

FinBro Developer Guide

Table of Contents

1. Introduction
2. Setting Up the Development Environment
3. High-Level Architecture
4. Component Details
 - Main Component
 - UI Component
 - Logic Component
 - Model Component
 - Storage Component
 - Command Classes
 - Exceptions Component
5. Class Structure
6. Design Patterns
7. Key Features and Implementation
 - Transaction Management
 - Command Parsing
 - Data Persistence
 - Financial Summaries
8. Sequence Diagrams for Key Operations
 - Adding a Transaction
 - Searching for a Transaction
 - Filtering Transactions
 - Obtaining a Monthly Financial Summary
 - Obtaining the Current List of Transactions
 - Viewing Balance
 - Editing a Transaction
9. Testing
10. Future Enhancements
11. Appendix
12. Glossary
13. References

Introduction

FinBro is a personal finance management application that operates through a Command Line Interface (CLI). This developer guide provides comprehensive information about the architecture, implementation, and design decisions behind FinBro to help developers understand the codebase and contribute effectively.

Setting Up the Development Environment

Prerequisites

- JDK 17
- Gradle 7.6.2 or higher
- IntelliJ IDEA (recommended)

Getting Started

1. Clone the repository:

```
git clone https://github.com/AY2425S2-CS2113-W13-3/tp.git
```

2. Import the project as a Gradle project in IntelliJ IDEA:

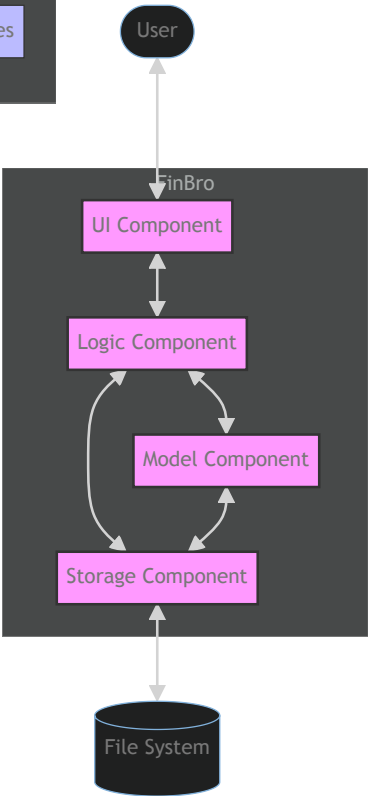
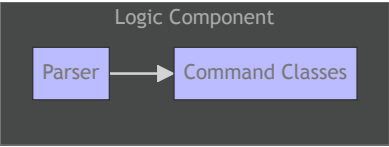
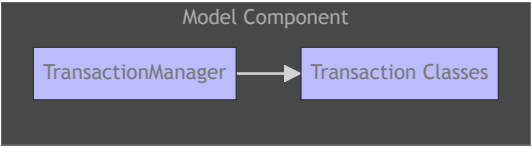
- Open IntelliJ IDEA
- Select "Import Project"
- Navigate to the project directory and select the `build.gradle` file
- Follow the prompts to complete the import

3. Verify the setup:

- Run the tests:  `./gradlew test`
- Run the application:  `./gradlew run`

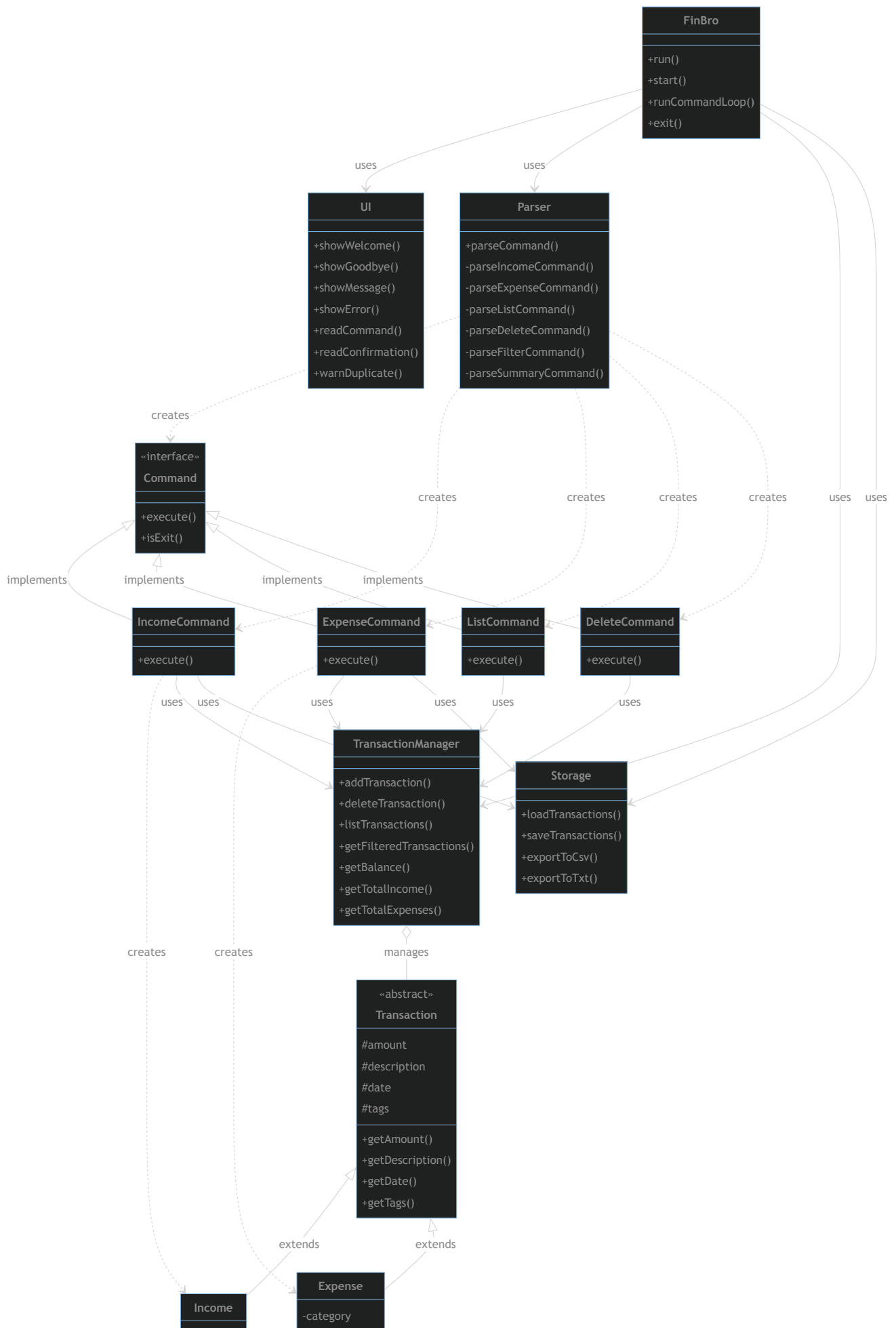
High-Level Architecture

FinBro follows a layered architecture pattern with clear separation of concerns:



