

# Personal Finance Tracker

## Project description

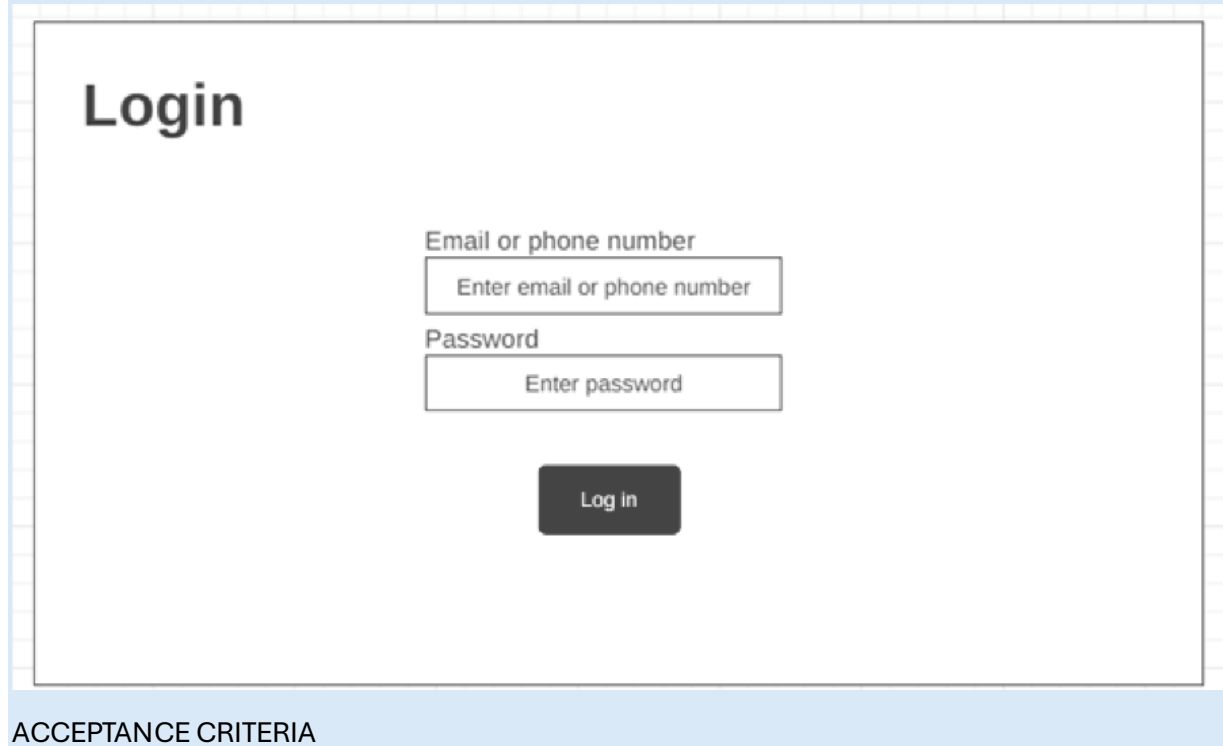
The personal finance tracker is an application you can use to manage your bank accounts. Users are able to log in, create multiple bank accounts and even share it with others, but the owner has the most authority over the bank account. The application allows users to make transactions to others. A person can set up budget goals so that application can give advice: the tracker will tell the person how much money he still needs in order to reach his goal, or how much he is allowed to spend. The user also has the ability to look through all of his expenses/income and sort them by certain amounts, names or dates. Additionally, there are bank administrators that can manage bank accounts and delete users to keep the application safe.

# User stories

## STORY – LOGIN PAGE

As a user,  
I'm able to log into my account,  
So that I can access my bank accounts.

### WIREFRAME



The wireframe shows a login page layout. At the top left, the word "Login" is displayed in a large, bold font. Below it, centered, are two input fields. The first is labeled "Email or phone number" and contains the placeholder text "Enter email or phone number". The second is labeled "Password" and contains the placeholder text "Enter password". Below these fields is a dark rectangular button labeled "Log in". The entire form is enclosed in a light blue border.

### ACCEPTANCE CRITERIA

- User can log in with his credentials.
- Login validation: email address and password have to be correct, if one of them is wrong send a warning.
- After a successful login the user is brought to the main page.

