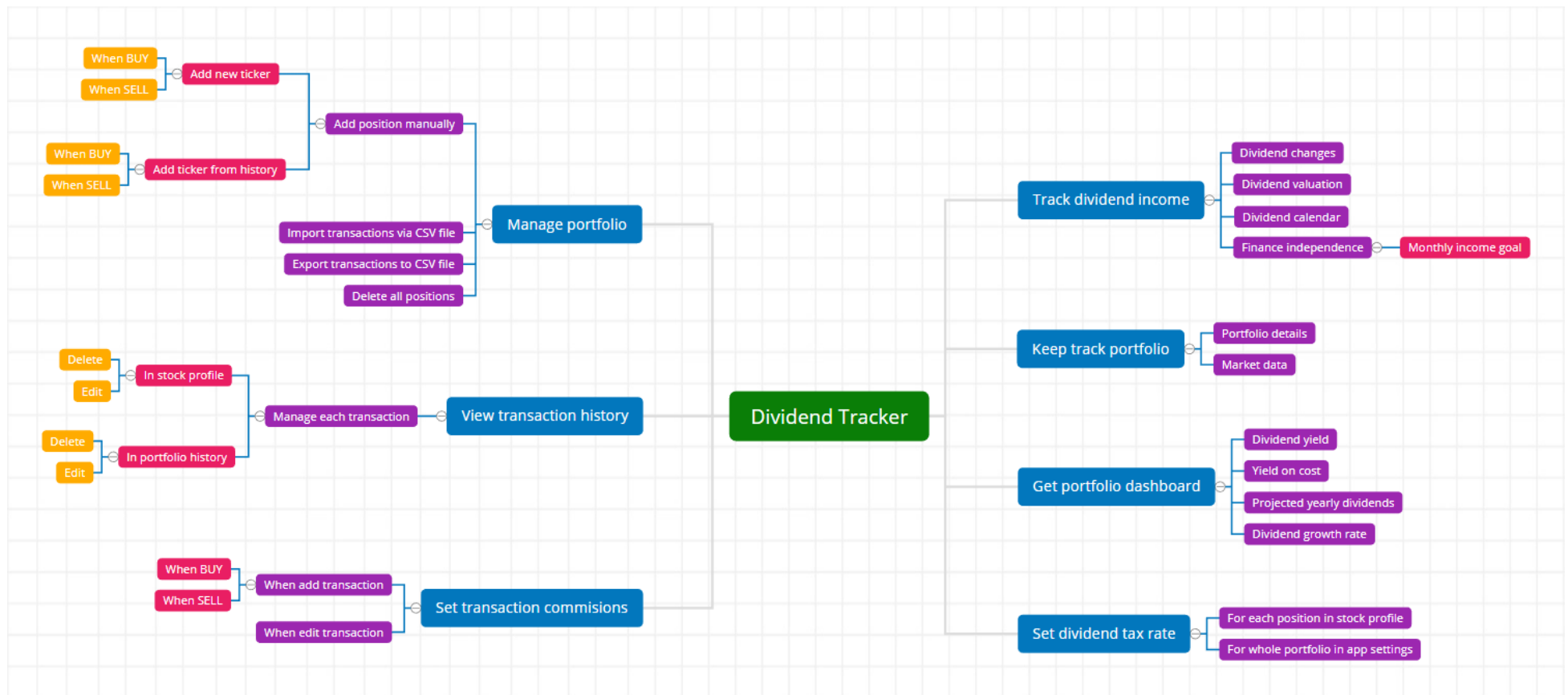# Dividend Tracker application for iPhone

[Brovkov Dmitriy](#)

