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

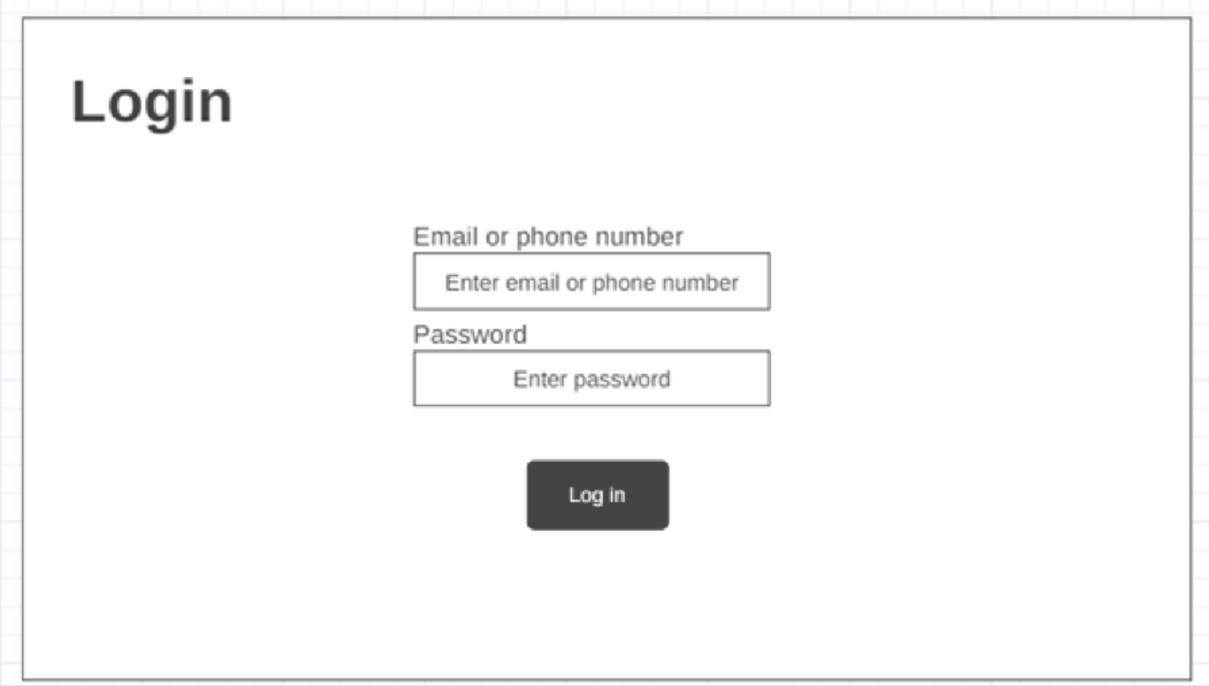
STORY – LOGIN PAGE

As a user,

I'm able to log into my account,

So that I can access my bank accounts.

WIREFRAME



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.

