**Functional Requirement Document**

Project: Xpenditure

**Purpose**: Develop a webapp that allows user to add and manage daily expenses

**Team**

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Email** |
| Garima Sharma | Front-End Developer | [Gsharma6876@conestogac.on.ca](mailto:Gsharma6876@conestogac.on.ca) |
| Prutha Patani | Back-End Developer | [Ppatani8904@conestogac.on.ca](mailto:Ppatani8904@conestogac.on.ca) |
| Sagar Vaiyata | Data Scientist | [Svaiyata6207@conestogac.on.ca](mailto:Svaiyata6207@conestogac.on.ca) |
| Zarana Gohil | DBA | [Zgohil0060@conestogac.on.ca](mailto:Zgohil0060@conestogac.on.ca) |

**Scope:** Xpenditure aims to develop a software application that allows individuals or businesses to track and manage their expenses. The project will include the following key features:

Data entry: Users will be able to input their expenses, including the amount, date, and category of the expense. Categorization: Expenses will be organized into categories, such as transportation, groceries, and entertainment, to allow for easy tracking and analysis of spending patterns.

Budgeting: Users will be able to set budgets for different categories of expenses and track their progress towards these budgets.

Reporting: The application will generate reports that provide insight into spending patterns, such as total expenses by category and month-to-month comparisons.

Accessibility: The application will be available on web for easy access and the responsive web design can be used by any size devices.

Security: The application will be designed with security in mind to ensure user's data is safe and protected.

Xpenditure will be developed using an agile methodology and will be tested for usability and functionality before being released to the public.

Additionally, Xpenditure has Premium subscriptions where the user will be able to predict monthly expenses based on features like regional inflation and previous month expenses.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **Functional Requirement** | **Category** | **Notes** | **Priority** | **Owner** |
|  |  |  |  |  |  |
| **1** | System shall allow visitor to land on landing page | System | The URL is working properly. | High |  |
| **2** | System shall allow new user  to register | User | User shall create new password | High |  |
| **3** | System shall allow existing user to login | User | User shall enter password and username to login | High |  |
| **4** | System shall allow user to verify his/her email | User | User shall verify email to access the features of Application | High |  |
| **5** | System shall allow user to  reset password if he/she forgets password | User | Send reset password link to user’s registered email id | High |  |
| **6** | System shall allow existing user to edit his/her personal  details | User | User can edit name, phone no. etc | Medium |  |
| **7** | System shall allow user to delete his/her account | User | User can only send request  which will be handled by admin | Medium |  |
| **8** | System shall allow user to upgrade the account | User | User can purchase the premium subscription | Low |  |
| **9** | System shall allow user to downgrade the account | User | User can opt out from the subscription | Low |  |
| **10** | System shall allow user to enter expense details | Expense |  | High |  |
| **11** | System shall allow user to  update expense details | Expense |  | High |  |
| **12** | System shall allow user to delete expense details | Expense |  | medium |  |
| **13** | System shall allow user to set monthly budget | Expense |  | High |  |
| **14** | System shall notify when user surpasses monthly budget | Expense |  | High |  |
| **15** | System shall allow user to  record payment method – credit, debit or cash | Expense | User | High |  |
| **16** | System shall display different categories available to user at  the time of adding the expense | Expense | Categories can be like education, grocery, transportation etc. | Medium |  |
| **17** | System shall allow user to edit the expense category | Expense |  | medium |  |
| **18** | System shall allow user to edit  payment method | Expense |  | medium |  |
| **19** | System shall allow user to edit the expense amount | Expense |  | medium |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **20** | System shall allow user to delete the expense | Expense | low |  |
| **21** | System shall display payment  history to user | Payment | medium |  |
| **22** | System shall allow user to  make payment to upgrade his/her account | Payment | high |  |
| **23** | System shall allow premium user to add new categories  for expense | Premium | high |  |
| **24** | System shall allow premium user to edit the categories | Premium | medium |  |
| **25** | System shall allow premium  user to delete the category | Premium | medium |  |
| **26** | System shall display expense summary for current month | User | medium |  |
| **27** | System shall allow user to | User | medium |  |
|  | browse previous months |  |  |
|  | expense summary |  |  |
| **28** | System shall allow user to  choose the format of the report | User | medium |  |
| **29** | System shall allow user to  download the expense report in excel or pdf format | Report | low |  |
| **30** | System shall allow user to generate monthly report/s | Report | medium |  |
| **31** | System shall allow user to  generate weekly report/s | Report | medium |  |
| **32** | System shall allow user to generate daily report/s | Report | medium |  |
| **33** | System shall send a reminder | Budget | high |  |
|  | in case of overspent |  |  |
| **34** | System shall allow user to | report | high |  |
|  | record the date of the |  |  |
|  | transaction |  |  |
| **35** | System shall allow user to edit | user | medium |  |
|  | the data of the transaction |  |  |
| **36** | System shall allow user to set | user | high |  |
|  | saving goals |  |  |
| **37** | System shall allow user to edit | user | medium |  |
|  | saving goal |  |  |
| **38** | System shall allow user to | user | medium |  |
|  | delete saving goal |  |  |
| **39** | Allow users to schedule and track bills and recurring  payments. | report | high |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **40** | System shall send the email  notification for upcoming bill due date | System |  | high |  |
| **41** | System shall allow premuim customers to get daily  expense prediction | report |  | high |  |
| **42** | System shall allow premium customers to get weekly expense prediction | report |  | high |  |
| **43** | System shall allow premium customers to get monthly expense predictions | report |  | high |  |
| **44** | System shall allow premium customers to set monthly saving goal. | expense |  | high |  |
| **45** | System shall identify the highest expenses spent by category. | report |  | medium |  |
| **46** | System shall allow admin to get data of active users | report |  | high |  |
| **47** | Admin shall be able to add or display any offers on premium purchase | Admin |  | low |  |
| **48** | Admin shall be able to delete any offers on premium purchase | Admin |  | low |  |
| **49** | Admin shall have power to determine if new category to be set for all users. | Admin |  | medium |  |
| **50** | Admin shall have power to determine if new category to be deleted for all users. | Admin |  | medium |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **51** | System shall be able to generate bill reminders when premium user fails to make payment | system |  | high |  |
| **52** | System shall be able to logout | system |  | high |  |
| **53** | System shall analyze past transactions to analyze trends | system |  | high |  |
| **54** | System shall predict future income and expenses | prediction |  | high |  |
| **55** | Graph representation for easy understanding | Display |  | low |  |
| **56** | System shall allow user to provide feedback either via email or customer support | User |  | high |  |
| **57** | System shall provide secure data storage for privacy. | system |  | high |  |
| **58** | System shall send notifications before | Admin |  | high |  |
| **59** | System shall advice user where to invest less and were to invest more | prediction |  | high |  |
| **60** | System shall allow user to save their payment method | expense |  | high |  |