

University of Westminster
Software Development I
4COSC006C

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1.User Guide

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User Guide

PERSONAL FINANCE TRACKER

This is a financial tracker that helps to store different types of transaction done by a person. This is a python based program. User can add transactions, update a transaction that exists, view transaction and delete transaction. User can get total income, total expenses and net income in transaction summary option.

Let's start

→ Install python

- Install the python from the <https://www.python.org/downloads/>

→ Get and run python file

- Download the python script file ('personal_finance_tracker.py') from the provided source and run it in the python base app
- Then system will ask a question to select from following options

Personal Finance Tracker

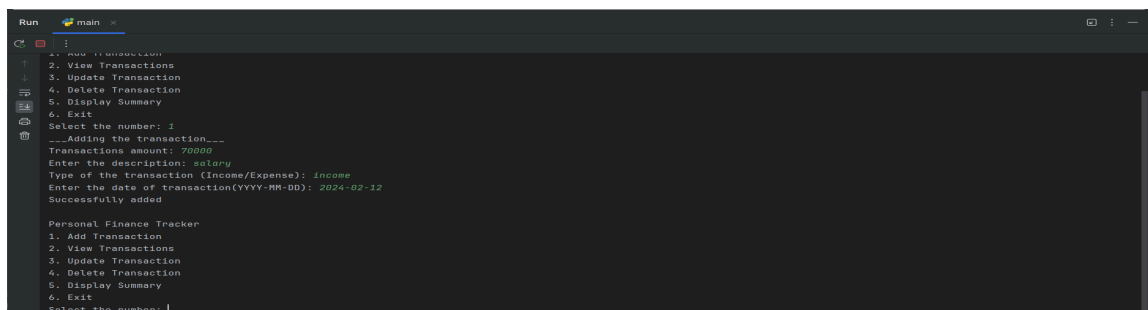
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit

Select the number:

- Enter the related number of the service you need in above space

❖ Add transaction

If you need to add transaction enter the number 1
Then add amount,description of the transaction ,Is
that a income or a expense and date



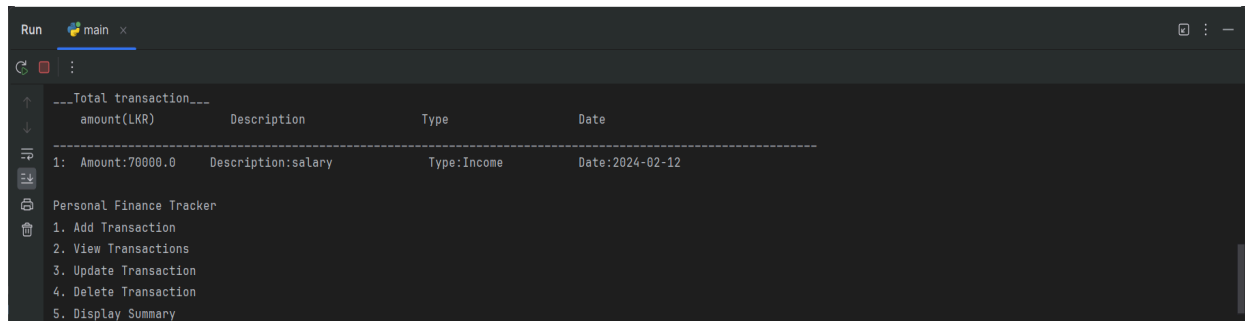
```
Run main
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 1
--Adding the transaction---
Transactions amount: 70000
Enter the description: salary
Type of the transaction (Income/Expense): income
Enter the date of transaction(yyyy-mm-dd): 2024-02-12
Successfully added

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: |
```

- Enter the correct amount
- Enter the correct description
- Mention that income or a expense (user only can use these words)

❖ View transaction

If you need to view your transactions enter the number 2



```

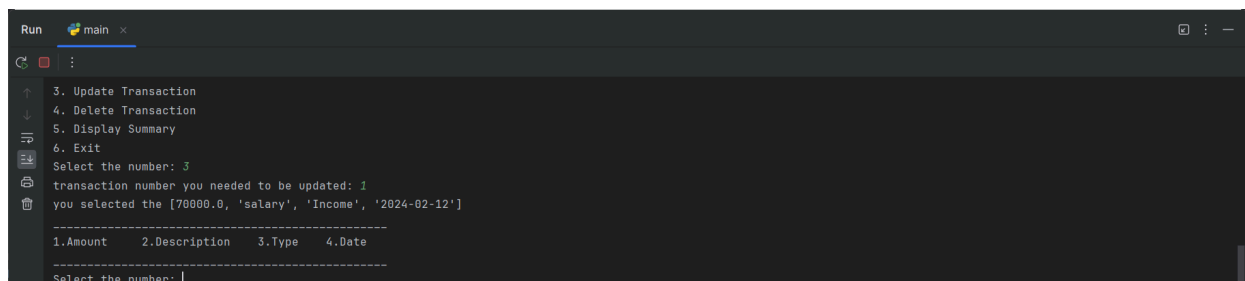
Run  main x
---Total transaction---
amount(LKR)      Description      Type      Date
-----
1: Amount:70000.0  Description:salary    Type:Income  Date:2024-02-12

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
  
