Tinkle

Functional Specifications

Zayar Naing

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- Confidential-

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1. Overview

Tinkle is a MERN project designed as a web application for individuals who want to effortlessly track their finances or develop a habit of managing and monitoring their money. In addition to its tracking features, the application offers resources to increase knowledge about money, finance, and business through a dedicated page.

Furthermore, the website enables users to create budgets, make lists, set goals, and view records and statistics.

2. Tinkle Mind Map

We will go into mind-numbing details later, **but** for now, let us look at a quick mind map of the project structure so that you get the big picture of how the project will go. This is the mind map of **Tinkle:**

3. Screen by Screen Specification

Tinkle consists of a moderate number of screens. Most screens will follow a standard format, with a look and feel designed in the future by a graphic designer. This document is more concerned with the functionality and the interaction design, not the exact look and layout.

All screens are created in Figma.

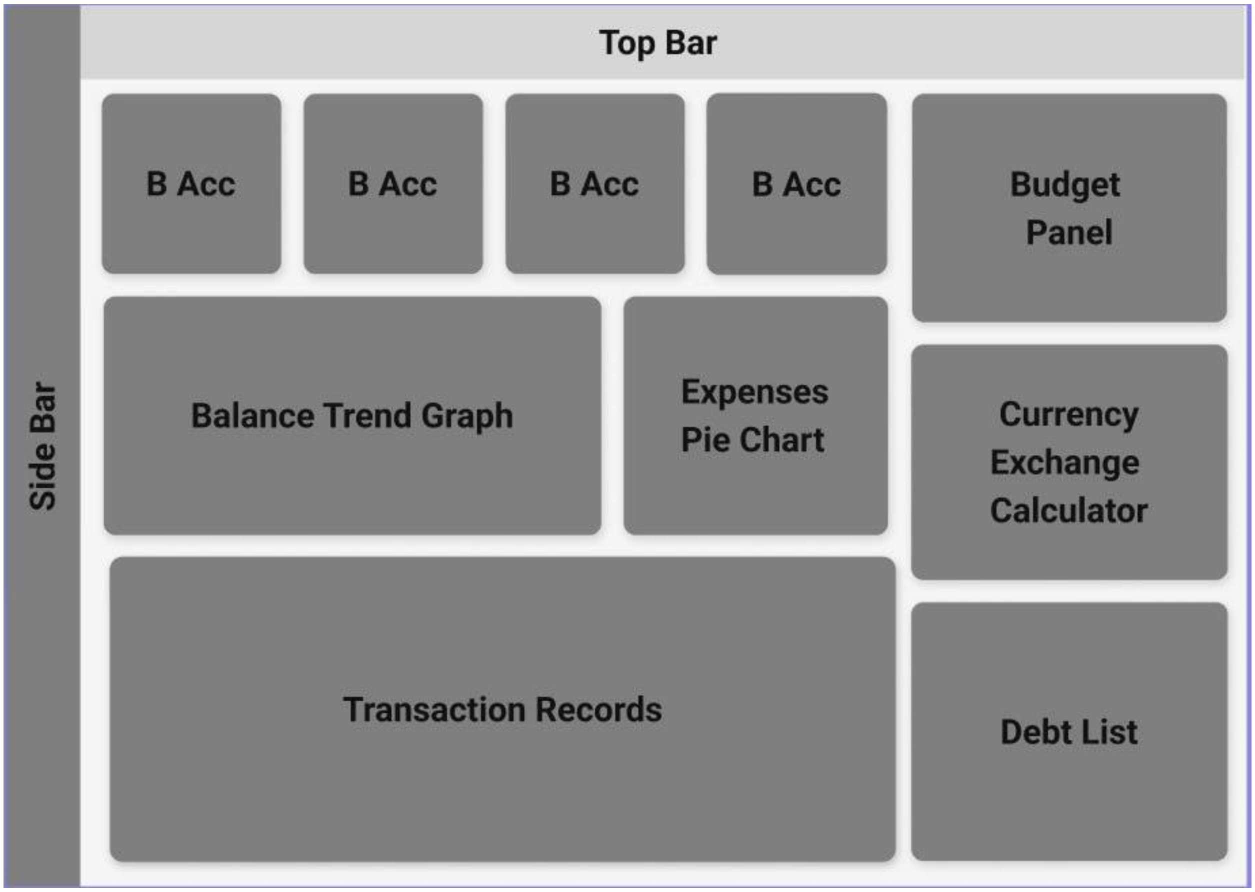
Each screen in **Tinkle** is known by a canonical name which will always appear, in this document, with an underline, so you know we are referring to a screen by name, for example, Dashboard Page.

