

Use Case 1 - Import Transactions (CSV)

Upload CSV (Before Upload)



Preview CSV (After Upload)

The screenshot shows the same 'Import Transactions' screen after a CSV file has been uploaded. It now displays a preview of the transaction data. The table has four columns: Date, Description, Amount, and Category. One row is shown with the values: 2025-10-29, xxxxxx, 320.0, and xxxxxx. Below the table, a message says 'Duplicates detected: 5' followed by 'Skip' and 'Merge' buttons. At the bottom are 'back' and 'import' buttons.

Date	Description	Amount	Category
2025-10-29	xxxxxx	320.0	xxxxxx

Import Complete (After Success)



Use Case 2 - Add & Edit Transactions.

Transactions		[Add transaction] [+]		
Filter by Category : All Categories		[Search transactions]		
Date	Description	Category	Amount	Actions
2025-03-15	Starbucks	Dining	\$ 7.09	[Edit]
2025-03-14	Metro	Grocery	\$ 30.28	[Edit]
2025-03-10	Netflix	Leisure	\$ 19.99	[Edit]
2025-03-08	UofT	Education	\$ 600.00	[Edit]
....				

Add Transaction

Date : []

Amount : [Income] [Expenses]

Description :

Category : [A]

Edit Transaction

Date : []

Amount : [Income] [Expenses]

Description :

Category : [A]

Choosing Category

Before: Transaction List View

Categorize Spending

Transaction List Screen

<input type="checkbox"/> SuperMarket	- 65.40	Groceries
<input type="checkbox"/> Gas Station	- 45.00	Uncategorized
<input type="checkbox"/> PetValue	- 80.00	Uncategorized

Select Transaction **Import CSV** **Add Transaction**

During: Category Selection View

Categorize Spending

Category Selection Screen

Selected Transaction:

Gas Station	- 45.00
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Choose Category:

- Groceries
- Transport
- Food & Dining
- Uncategorized

Save Category **Cancel** **New Category**

After: Success View

Categorize Spending

Transaction List Screen

Category updated successfully!

<input type="checkbox"/> SuperMarket	- 65.40	Groceries
<input type="checkbox"/> Gas Station	- 45.00	Transport
<input type="checkbox"/> PetValue	- 80.00	Uncategorized

Select Transaction **Import CSV** **Add Transaction**

Create New Category

Categorize Spending

Create Category Screen

Category Name:

Create Category **Cancel**

After Creating New Category

Categorize Spending

Category Selection Screen

Selected Transaction:

PetValue	- 80.00
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Choose Category:

- Groceries
- Transport
- Food & Dining
- Uncategorized
- Pet Care

Save Category **Cancel** **New Category**

Post Conditions Views

Categorize Spending

Transaction List Screen

<input type="checkbox"/> PetValue	- 80.00	Transport
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Select Transaction **Import CSV** **Add Transaction**

New Category Created

Categorize Spending

Category Selection Screen

Choose Category:

- Pet Care

Save Category **Cancel** **New Category**

User Cancelled Operation

Categorize Spending

Transaction List Screen

<input type="checkbox"/> PetValue	Uncategorized
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Select Transaction **Import CSV** **Add Transaction**

Main flow

(After import)

(category) will be generated

(User Clicks Category)

CSV Imported

1. ... m m **Category** Click for more info

2. ... m m **Category**

3. ... m m **Category**

4. ... m m **Category**

Confirm **Cancel**

... m m **Category**

System Suggested Category

Manual Override

Other Categories

Feedback

Save **Cancel**

Selected item fills screen

(After adding entry)

Entry Added

m m **Category**

Confirm **Cancel**

relatively the
same

Use Case 5 - Budget

Monthly Budget		<input type="button" value="Add budget [+]"/>	
Category	Budget Limit	Spent	Remaining
Dining	\$ 500.00	\$ 425.00	\$ 75.00
Grocery	\$ 600.00	\$ 320.50	\$ 279.50
:	:	:	:

(Add more categories)

Add / Edit Budget

Set Budget Limit

Category : [Dining]

Monthly Budget : [\$500.00]

Warning !
⚠ Budget Alerts.
Dining Budget - Close to Limit !
Transport budget exceeded by \$10.00 !

Alternate flow:

Monthly Budget

Start tracking your spending !

[Create your first Budget]

Error !
Please enter a valid
(Positive) Amount

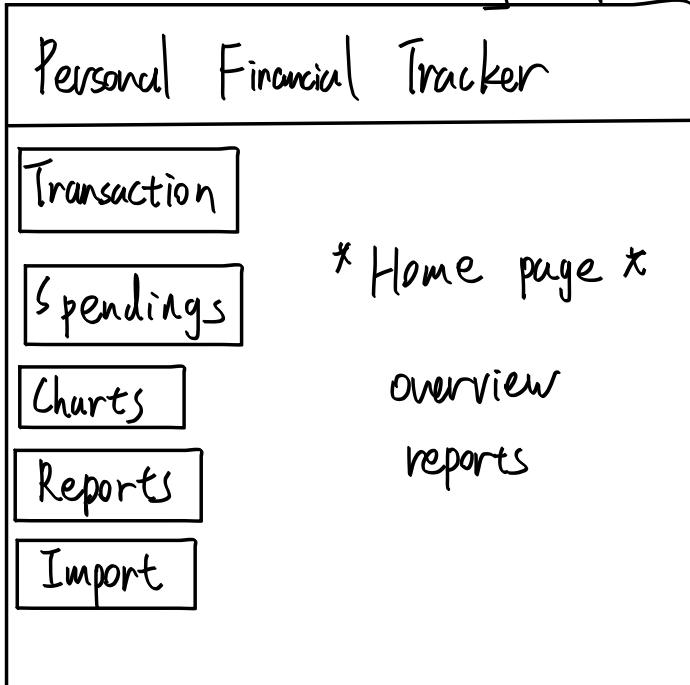
Spending by Category

Dining : \$425.00 [set budget]

Groceries : \$320.50 [set budget]

Transport : \$210.00 [set budget]

Use Case 6 - Weekly reports.



Reports

time Period

Category

Generate report