Component Details

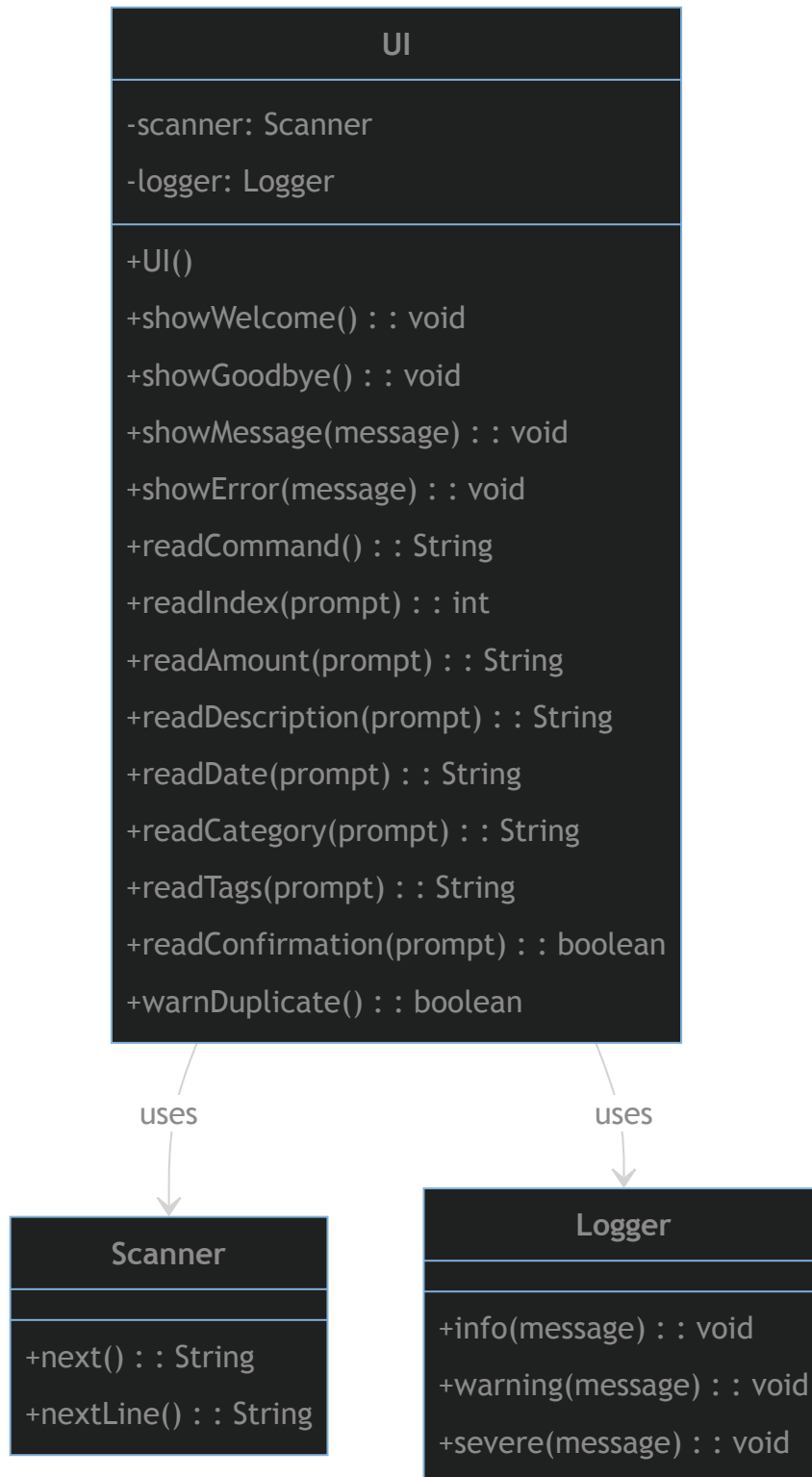
Main Component

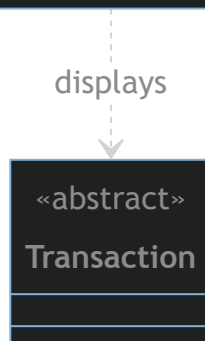
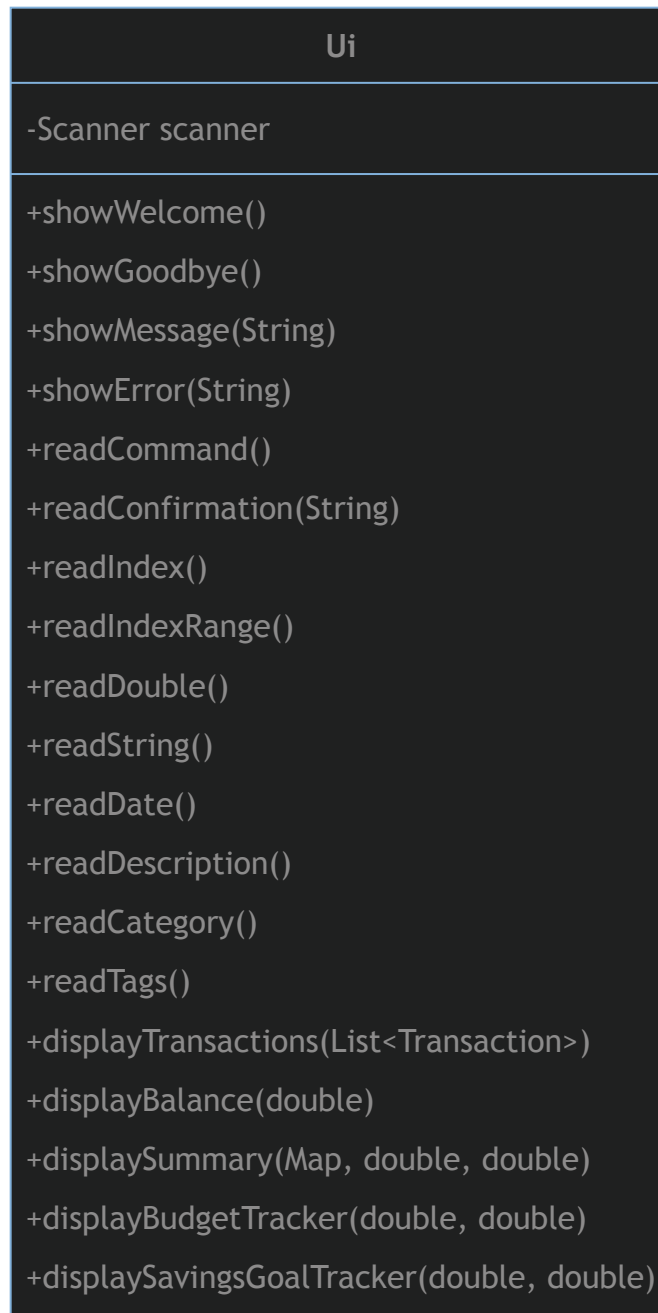


+toString()

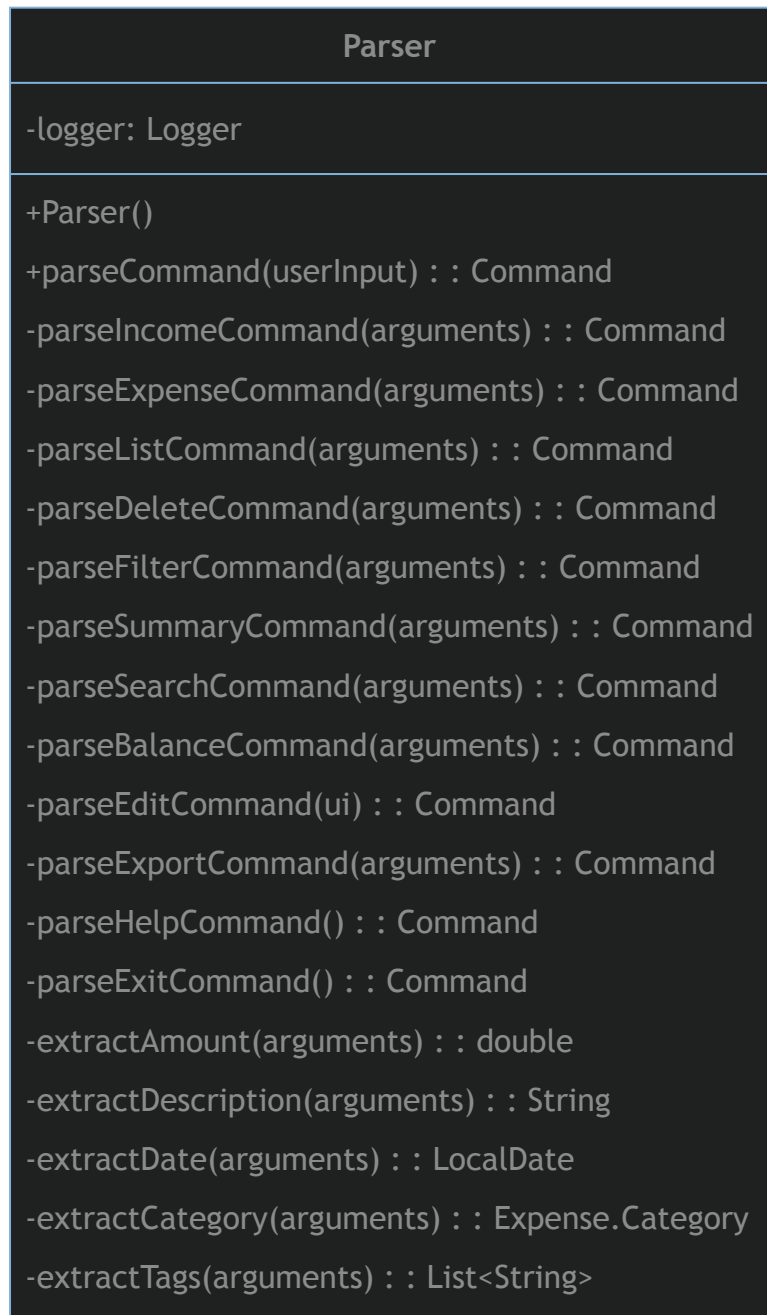
+getCategory()
+toString()