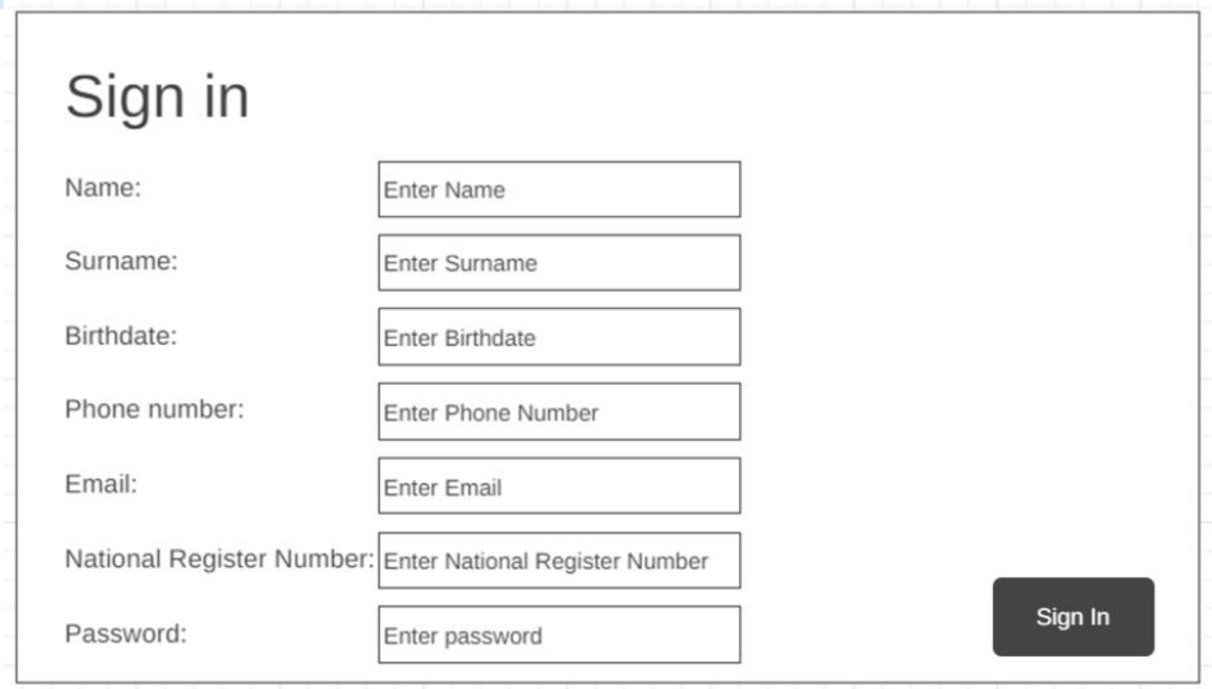
STORY – CREATE ACCOUNT

As a new client,

I'm able to create an account,

So that I can create and manage my back accounts.

WIREFRAME



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

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.

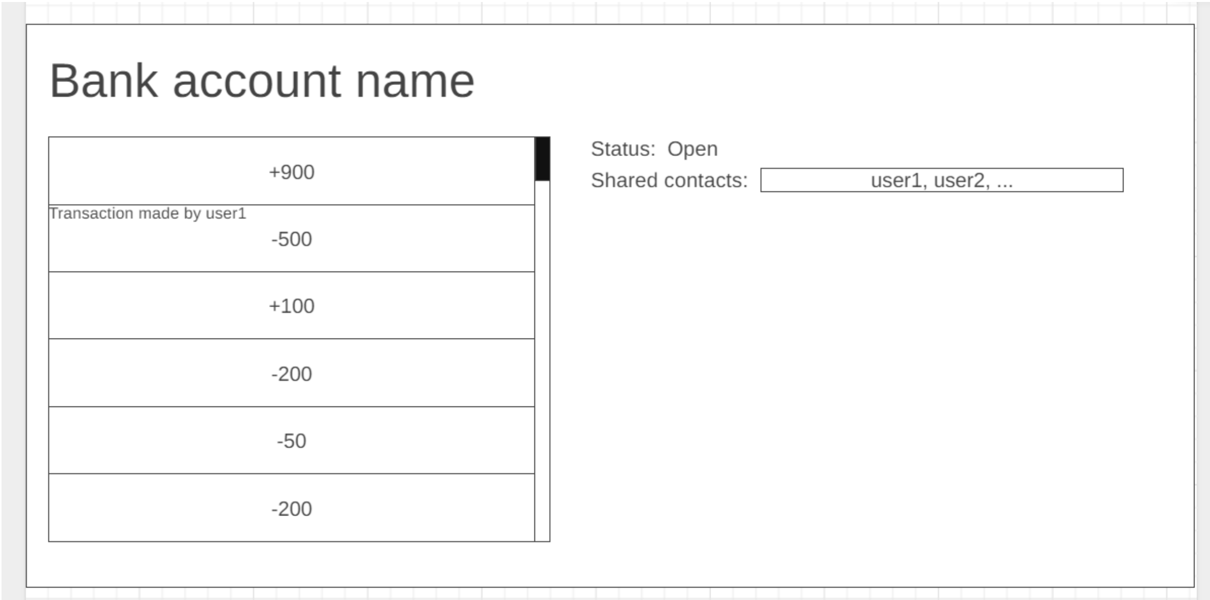
STORY – VIEW BANK ACCOUNT

As a user,

I'm able to see a certain bank account,

So that I can see my bank account in more detail.

