

# **Personal Finance Manager Console Application Business Requirements**

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# 1. Document History

Version	Author	Comment
2.0	Matěj Noga	Opravená verze prvního dokumentu pro lepší čitelnost a upravený priority funkčních a nefunkčních požadavků

## 2. Introduction

This document outlines the functional and non-functional requirements for the "Personal Finance Manager" (PFM) console-based application. It is designed for users who want to efficiently manage their personal finances by tracking incomes, expenses, and generating reports.

### **3. Purpose of the Personal Finance Manager**

The purpose of the PFM application is to provide users with an intuitive interface to manage personal finances, keep track of transactions, and gain insights into their spending habits.

# 4. Requirements

## Functional Requirements

### REQ-FM-001: Application Installation

- **Description:** The application should be easy to install on multiple operating systems (Windows, macOS, Linux).
- **Priority:** High
- **Related to:** REQ-FM-101

### REQ-FM-002: Initial User Setup

- **Description:** Upon first launch, the user will be prompted to create a profile with details such as name, currency preference, and security PIN.
- **Priority:** High
- **Related to:** REQ-FM-003

### REQ-FM-003: Login and Authentication

- **Description:** Users will be required to log in using a security PIN. This ensures that their financial data remains secure.
- **Priority:** High
- **Related to:** REQ-FM-002

### REQ-FM-004: View Account Balance

- **Description:** Users should be able to view their current account balance after logging in.
- **Priority:** High

### REQ-FM-005: Add Income Entry

- **Description:** The application should allow users to add new income entries with details such as date, category, and amount.
- **Priority:** High

### REQ-FM-006: Add Expense Entry

- **Description:** Users should be able to record expenses, including date, category, amount, and a brief note.
- **Priority:** High

### REQ-FM-007: View Transaction History

- **Description:** Users should have access to a list of all their past transactions, both incomes and expenses, filtered by date and category.
- **Priority:** Medium

#### **REQ-FM-008: Edit or Delete Transaction**

- **Description:** Users should have the ability to edit or delete existing transactions.
- **Priority:** Medium

#### **REQ-FM-009: Generate Monthly Report**

- **Description:** The application should generate monthly reports that show total income, total expenses, and net savings.
- **Priority:** Medium

#### **REQ-FM-010: Data Backup and Restore**

- **Description:** The application should provide options to back up data to an external file and restore it as needed.
- **Priority:** High

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## **Non-Functional Requirements**

#### **REQ-FM-101: Cross-platform Compatibility**

- **Description:** The application should be compatible with Windows, macOS, and Linux.
- **Priority:** High

#### **REQ-FM-102: Data Security and Encryption**

- **Description:** All sensitive financial data should be encrypted, ensuring user privacy and data protection.
- **Priority:** High

#### **REQ-FM-103: Responsive Performance**

- **Description:** The application should respond quickly to user inputs, especially when loading large amounts of data.
  - **Priority:** Medium
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## 6. Glossary of Terms

- **PIN:** Personal Identification Number.
  - **PFM:** Personal Finance Manager.
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## 7. Priorities

1. **Security and data encryption (REQ-FM-003, REQ-FM-102)**
2. **Cross-platform functionality (REQ-FM-101)**
3. **Core financial functionalities like adding transactions and generating reports (REQ-FM-005, REQ-FM-006, REQ-FM-009)**