3.1 Dashboard Page

Displayed when the project is started, the Dashboard Page serves multiple purposes:

- Allows users to create balance accounts and insert the amount of money they want.
- Allows users to edit and delete balance accounts
- Allows users to see their balance from each account they created.
- Allows users to see a few previous records in the Records Panel and will be able to add new income and expense records.
- Allows users to see the statistics of their expenses and budgets with charts and graphs.
- Allows users to calculate the currency exchange rate with their currency exchange calculator.
- Allows users to see the Debt list they have created and see the names and details of debt they owe, and they lent.
- Allows users to navigate to see more of the records, budget plans, statistics and debt lists by clicking on the see more button in each respective panel or by clicking the panel in some cases.
- Allows users to add record from the top bar (This goes for all pages)
- Allows users to go to other pages using the side navigation bar (This goes for all pages)

The Dashboard Page looks like this:



3.2 Records Page

The Records Page allows the following features:

- Allows users to see all their previous records and their minute details like (Categories, Accounts they used, Amount of money, Expense or Income, Date and Extra Notes).
- Allows users to add, edit and delete records.
- Allows users to see the total income and total expense of the month
- Allows users to see the expense categories in a pie chart and see the total expense in each category.

- Allows users to filter the record list to find the record they desire easier.
- When using the filter option, users will be able to filter the record with Date, Category, Account and Amount.
- Allows users to search the record through a search bar as well.
- Allows to select the records and delete multiple records at once.
- Allows to export data in .csv format which can be displayed in Excel, Notepad, or Word.
- When selecting the records, users see the total changes it will make to the balance accounts when users delete records.

The Records Page looks like this:

3.3 Budget Page

This is the page where you will be able to do budgeting. For people who do not know about budgeting, Budgeting is when you set an amount of money (limit) for a topic so that you will be mindful of how much you will spend on that topic or category. The Budget Page has the following features:

- Allows users to create budget plans for a certain topic with the option of period to choose such as Weekly budget, Monthly budget, Yearly budget, or a One-Time budget.
- Allows users to edit and delete budget.
- Allows users to see and track the amount of money they can spend for certain topics in numbers and in a bar meter.
- Allows users to see how much they are overspending if they go over the limit of budget.
- Allows users to see the records that made the budget level go up.

The Budget Page looks like this:

3.4 Lists Page

The Lists Page will have two categories; To Buy List and Debt list with their own sections.