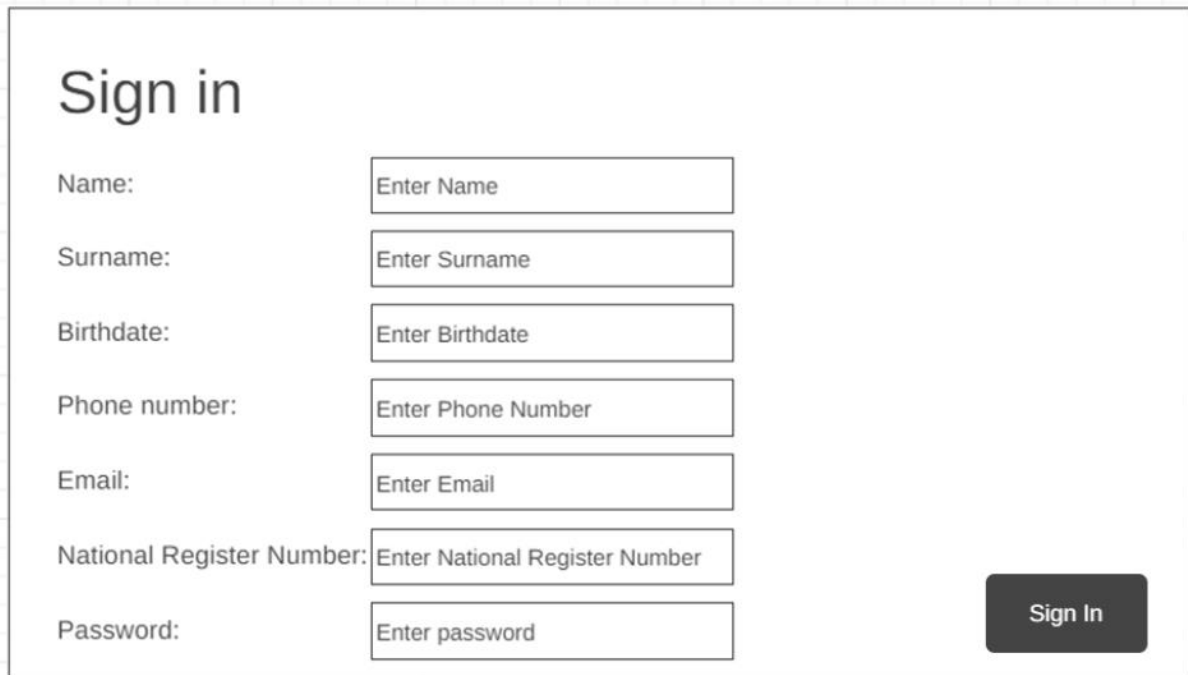
## STORY – CREATE ACCOUNT

As a new client,

I'm able to create an account,

So that I can create and manage my back accounts.

### WIREFRAME



The wireframe shows a 'Sign in' form with the following fields and labels:

- Name: Enter Name
- Surname: Enter Surname
- Birthdate: Enter Birthdate
- Phone number: Enter Phone Number
- Email: Enter Email
- National Register Number: Enter National Register Number
- Password: Enter password

A 'Sign In' button is located at the bottom right of the form.

### ACCEPTANCE CRITERIA

- User has to enter his name, surname, birthdate, phone number, email address and national register number.
- Only one account can be created with email address/national register number.
- User can choose his own password.
- Validation on user information and password.
- User can immediately log in with his email address/phone number and password after creating an account.
- Password needs to be at least 8 characters long, with a number, an uppercase letter, a lowercase letter and a special character.

## STORY – UPDATE ACCOUNT

As a user,

I'm able to update my account information,

So that user information is correct.

### WIREFRAME

The wireframe shows a 'Settings' page with the title 'Settings' in a large, bold font. Below the title is the subtitle 'Update account settings'. There are four input fields labeled 'Name:', 'Surname:', 'Phone number:', and 'Email:'. Each label is followed by a rectangular input box. Below these fields is a dark gray button with the text 'Confirm' in white.

### ACCEPTANCE CRITERIA

- A user can change account information.
- User cannot change his name, birth date (age) and national register number.
- After updating information, application automatically changes user information from all accounts that have the user in their contacts.

## STORY – VIEW BANK ACCOUNT

As a user,  
I'm able to see a certain bank account,  
So that I can see my bank account in more detail.

