

Wallet Watcher

EECS 2311Z 23W

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Wallet Watcher Vision Statement

The Wallet Watcher app allows users to be able to track their monthly expenses, along with showing outcomes of money they can save, budget planning, and tracking the earnings they make through investments of any kind. The user will make an account and input any expenses, along with the monthly or annual income and the expenses that they have. By doing this, it will allow the user to be able to hold all expenses into one area, along with those expenses being categorized, and show the amount of money they have, and what they can do to increase their financial health by budgeting or saving their money.

The app will include many features that help the user be able to budget and save their income accordingly. The biggest features include a budget planner, expense tracker, and an earnings tracker. The budget planner's main functions include a user being able to set the goal of how much they want to save monthly or yearly or control how much, and suggested expenses that they can drop in order to achieve that goal (ex. A user is spending too much money on entertainment, and can drop a subscription if they do not use it anymore).

The expense tracker feature will allow users to be able to visualize recurring bills or other that they have to pay monthly or annually, along with a calendar which shows when each bill needs to be paid or each expense took place, so that they are never late on a payment. Furthermore, the user can also see any other expenses that they have including a mortgage, line of credit, etc. so that they can know exactly how much is left to be paid. These expenses can also be seen on a chart of the user's choice to be able to show how much they spend in each category and where they can spend less to save more.

The earnings tracker feature shows the user any investments that they have inputted, and what the losses or gains on those investments are and how they can impact the users' savings or budget goals.

At the end of the month the user is given a monthly report of all expenses, earnings, and any budget goals they have reached along with a "savings score" which shows the user how much they have saved compared to the last month. At the end of the year, the user will be able to see the average "savings score" and how well they did over an annual period of time.

The app will be considered a success based on two criteria. First, after some thorough use, financial managers, financial advisors will be asked if they can continue to use an app like this, and how this app is beneficial to them and if they would use this app over another app. Secondly, at the end of the year there will be an average taken of every single user's "savings score" and if it is above a certain percentage, then that means that users have had a positive impact from the app, and have been saving more than before.

Iteration 1: Save and Spend management

Big user story 1:

Track Expenses	
As a financially independent adult, I want to be able to track my expenses.	
Priority: High	Cost: 9 days

Detailed User Stories:

Enter expenses	
Enter and edit general expense with detailed information (amount, date, notes).	
Priority: High	Cost: 3 days

Bill Planner	
Manage bills (One-time and recurring), keep track of billing date, due date and if it is paid or not.	
Priority: High	Cost: 4 days

Card Purse	
Editable "purse" for storing credit cards, debit cards, cash and gift card info. And keep track of their balances.	
Priority: High	Cost: 2 days

Big user story 2:

Track Earnings

As a financially independent adult,
I want to be able to track all
kinds of my earnings.

Priority: High Cost: 11 days

Detailed User Stories:

Enter Income

Enter and edit income information.
Such as amount, pay day.

Question: Is it an one-time setup for
all future ledgers or manual entry each pay?
Answer: one-time setup.

Priority: High Cost: 3 days

Track Investments

Manage investments and their
earnings or losses for an user.

Priority: High Cost: 4 days

Miscellaneous Tracker

Manage and track RESP, RRSP,
TFSA, tax returns and other earnings.

Priority: High Cost: 4 days

Big user story 3:

Budget Planner	
As a financially independent adult, I want to be able to view and manage monthly and yearly budget plans.	
Priority: High	Cost: 6 days

Detailed User Stories:

Goals on savings	
Set a months or yearly goal on how much money to save.	
Priority: High	Cost: 3 days

Enter Budget	
Let user to enter or edit as a spending goal.	
Priority: High	Cost: 3 days

Iteration 2: Personalized account(s) with customizations

Big user story 4:

Account Management	
As a financially independent adult, I want myself and other member in my household to create our own personal accounts / business accounts.	
Priority: High	Cost: 13 days

Detailed User Stories:

(To be added)

Big user story 5:

Customization Options	
As a financially independent adult, I want all users to be able to categorize our savings and earnings	
Priority: Medium	Cost: 9 days

Detailed User Stories:

(To be added)

Big user story 6:

Create Reports	
As a financially independent adult, I want all users to be able to create their own desired spendings or earning reports.	
Priority: Medium	Cost: 10 days

Detailed User Stories:

(To be added)

Iteration 3: Projection and analysis

Big user story 7:

Information Visualization	
As a financially independent adult, I want to be able to see my earnings and expenses visualized	
Priority: Low	Cost: 15 days

Detailed User Stories:

(To be added)

Big user story 8:

Future Projection	
As a financially independent adult, I want to be able to see how much money I am gaining or losing.	
Priority: Low	Cost: 12 days

Detailed User Stories:

(To be added)

Big user story 9:

Suggestions	
As a financially independent adult, I want this app to be able to notify me if I am spending too much money.	
Priority: Medium	Cost: 12 days

Detailed User Stories:

(To be added)

EECS 2311 Project Peer Evaluation (Iteration 0)

Please submit this form on eClass (doc or pdf) Together with your submission

Each team member is supposed to put in 100% effort in developing the class project, in each iteration. If you think that in your team there are individuals who did not put as expected. You can mention it in this form. You evaluate everybody in your team by giving them a mark out of 100. This may affect their individual marks, as explained in class. Note that:

1. 100 means satisfactory. You don't give anybody more than 100.
2. Lower than 100 marks must have an explanation, which typically is a fact, like #commits, late commits, not completing the assigned tasks, not attending meetings, etc. that I can verify in your logs/github/etc.

Group Number: 7		
Member's Name	Mark	Explanation (only if mark < 100)
Mustafa Syed	100	
Muhammad Shahid	100	
Zhenxu Wang	100	
Jisong Xie	100	
Brahmjot Grewal	100	

Your name (printed): MUSTAFA SYED, MUHAMMAD SHAHID, ZHENXU WANG, JISONG XIE, BRAHMJOT GREWAL

Signature:

Zhenxu Wang *Mustafa Syed* *Muhammad Shahid* *Jisong Xie*
Brahmjot Grewal