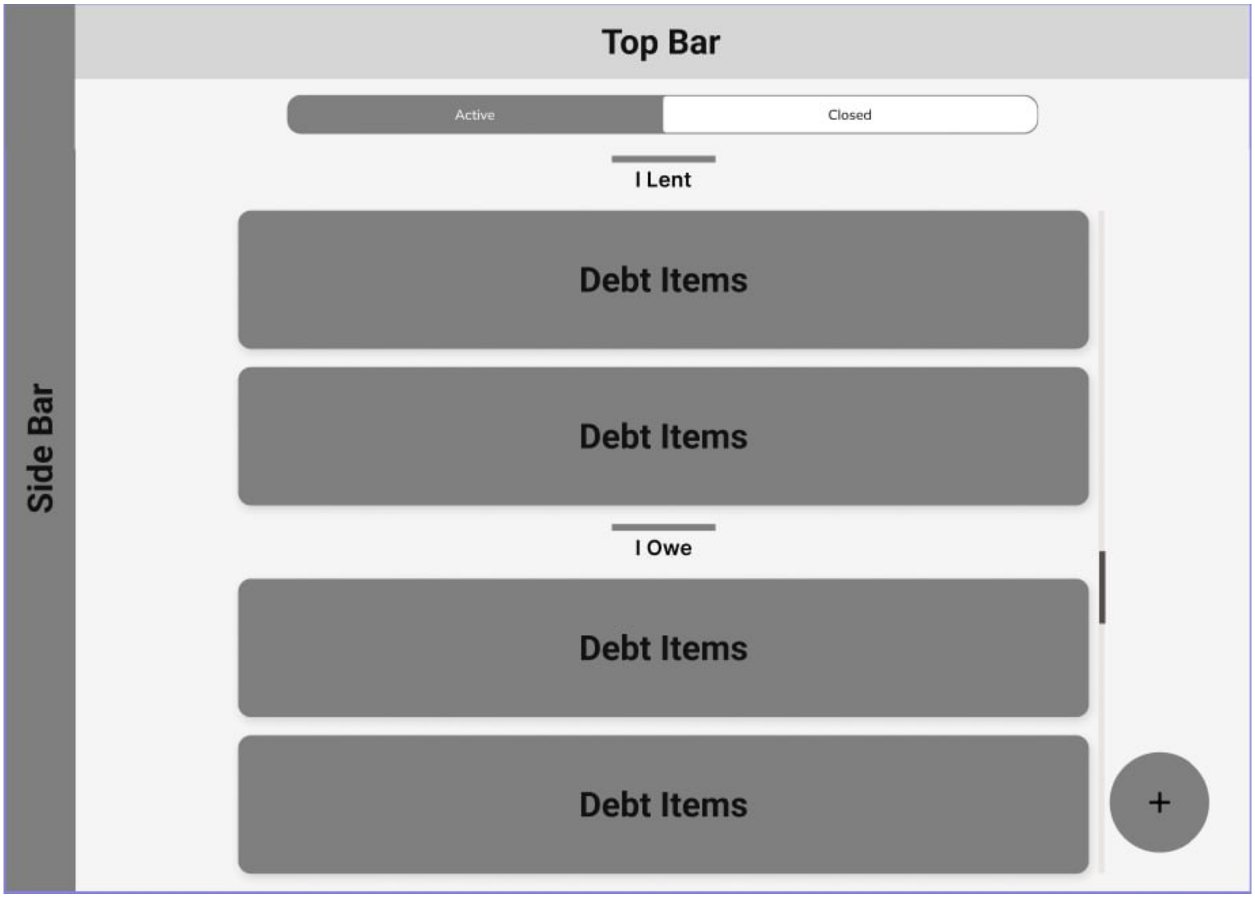
A. **Debt List Page**
   - It has two more sections; I owe, and I lent sections.
   - Allows users to add items with amounts they owe or lent, the respective names of the users they owe or lent, description of what it was for, the balance account they used, dates and due dates.
   - Allows users to add sub records when paying back the debt