```

❖ Update Transaction

If you needed to update the transaction select the number 3

Then select the transaction you needed to be updated



```

Run  main x
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 3
transaction number you needed to be updated: 1
you selected the [70000.0, 'salary', 'Income', '2024-02-12']

1.Amount      2.Description  3.Type      4.Date
-----
Select the number: 
  
```

Select the number needed to be updated
Enter the new item as you select

❖ Delete Transaction

If you needed to delete the transaction
select the number 4

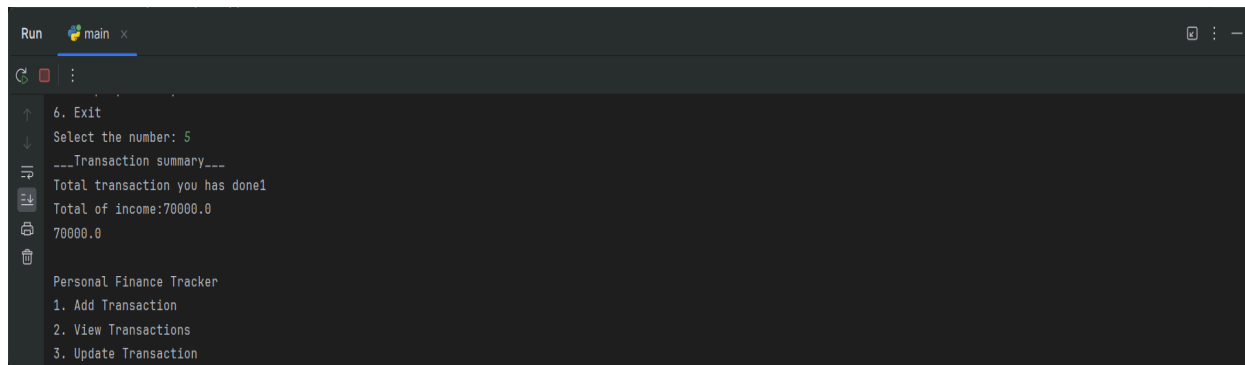
Then enter the transaction you needed to
delete from the file



```
Run main x
Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 4
___Deleting transaction___
Enter the transaction number to delete:
```

❖ Display Summary

If you needed to display the summary of
transaction select the number 5



```
Run main x
6. Exit
Select the number: 5
---Transaction summary---
Total transaction you has done1
Total of income:70000.0
70000.0

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
```

❖ Exit

Enter number 6 to exit the system

Test Document

- ❖ Add transaction

SCENARIO	Test Case	Input	Expected outcome	Actual output	result
Add transaction	Add transaction with valid amount	Transactions amount: 1000	Successfully added Select the number:	Successfully added Select the number:	Pass
	Add transaction with valid about	Type of the transaction (Income/Expense): Income	Successfully added Select the number:	Successfully added Select the number:	Pass
	Add transaction with valid date	Enter the date of transaction(YYYY-M M-DD): 2024-09-23	Successfully added Select the number:	Successfully added Select the number:	pass
Add transaction	Add transaction with invalid data	Transactions amount: Asd	Enter the Valid amount Select the number:	Enter the Valid amount Select the number:	Pass
	Add transaction with invalid about	Type of the transaction (Income/Expense): 5410ds	please enter income or expense Type of the transaction (Income/Expense):	please enter income or expense Type of the transaction (Income/Expense):	Pass
	Add transaction with valid date	Enter the date of transaction(YYYY-M M-DD):5428	please enter date in (YYYY-MM-DD) format: Enter the date of transaction(YYYY-M M-DD)	please enter date in (YYYY-MM-DD) format: Enter the date of transaction(YYYY-M M-DD)	pass

Add transaction with valid amount

```
Run main x
"C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\.venv\Scripts\python.exe" "C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\main.py"

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 1
___Adding the transaction___
Transactions amount: 400
Enter the description: salary
Type of the transaction (Income/Expense): income
Enter the date of transaction(YYYY-MM-DD): 2024-12-06
Successfully added

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
```

Add transaction with invalid data

```
Run main x
Select the number: 1
___Adding the transaction___
Transactions amount: ds
Enter the Valid amount

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number:
```

Add transaction with valid about

```
Run main x
"C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\.venv\Scripts\python.exe" "C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\main.py"

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 1
___Adding the transaction___
Transactions amount: 400
Enter the description: salary
Type of the transaction (Income/Expense): income
Enter the date of transaction(YYYY-MM-DD): 2024-12-06
Successfully added

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
```

Add transaction with invalid about

```
Run main x
"C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\venv\Scripts\python.exe" "C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\main.py"

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 1
---Adding the transaction---
Transactions amount: 5000
Enter the description: salary
Type of the transaction (Income/Expense): ds
please enter income or expense!
Type of the transaction (Income/Expense): |
```

