Syndicates:
   - Profile: Venture capitalists and syndicates are professional investors who provide funding to startups and early-stage businesses.
   - Familiarity with Computers and Software: Generally proficient, as they are accustomed to using technology for financial analysis, deal sourcing, and investment management. However, preferences and proficiency may vary among individuals.
3. Private Equity Firms :
   - Profile: Private equity firms invest in more mature companies that have demonstrated growth potential and stability.
   - Familiarity with Computers and Software: Similar to venture capitalists, private equity professionals are likely to be proficient with computers and financial software.

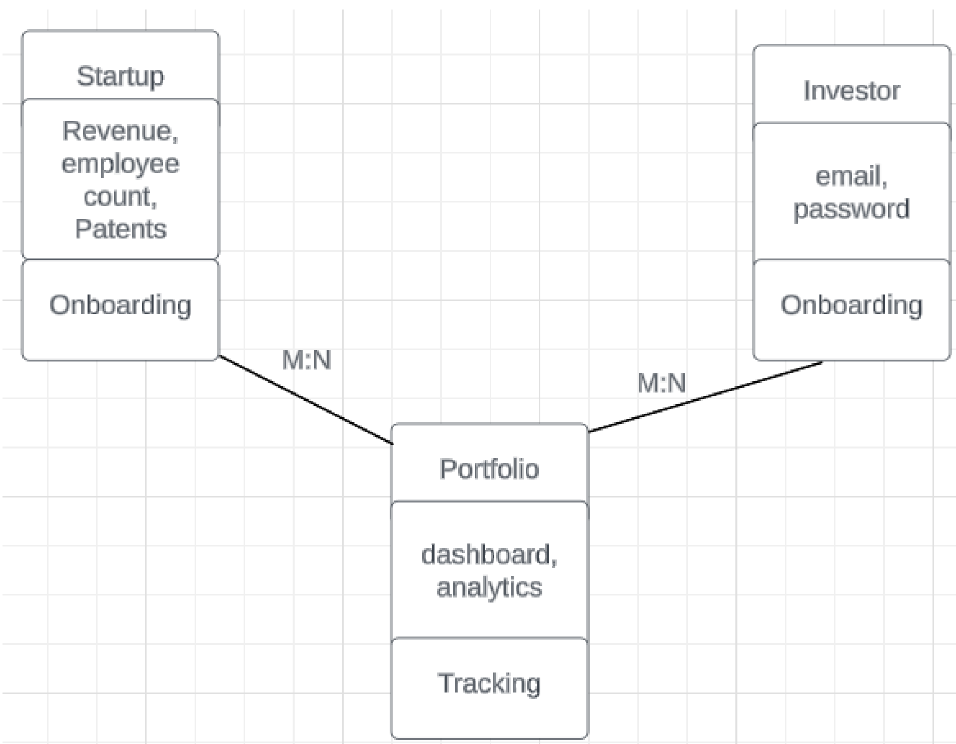
Users will primarily interact with the system through web-based interfaces tailored to their investment needs. The mode of use will involve activities such as browsing investment opportunities, conducting due diligence, analyzing financial data, managing investment portfolios, and communicating with other stakeholders.

Feature requirements (described using use cases)

No.	User Case Name	Description	Release
1.	Investor On-Boarding	The user (investor) registers by clicking the "register as investor" button on the home page, providing email, password, etc. After successful authentication, they're directed to the dashboard, completing onboarding	R1
2.	Startup On-Boarding	Users can register as startups by clicking the "register" button on the homepage, entering details including email, password, company description, founders, revenue, employee count, and future plans. Upon successful authentication, they are directed to the dashboard.	R1
3.	Portfolio Creation	Registered investors can create portfolios by selecting "create portfolio" on the dashboard. They input details like fund size and duration. Afterward, an invite link is sent to the startup.	R1
4.	Invite Link	Once a portfolio is created by an investor, registered startups receive a notification/invite link via dashboard and email. Unregistered startups receive an email containing details about the investor along with a registration link.	R1
5.	Display of revenue and user metrics on portfolio page	The Portfolio page prominently showcases revenue metrics (total earnings) and user metrics (startup list, amounts, net worth, patents, profit, employees), offering a comprehensive overview of portfolio performance.	R1
6.	View Standard Data and Graphical Illustrations	Investors can access standard data and graphical representations such as profit, expected growth, and update status markers for each company on the analytics dashboard.	R1
7.	Access Separate Analytics for Each Company	Investors can view individualized analytics for each company within a portfolio directly from the analytics dashboard.	R1
8.	View Combined Analytics for Portfolios	Investors can access aggregated analytics for all companies within a portfolio, providing a comprehensive overview of performance.	R1
9.	Export Analytics to PDF	Investors can export analytics data and graphical illustrations to a PDF format for offline reference or sharing purposes.	R1
10.	Export Analytics with Secure Link	Investors can generate a secure link to access analytics data and graphical illustrations externally, ensuring data privacy and accessibility.	R1
11.	Receive Update Notifications	Investors receive notifications for companies that have and haven't updated their financial data, enabling	R1