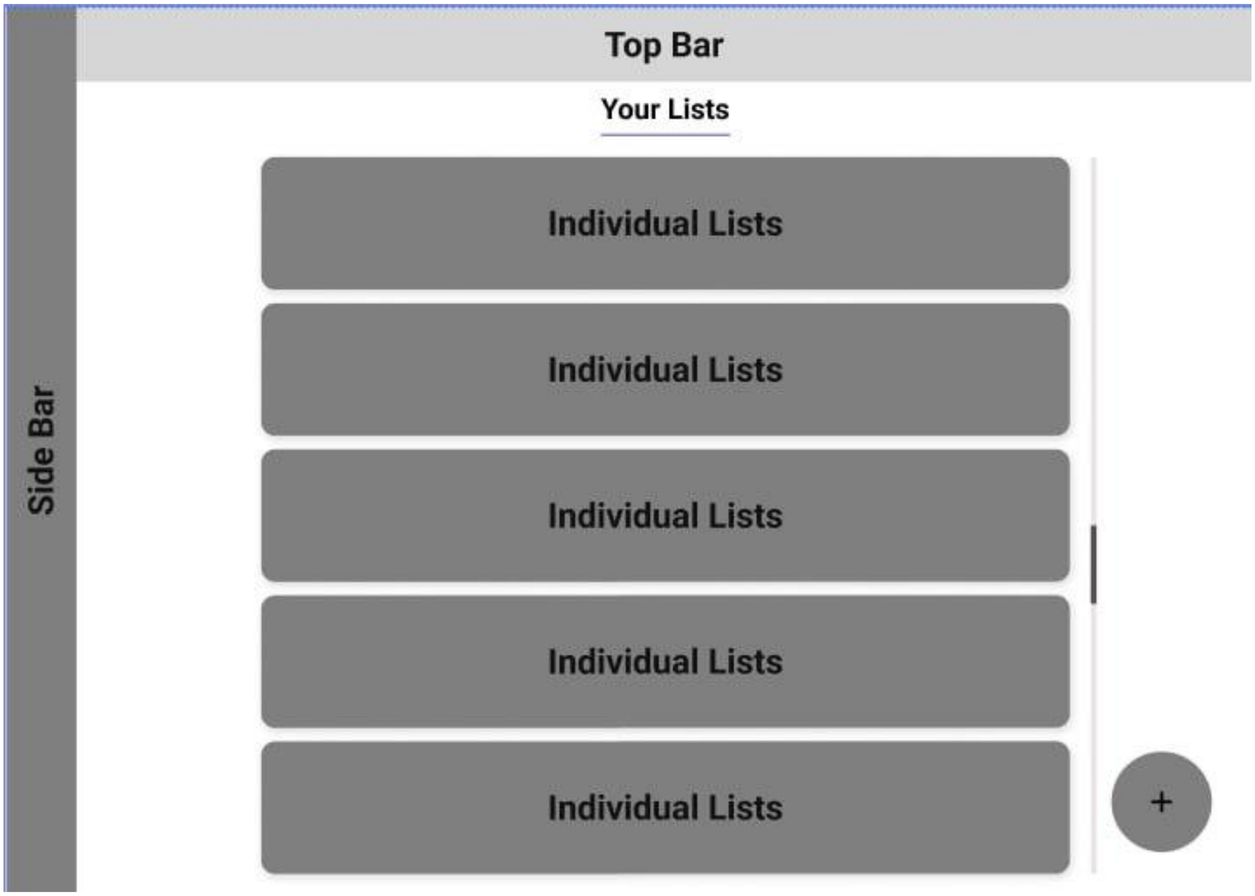
- Allows users to see the individual sub records of each debt list
- Allows users to edit and delete items

B. To Buy List Page

- Allows users to create lists, when creating a list, you will have two sections for each list; active and closed.
- Allows users to add items, descriptions of items, quantity of items and price as checklists in the active section of the list they have created
- Allows users to edit and delete items and lists as well
- Allows users to see the items they have check listed in the closed section

The Lists Page looks like this:


Top Bar
Active
Closed
I Lent
Debt Items
Debt Items
I Owe
Debt Items
Debt Items
+
Side Bar



