University of Westminster
Software Development I
4COSC006C

·   Name: J.A LALINDU S JAYASINGHE

·   IIT Student Number: 20232511

·   UOW Number: W2084718

1.User Guide

2.Test document

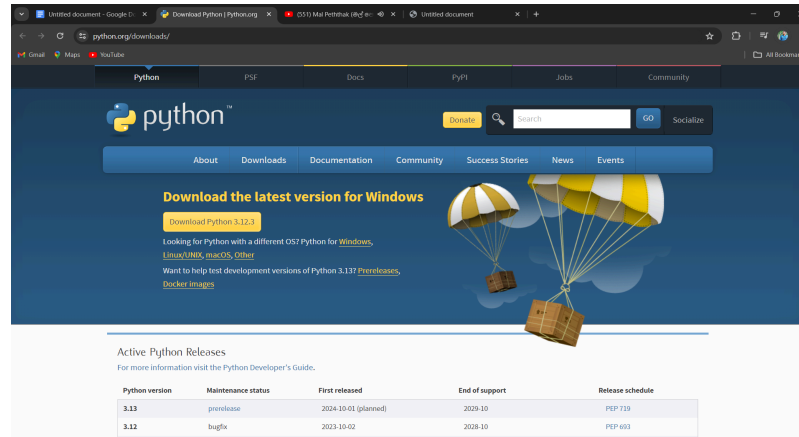# *1.User Guide*

- Personal Finance Tracker using Python

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

❖ Let s start :-

➢ Install python
- Install python from

   https://www.python.org/downloads/

❖ <u>Get and run python file</u>

■ <u>Download the python script file</u>
('persanal_final_traker.py')from the provided source and run it in th python bass app

● Then system will ask a question to select the option from below

    1. Add transaction

    2. Add bulk transactions

3. View transaction

4. Update transaction

5. Delete transaction

6. Display summary

7. Exit

● Enter the number of the option you needed

❖ 1.Add transaction

If you need to add translation to the list enter the number 1.

Enter the type of the transaction you're adding.

Then enter the date description of the transaction and amount of the transaction

```
| Personal Finance Tracker |
+---------------------------+
   1. Add Transaction
   2. Add bulk transactions
   3. View Transactions
   4. Update Transaction
   5. Delete Transaction
   6. Display Summary
   7. Exit
   ---------------------------
Select the number: 1
____Adding  Transactiopns____
Enter the type of transaction: salary
Enter the description: january
Transaction amount: 800000
Enter the date of transaction(YYYY-MM-DD): 2024-01-25
Transaction added successfully
```

- Enter the type of the transaction your adding
- Enter the description about the transaction
- Enter the amount of the transaction
- Enter the date in (YYYY-MM-DD)

   (Date only can be in this format)

❖ 2. Add bulk transactions

Enter number 2 to add transaction from a bulk file to the transaction list

```
1. Add Transaction
2. Add bulk transactions
3. View Transactions
4. Update Transaction
5. Delete Transaction
6. Display Summary
7. Exit
---------------------------
elect the number: 2
nter the file name: bf
hopping   2024-04-08 fashonbug   10000

'shopping', '2024-04-08', 'fashonbug', '10000']
hopping
rocery 2023-10-01 foodcity   5000

'grocery', '2023-10-01', 'foodcity', '5000']
rocery
```

● Add the name of the bulk folder
   you wish to add to the list

❖ 3.View transaction

If you need to view transaction you have
added enter the   number 2

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


___Transactions___


1 |_____salary_____|

------------------------------------------------------------------
    date: 2024-01-25, description: january, amount: 50000
    date: 2024-01-25, description: january, amount: 80000.0
    date: 2024-01-25, description: january, amount: 800000.0
```

- This will show all transaction you have added

❖ 4.Update transaction

If you needed to update a transaction in the list select number 4

- Select the transaction type first

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

___Transactions___

1 |_____salary_____|
-------------------------------------------------------------
    date: 2024-01-25, description: january, amount: 50000
    date: 2024-01-25, description: january, amount: 80000.0
    date: 2024-01-25, description: january, amount: 800000.0
----------------------------------------------
Enter the transaction type to update: salary
 **Enter the transaction number: 1
```