WIREFRAME



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).

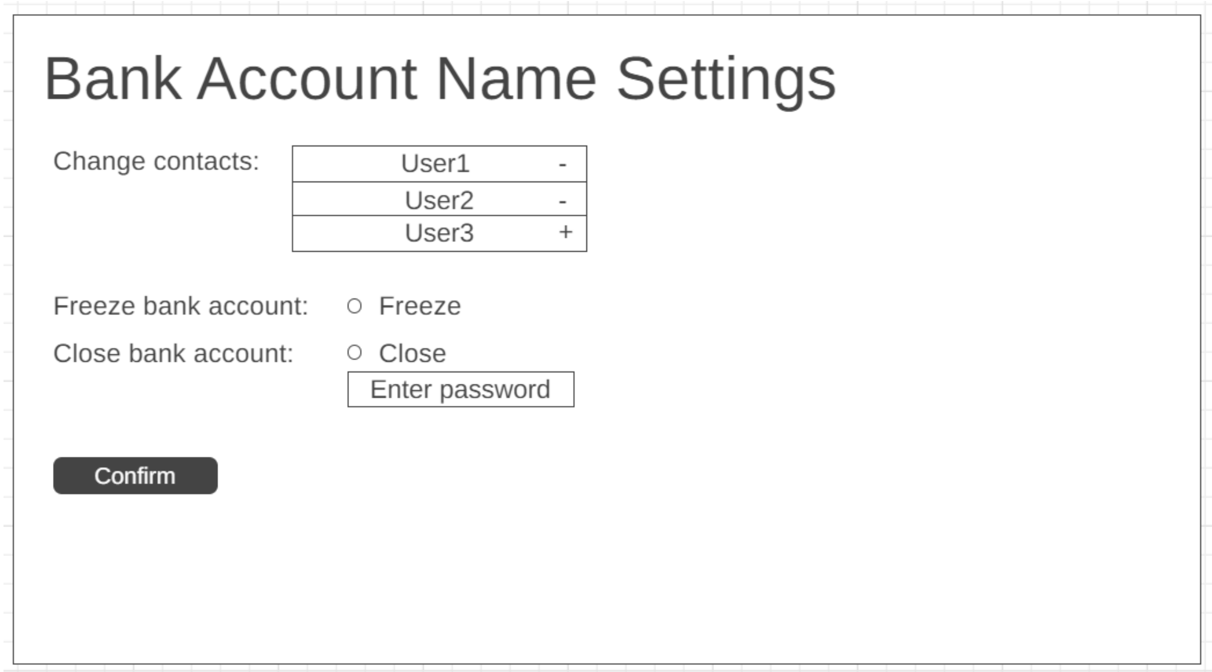
STORY – UPDATE BANK ACCOUNT

As a user,

I'm able update a bank account,

So that I can change certain aspects of the bank account

WIREFRAME



ACCEPTANCE CRITERIA

- The user can change the status of the bank account