### WIREFRAME

The wireframe shows a user interface for viewing a bank account. It features a title 'Bank account name' at the top left. Below the title is a table with six rows of transaction data. To the right of the table, there are two lines of text: 'Status: Open' and 'Shared contacts: user1, user2, ...'.

Transaction made by user1	Amount
	+900
	-500
	+100
	-200
	-50
	-200

Status: Open  
Shared contacts: user1, user2, ...

### ACCEPTANCE CRITERIA

- User can see all his expenses and income on the bank account.
- The user can see the status of the bank account (open, blocked, frozen and closed).

## STORY – UPDATE BANK ACCOUNT

As a user,

I'm able update a bank account,

So that I can change certain aspects of the bank account

### WIREFRAME

## Bank Account Name Settings

Change contacts:

User1	-
User2	-
User3	+

Freeze bank account: ☐ Freeze

Close bank account: ☐ Close

Enter password

Confirm

### ACCEPTANCE CRITERIA

- The user can change the status of the bank account

## STORY – UPDATE BANK ACCOUNT STATUS

As an administrator,

I'm able to update the status of a bank account,

So that I can help the owner when he isn't able to do it himself.

### WIREFRAME

The wireframe shows a settings page titled "Bank Account Name Settings Of User0". It contains three rows of settings, each with a label and a radio button option:

- "Freeze bank account:" with an "Unfreeze" radio button.
- "Close bank account:" with an "Open" radio button.
- "Block bank account:" with "Block" and "Unblock" radio buttons.

Below these settings is a text input field labeled "Add a note". At the bottom left is a dark "Confirm" button.

### ACCEPTANCE CRITERIA

- The administrator can (un)block the bank account
- The administrator can unfreeze the bank account, if the user froze it.
- The administrator can open the bank account, if the user had closed it.

## STORY – DELETE BANK ACCOUNT

As an owner,

I'm able to delete a bank account,

So that I don't have to manage it.

### WIREFRAME

The wireframe shows a form titled "Bank Account Name Settings". It includes a "Change contacts:" section with a table listing "User1", "User2", and "User3" with minus, minus, and plus icons respectively. Below this are two radio button options: "Freeze bank account:" with a "Freeze" option, and "Close bank account:" with a "Close" option. A text input field labeled "Enter password" is positioned next to the "Close" option. A dark "Confirm" button is located below the radio buttons. At the bottom, there is a label "Enter password to confirm deletion:" followed by a "Password" input field and a red "Delete Bank account" button.

Bank Account Name Settings							
Change contacts:	<table border="1"><tr><td>User1</td><td>-</td></tr><tr><td>User2</td><td>-</td></tr><tr><td>User3</td><td>+</td></tr></table>	User1	-	User2	-	User3	+
User1	-						
User2	-						
User3	+						
Freeze bank account:	<input type="radio"/> Freeze						
Close bank account:	<input type="radio"/> Close						
	<input type="text" value="Enter password"/>						
<input type="button" value="Confirm"/>							
Enter password to confirm deletion: <input type="text" value="Password"/>							
<input type="button" value="Delete Bank account"/>							

### ACCEPTANCE CRITERIA

- The owner can delete a bank account, if the status is closed. When deleting it, the owner has to enter his password.
- After deleting the bank account, the application will remove it from every user that used this bank account.



## STORY – MAIN PAGE

As a user,  
I'm able to see all bank accounts,  
So that I can manage them on the main page.

## WIREFRAME

### Main Page

Bank account 1 200 Open	Bank account 3 10000 Open
Bank account 2 500 Frozen	Bank account 4 Balance: 1900 Open