● Select the transaction from the transaction type

```
Enter the transaction type to update: salary
 **Enter the transaction number: 1
```

● Select the option you needed to update

```
Enter the transaction type to update: salary
 **Enter the transaction number: 1
____select the number you wish to update.___
   1.Amount
   2.Date
   3.Discription
select the number to update: █
```

- Number 1 to change the amount
- Number 2 to change the date
- Number 3 to change the description

❖ 5.Delete transaction

Select number 5 for delete the transaction from the list

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

___Transactions___

1 |_____salary_____|
_____
    date: 2222-22-22, description: september, amount: 90000000000
    date: 2024-01-25, description: january, amount: 80000.0
    date: 2024-01-25, description: january, amount: 800000.0
Enter the transaction type wish to delete: salary
[{'amount': 90000000000, 'date': '2222-22-22', 'description': 'september', 'driscription': 'september'}, {'amount': 80000.0, 'date': '2024-01-25', 'description': 'january', 'dri
scription': 'sep'}, {'amount': 800000.0, 'date': '2024-01-25', 'description': 'january'}]
    Enter the transaction you wish to delete: 1
    successfully deleted!
```

- Select the transaction type
- Select the transaction to delete

❖ [6.display summary](#)

 If you need to display all the transactions you have done enter the number 6

```
------------------------------
Select the number: 6
___Transaction summary___
* You have added 1 transaction type
{'amount': 800000.0, 'date': '2024-01-25', 'description': 'january'}
```

❖ [7.Exit](#)

 If you enter number 7 its will save the transaction and exit from
the program

2.Test document

- ❖ Add transaction

SCENARIO	Test case	input	Expected outcome	Actual output	Result
Add transaction	Add transaction with valid Transaction type	Transaction type:salary	Enter the description:	Enter the description:	Pass
	Add purpose of the transaction	Any purpose of the transaction: January	Transaction amount:	Transaction amount:	Pass
	Transaction amount:	Transaction amount:800000	Enter the date of transaction(YYYY-MM-DD):	Enter the date of transaction(YYYY-MM-DD):	pass
	Enter the date of transaction(YYYY-MM-DD):	Enter the date of transaction(YYYY-MM-DD):2025-03-23	Transaction added successfully	Transaction added successfully	
			Select the number:	Select the number:	

Add transaction with invalid inputs	If transaction type is empty	Transaction type:	Transaction type cannot be empty! Enter the type of transaction:	Transaction type cannot be empty! Enter the type of transaction:	Pass
	Empty purpose of the transaction	Enter the description:	Description cannot be empty! Enter the description:	Description cannot be empty! Enter the description:	Pass
	If input is not a integer amount:	Transaction amount: thousand	Enter only numbers! Transaction amount:	Enter only numbers! Transaction amount:	Pass
	If not in format of the date transaction(YYYY-MM-DD):	Enter the date of transaction(YYYY-MM-DD):2005 2 5	please enter date in (YYYY-MM-DD) format: Enter the date of transaction(YYYY-MM-DD):	please enter date in (YYYY-MM-DD) format: Enter the date of transaction(YYYY-MM-DD):	pass

- <u>Add transaction type with valid amount</u>

```
____Adding  Transactiopns____
Enter the type of transaction: car repaire
Enter the description: █
```

- <u>Add purpose of the transaction</u>

```
Enter the description: tyer change
Transaction amount: █
```

- ## Add transaction amount

```
Transaction amount: 10000
Enter the date of transaction(YYYY-MM-DD): 
```

- ## Enter the date of transaction

```
Enter the date of transaction(YYYY-MM-DD): 2024-01-06
     Transaction added successfully

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

- <u>If transaction type is empty</u>

```
____Adding   Transactiopns____
Enter the type of transaction: car repaire
Enter the description: █
```