Software QA engineer

Project mind map
Showing app functions and customer value

Dividend Tracker

- **Manage portfolio**
  - Add position manually
    - Add new ticker
      - When BUY
      - When SELL
    - Add ticker from history
      - When BUY
      - When SELL
  - Import transactions via CSV file
  - Export transactions to CSV file
  - Delete all positions
- **View transaction history**
  - Manage each transaction
    - In stock profile
      - Delete
      - Edit
    - In portfolio history
      - Delete
      - Edit
- **Set transaction commisions**
  - When add transaction
    - When BUY
    - When SELL
  - When edit transaction
- **Track dividend income**
  - Dividend changes
  - Dividend valuation
  - Dividend calendar
  - Finance independence
    - Monthly income goal
- **Keep track portfolio**
  - Portfolio details
  - Market data
- **Get portfolio dashboard**
  - Dividend yield
  - Yield on cost
  - Projected yearly dividends
  - Dividend growth rate
- **Set dividend tax rate**
  - For each position in stock profile
  - For whole portfolio in app settings

Test cases

ID: TC01
Title: Add transaction - SELL non existing position from portfolio
Objective: Verify portfolio will not obtain any changes
Precondition: Add some stocks with different tickers into portfolio (example: 10 JPM 130$ per share, 2 BLK 670$ per share)
Steps:
1. Enter portfolio
2. Tap to + icon
3. SELL any stock not from portfolio (example: SELL XOM 100 shares with 99$ sell price)
4. Check portfolio details

Expected result: Get warning that stock with this ticker not in portfolio and operation terminated

ID: TC02
Title: Import/Export - Import CSV file included tickers with stock split history
Objective: Check correct import CSV with splitted stocks
Precondition: Create CSV file with data including some ticker with split history (example: 20 AAPL 60$ per share with transaction date 2020-03-18)
Steps:
1. Go settings
2. Import portfolio CSV file
3. Tap AAPL in stock list and look at shares quantity

Expected result: Get warning about date and price of transaction

ID: TC03

Title: UI - Dashboard alignment

Objective: Compare UI with mock-up

Precondition: No preconditions needed

Steps:

    1. Go to dashboard

    2. Look at "Dividend Yield" and "Yield on coast" borders

Expected result: "Dividend Yield" and "Yield on coast" aligned with near elements of interface
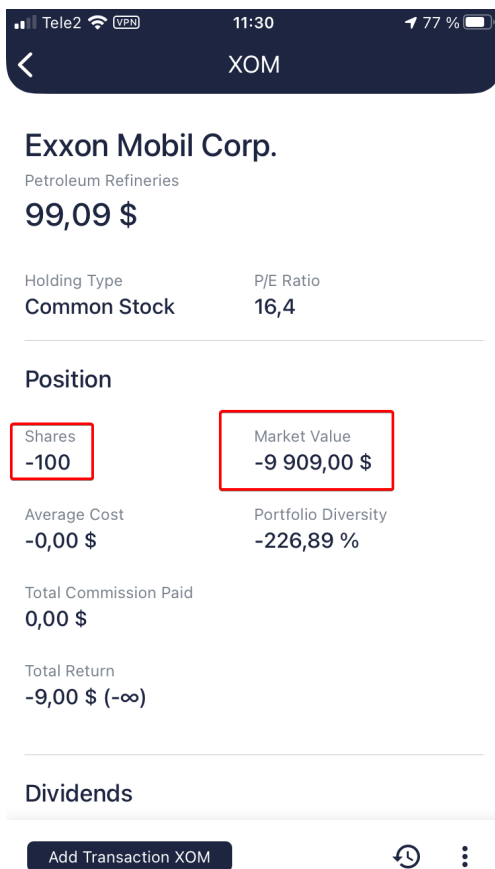
Bug reports

ID: BUG01
Title: Add transaction - SELL non existing position from portfolio
Preconditions: Add some stocks with different tickers into portfolio (example: 10 JPM 130$ per share, 2 BLK 670$ per share)
Steps to reproduce:
1. Enter portfolio
2. Tap to + icon
3. SELL any stock not from portfolio (example: SELL XOM 100 shares with 99$ sell price)
4. Check portfolio details

