



BudgetSimple

USER REQUIREMENTS SPECIFICATIONS

Budget Simple

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Version history

Version	Date	Author(s)	Changes	State
1.0	17.09.2021	Stela Trencheva	Data constraints Backlog with user stories;	Draft

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1. Product Backlog

User Story 1:

Priority: 1

Estimation: 5

As a user, I can register in the application so that I can have access to it

Acceptance criteria:

- I must enter my personal information (first/last name, email, address, phone number, username, password)
- I will make a registration if all the entered details meet the validation criteria

User Story 2:

Priority: 5

Estimation: 2

As a user, I can login in the application so that I can add transactions, see statistics and track my budget

Acceptance criteria:

- I must enter my username and password
- I must try to login
- I can see a warning message if login credentials are incorrect
- I have access to the application if login credentials are correct

User Story 3:

Priority: 9

Estimation: 3

As a user, I can create wallets so that I can track money flows by different topics

Acceptance criteria:

- I can see available wallets
- I must enter the title and description of a new wallet
- I must choose a currency for the new wallet

- I can add the wallet

User Story 4:**Priority: 17****Estimation: 8**

As a user, I can set monthly budget to a wallet so that I track my spending and compare it with a goal

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I must choose to set a budget of the wallet
- I must enter an amount
- I must set the budget
- I can see how much over or below the budget is my spending

User Story 5:**Priority: 13****Estimation: 34**

As a user, I can add transactions to a wallet so that I track each of my spending

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I must choose to add a transaction
- I must enter an amount of the transaction
- I must choose a date of the transaction
- I can select a category
- I can add a description
- I can choose how to split the amount of the transaction if there are multiple people in the wallet

- I can add an image of a bill to the transaction
- I must add the transaction
- I can see updated data in the wallet

User Story 6:

Priority: 21

Estimation: 233

As a user, I can invite people to the wallet so that I can share a wallet with multiple people

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I must generate unique sharable code/URL/QR code
- I must share the code through the most used platforms for communication or copy it

User Story 7:

Priority: 25

Estimation: 144

As a user, I can use an invitation code so that I can enter a wallet

Acceptance criteria:

- I must enter the invitation code
- I must enter username of the person inviting me
- I can enter the wallet

User Story 8:

Priority: 29

Estimation: 610

As a user, I can see how much other members of a wallet spent so I know how much each member owes to the others

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I can see spent money of all members
- I can see spent money per member
- I can see how much I owe to the others
- I can see how much each of the other members owes me

User Story 9:

Priority: 53

Estimation: 377

As a user and owner of a wallet, I can restrict members' activity in a wallet so that some things are not editable from all members

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I can see members of the wallet
- I must choose a member
- I must choose to restrict that member
- The restricted member will not be able to change/set budget and use bonuses/discounts

User Story 10:

Priority: 33

Estimation: 4181

As a user, I can see statistics about how much I/and others have spent so that I know how I manage my money

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I can see transaction and spent money for the whole time
- I can see transactions and spent money per month/week/range of dates
- I can see transactions and spent money per category

User Story 11:**Priority: 37****Estimation: 6765**

As a user, I can see predictions of future months spending so I know how much I might spent according to the previous months

Acceptance criteria:

- I can see available wallets
- I must choose a wallet
- I can see how much I have spent previous months
- The future months are calculated depending of the average of previous months
- I can see predictions for future months

User Story 12:**Priority: 57****Estimation: 13**

As a user, I can rate the application so I share my experience and opinion

Acceptance criteria:

- I can see the survey
- I must choose a rating of 1-5
- I can answer the questions of the survey
- I must submit the rating

User Story 13:**Priority: 61****Estimation: 21**

As an admin, I can see users' feedbacks and suggestions of improvement so that I know how users find it working with the application

Acceptance criteria:

- I can see all submitted user feedbacks
- I can sort the displayed user feedbacks by rating
- I can see each of the feedbacks more detailed
- I can see a report of overall experience based on rating

User Story 14:**Priority: 41****Estimation: 987**

As an admin, I can add discounts and bonuses so that users can unlock them when completing different tasks

Acceptance criteria:

- I can see the list of available bonuses
- I must enter the new bonus info (title, description, link to website)
- I must add a new bonus

User Story 15:**Priority: 45****Estimation: 2584**

As a user, I can fulfill tasks so I can unlock and use bonuses

Acceptance criteria:

- I can see a list of tasks and bonuses related to each of the goals
- I must fulfill a task

- I get access to the bonus/discount code
- I can use this bonus/discount code once

User Story 16:

Priority: 49

Estimation: 1597

As an admin, I can see who has unlocked bonuses so that I can track which tasks users are fulfilling the most