- ## Empty purpose of the transaction

```
Enter the description:
    Description cannot be empty!
Enter the description: █
```

- ## If input is not a integer amount

```
Transaction amount: thousen
      Enter only numbers!
Transaction amount: █
```

- <u>If not in format of the date of transaction</u>

```
Enter the date of transaction(YYYY-MM-DD): 2002-2-6
please enter date in (YYYY-MM-DD) format:
Enter the date of transaction(YYYY-MM-DD): █
```

❖ <u>Add bulk transactions</u>

scenario	Test case	input	Expected outcome	Actual outcome	Result

Add bulk transaction	If user entered file is existing	Enter the file name:bfile	View all the lines in the file Select the number:	View all the lines in the file Select the number	Pass
	If user enter file is not existing	Enter the file name:bff	File not found! Select the number:	File not found! Select the number:	pass

- File is existing

```
Select the number: 2
Enter the file name: bf
shopping   2024-04-08 fashonbug   10000

['shopping', '2024-04-08', 'fashonbug', '10000']
shopping
grocery 2023-10-01 foodcity   5000

['grocery', '2023-10-01', 'foodcity', '5000']
grocery

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

- <u>File is not existing</u>

```
Enter the file name: bff
File not fount

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

scenario	Test case	input	Expected outcome	Actual outcome	result
Update transaction	Select the transaction type	Input a existing type	*Enter the transaction number:	*Enter the transaction number:	<u>Pass</u>
		Input a not existing type	Select the number:	Select the number:	<u>Pass</u>

	Select the transaction	Enter the number of the transaction	____select the number you wish to update.____
			  1.Amount
			  2.Date
			  3.Description
			
			Select the number:
				____select the number you wish to update.____
				  1.Amount
				  2.Date
				  3.Description
				
				Select the number:
					pass

		Enter the number of the transaction that not under the selected type			

ect the ount,date scription	Entering number from 1 to 3	Display amount oe date or description update option	Display amount oe date or description update optic
	Not selecting number from 1 to 3	Enter number 1 to 3	Enter numb 1 to 3
ered the ount,date lescription rectly		Transaction updated successfully! Select the number:	Transaction updated successfully Select the number:

- <u>Input a existing type</u>

```
Enter the transaction type to update: salary
  **Enter the transaction number: ▌
```

- <u> Enter the number of the transaction</u>

```
____select the number you wish to update.___
  1.Amount
  2.Date
  3.Discription
select the number to update: ▌
```

- <u>Entering number from 1 to 3</u>

```
 select the number to update: 1
    Enter the new amount: ▌
```

➔ This is same as date and

description

- <u>Input a not existing type</u>

```
Enter the transaction type to update: house
Enter the transaction type to update:
```

- <u>Enter the number of the transaction that not under the selected type</u>

```
 **Enter the transaction number: 5

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

- <u>Not selecting number from 1 to 3</u>

```
select the number to update: 5
Enter number 1 to 3

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

- <u>Entered the amount,date or description correctly</u>

```
Enter the new amount: 50
    Transaction updated successfully!

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

❖ <u>Delete transaction</u>

Scenario	Test case	input	Expected	Actual	result

			outcome	outcome	
Delete transactions	Enter the transaction type	Transaction type	Enter the transaction you wish to delete:	Enter the transaction you wish to delete:	<u>Pass</u>
		Input a not existing transaction type	Enter a valid transaction! Select the number:	Enter a valid transaction! Select the number:	<u>Pass</u>
	Enter the transaction number	Enter a valid transaction number	successfully deleted! Select the number:	successfully deleted! Select the number:	<u>pass</u>

- **Enter the existing transaction type**

```
Enter the transaction type wish to delete: boom
[{'amount': 80000.0, 'date': '2002-09-12', 'description': 'january '}]
    Enter the transaction you wish to delete:
```

- **Enter the not existing transaction type**

```
Enter the transaction type wish to delete: kook
    Enter a valid transaction!

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

- <u>Enter a valid transaction number</u>

```
Enter the transaction you wish to delete: 3
successfully deleted!


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