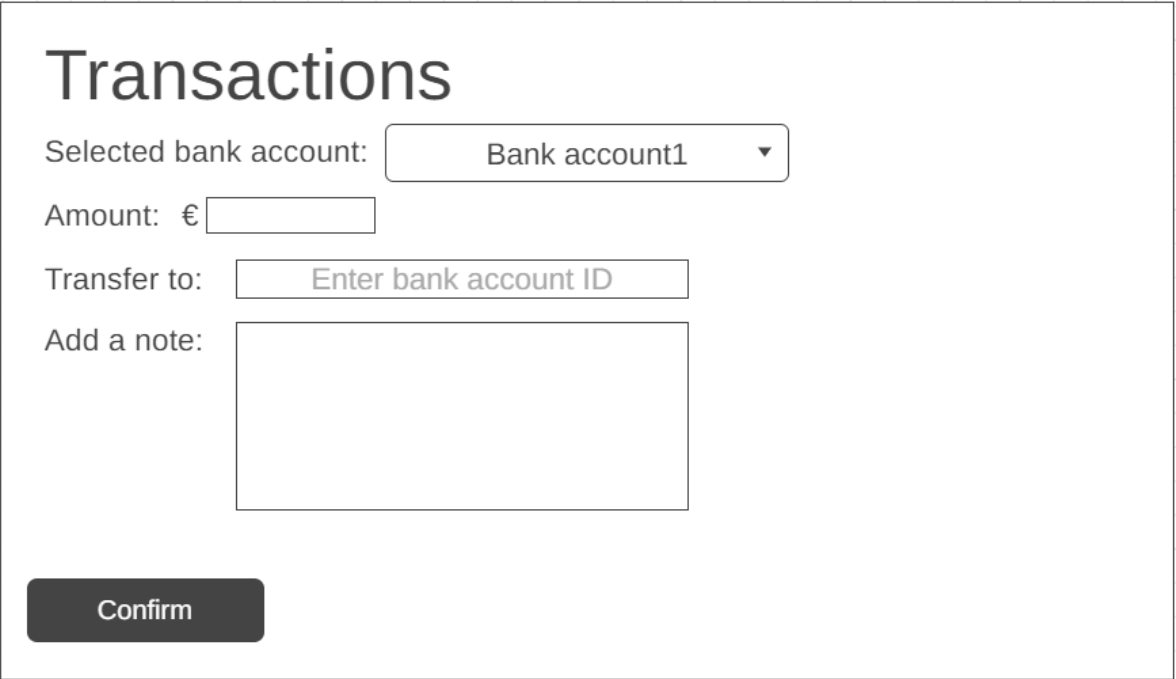
## ACCEPTANCE CRITERIA

- The user can see all bank accounts he has or that are shared with him.
- The name, status and balance of the bank accounts are visible on the main page.
- The user can click on the bank accounts that redirect them to a more detailed page of the bank account.

## STORY – TRANSACTION PAGE

As a user,  
I'm able to access the transaction page,  
So that I can make transactions to other accounts

### WIREFRAME



The wireframe shows a page titled "Transactions". It contains the following elements:

- A label "Selected bank account:" followed by a dropdown menu showing "Bank account1" with a downward arrow.
- A label "Amount: €" followed by a text input field.
- A label "Transfer to:" followed by a text input field containing the placeholder text "Enter bank account ID".
- A label "Add a note:" followed by a larger text area.
- A dark grey button labeled "Confirm" at the bottom left.

### ACCEPTANCE CRITERIA

- The user can enter a number in, but the number cannot be higher than the balance of this bank account or negative.
- The user can transfer money to another account that he owns or to someone else's account. The money is immediately taken from the account and transferred to the other bank account.

## STORY – SORTING INCOME PAGE

As a user,

I'm able to access a sorting page of a certain bank account,

So that I can check for more detailed information.

### WIREFRAME

Income of Bank account1

Filter by

From user3	+ 2400	11/01/2011
From user2	+ 2400	11/01/2011
From user3	+ 2400	10/10/2010
From user5	+ 2400	01/01/2010

### ACCEPTANCE CRITERIA

- The user can sort by certain dates, amounts and ID of bank accounts.
- Validation on date: cannot be in the future.
- Validation on amount: cannot be negative.
- Validation on ID: if no ID has been found return an error.

## STORY – SORTING EXPENSE PAGE

As a user,

I'm able to access a sorting page of a certain bank account,

So that I can check for more detailed information.

### WIREFRAME

Expenses of Bank account1		
Filter by	user name ▼	user3
From user3	- 100	11/01/2011
From user3	- 50	11/01/2011
From user3	- 1000	10/10/2010
From user3	- 500	01/01/2010

### ACCEPTANCE CRITERIA

- The user can sort by certain dates, amounts and ID of bank accounts.
- Validation on amount: cannot be negative.
- Validation on ID: if no ID has been found return an error.
- The user can see an expense overview.