UI Component

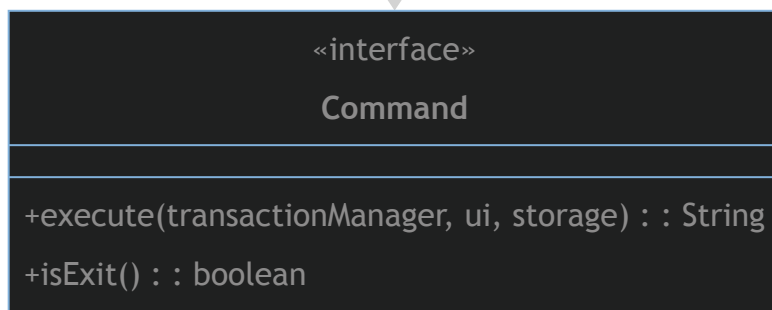




Logic Component

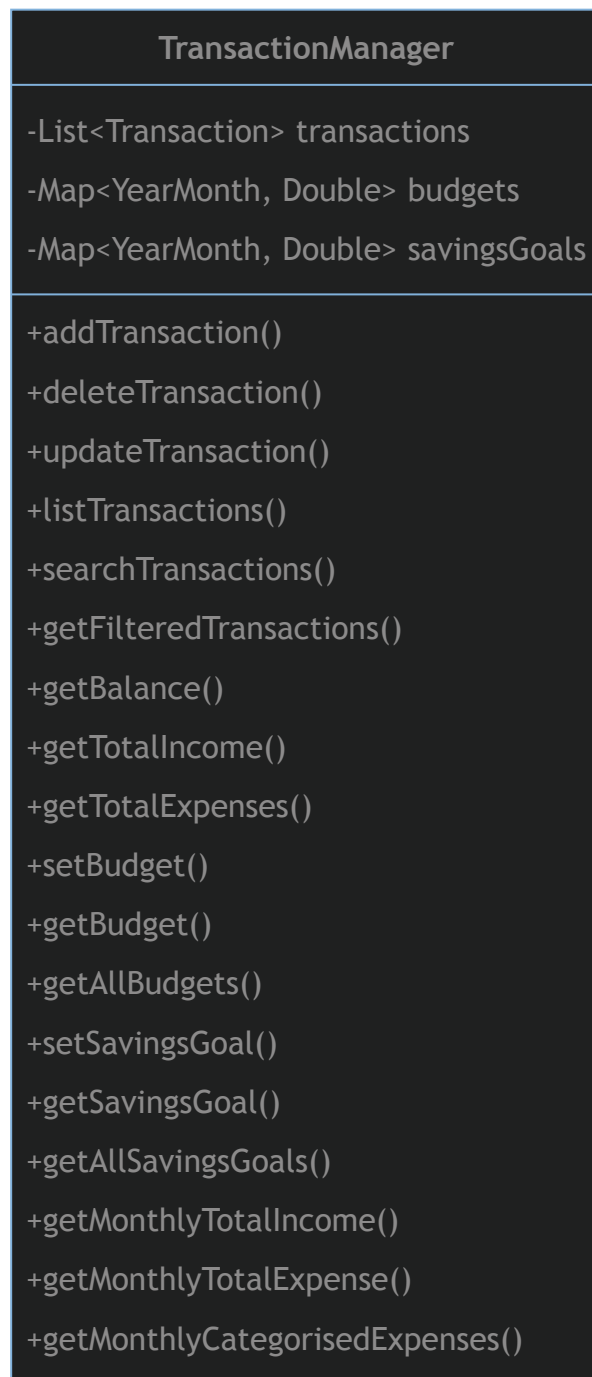


creates

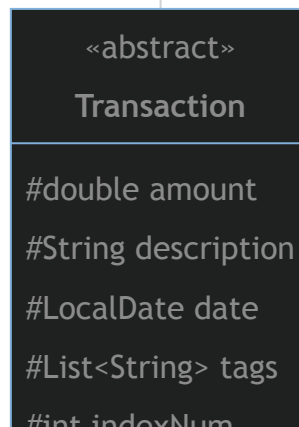


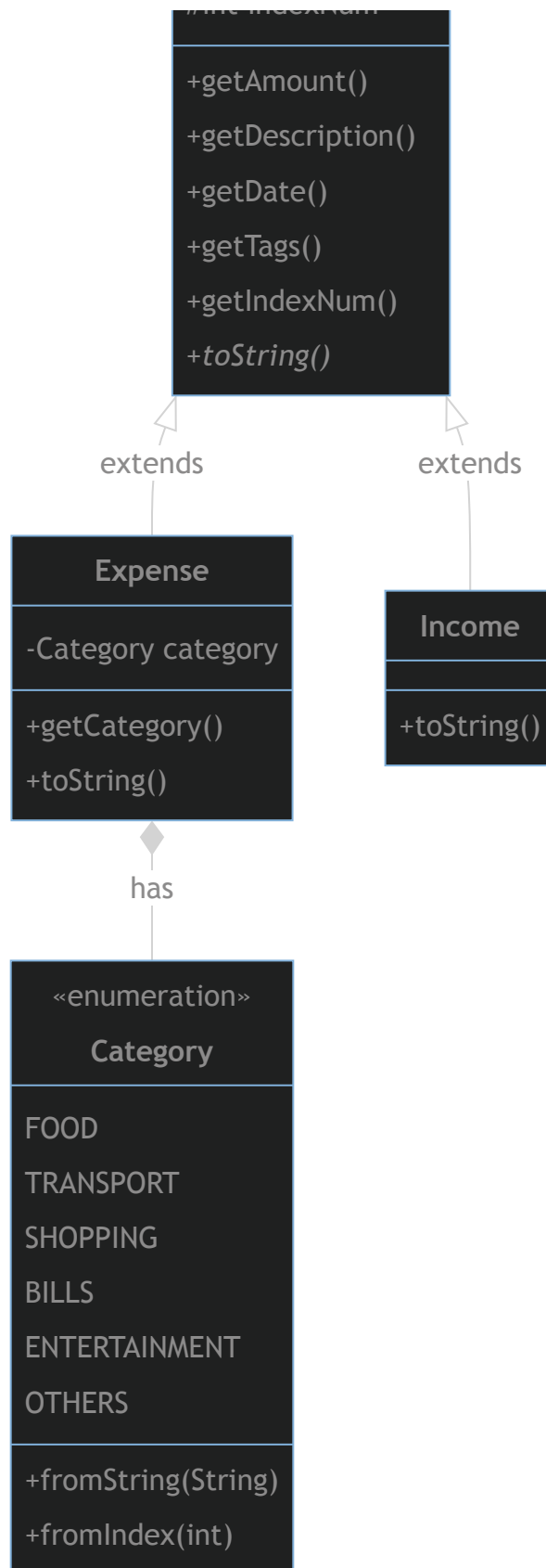


Model Component

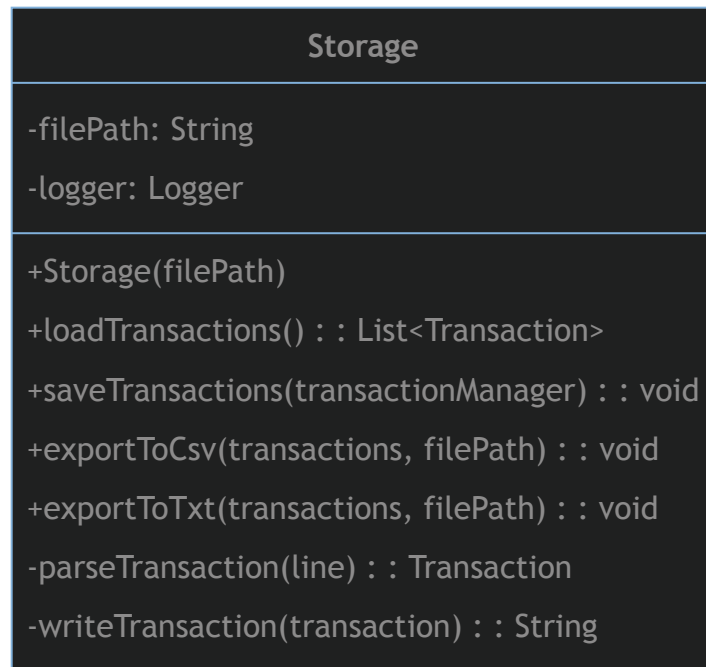


