**2. Use Cases & User Stories**

**2.1 Main Actor**

- **Primary Actor**: Budget Owner (the user)

**2.2 Use Cases (high-level)**

**UC-1: Add Transaction**

- Actor opens the app, fills a form (date, description, amount, type, category), and saves it.

**UC-2: View Monthly Summary**

- Actor selects a month (or uses default current month) and sees total income, total expenses, net savings, and spending by category.

**UC-3: Edit Transaction**

- Actor finds an existing transaction and corrects its amount, category, or description.

**UC-4: Delete Transaction**

- Actor deletes an incorrect or duplicate transaction.

**UC-5 (optional later): Configure Monthly Budgets**

- Actor sets budget amounts per category for a given month and sees remaining budget. (We can keep this in the "future" bucket for now.)

**2.3 Example User Stories (Agile style)**

1. **Add transaction**

   o *As a* budget owner:

   o *I want* to add an income or expense with a category and date

   o *So that* I can keep track of where my money goes each month.

2. **See monthly overview**

   o *As a* budget owner:

   o *I want* to see total income, expenses, and net savings for a month

   o *So that* I understand my overall financial position for that period.

3. **See category breakdown**

   o *As a* budget owner:

- o *I want* to see how much I spent in each category

- o *So that* I can identify where I might need to cut costs.

4. **Correct mistakes**

- o *As a* budget owner:

- o *I want* to edit or delete a transaction

- o *So that* my data remains accurate when I make input errors.

5. **Visual overview (later)**

- o *As a* budget owner:

- o *I want* to see a chart of my spending by category

- o *So that* I can quickly understand my spending patterns at a glance.

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**3. How to Approach This as a BA/MBA student**

**3.1 My mindset as BA/MBA Student:**

When I think about this project, I keep asking:

- **What problem am I solving?**

  - o "I can't see where my money goes each month in a clean way."

- **What is the minimum lovable product?**

  - o A simple, reliable tool I *actually use*.

- **How would I explain this to a stakeholder?**

  - o In plain language, with outcomes and simple screenshots.

- **How will I measure success?**

  - o The usage metrics listed above.