		prompt action to ensure data accuracy and completeness.	
12.	Update Reminder Notifications	The system sends reminders to companies according to the update frequency set by investors. Companies receive notifications prompting them to complete required details and attach necessary documents via an update form.	R1
13.	Close Portfolio	Investors can manually close a portfolio by clicking the "close portfolio" button. Clicking the button will prompt the investor for confirmation of closure, and upon confirmation, the portfolio will be closed.	R1
14.			

Use case diagram



Use case description

<table>
<tr><td>Use Case Number:</td><td>UC-01</td></tr>
<tr><td>Use Case Name:</td><td>Investor On-Boarding</td></tr>
<tr><td>Overview:</td><td>The purpose of the Investor On-Boarding Use Case is to allow users (investors) to register and onboard onto the platform by providing necessary information, subsequently directing them to the dashboard upon successful authentication.</td></tr>
<tr><td>Actors:</td><td>Investor</td></tr>
<tr><td>Pre condition:</td><td>The investor is not already registered on the platform.</td></tr>
<tr><td>Flow:</td><td>Main (success) Flow:
1. The investor navigates to the home page.
2. The investor clicks on the "register as investor" button.
3. The system prompts the investor to provide necessary information such as email, password, etc.
4. The investor submits the required information.
5. The system validates the information provided.
6. If the information is valid, the system authenticates the investor.
7. Upon successful authentication, the system directs the investor to the dashboard.</td></tr>
<tr><td></td><td>Alternate Flows:
1. Invalid Information Provided:
• In step 5, if the provided information is invalid, the system prompts the investor to correct the errors.
• The investor corrects the errors and resubmits the information.
• The system proceeds with step 6 of the main flow.
2. Authentication Failure:
• In step 6, if the authentication fails, the system notifies the investor about the failure.
• The investor may retry authentication or contact support.
• The flow terminates until successful authentication.</td></tr>
<tr><td>Post Condition:</td><td>The investor is successfully authenticated and directed to the dashboard.</td></tr>
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Use Case Number:	UC-02

Use Case Name:	Startup On-Boarding
Overview:	The "Startup On-Boarding" use case allows users to register as startups on the platform, providing necessary details and accessing the dashboard upon successful authentication.
Actors:	Startup (User)
Pre condition:	The startup is not already registered on the platform.
Flow:	Main (success) Flow: 1. User navigates to the homepage. 2. User clicks the "register" button. 3. User fills in the required details including email, password, company description, founders, revenue, employee count, and future plans. 4. User submits the registration form. 5. System authenticates the user's information. 6. Upon successful authentication, user is directed to the dashboard.
	Alternate Flows: 1. Registration Failure • User is prompted with an error message. 2. Authentication Failure • User is prompted to re-enter authentication details.
Post Condition:	The user is successfully registered as a startup and directed to the dashboard.

Use Case Number:	UC-03
Use Case Name:	Display of revenue and user metrics on portfolio page
Overview:	The Use Case provides users with a comprehensive overview of portfolio performance by prominently displaying revenue and user metrics on the Portfolio page.
Actors:	Portfolio Manager,System(Platform)
Pre condition:	1. The user must be authenticated and authorized to access the Portfolio page. 2. There should be existing data on revenue and user metrics available for display.
Flow:	Main (success) Flow: 1. The user navigates to the Portfolio page.

	2. The system fetches and displays the revenue metrics prominently (e.g., total earnings). 3. The system fetches and displays user metrics (startup list, amounts, net worth, patents, profit, employees) in a comprehensive format.
	Alternate Flows: 1. If Revenue Data is Unavailable: • If revenue data is unavailable, display a message indicating the absence of revenue metrics. • Proceed to display user metrics as per the main flow. 2. If User Metrics Data is Unavailable: • If user metrics data is unavailable, display a message indicating the absence of user metrics.
Post Condition:	Upon completion of the main flow, the Portfolio page displays both revenue metrics and user metrics as described in the main flow or alternate flows if applicable.