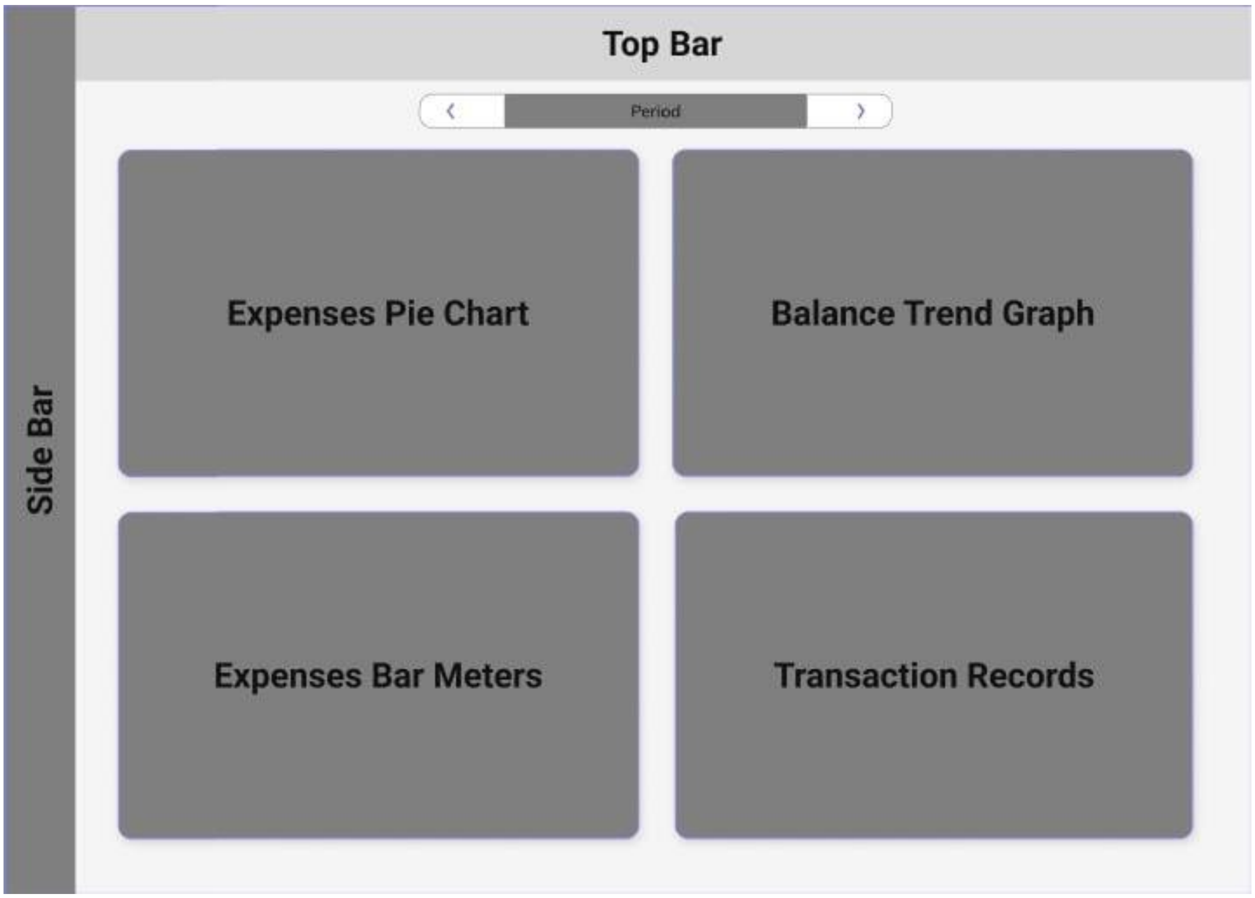
3.5 Statistic Page

The Statistic Page allows you to see:

- The statistics of the expenses and balance trend in charts and graphs in detail.
- The Expenses will be shown in a pie chart with distinct categories with the total amount of the expense
- The details which are the category names, amount spent in each category and the color of the category will be shown below the chart with the total amount spent in each category

- You will also see the names of the categories when you hover over the color on the chart
- The balance trend of income and expenses of a time can also be seen as a graph in this page with records of trend in this page

The Statistics Page looks like this:

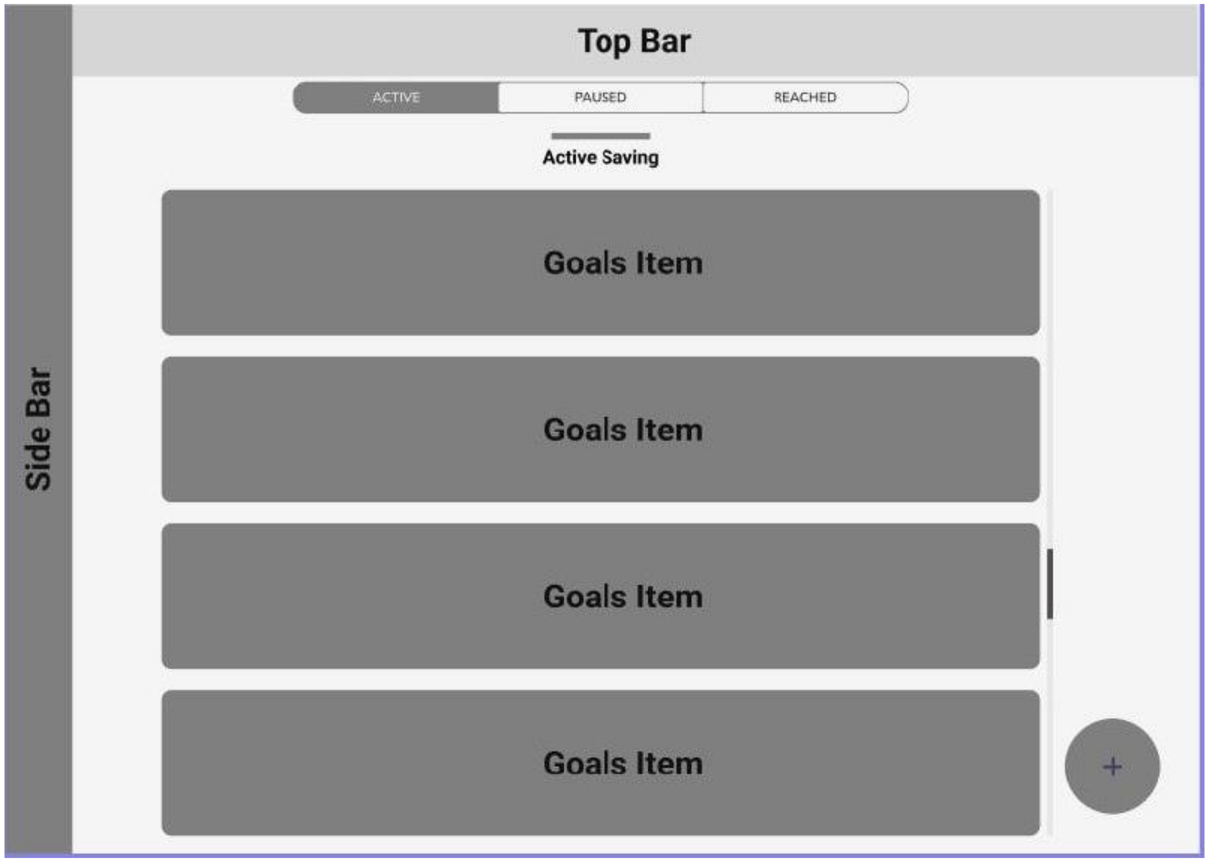


3.6 Goals Page

In this Goals Page:

- This page has three sections; active, paused and reached.
- Users will be prompted with the saving goal suggestion when they want to create a saving goal
- Users will be able to create savings goals with the amount the user wanted to save, the desired date to reach the goal, the amount they already saved and the description.
- Users will be able to view the details of each goal with how much they have saved, how much they still must save, the estimated time the saving will reach and the option to add more saving amount to the saving
- Users will be able to not only edit and delete goals but also pause and set as reached to goals as well.
- When the goal of saving is reached, the respective goal will be placed in the reached section
- When the user set the goal as paused and the goal will be placed in the paused section, they have the option to resume the goal any time.

The Goals Page looks like this:



3.7 Knowledge Page

The <u>Tips and Knowledge Page</u> is made up of two subtopics; <u>Books Page</u> and <u>Videos Page</u>.

A. Videos Page

<u>Videos Page</u> will have the following features:

- Allows users to check out videos that are related to finance and business.