manages

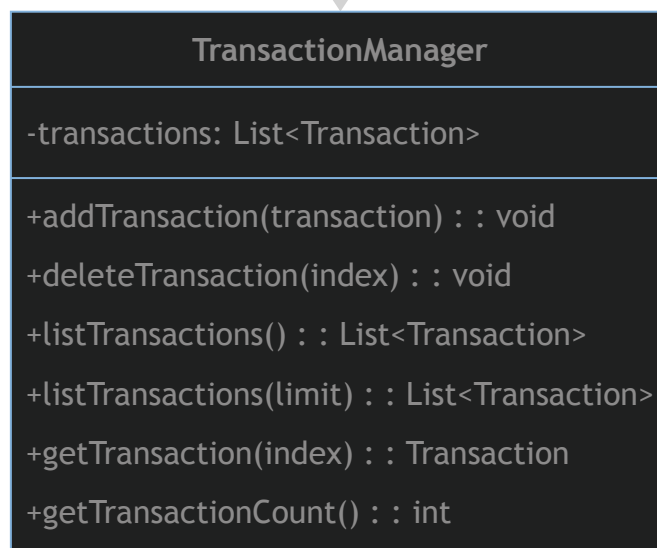




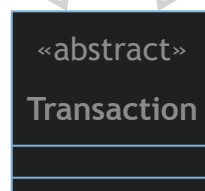
Storage Component

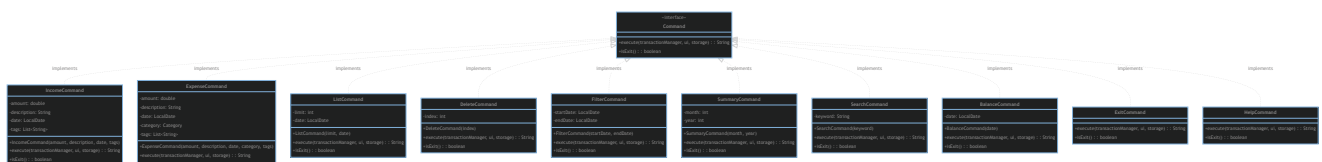


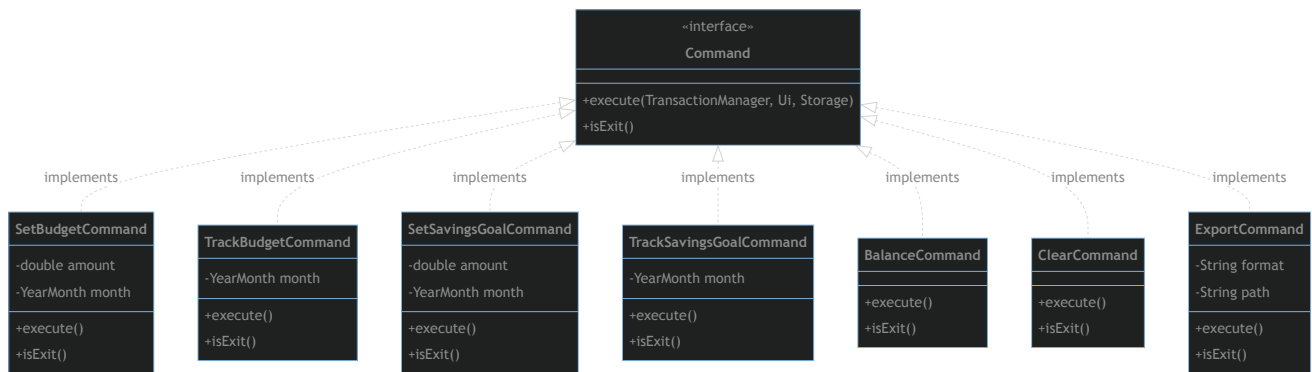
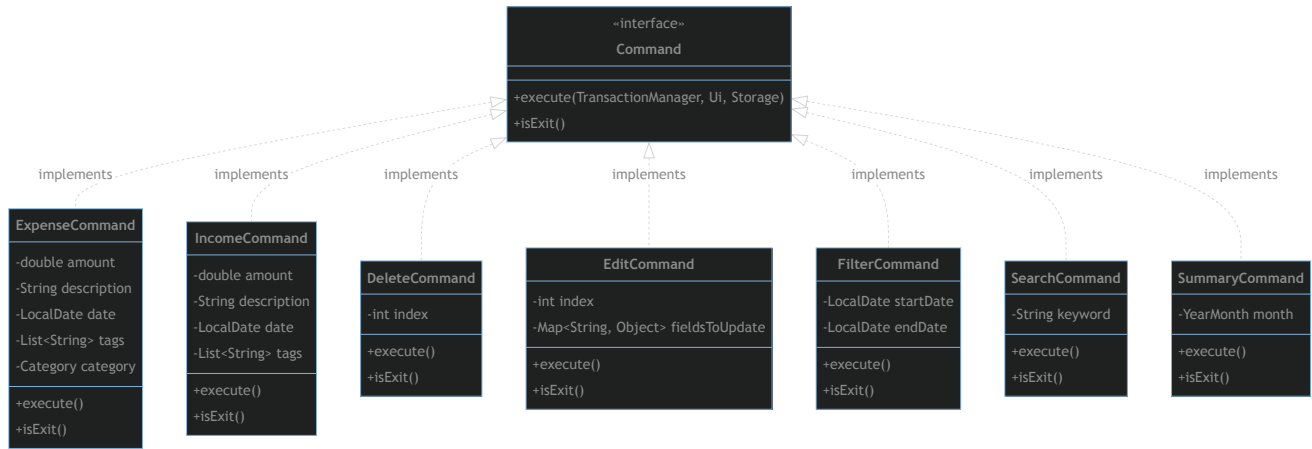
saves/loads