Add transaction with valid date

```
Run main x
"C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\venv\Scripts\python.exe" "C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\main.py"

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 1
---Adding the transaction---
Transactions amount: 5000
Enter the description: salary
Type of the transaction (Income/Expense): ds
please enter income or expense!
Type of the transaction (Income/Expense): |
```

Add transaction with invalid date

```
Run main x
"C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\venv\Scripts\python.exe" "C:\Users\Lalindu S Jayasinghe\PycharmProjects\pythonProject3.py\main.py"

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 1
---Adding the transaction---
Transactions amount: 5000
Enter the description: salary
Type of the transaction (Income/Expense): ds
please enter income or expense!
Type of the transaction (Income/Expense): income
Enter the date of transaction(YYYY-MM-DD): 526640
please enter date in (YYYY-MM-DD) format:
Enter the date of transaction(YYYY-MM-DD):
```

❖ View Transactions

SCENARIO	Test Case	Input	Expected outcome	Actual output	result
View transaction	View transactions when file is empty	1. Add Transaction 2. View Transactions 3. Update Transaction 4. Delete Transaction 5. Display Summary 6. Exit Select the number:2	No transactions found	No transactions found	pass
	View transactions	1. Add Transaction 2. View Transactions 3. Update Transaction 4. Delete Transaction 5. Display Summary 6. Exit Select the number:2	amount(LKR) : Description : Type : Date :	amount(LKR) : Description : Type : Date :	pass

View transactions when file is empty

```
Run main
5. Display Summary
6. Exit
Select the number: 2
---Total transaction---
You haven't add any transactions yet.

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: |
```

View transactions

```
Run main
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 2
---Total transaction---
amount(LKR)      Description      Type      Date
-----
1: Amount:1000.0  Description:salary  Type:Income  Date:2002-12-09

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
```

❖ Update Transactions

SCENARIO	Test Case	Input	Expected outcome	Actual output	result
Update transaction	Updating a transaction with an invalid amount	Enter the new amount: Gfcg	Enter a valid amount Select the number:	Enter a valid amount Select the number:	Pass
	Updating a transaction with a valid amount	Enter the new amount 10000			pass

Updating a transaction with an invalid amount

```
Run main x
6. Exit
Select the number: 3
transaction number you needed to be updated: 1
you selected the [50000, 'salary', 'Income', '2002-02-02']

1.Amount    2.Description  3.Type    4.Date
-----
Select the number: 1
Enter the new amount: hg
Enter a valid amount

1.Amount    2.Description  3.Type    4.Date
-----
Select the number: |
```

Updating a transaction with a valid amount

```
Run main x
1.Amount    2.Description  3.Type    4.Date
-----
Select the number: 1
Enter the new amount: 9000000
Updated successfully
|
Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number:
```

❖ Delete Transactions

SCENARIO	Test Case	Input	Expected outcome	Actual output	result
Delete transaction	Deleting a transaction	Enter the transaction number to delete:1	Successfully deleted	Successfully deleted	pass
	Invalid input	Enter the transaction number to delete:k	Enter a valid transaction!	Enter a valid transaction!	

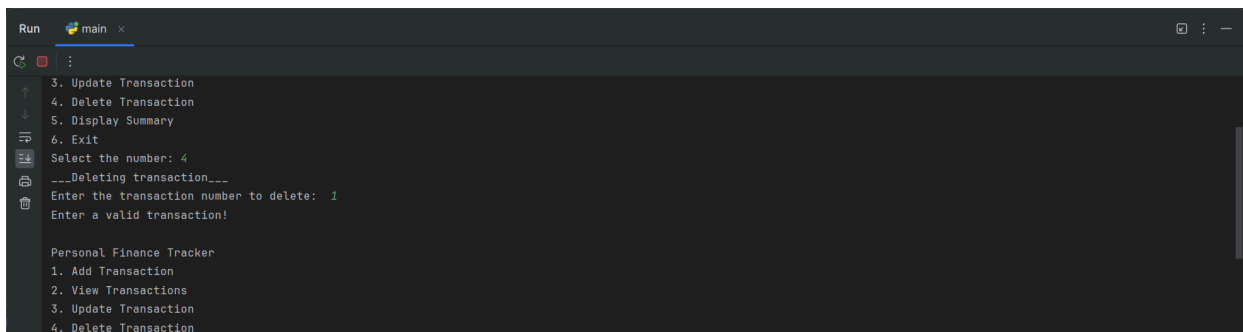
Deleting a transaction



```
Run main x
6. Exit
Select the number: 4
___Deleting transaction___
Enter the transaction number to delete: 1
Successfully deleted

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number:
```

Invalid input



```
Run main x
3. Update Transaction
4. Delete Transaction
5. Display Summary
6. Exit
Select the number: 4
___Deleting transaction___
Enter the transaction number to delete: 1
Enter a valid transaction!

Personal Finance Tracker
1. Add Transaction
2. View Transactions
3. Update Transaction
4. Delete Transaction
```

END