

# Task for Product Engineer

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## ✓ Dev B ( Product Engineer) – Task List

Objective: Create the full UX flow from onboarding to dashboard, handle input collection, call backend APIs, and present all insights beautifully.



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### Task B1 – User Onboarding UI



- **Input:** New session
  - **Output:** User risk profile + investment intent
  - **Core Functionality:**
    - 3-5 card form (risk level, investment size, style)
    - Store state locally/session
  - **Evaluation:**
    - ✓ Clean transitions
    - ✓ Final payload captured accurately
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### Task B2 – Portfolio Upload & Preview



- **Input:** CSV/XLS file
- **Output:** Preview and review screen
- **Core Functionality:**
  - File parser
  - Editable preview of tickers, quantities, avg price
- **Evaluation:**

-  Uploaded files parsed correctly
  -  Editable table works on mobile too
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## Task B3 – API Integration Layer

- **Input:** Portfolio JSON
  - **Output:** AI output from Dev A's module
  - **Core Functionality:**
    - `/api/predict` to trigger intelligence backend
    - Show loader until response arrives
  - **Evaluation:**
    -  Handles slow/fail gracefully
    -  Tracks request ID, allows retry
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## Task B4 – Output Dashboard UI

- **Input:** Full JSON response from Dev A
  - **Output:** Rich interactive dashboard
  - **Core Functionality:**
    - Sectioned view:
      - Summary
      - Allocation charts
      - Stock-level cards
      - Red flags & explainability
  - **Evaluation:**
    -  All components map to backend data
    -  Mobile responsive
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## Task B5 – “Why This” LLM UI

- **Input:** GPT-4 output per stock
  - **Output:** Tooltip or modal view
  - **Core Functionality:**
    - Integrate natural language output inline
  - **Evaluation:**
    -  Shows insight on hover or click
    -  Does not break layout
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## Task B6 – Lead Capture Flow

- **Input:** Final report screen
  - **Output:** User contact + report metadata
  - **Core Functionality:**
    - Simple lead form
    - POST to webhook or DB
  - **Evaluation:**
    -  Valid email/phone only
    -  Thank you screen or redirection
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