**<Team 6>**

**<MONESA>**

**Vision Document**

**Version <0.2>**

**Revision History**

| **Date** | **Version** | **Description** | **Author** |
| --- | --- | --- | --- |
| 03/06/2022 | <0.1> | Report main ideas. | <Hà Huỳnh Đức Huy> |
| 08/06/2022 | <0.2a> | Modify section 4, 6. | <Nguyễn Tiến Lợi> |
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**Vision (Small Project)**

# **Introduction**

## Purpose

Web application that simplifies personal money management by integrating all accounts such as banks and cash in one location.

## Scope

Monesa allows customers to track and control their expenses. It has a user-friendly interface and is simple to use.

## References

* Money Lover (Web and app).
* Money Manager (Android).

# **Positioning**

## Problem Statement

| The problem of | Manage expenses in a rudimentary way. |
| --- | --- |
| affects | Those who have a hard time managing their spending. |
| the impact of which is | Waste of time and effort, and subjective calculations might lead to confusion. |
| a successful solution would be | It assists users in effectively and scientifically managing their spending. |

## Product Position Statement

| For | * Student. * Entrepreneur. * Housewives and other family members. * Office employees need to compile income and spending figures. * People have an average or low income. |
| --- | --- |
| Who | * It's easy to keep track of income and expenses. * Create a budget for the future. * You won't have to be concerned about out-of-control spending any more. |
| The (product name) | Monesa Website |
| That | * Create an income and expense management system for individuals and groups: * Manage revenue and expense categories. * Manage wallets (Default: cash). * Manage currency (Default: VND). * Manage income and expense caps (by day, month, and year, with a warning system). * Look up demand-driven expenditure. |
| Unlike | Users keep track of their rudimentary expenditures. |
| Our product | Provide online budgeting services that are quick, easy to use, and secure. |

# **Stakeholder and User Descriptions**

## Stakeholder Summary

| **Name** | **Description** | **Responsibilities** |
| --- | --- | --- |
| Development team | Nhóm 6 20clc10 | Software development and upgrading. |
| Supervisor | Hồ Tuấn Thanh | Track and help the development team create software. |
| Project manager | Huỳnh Thành Nguyên | Manage, divide work, and motivate members. |
| End Users | Student, entrepreneur… | Use and review software. |
| Third-party | Google | Google Authentication. |

## User Summary

| **Name** | **Description** | **Responsibilities** | **Stakeholder** |
| --- | --- | --- | --- |
| End Users | Expense management | * Set up a personal/group revenue and expenditure management system. * Look up spending on demand. | Self-represented |

## User Environment

The browser is being utilized as the platform. As the platform grows in popularity, it is becoming faster and more accessible from any internet-connected device.

## Summary of Key Stakeholder or User Needs

| **Need** | **Priority** | **Concerns** | **Current Solution**  **(Referencing Money Lover)** | **Proposed Solutions** | |
| --- | --- | --- | --- | --- | --- |
| Individual/group revenue and expenditure management | high | Revenue and expenditure management in what form and presented like this? | Manage data by date, type of spending. | | Adding currency converter to diverse many types of income.  Add spending method to control balance of cash or bank account |
| On-demand revenue and expenditure reports | 1 | How is income and expenditure reporting presented and based on what data? | Visualize income and debt as bar chart, based on the data entered by the user. | | Create search bar for viewing more specific detail of transaction. |
| Ensuring customer information security | 3 | How secure is each customer's information? | Authenticate user by using account or third-party account (Google, Facebook) | | Adding second factor authentication to improve security |

## Alternatives and Competition

## Money Lover

Short description: is a website that allows users to enter storage and spending statistics for themselves, their families, or a certain group.

Platform: Website.

Price: Free access.

Featured Feature:

* Multiple devices can be used at the same time..
* Automatically remind users, saving plans for the future.
* Easy currency conversion, goods bill scanning.
* Don't worry about debt.

## Money Manager

Short description: specialized phone application to support effective financial control.

Platform: iOS, Android

Price: Free access.

Featured Feature:

* Support financial control with management features.
* Analyze spending by charts, reports, fund raising, look up by week - month in a professional manner.

# **Product Overview**

## Product Perspective

The product uses the google API to get the profile, email and other data needed to create an account or confirm login.

## Assumptions and Dependencies

When the user does not use or does not provide data to the website for a long time, the system will become stagnant and the statistics are not accurate, so to improve that problem, the system will remind the user to handle that case.

# **Product Features**

* Sign up, Sign in, Sign out, Recover account if forgetting password.
* Two factor authentication using email or recovery question
* Compilation of the management of personal expenditure management or group.
* Make friends, add users to the group revenue management system
* Setting the permissions of each member in the collection management system
* Keep track of the history of transactions.
* Search for spending with specific categories.
* Visualize the income, outcome using graphs.
* Export transaction history as .csv or .json file.
* Input transaction (Income, Outcome, Transfer).
* Set a limit for spending (day/month/year).
* Remind if spending is close to limit or exceed.
* Using many currencies.
* Using an administrator to manage the user's account (recover or suspend).

# **Non-Functional Requirements**

* Speed: Respond on click.
* Security: site security (algorithm for storing accounts as well as passwords)
* Portability: Everywhere as long as the user has access to the internet.
* Compatibility: adaptive to many popular browsers (Edge, Chrome, Firefox, etc.)
* Capacity: The website may contain many people (expects at 100 users) online at the same time and may store the user's information