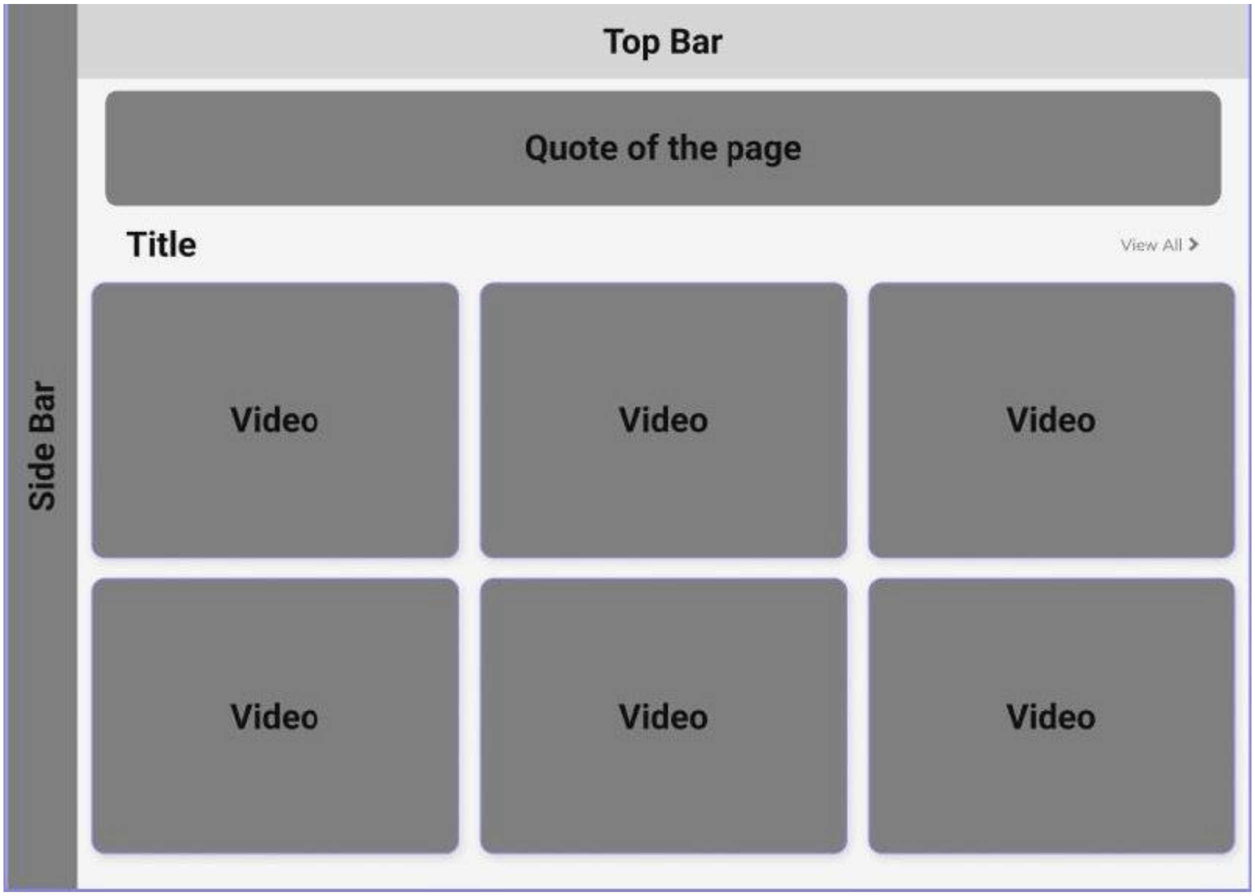
- The page will have several topics of videos to choose from and each topic can be navigated to another page of all the videos in each topic from “View All” button.
- Allows users to search for the video they are looking for through the search bar which will appear in the top bar when Tips and Knowledge Page is selected.
- When pressing the see more or videos, you will navigate to a link to a website where you can watch the video they are interested in.
- Allows users to mark the videos as favorite when finding the video, they like or interested so that they will be added in the “Favorite” topic of the page.