Use Case Number:	UC-04
Use Case Name:	View Standard Data and Graphical Illustrations
Overview:	Allow investors/portfolio managers to access standard data and graphical representations for each company on the analytics dashboard.
Actors:	Investors/Portfolio Managers
Pre condition:	The investor is logged into the system and has appropriate access permissions to view the analytics dashboard.
Flow:	Main (success) Flow: 1. Investor navigates to the analytics dashboard. 2. Investor selects a specific company to view its data and graphical illustrations. 3. System retrieves standard data such as profit, expected growth, and update status markers for the selected company. 4. System displays the data along with graphical illustrations on the dashboard.
	Alternate Flows: 1. If the selected company's data is not available: • Display an appropriate message indicating the unavailability of data for the selected company. 2. If the investor doesn't have permission to view the analytics dashboard: • Display an error message indicating insufficient permissions.
Post Condition:	The investor successfully views standard data and graphical illustrations for the selected company on the analytics dashboard.

Use Case Number:	UC-06
Use Case Name:	View Combined Analytics for Portfolios
Overview:	The use case aims to allow investors to access aggregated analytics for all companies within a portfolio, providing a comprehensive overview of performance.
Actors:	Investors
Pre condition:	The user must be authenticated and have appropriate permissions to access portfolio analytics.
Flow:	Main (success) Flow: 1. Investor navigates to the analytics section of the portfolio. 2. System retrieves analytics data for all companies within the portfolio. 3. System aggregates the analytics data. 4. System presents the combined analytics overview to the user.
	Alternate Flows: 1. No data available: • If there is no data available for any of the companies within the portfolio: o System notifies the user that there is no data available. o Use case ends. 2. Insufficient permissions: • If the investor doesn't have sufficient permissions to view portfolio analytics: o System denies access to the analytics section. o Use case ends.
Post Condition:	The investor has accessed the combined analytics overview for all companies within the portfolio.

Use Case Number:	UC-07
Use Case Name:	Export Analytics to PDF
Overview:	Allow investors to export analytics data and graphical illustrations to a PDF format for offline reference or sharing purposes.
Actors:	Investor
Pre condition:	The investor must have access to the analytics platform and relevant data.
Flow:	Main (success) Flow:

	1. Investor navigates to the analytics section. 2. Investor selects the desired analytics data and graphical illustrations. 3. Investor clicks on the "Export to PDF" option. 4. System generates a PDF document containing the selected analytics data and illustrations. 5. System prompts the investor to download or share the PDF.
	Alternate Flows: 1. If the investor selects invalid data: • Investor selects invalid data. • System prompts the investor to select valid data. 2. If there is an error in generating the PDF: • System encounters an error while generating the PDF. • System displays an error message to the investor. • Investor may retry or contact support.
Post Condition:	The PDF containing the selected analytics data and illustrations is successfully generated and available for download or sharing.

Use Case Number:	UC-08
Use Case Name:	Receive Update Notifications
Overview:	The purpose of the use case is to notify investors about companies that have and haven’t updated their financial data, facilitating prompt action to ensure data accuracy and completeness.
Actors:	Investors
Pre condition:	The purpose of the use case is to notify investors about companies that have and haven’t updated their financial data, facilitating prompt action to ensure data accuracy and completeness.
Flow:	Main (success) Flow: 1. The system checks for updates in financial data for monitored companies. 2. If updates are found, notifications are sent to the investors. 3. Investors receive the notifications.
	Alternate Flows: 1. No Updates Found: • If no updates are found, no notifications are sent. 2. Notification Failure: • If there's a failure in sending notifications, the system logs the error and attempts to resend notifications later.

