

NATIONAL UNIVERSITY OF THE ALTIPLANO



# Personal Finance Management Project

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# 1 Project Description: Finanz360

It is a desktop application designed to provide personalized and efficient financial management. This tool offers a comprehensive solution for personal finance management. It allows users to track detailed income and expenses, generate personalized reports, visualize financial data through intuitive graphs, and manage budgets and debts. Additionally, it incorporates advanced predictive analysis features to help users better plan their future finances.

## 2 Requirements Identification

### 2.1 Functional Requirements

- Allow users to record their financial transactions.
- Generate monthly and yearly financial reports.
- Provide tools to create and follow personalized budgets.
- Allow users to set savings goals and track their progress.
- Integrate with bank accounts to automatically import transactions.
- Offer expense analysis by category to identify areas for improvement.
- Provide automatic alerts to remind users of pending payments and due dates.
- Allow users to export data in common formats like CSV or PDF.
- Offer an intuitive and user-friendly interface for optimal user experience.
- Provide customization options to adapt to user preferences.

### 2.2 Non-Functional Requirements

- The application must be secure and protect user financial information.
- It should be compatible with a variety of devices and mobile operating systems.
- The application should load quickly, ideally in less than two seconds.
- It should be easy to learn and use, even for users without financial experience.
- The application should be scalable to handle a large volume of transactions and users.
- It must comply with accessibility standards to ensure it is usable for all users, including those with disabilities.

- The application should be reliable and available when users need it, with minimal downtime.
- It must comply with data privacy regulations and protect user personal information.
- The application should be easy to maintain and update to ensure long-term functionality.
- It should have an attractive and modern user interface to enhance user satisfaction.

### 3 MoSCoW Classification

Requirement Description	Must Have	Should Have	Could Have	Won't Have
Tracking of income and expenses	<b>X</b>			
Generation of financial reports	<b>X</b>			
Visualization of financial data through graphs	<b>X</b>			
Personalized budgets	<b>X</b>			
Payment reminders and due dates		<b>X</b>		
Data security		<b>X</b>		
Savings recommendations			<b>X</b>	
Predictive analysis of future expenses			<b>X</b>	
Integration with smart assistants like Alexa or Google Home				<b>X</b>
Retirement planning			<b>X</b>	
Integration with banks		<b>X</b>		
Expense analysis by category	<b>X</b>			
Smart reminders		<b>X</b>		
Debt management	<b>X</b>			
Voice recognition			<b>X</b>	
Financial chatbot			<b>X</b>	
Emergency planning		<b>X</b>		
User interface customization			<b>X</b>	
Transaction recording	<b>X</b>			
Budget tracking	<b>X</b>			
Payment reminders		<b>X</b>		
Bank account management		<b>X</b>		
Investment analysis			<b>X</b>	
Security and privacy	<b>X</b>			
Integration with financial advisors				<b>X</b>
Advanced predictive analysis features			<b>X</b>	