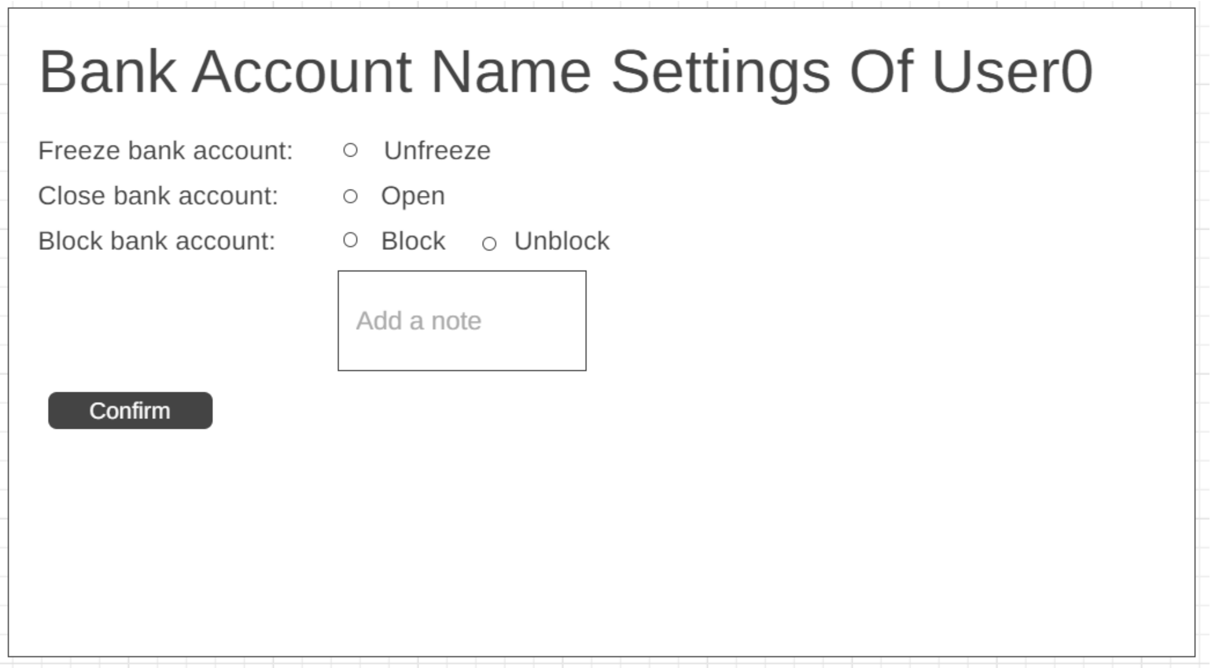
STORY – UPDATE BANK ACCOUNT STATUS

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



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.

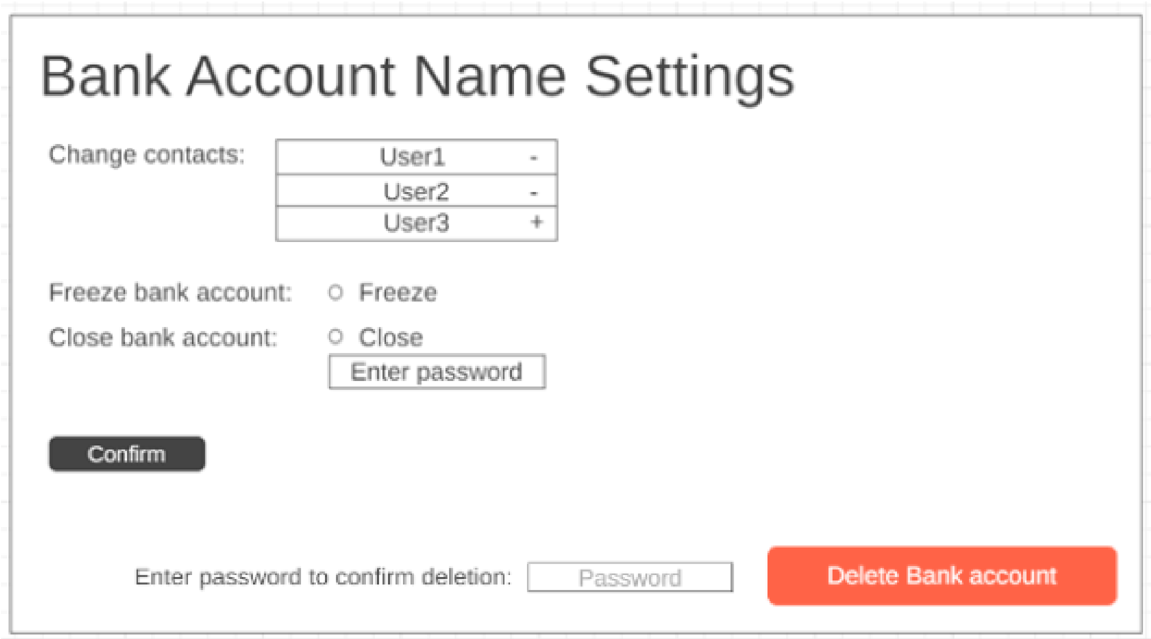
STORY – DELETE BANK ACCOUNT

As an owner,

I'm able to delete a bank account,

So that I don't have to manage it.