Acceptance criteria:

- I can see the list of available bonuses
- I can see how many times each of them is unlocked
- I can see who has unlocked a bonus
- I can generate a report with most received bonuses and most fulfilled tasks

User Story 17:

Priority: 65

Estimation: 55

As an admin, I can register new customer support employees so that more employees can help users of the application

Acceptance criteria:

- I must enter the information of the new employee (first and last name, address, email, phone number, hourly wage, starting date of work)
- The employee is registered in the system if he doesn't already exist
- Email address with login credentials is sent to the person

User Story 18:

Priority: 69

Estimation: 1

As a customer support, I can change the received from the admin password so I am the only one that knows the password

Acceptance criteria:

- I must enter my previous password
- I must enter the new password two time
- I must update the password

User Story 19:**Priority: 73****Estimation: 17711**

As a user, I can contact customer support so that I can ask a question and get help

Acceptance criteria:

- I must open the live chat
- I can see frequently asked questions
- I can choose to text support
- I must write a message
- I must sent a message

User Story 20:**Priority: 77****Estimation: 28657**

As a customer support, I can answer questions in the live chat so that I can help solve the problems of the users

Acceptance criteria:

- I can get a random customer message
- I get assigned to a ticket of the problem
- I must text the user back
- I must close the ticket if the problem is solved

User Story 21:**Priority: 81****Estimation: 89**

As an admin, I can see how many hours customer support employees have worked so I know how much they should be paid

Acceptance criteria:

- I can see a list of all customer support employees
- I can see individually how many hours each of them has worked
- I can see the dates they have been available by weeks/months/etc.

User Story 22:**Priority: 85****Estimation: 10946**

As a user, I can use a QR code so that I can enter a wallet

Acceptance criteria:

- I must scan the QR code
- I can enter the wallet

User Story 23:**Priority: 100****Estimation: 46368**

As a user, I can take a photo of a bill so that all products and the total amount of the bill are automatically displayed in the transaction description

Acceptance criteria:

- I must upload a photo of a bill
- I must select text that I want to be uploaded
- I can format the text
- I must upload the data from the bill
- I must add the transaction

User Story 24:**Priority: 13****Estimation: 5**

As a user, I can edit my profile information so that I can update it with a relevant one

Acceptance criteria:

- I must go into "Edit mode"
- I can choose which fields to edit
- I must save the updated info
- I see my updated information

User Story 25:**Priority: 9****Estimation: 2**

As a user, I can logout of the application so that I am not in my account when I don't want to use the application any more

Acceptance criteria:

- I must try to logout
- I am redirected to "Sign-in" page

2. Data Constraints

For all users I will store:

1. First name
2. Last name
3. Address (street, street number, zip code, town, country)
4. Personal e-mail address
5. Username
6. Password
7. Date of birth
8. Photo
9. Role

Additional data for all customer service employees:

10. Date of first working day
11. Emergency telephone number
12. Bank account number
13. Hourly wage

For every transaction, I will store:

1. Title
2. Description (Optional)
3. Category (Optional)
4. Amount
5. Date
6. Photo (Optional)
7. Split type between members

For each rating, I will store:

1. Rating (1-5)
2. Questions
3. Answers
4. Additional note


For each bonus, I will store:

1. Title
2. Description
3. Website link
4. Discount
5. Task to be fulfilled

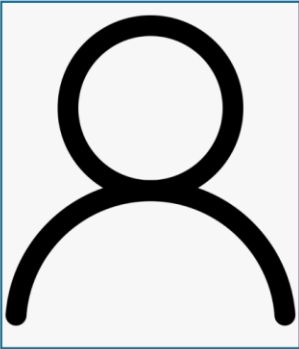
Users in the system:

1. Users of the application
2. Admins
3. Customer support

3. Design

**BudgetSimple**

DashboardWalletsAccountContactSign out



My bonuses
Rate BudgetSimple

Want to close your account? [Deactivate](#)

Names:

Username:


Email:

Phone number:

Address:

Update info

Change password

**BudgetSimple**

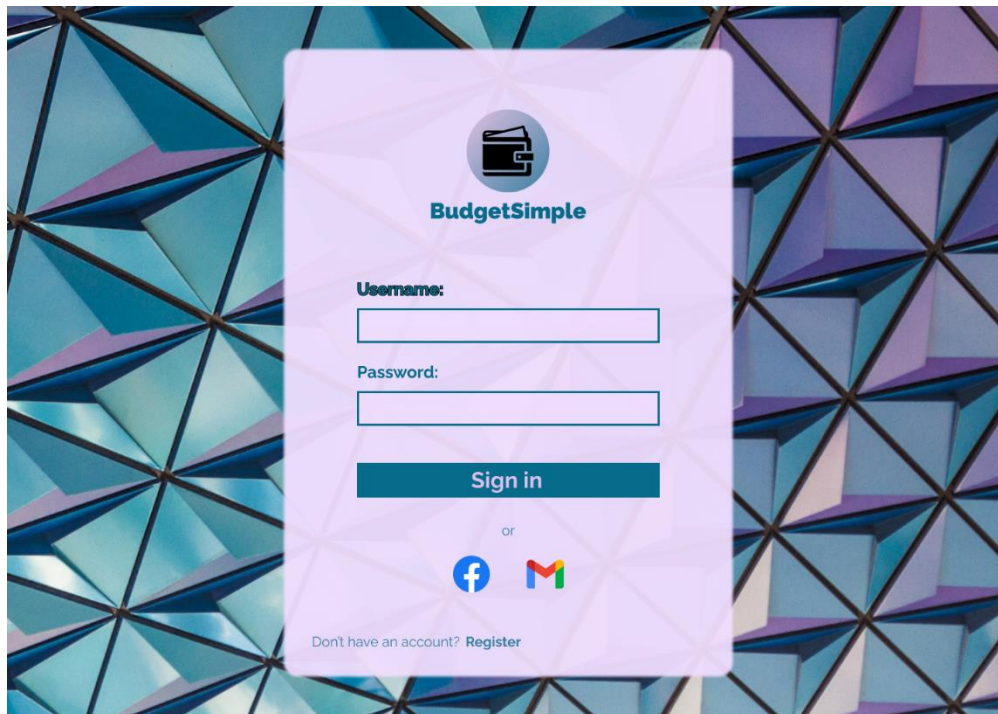
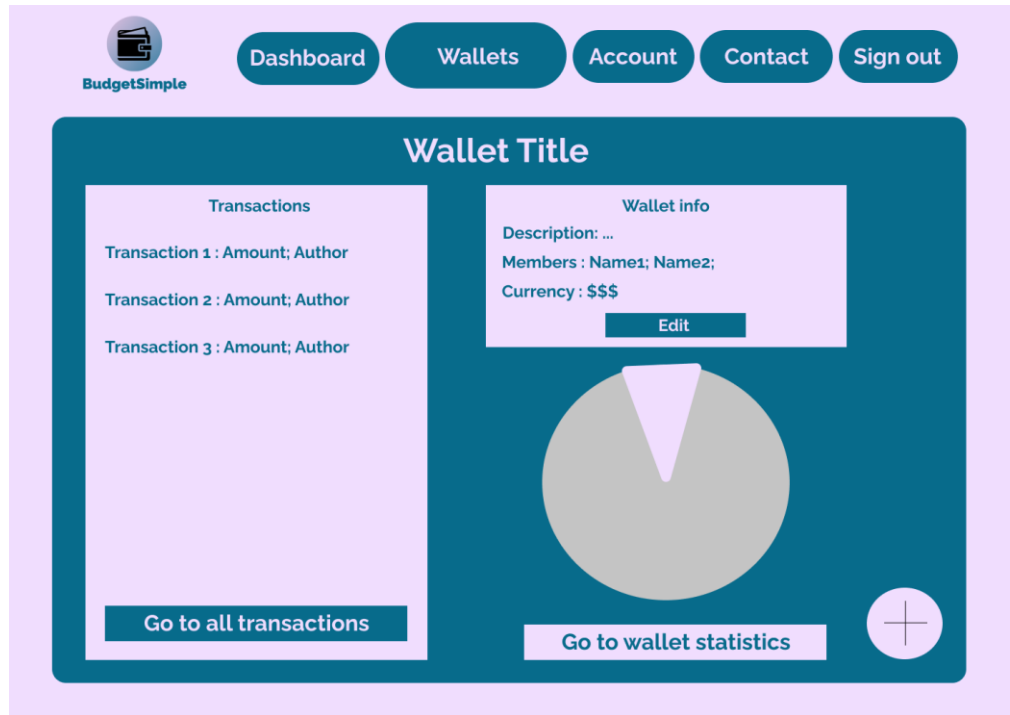
DashboardWalletsAccountContactSign out

Chat

Me: Question...
Employee: Answer...
Me: Question 1...

Write here...Send

Go to frequently asked questions





BudgetSimple

Dashboard

Wallets

Account

Contact

Sign out

Wallet 1: Name

Wallet 2: Name

Go to wallets

Your spending: \$\$\$

Category with most spending: ...

Month with highest spending: ...

Go to spending statistics

Ticket 1: Title

Ticket 2: Title

Go to chat

Task 1: Title

Task 2: Title

Earn bonuses