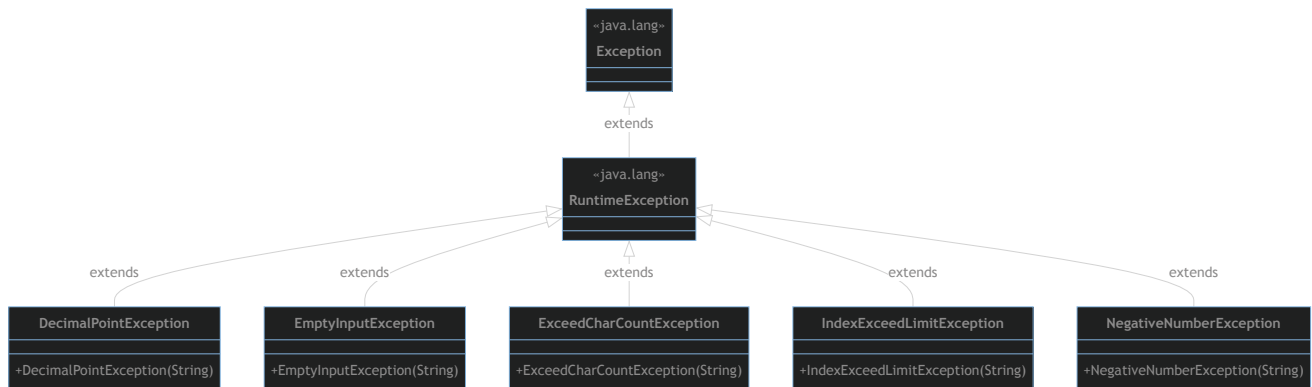
manages manages







Exceptions Component



Class Structure

```

seedu.finbro/
├── FinBro.java           # Main class
├── logic/
│   ├── command/
│   │   ├── Command.java # Command interface
│   │   └── IncomeCommand.java
  
```

```

├── |
│   ├── ExpenseCommand.java
│   ├── ... # Other command implementations
│   └── parser/
│       └── Parser.java # Input parser
├── model/
│   ├── Transaction.java # Abstract base class
│   ├── Income.java
│   ├── Expense.java
│   └── TransactionManager.java # Business logic
├── storage/
│   └── Storage.java # Data persistence
└── ui/
    └── Ui.java # User interface

```

Design Patterns

FinBro implements several design patterns to enhance maintainability and extensibility:

1. Command Pattern

All user actions are encapsulated as command objects implementing the `Command` interface. This allows for:

- Uniform handling of different commands
- Easy addition of new commands
- Support for operations like undo/redo (future enhancement)

2. Singleton Pattern

The `TransactionManager` is implemented as a singleton to ensure:

- Only one instance manages the transactions
- Consistent state across the application
- Centralized access to transaction data

3. Factory Method Pattern

The `Parser` class serves as a factory, creating appropriate command objects based on user input. Benefits include:

- Encapsulation of command creation logic
- Separation of command execution from creation
- Enhanced extensibility when adding new commands

4. Model-View-Controller (MVC)

The application follows an MVC-like structure:

- **Model:** `Transaction` classes and `TransactionManager`
- **View:** `Ui` class
- **Controller:** `Command` classes and `FinBro` class

Key Features and Implementation

Transaction Management Feature

Overview

The Transaction Management feature is a core component of FinBro that allows users to add, delete, search, and filter financial transactions. Transactions can be either income or expenses, each with different attributes and behaviors.

This section explains the design considerations and implementation details of the Transaction Management system, focusing on adding and deleting transactions.

Design Considerations

Transaction Hierarchy

The Transaction Management system uses inheritance to model different types of financial transactions:

- `Transaction` (abstract): Base class that defines common attributes and behaviors
 - `Income` : Extends `Transaction`, representing money received
 - `Expense` : Extends `Transaction`, representing money spent, with additional attributes like category

This approach provides several benefits:

1. Code reuse through inheritance of common attributes and methods
2. Polymorphism enabling operations on collections of different transaction types
3. Type safety provided by Java's type system

Alternative Designs Considered

1. Single Transaction Class with Type Enum

```
class Transaction {
    enum Type { INCOME, EXPENSE }
    private Type type;
    private Category category; // Only used for expenses
    // Other fields
}
```

This approach was rejected because:

- It would lead to optional fields that are only relevant for specific transaction types
- Type safety would rely on runtime checks rather than compile-time enforcement
- Would violate the Single Responsibility Principle by having one class handle multiple concerns

2. Composition-based Approach

```
class Transaction {
    private TransactionDetails details;
    // Common fields
}
```

```

}

interface TransactionDetails { }
class IncomeDetails implements TransactionDetails { }
class ExpenseDetails implements TransactionDetails { }

```

This approach was considered but not implemented because:

- Added complexity without significant benefits for our use case
- Inheritance provided a cleaner solution for the current requirements

Implementation Details

Adding a Transaction

The process of adding a transaction involves several components interacting together:

1. **UI** captures the user input
2. **Parser** interprets the command and creates the appropriate Command object
3. **Command** (e.g., IncomeCommand, ExpenseCommand) creates the transaction object
4. **TransactionManager** stores the transaction
5. **Storage** persists the transaction to disk

Duplicate Detection

The system checks for potential duplicate transactions based on amount and description:

```

public ArrayList<Transaction> getTransactionDuplicates(double amount, String description) {
    assert description != null : "Description cannot be null";
    assert amount > 0 : "Amount must be greater than zero";
    return transactions.stream()
        .filter(t -> (t.getDescription().equals(description) && t.getAmount() == amount ))
        .collect(Collectors.toCollection(ArrayList::new));
}

```

If duplicates are found, the user is warned and prompted to confirm before proceeding:

```

if (!transactionManager.getTransactionDuplicates(amount, description).isEmpty()) {
    if (!ui.warnDuplicate()) {
        return "Transaction cancelled by user";
    }
}

```

This helps prevent accidental duplication of transactions while still allowing intentional repetition.

Deleting a Transaction

Deleting a transaction follows a similar component interaction pattern:

1. **UI** captures the delete command with an index
2. **Parser** creates a DeleteCommand with the specified index

3. **DeleteCommand** removes the transaction from TransactionManager

4. **Storage** persists the updated transaction list

Implementation details:

```
public void deleteTransaction(int index) {
    assert index >= 0 : "Index must be non-negative";
    assert index < transactions.size() : "Index must be within the bounds of the transaction list";

    if (index < 1 || index > transactions.size()) {
        logger.warning("Attempt to delete transaction at invalid index: " + index);
        throw new IndexOutOfBoundsException("Transaction index out of range: " + index);
    }
    Transaction removed = transactions.remove(index - INDEX_OFFSET); // Convert from 1-based to 0-based

    // Update the index numbers for all transactions after the deleted one
    for (int i = index; i < transactions.size(); i++) {
        transactions.get(i).indexNum -= INDEX_OFFSET;
    }

    logger.info("Deleted " + removed.getClass().getSimpleName() +
        " with amount $" + removed.getAmount() +
        " at index " + index);
}
```

The implementation maintains proper indexing by updating the index numbers of all transactions following the deleted one.

Viewing of Balance

The balance viewing feature follows this component interaction pattern:

1. **UI** captures the balance command with optional date parameters
2. **Parser** creates a BalanceCommand with specified date parameters
3. **BalanceCommand** requests balance calculation from TransactionManager
4. **TransactionManager** calculates balance based on all or filtered transactions
5. **BalanceCommand** formats and returns the balance information
6. **UI** displays the formatted balance to the user

Implementation Details

Date-Filtered Balance Calculation

```
public String execute(TransactionManager transactionManager, Ui ui, Storage storage) {
    assert transactionManager != null : "TransactionManager cannot be null";
    assert ui != null : "UI cannot be null";
    assert storage != null : "Storage cannot be null";

    logger.info("Executing balance command");

    double balance = transactionManager.getBalance();
    double totalIncome = transactionManager.getTotalIncome();
    double totalExpenses = transactionManager.getTotalExpenses();
}
```

```

// Verify the relationship between balance, income, and expenses
assert Math.abs((totalIncome - totalExpenses) - balance) < 0.001 :
    "Balance calculation error: " + balance + " != " + totalIncome + " - " + totalExpenses;

String formattedBalance = CURRENCY_FORMAT.format(balance);
String formattedIncome = CURRENCY_FORMAT.format(totalIncome);
String formattedExpenses = CURRENCY_FORMAT.format(totalExpenses);

return "Current Balance: " + formattedBalance + "\n" +
    "Total Income: " + formattedIncome + "\n" +
    "Total Expenses: " + formattedExpenses;
}

```

Key Design Features

1. Flexible date filtering: Users can view overall balance or balance from a specific date
2. Comprehensive information: Shows income, expenses, and net balance in a single view
3. Clean formatting: Presents financial information in a well-organized, readable format
4. Integration with budgeting: Displays budget status when applicable
5. Error handling: Validates date parameters and provides clear error messages
6. Separation of concerns: Calculation logic remains in `TransactionManager` while presentation is handled by `BalanceCommand`

This implementation provides users with a quick overview of their financial position, either overall or from a specific date forward, enhancing financial awareness.