WIREFRAME



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.

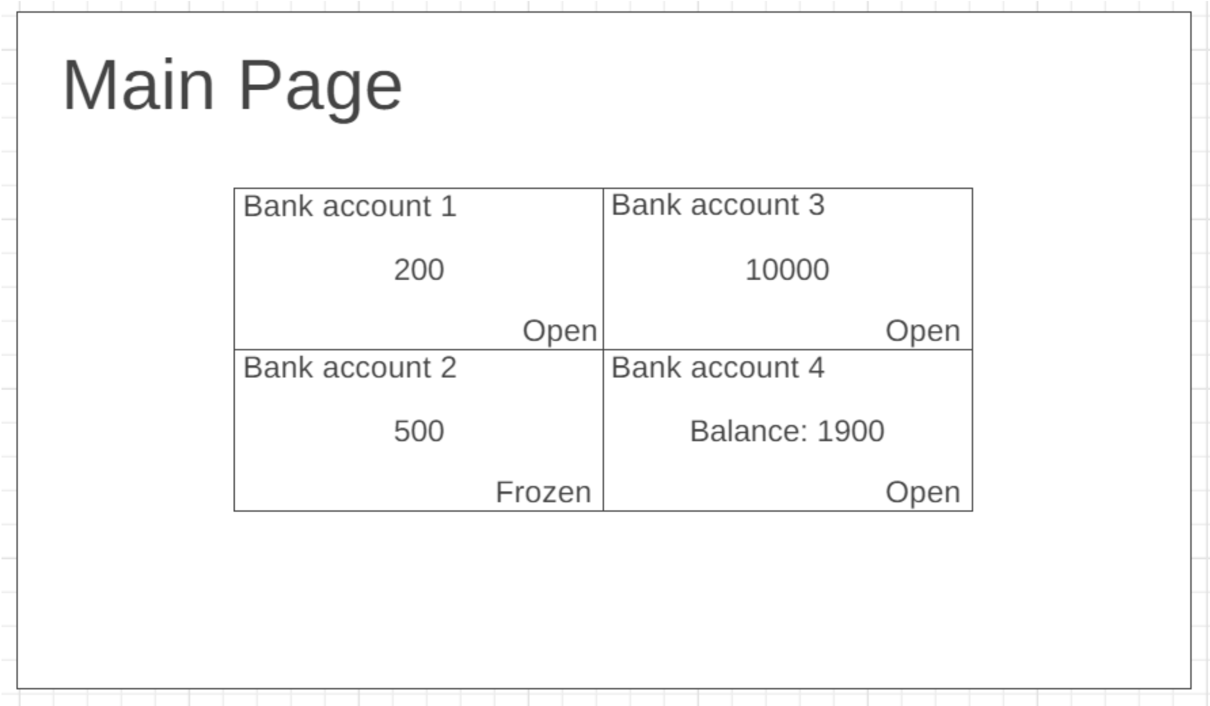
STORY – MAIN PAGE

As a user,

I'm able to see all bank accounts,

So that I can manage them on the main page.

WIREFRAME



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.