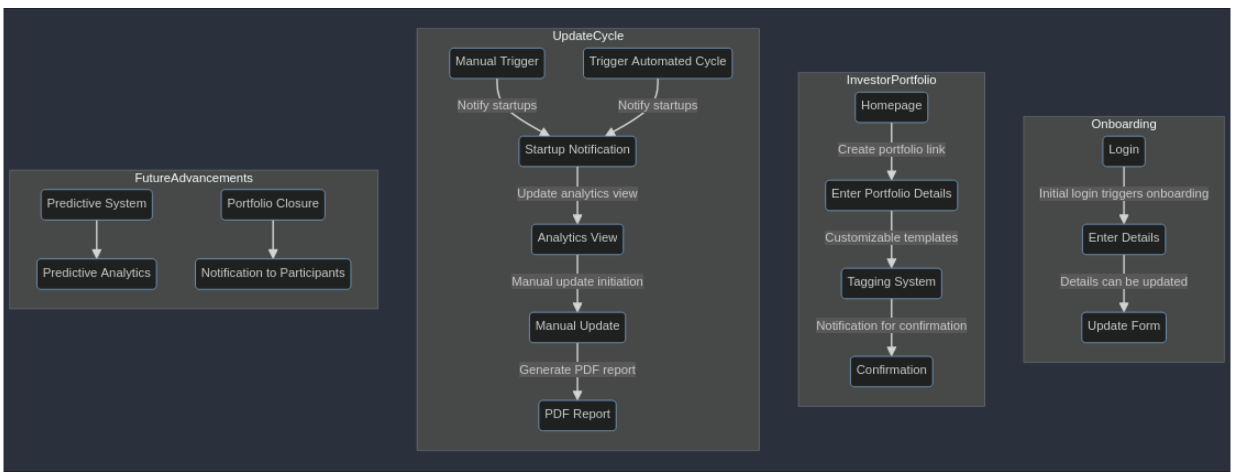
Post Condition:	Investors have received notifications regarding updates or lack thereof in the financial data of monitored companies.

Use Case Number:	UC-12
Use Case Name:	Update Reminder Notifications
Overview:	The purpose of the "Update Reminder Notifications" use case is to prompt companies to update their details and attach necessary documents via an update form based on the update frequency set by investors.
Actors:	Investors, Companies
Pre condition:	1. Investors have set update frequencies for the companies. 2. Companies have previously registered with the system.
Flow:	Main (success) Flow: 1. The system checks the update frequency set by investors for each company. 2. If the update frequency matches the current date, the system generates reminder notifications. 3. Reminder notifications are sent to the respective companies. 4. Companies receive the notifications and access the update form. 5. Companies complete the required details and attach necessary documents. 6. Companies submit the update form.
	Alternate Flows: 1. No pending updates: • No reminder notifications are sent. 2. Companies don't complete the update form: • Pending updates remain, and reminder notifications may be reattempted based on the update frequency set by investors.
Post Condition:	All companies with pending updates have submitted the necessary details and documents via the update form.

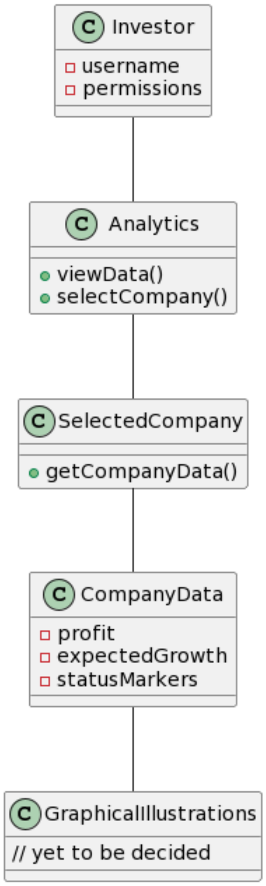
Use Case Number:	UC-09
Use Case Name:	Close Portfolio
Overview:	Investors can manually close a portfolio by clicking the "close portfolio" button. Clicking the button will prompt the investor for confirmation of closure, and upon confirmation, the portfolio will be closed.
Actors:	Investor

Pre condition:	1. The investor is logged into the system. 2. The portfolio to be closed exists and is open.
Flow:	Main (success) Flow: 1. The investor navigates to the portfolio they want to close. 2. The investor clicks on the "close portfolio" button. 3. The system prompts the investor for confirmation. 4. The investor confirms the closure. 5. The system closes the portfolio.
	Alternate Flows: 1. Cancellation of Closure: • If the investor cancels the closure at the confirmation prompt: • HenceThe portfolio remains open.
Post Condition:	The portfolio is successfully closed.

Basic Flow Diagram:



Basic UML Diagram:


Investor
username
permissions
Analytics
viewData()
selectCompany()
SelectedCompany
getCompanyData()
CompanyData
profit
expectedGrowth
statusMarkers
GraphicalIllustrations
// yet to be decided