Editing a Transaction

Editing a transaction also follows a similar component interaction pattern:

1. **UI** captures the edit command with a keyword and parameters to update
2. **Parser** creates an `EditCommand` with the specified keyword and parameters
3. **UI** asks for user confirmation before proceeding
4. **EditCommand** retrieves and updates the transaction at the specified index
5. **TransactionManager** updates the transaction in its collection
6. **Storage** persists the updated transaction list

Implementation Details

Index-Based Transaction Selection

```

public String execute(TransactionManager transactionManager, Ui ui, Storage storage) {
    // Check if index is valid (1-based indexing for user interface)
    if (index < 1 || index > transactionManager.getTransactionCount()) {
        return "Invalid index. Please provide a valid transaction index.";
    }

    try {
        // Get original transaction (accounting for INDEX_OFFSET)
        Transaction originalTransaction = transactionManager.getTransaction(index - 1);

```

```

// Create updated transaction based on parameters
Transaction updatedTransaction = createUpdatedTransaction(originalTransaction, parameters);

if (updatedTransaction != null) {
    // Replace transaction at index
    transactionManager.updateTransactionAt(index - 1, updatedTransaction);
    storage.saveTransactions(transactionManager);
    return "Transaction at index " + index + " successfully updated:\n" + updatedTransaction;
}
return "Failed to update transaction.";
} catch (Exception e) {
    logger.log(Level.WARNING, "Error updating transaction", e);
    return "Failed to update transaction: " + e.getMessage();
}
}

```

User Confirmation via UI

The `parseEditCommand` method in `Parser.java` now includes a confirmation step:

```

private Command parseEditCommand(Ui ui) {
    try {
        // Get index of transaction to edit
        int index = ui.readIndex("Enter the index of transaction to edit:\n> ");

        // Add confirmation step
        boolean confirmed = ui.readConfirmation("Do you want to edit transaction at index " + index + "?");
        if (!confirmed) {
            return new Command() {
                @Override
                public String execute(TransactionManager transactionManager, Ui ui, Storage storage) {
                    return "Edit operation cancelled.";
                }

                @Override
                public boolean isExit() {
                    return false;
                }
            };
        }

        // Proceed with collecting parameters for the edit
        Map<String, String> parameters = new HashMap<>();

        // Collect parameters with UI interaction
        String amountStr = ui.readAmount("Enter new amount (press Enter to skip):\n> ");
        if (!amountStr.isEmpty()) {
            parameters.put("a", amountStr);
        }

        // [Additional parameter collection]

        return new EditCommand(index, parameters);
    } catch (Exception e) {
        logger.log(Level.WARNING, "Error parsing edit command", e);
        return new InvalidCommand("Invalid edit command: " + e.getMessage());
    }
}

```

```
}
```

Transaction Update Logic

The selective field update approach is retained:

```
private Transaction createUpdatedTransaction(Transaction original, Map<String, String> parameters) {
    try {
        // Default values from original transaction
        double amount = original.getAmount();
        String description = original.getDescription();
        LocalDate date = original.getDate();
        List<String> tags = new ArrayList<>(original.getTags());

        // Update values based on parameters
        if (parameters.containsKey("a")) {
            amount = Double.parseDouble(parameters.get("a"));
        }
        if (parameters.containsKey("d")) {
            description = parameters.get("d");
        }
        if (parameters.containsKey("date")) {
            date = LocalDate.parse(parameters.get("date"));
        }
        if (parameters.containsKey("t")) {
            tags = Arrays.asList(parameters.get("t").split(","));
        }

        // Create new transaction based on the type of the original
        if (original instanceof Income) {
            return new Income(amount, description, date, tags);
        } else if (original instanceof Expense) {
            Expense originalExpense = (Expense) original;
            Expense.Category category = originalExpense.getCategory();

            if (parameters.containsKey("c")) {
                category = Expense.Category.fromString(parameters.get("c"));
            }

            return new Expense(amount, description, date, category, tags);
        }
        return null;
    } catch (NumberFormatException e) {
        logger.log(Level.WARNING, "Invalid amount format in edit command", e);
        return null;
    } catch (DateTimeParseException e) {
        logger.log(Level.WARNING, "Invalid date format in edit command", e);
        return null;
    }
}
```

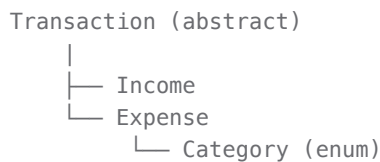
Key Design Features

1. Direct index reference: Uses explicit index numbers for unambiguous transaction targeting
2. User confirmation: Prevents accidental edits through a confirmation prompt

3. Type preservation: Maintains the original transaction type (Income or Expense)
4. Selective updates: Only modifies fields explicitly specified in the edit command
5. Robust validation: Handles invalid indices, amounts, dates, and categories
6. 1-based user indexing: Presents user-friendly 1-based indexing while using 0-based indexing internally

This implementation balances user experience with data integrity and provides clear feedback throughout the editing process.

Class Diagram of Transaction Component



The Transaction class provides common attributes and methods:

- `amount` : The monetary value
- `description` : Text description of the transaction
- `date` : When the transaction occurred
- `tags` : Optional categorization labels
- `getAmount()` , `getDescription()` , etc.: Accessor methods
- `toString()` : Abstract method implemented by subclasses

Storage Considerations

Transactions are persisted to disk in a text file format where fields are separated by a pipe character ('|'):

```
INCOME|2025-03-15|1000.00|Salary|work
EXPENSE|2025-03-16|50.00|Groceries|FOOD|essential
```

When saving and loading transactions, the system performs conversion between the object model and this text representation. This approach was chosen for its simplicity and human readability, while still providing adequate structure for reliable parsing.

Defensive Programming Aspects

The Transaction Management system uses several defensive programming techniques:

1. **Assertions:** Pre-conditions and post-conditions are verified using assertions

```
assert amount > 0 : "Expense amount must be greater than zero";
```

2. **Logging:** Key operations are logged for debugging and auditing

```
logger.info("Added " + transaction.getClass().getSimpleName() +  
    " with amount $" + transaction.getAmount());
```

3. **Immutability:** Transaction objects are immutable once created, preventing accidental state changes

```
public List<String> getTags() {  
    return new ArrayList<>(tags); // Return a copy to prevent modification  
}
```

4. **Null checks:** Methods verify parameters are valid before proceeding

```
if (tags != null) { ... }
```

These techniques enhance the robustness of the system and make debugging easier.

Command Parsing

The `Parser` class converts user input into appropriate command objects through several phases:

1. Tokenization of input
2. Extraction of command word
3. Parameter parsing
4. Command object creation

Implementation Example:

```
public Command parseCommand(String userInput) {  
    String[] parts = userInput.split("\\s+", 2);  
    String commandWord = parts[0].toLowerCase();  
    String arguments = parts.length > 1 ? parts[1] : "";  
  
    switch (commandWord) {  
        case "income":  
            return parseIncomeCommand(arguments);  
        case "expense":  
            return parseExpenseCommand(arguments);  
        // ... other commands  
    }  
}
```

Data Persistence

The `Storage` class manages saving and loading of transaction data using a custom text-based format.