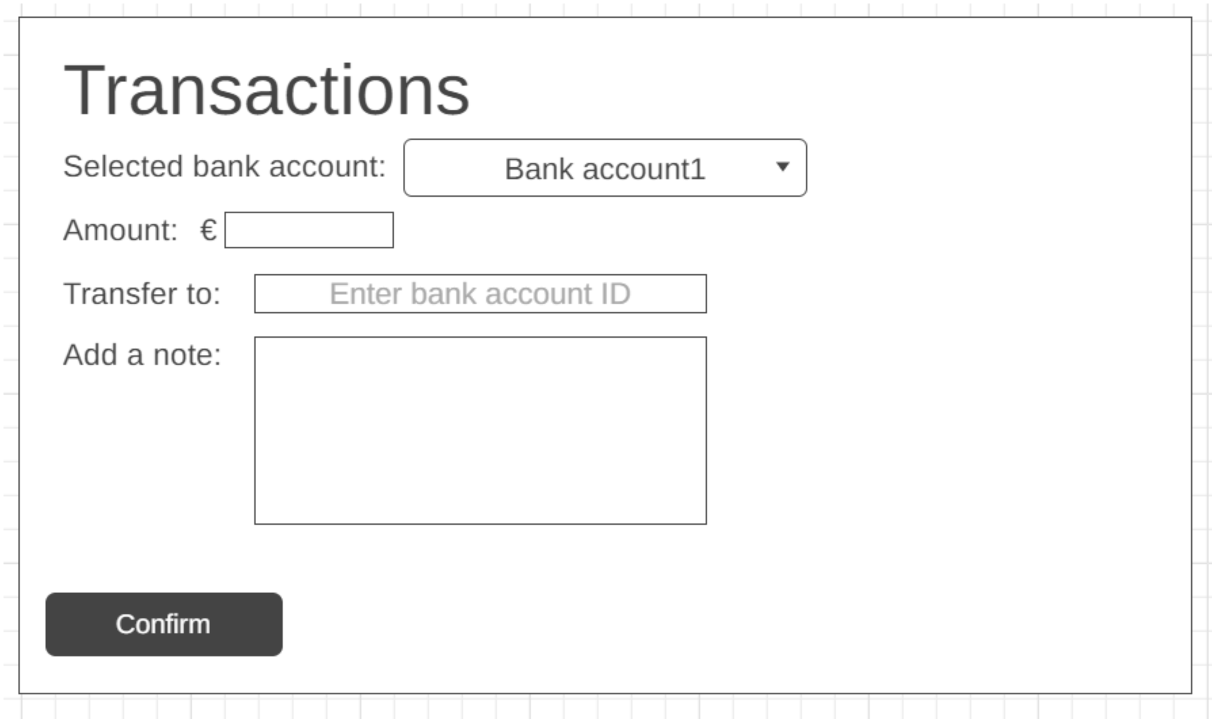
STORY – TRANSACTION PAGE

As a user,

I’m able to access the transaction page,

So that I can make transactions to other accounts

WIREFRAME



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.