Result: Portfolio get loss 9900$

Expected result: Get warning that stock with this ticker not in portfolio and operation terminated
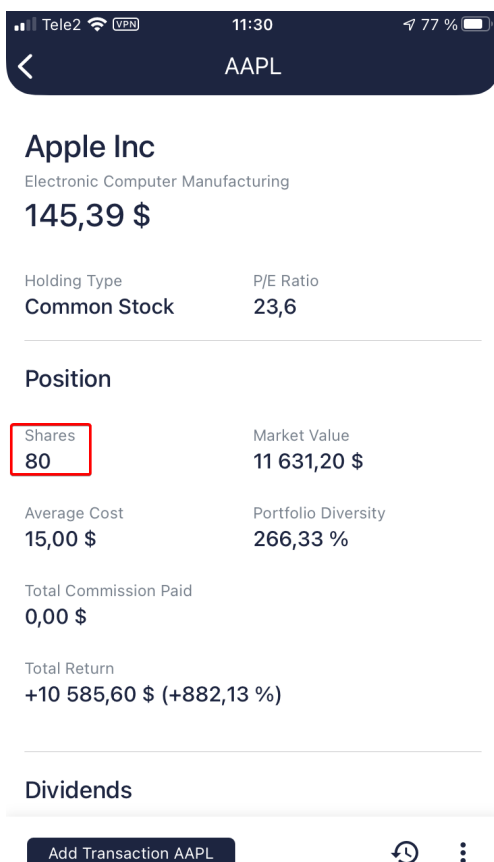Environment: iPhone 8; iOS 14.8.1; app v. 1.7.1.957

ID: BUG02

Title: Import/Export - Import CSV file included tickers with stock split history

Precondition: Create CSV file with data including some ticker with split history (example: 20 AAPL 60$ per share with transaction date 2020-03-18)

Steps to reproduce:
1. Go settings
2. Import portfolio CSV file
3. Tap AAPL in stock list and look at shares quantity

Result: Auto splitted stock quantity

Expected result: Get warning about date and price of transaction

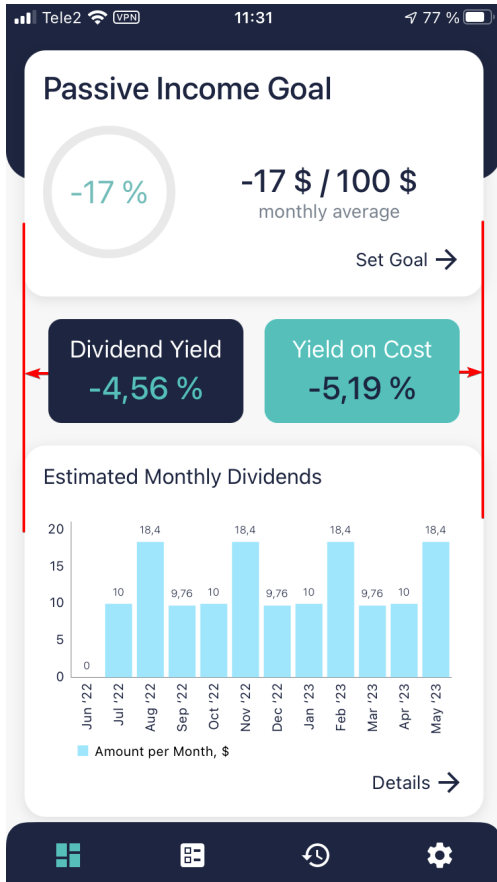Environment: iPhone 8; iOS 14.8.1; app v. 1.7.1.957

ID: BUG03

Title: UI - "Yield" fields on dashboard not aligned

Precondition: No preconditions needed

Steps to reproduce:

1. Go to dashboard
2. Look at "Dividend Yield" and "Yield on coast" borders

Result: "Dividend Yield" and "Yield on coast" not aligned with near elements of interface

Expected result: "Dividend Yield" and "Yield on coast" aligned with near elements of interface

Environment: iPhone 8; iOS 14.8.1; app v. 1.7.1.957