File formats:

- **Internal storage:** Text file with fields separated by '|' delimiter
- **Export formats:** CSV and TXT

Implementation:

- Transactions are serialized to text format for persistence
- Data is loaded into memory at application startup
- Changes are saved to disk after each transaction modification

Financial Summaries

The `SummaryCommand` generates financial reports with the following capabilities:

- Filtering by time period (month/year)
- Categorized expense breakdown
- Tag-based transaction analysis
- Income vs. expense comparison

Sequence Diagrams for Key Operations

Adding a Transaction

This sequence diagram illustrates the process when a user adds a new transaction:

```
@startuml
!theme plain
skinparam sequenceMessageAlign center
skinparam responseMessageBelowArrow true

actor "User" as User
participant "Ui" as UI
participant "FinBro" as FinBro
participant "Parser" as Parser
participant "IncomeCommand" as IncomeCommand
participant "TransactionManager" as TransactionMgr
participant "Income" as Income
participant "Storage" as Storage

User -> UI : input command
activate UI

UI -> FinBro : readCommand()
activate FinBro

FinBro -> Parser : parseCommand(userInput)
activate Parser
note right: Parse "income 3000 d/Monthly salary t/work"

Parser -> IncomeCommand : new IncomeCommand(amount, description, tags)
activate IncomeCommand
IncomeCommand --> Parser : command
deactivate IncomeCommand
Parser --> FinBro : command
deactivate Parser

FinBro -> IncomeCommand : execute(transactionManager, ui, storage)
```

```

activate IncomeCommand

IncomeCommand -> TransactionMgr : getTransactionDuplicates(amount, description)
activate TransactionMgr
TransactionMgr --> IncomeCommand : duplicates
deactivate TransactionMgr

note right of IncomeCommand: Check for duplicates

alt duplicates found
    IncomeCommand -> UI : warnDuplicate()
    activate UI
    UI --> IncomeCommand : confirmResult
    deactivate UI

    alt user cancels transaction
        IncomeCommand --> FinBro : "Transaction cancelled by user"
    end
end

IncomeCommand -> Income : new Income(amount, description, tags)
activate Income
Income --> IncomeCommand : income
deactivate Income

IncomeCommand -> TransactionMgr : addTransaction(income)
activate TransactionMgr
TransactionMgr --> IncomeCommand
deactivate TransactionMgr

IncomeCommand -> Storage : saveTransactions(transactionManager)
activate Storage
Storage --> IncomeCommand
deactivate Storage

IncomeCommand --> FinBro : result message
deactivate IncomeCommand

FinBro -> UI : showMessage(result)
UI --> User : display result
deactivate UI
deactivate FinBro

@enduml

```

Searching for a Transaction

This sequence diagram illustrates the process of searching for transactions:

```

@startuml
!theme plain
skinparam sequenceMessageAlign center
skinparam responseMessageBelowArrow true

actor ":User" as User
participant ":Ui" as UI
participant ":FinBro" as FinBro
participant ":Parser" as Parser

```

```

participant ":SearchCommand" as SearchCommand
participant ":TransactionManager" as TransactionMgr

User -> UI : input command
activate UI

UI -> FinBro : readCommand()
activate FinBro

FinBro -> Parser : parseCommand(userInput)
activate Parser
note right: Parse "search lunch"

Parser -> SearchCommand : new SearchCommand(keyword)
activate SearchCommand
SearchCommand --> Parser : command
deactivate SearchCommand
Parser --> FinBro : command
deactivate Parser

FinBro -> SearchCommand : execute(transactionManager, ui, storage)
activate SearchCommand

SearchCommand -> TransactionMgr : getTransactionsContainingKeyword(keyword)
activate TransactionMgr
TransactionMgr --> SearchCommand : matchingTransactions
deactivate TransactionMgr

SearchCommand --> FinBro : result message (list of matches)
deactivate SearchCommand

FinBro -> UI : showMessage(result)
UI --> User : display result
deactivate UI
deactivate FinBro

@enduml

```

Filtering Transactions

This sequence diagram illustrates the process of filtering transactions based on a date range:

```

@startuml
!theme plain
title Filter Command Sequence
skinparam sequenceMessageAlign center
skinparam responseMessageBelowArrow true

actor ":User" as User
participant ":Ui" as UI
participant ":FinBro" as FinBro
participant ":Parser" as Parser
participant ":FilterCommand" as FilterCommand
participant ":TransactionManager" as TransactionMgr

User -> UI : input command
activate UI

```

```

UI -> FinBro : readCommand()
activate FinBro

FinBro -> Parser : parseCommand(userInput)
activate Parser
note right: Parse "filter d/2023-01-01 to/2023-12-31"

Parser -> FilterCommand : new FilterCommand(startDate, endDate)
activate FilterCommand
FilterCommand --> Parser : command
deactivate FilterCommand
Parser --> FinBro : command
deactivate Parser

FinBro -> FilterCommand : execute(transactionManager, ui, storage)
activate FilterCommand

FilterCommand -> TransactionMgr : getFilteredTransactions(startDate, endDate)
activate TransactionMgr
TransactionMgr --> FilterCommand : filteredTransactions
deactivate TransactionMgr

FilterCommand --> FinBro : result message (list of filtered transactions)
deactivate FilterCommand

FinBro -> UI : showMessage(result)
UI --> User : display result
deactivate UI
deactivate FinBro

@enduml

```

Obtaining a Monthly Financial Summary

This sequence diagram illustrates the process of obtaining a monthly financial summary:

```

@startuml
!theme plain
skinparam sequenceMessageAlign center
skinparam responseMessageBelowArrow true

actor "User" as User
participant "Ui" as UI
participant "FinBro" as FinBro
participant "Parser" as Parser
participant "SummaryCommand" as SummaryCommand
participant "TransactionManager" as TransactionMgr

User -> UI : input command
activate UI

UI -> FinBro : readCommand()
activate FinBro

FinBro -> Parser : parseCommand(userInput)
activate Parser
note right: Parse "summary m/2 y/2025"

```

```

Parser -> SummaryCommand : new SummaryCommand(month, year)
activate SummaryCommand
SummaryCommand --> Parser : command
deactivate SummaryCommand
Parser --> FinBro : command
deactivate Parser

FinBro -> SummaryCommand : execute(transactionManager, ui, storage)
activate SummaryCommand

SummaryCommand -> TransactionMgr : getMonthlyTotalIncome(month, year)
activate TransactionMgr
TransactionMgr --> SummaryCommand : totalIncome
deactivate TransactionMgr

SummaryCommand -> TransactionMgr : getMonthlyTotalExpenses(month, year)
activate TransactionMgr
TransactionMgr --> SummaryCommand : totalExpenses
deactivate TransactionMgr

SummaryCommand -> TransactionMgr : getMonthlyCategorisedExpenses(month, year)
activate TransactionMgr
TransactionMgr --> SummaryCommand : categorisedExpenses
deactivate TransactionMgr

SummaryCommand -> TransactionMgr : getMonthlyTaggedTransactions(month, year)
activate TransactionMgr
TransactionMgr --> SummaryCommand : taggedTransactions
deactivate TransactionMgr

SummaryCommand --> FinBro : result message
deactivate SummaryCommand

FinBro -> UI : showMessage(result)
UI --> User : display result
deactivate UI
deactivate FinBro

@enduml

```

Obtaining the Current List of Transactions

This sequence diagram illustrates the process of obtaining the current list of transactions:

```

@startuml
!theme plain
skinparam sequenceMessageAlign center
skinparam responseMessageBelowArrow true

actor "User" as User
participant "Ui" as UI
participant "FinBro" as FinBro
participant "Parser" as Parser
participant "ListCommand" as ListCommand
participant "TransactionManager" as TransactionMgr

User -> UI : input command
activate UI