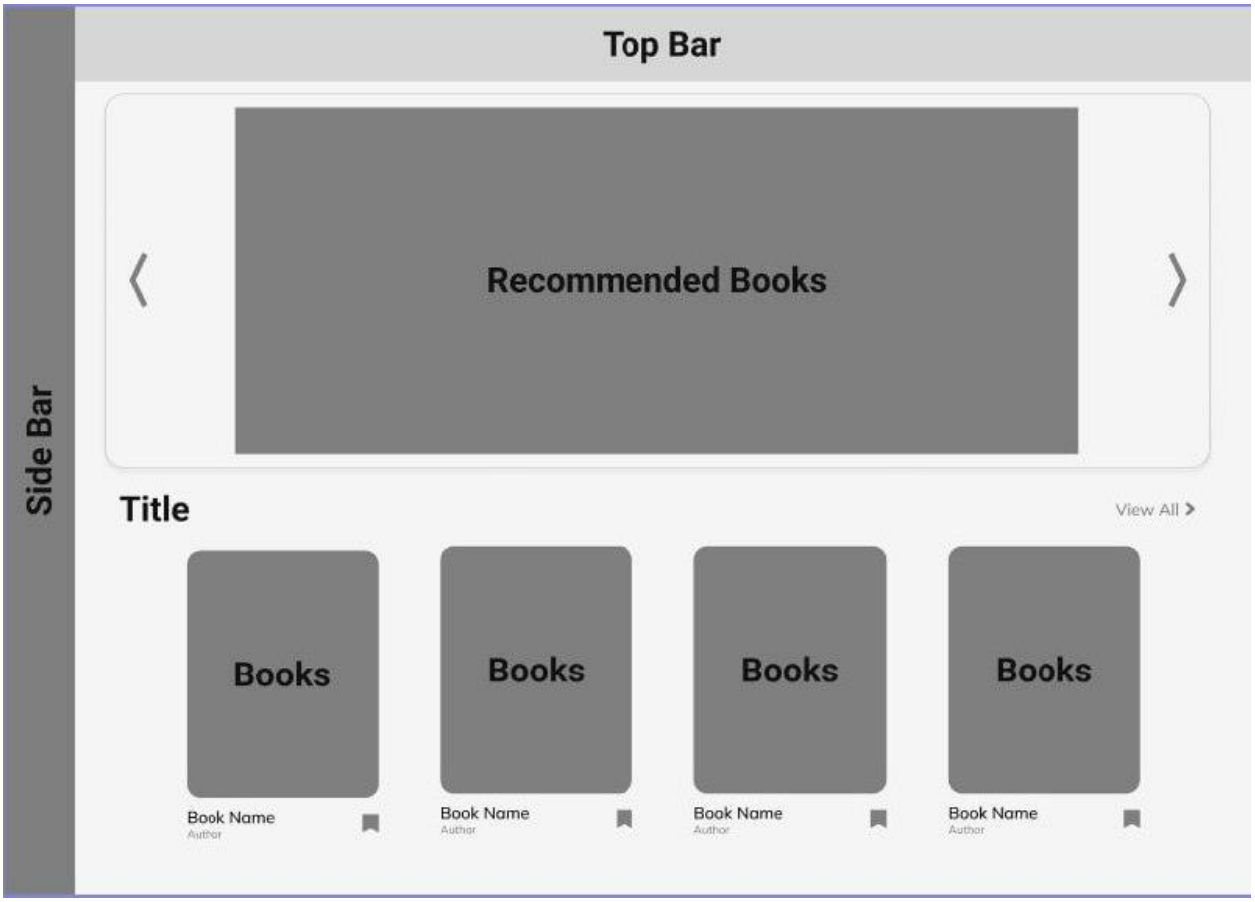
B. Books Page

Books Page will have the following features:

- Allows users to check out books that are related to finance and business.
- The page will have several topics of books to choose from and each topic can be navigated to another page of all the books in each topic from “View All” button.
- Allows users to search for the book they are looking for through the search bar which will appear in the top bar when Knowledge Page is selected.
- When pressing the see more or books, you will navigate to a link to a website where you can read the book you are interested in.
- Allows users to mark the books as their favorite when finding the book, they like or are interested in so that they will be added in the “Favorite” topic of the page.

The Knowledge Pages looks like this:




Top Bar
Side Bar
Recommended Books
Title
View All
Books
Books
Books
Books
Book Name
Author
Book Name
Author
Book Name
Author
Book Name
Author