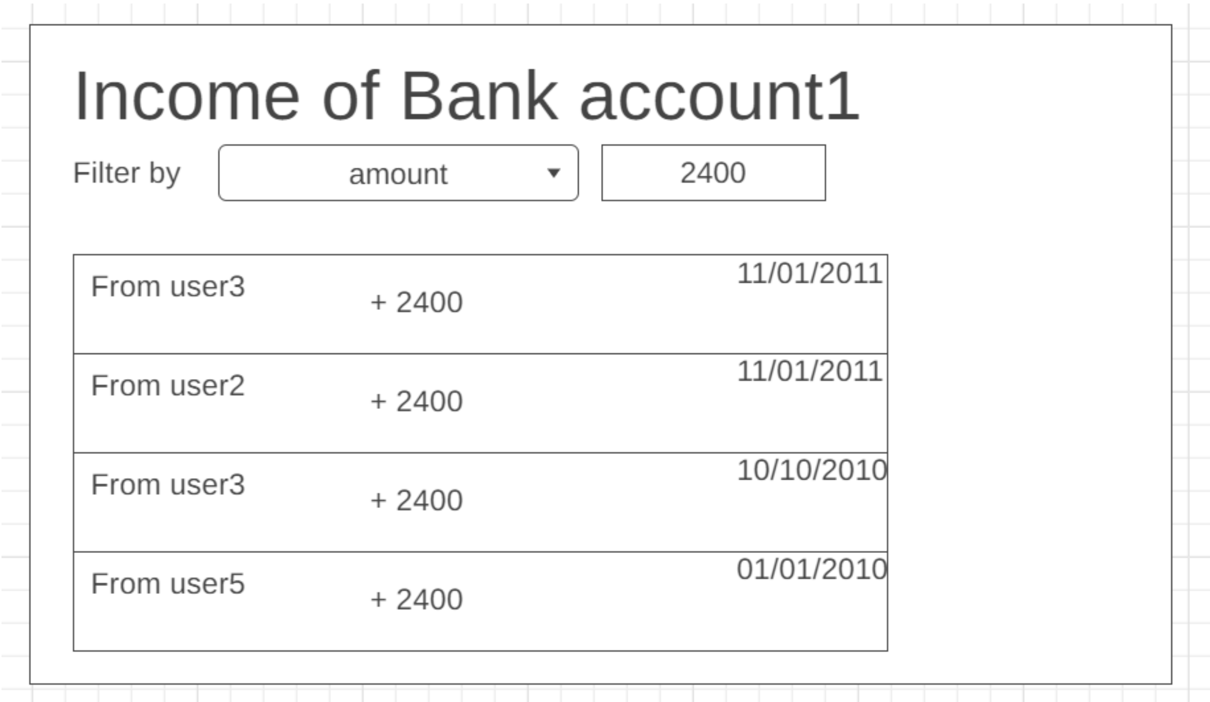
STORY – SORTING INCOME PAGE

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



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.

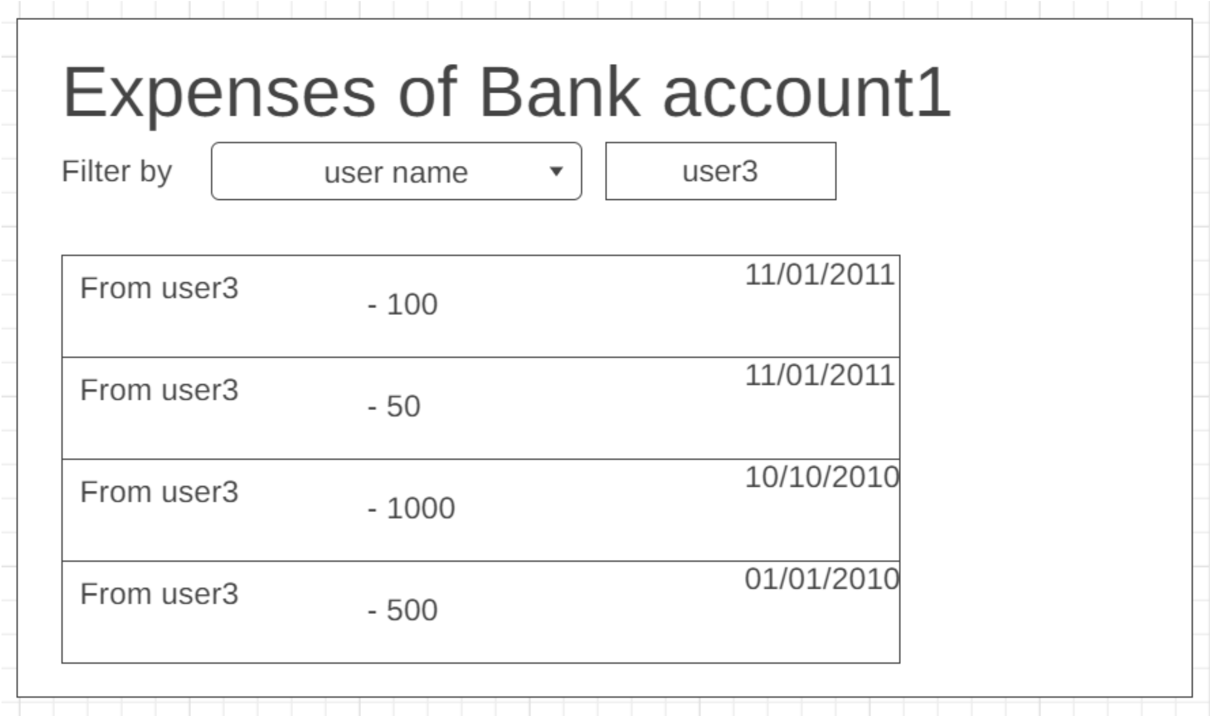
STORY – SORTING EXPENSE PAGE

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



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.