```

```

UI -> FinBro : readCommand()
activate FinBro

FinBro -> Parser : parseCommand(userInput)
activate Parser
note right: Parse "list n/5 d/2025-03-01"

Parser -> ListCommand : new ListCommand(limit, date)
activate ListCommand
ListCommand --> Parser : command
deactivate ListCommand
Parser --> FinBro : command
deactivate Parser

FinBro -> ListCommand : execute(transactionManager, ui, storage)
activate ListCommand

alt date provided
    ListCommand -> TransactionMgr : listTransactionsFromDate(date)
    activate TransactionMgr
    TransactionMgr --> ListCommand : filteredTransactions
    deactivate TransactionMgr

    alt limit provided
        note right of ListCommand: Apply limit to filtered list
    end
else no date
    alt limit provided
        ListCommand -> TransactionMgr : listTransactions(limit)
        activate TransactionMgr
        TransactionMgr --> ListCommand : limitedTransactions
        deactivate TransactionMgr
    else no limit
        ListCommand -> TransactionMgr : listTransactions()
        activate TransactionMgr
        TransactionMgr --> ListCommand : allTransactions
        deactivate TransactionMgr
    end
end

ListCommand --> FinBro : result message
deactivate ListCommand

FinBro -> UI : showMessage(result)
UI --> User : display result
deactivate UI
deactivate FinBro

@enduml

```

Viewing Balance

This sequence diagram illustrates the process of viewing the current balance:

```

@startuml
!theme plain
skinparam sequenceMessageAlign center

```

```
skinparam responseMessageBelowArrow true
```

```
actor "User" as User
participant "UI" as UI
participant "FinBro" as FinBro
participant "Parser" as Parser
participant "BalanceCommand" as BalanceCommand
participant "TransactionManager" as TransactionMgr
participant "Storage" as Storage
```

```
User -> UI : input command
activate UI
```

```
UI -> FinBro : readCommand()
activate FinBro
```

```
FinBro -> Parser : parseCommand(userInput)
activate Parser
note right: Parse "balance" or "balance d/2023-01-01"
```

```
alt date parameter provided
    Parser -> Parser : Extract date parameter
    Parser -> BalanceCommand : new BalanceCommand(date)
else no date parameter
    Parser -> BalanceCommand : new BalanceCommand(null)
end
```

```
activate BalanceCommand
BalanceCommand --> Parser : command
deactivate BalanceCommand
Parser --> FinBro : command
deactivate Parser
```

```
FinBro -> BalanceCommand : execute(transactionManager, ui, storage)
activate BalanceCommand
```

```
alt date specified
    BalanceCommand -> TransactionMgr : getTotalIncomeFromDate(date)
    activate TransactionMgr
    TransactionMgr --> BalanceCommand : totalIncome
    deactivate TransactionMgr
```

```
    BalanceCommand -> TransactionMgr : getTotalExpensesFromDate(date)
    activate TransactionMgr
    TransactionMgr --> BalanceCommand : totalExpenses
    deactivate TransactionMgr
```

```
else no date
    BalanceCommand -> TransactionMgr : getTotalIncome()
    activate TransactionMgr
    TransactionMgr --> BalanceCommand : totalIncome
    deactivate TransactionMgr
```

```
    BalanceCommand -> TransactionMgr : getTotalExpenses()
    activate TransactionMgr
    TransactionMgr --> BalanceCommand : totalExpenses
    deactivate TransactionMgr
```

```
end
```

```
BalanceCommand -> BalanceCommand : formatBalanceMessage(totalBalance, totalIncome, totalExpenses, tit
BalanceCommand --> FinBro : formatted balance message
deactivate BalanceCommand
```

```
FinBro -> UI : showMessage(result)
UI --> User : display balance information
deactivate UI
deactivate FinBro

@enduml
```

Editing a Transaction

This sequence diagram illustrates the process of editing a transaction:

```
@startuml
!theme plain
skinparam sequenceMessageAlign center
skinparam responseMessageBelowArrow true

actor "User" as User
participant "Ui" as UI
participant "FinBro" as FinBro
participant "Parser" as Parser
participant "EditCommand" as EditCommand
participant "TransactionManager" as TransactionMgr
participant "Storage" as Storage

User -> UI : input command
activate UI

UI -> FinBro : readCommand()
activate FinBro

FinBro -> Parser : parseCommand(userInput)
activate Parser

note right: Parse "edit 1 a/200.0 d/Updated Description"

Parser -> UI : readIndex("Enter the index of transaction to edit")
activate UI
UI --> Parser : index
deactivate UI

Parser -> UI : readConfirmation("Do you want to edit transaction at index 1?")
activate UI
UI --> Parser : confirmed (boolean)
deactivate UI

alt user confirms
    Parser -> UI : readAmount("Enter new amount (press Enter to skip)")
    activate UI
    UI --> Parser : amountStr
    deactivate UI

    Parser -> UI : readDescription("Enter new description (press Enter to skip)")
    activate UI
    UI --> Parser : descriptionStr
    deactivate UI
end
```



```

note right of Parser: Additional UI interactions for other parameters

Parser -> EditCommand : new EditCommand(index, parameters)
activate EditCommand
EditCommand --> Parser : command
deactivate EditCommand
else user cancels
  Parser -> EditCommand : new SimpleCommand("Edit operation cancelled.")
  activate EditCommand
  EditCommand --> Parser : command
  deactivate EditCommand
end

Parser --> FinBro : command
deactivate Parser

FinBro -> EditCommand : execute(transactionManager, ui, storage)
activate EditCommand

alt valid index
  EditCommand -> TransactionMgr : getTransaction(index - 1)
  activate TransactionMgr
  TransactionMgr --> EditCommand : originalTransaction
  deactivate TransactionMgr

  EditCommand -> EditCommand : createUpdatedTransaction(originalTransaction, parameters)

  alt valid updated transaction
    EditCommand -> TransactionMgr : updateTransactionAt(index - 1, updatedTransaction)
    activate TransactionMgr
    TransactionMgr --> EditCommand : success
    deactivate TransactionMgr

    EditCommand -> Storage : saveTransactions(transactionManager)
    activate Storage
    Storage --> EditCommand : success
    deactivate Storage

    EditCommand --> FinBro : "Transaction at index X successfully updated"
  else invalid update parameters
    EditCommand --> FinBro : "Failed to update transaction"
  end
end
else invalid index
  EditCommand --> FinBro : "Invalid index. Please provide a valid transaction index."
end

deactivate EditCommand

FinBro -> UI : showMessage(result)
UI --> User : display result
deactivate UI
deactivate FinBro

@enduml

```

Testing

Structure

Tests are organized following the same package structure as the main code:

```
test/java/seedu/finbro/
├── logic/
│   ├── command/
│   │   ├── IncomeCommandTest.java
│   │   └── ...
│   └── parser/
│       └── ParserTest.java
├── model/
│   ├── TransactionTest.java
│   └── TransactionManagerTest.java
├── storage/
│   └── StorageTest.java
```

Running Tests

Run all tests:

```
./gradlew test
```

Run a specific test:

```
./gradlew test --tests "seedu.finbro.model.TransactionTest"
```

Text UI Testing

Text UI testing verifies application behavior by comparing output against expected results:

1. Run tests:

```
cd text-ui-test
./runtest.sh
```

2. The script compares the actual output against predefined expected output.

Future Enhancements

Planned Features

1. Recurring Transactions

- Automatic addition of regular income/expenses
- Customizable recurrence patterns

2. Budget Management

- Setting spending limits by category
- Alerts when approaching budget thresholds
- Visual budget utilization indicators

3. Data Visualization

- Text-based charts for spending patterns
- Trend analysis for income/expenses over time
- Category distribution visualization

4. Multiple Accounts

- Support for tracking different financial accounts
- Transfer operations between accounts
- Consolidated and per-account reporting

5. Investment Tracking

- Basic portfolio management
- Investment performance metrics
- Asset allocation tracking

Appendix

Glossary

- **CLI:** Command Line Interface
- **Transaction:** Any financial event (income or expense)
- **Tag:** User-defined label for categorizing transactions
- **Category:** Predefined classification for expenses

References

- Java SE 17 Documentation
- JUnit 5 User Guide
- Gradle User Manual