

## **Deliverable 1- SENG2021**

### **PROBLEM STATEMENTS:**

1. No platform exists to receive personalised rewards and schemes determined by an individual's transaction history.
2. There is no easy way to access tips suggested by Macquarie Bank in order to optimise savings.
3. There is no way to view visual depictions and further analyse an individual's foregone and upcoming expenses and savings.
4. No platform exists to predict customers' future savings and expenses deduced by their salary and transaction history.
5. There is no easy way to locate the closest Macquarie Bank branches and atms.
6. There is no feature to compare customers' expenses to those in the same age bracket.

### **FEATURES:**

<b>Theme:</b>	<b>Feature:</b>
Personalised Schemes	1. Receive personalised rewards and schemes which are based on an individual's transaction history.
Tips	2. Easily access tips provided by Macquarie Bank.
Categorised Expenditure and account Balance	3. Visual depictions and analysis of an individual's transaction history <ol style="list-style-type: none"> <li>a. View monthly account balance and expenditure in the form of a graph.</li> <li>b. View categorised yearly and monthly spendings in the form of a pie chart.</li> <li>c. View a customer's transaction history based on categories</li> </ol>
Projected Savings/Expenses	4. Predict customers' savings and expenses deduced by their salary and transaction history.
MQ Locations	5. Locate the closest Macquarie Bank branches and atms.
Comparisons	6. Compare our categorised expenses to that of an average person in the same age bracket.
Log in	7. Ability to log in to the account.

Log out	8. Ability to log out of the
Payment Reminders	9. Ability to set and schedule payment reminders <ul style="list-style-type: none"> <li>a. View all upcoming payments in the form of a calendar.</li> <li>b. Send reminders through the calendar for upcoming scheduled payments.</li> <li>c. Ability to view, edit and delete reminders</li> </ul>

## USER STORIES:

### 1) Feature: 1

**As a:** Macquarie client

**So that:** I am aware of all the exciting offers provided by the bank and further able to make use of all of them

**I want to:** know about the schemes and offers my Bank provides

**GIVEN** I am logged in on the website and want to know the offers my bank provides

**WHEN** I click on the “Offers and Schemes” which is the 5th button on the Toggle

Menu

**THEN** A page with all the offers provided by the bank comes up in a tabular format

**WHEN** I click on a particular offer

**THEN** I am directed to the Macquarie bank website which gives me more information about that particular offer

### 2) Feature: 2

**As a:** Macquarie client

**So that:** I am able to optimise my expenses and savings

**I want to:** know any tips offered by Macquarie Bank that will help me spend and save more efficiently.

**GIVEN** I am on the website and want to know what tips are available

**WHEN** I click on “Tips” which is the 6th button on the toggle menu

**THEN** A page with 6 youtube videos (by Macquarie Bank), each featuring a distinct tip, will come up on the screen.

**WHEN** I click on a particular video

**THEN** that video will start to play on the same screen in a small window (which has the additional feature to be expanded)

### 3) Feature: 3a

**As a:** Macquarie client

**So that:** I am able to view and visualise my monthly expenditure and account balance

**I want to:** view a bar graph of my spendings for the year, categorised monthly

**GIVEN** I am logged in on the website and want to view a summary of my transaction history

**WHEN** I click "Profile", which is the first button on the toggle menu

**THEN** I will be directed to my profile page which will show two graphs; one for my account balance and one for my expenditure for the last 12 months

**WHEN** I hover over each bar in the graph

**THEN** dependent on the graph, my exact spending or account balance for that month will appear.

4) **Feature: 3b**

**As a:** Macquarie client

**So that:** I am able to visualise a categorised summary of my transaction/spending history

**I want to:** view a pie chart of my spendings for the year ( or month) categorised by essentials such as food, travel, petrol etc.

**GIVEN** I am logged in on the website and want to view my transactions

**WHEN** I click "Expenditure" which is the 2nd button on the toggle bar at the top of the page

**THEN** a pie chart depicting my spendings, over a set period of time, and a list of transactions will appear

**WHEN** I change the length of time for my transactions

**THEN** my pie chart will change to illustrate my transactions for the duration chosen.

5) **Feature: 3c**

**As a:** Macquarie client

**So that:** I am able to understand the details (what and how much) of my expenditure within a particular category

**I want to:** view my transaction history by category

**GIVEN** I am logged in on the website and want to view my transactions

**WHEN** I click the "Expenditure" button which is the 2nd button on the toggle menu at the top of the page

**THEN** a pie chart depicting my spendings in the year and a list of transactions will appear

**WHEN** I click on a particular category on the pie chart

**THEN** my transaction history for that particular category in the last year will appear.

**WHEN** I click the monthly button on the top left of the screen

**THEN** my transaction history for that particular category in the last month will appear.

**WHEN** I click the yearly button on the top left of the screen

**THEN** my transaction history for that particular category in the last year will appear.

6) **Feature: 4**

**As a:** Macquarie client

**So that:** I am able to better understand my future savings and expenses

**I want to:** View my projected savings and expenses based on my transaction history.

**GIVEN** I am logged in on the website and want to view my calendar

**WHEN** I click the “Projections” button which is the 4th button on the toggle menu at the top of the page

**THEN** two graphs will appear, depicting the predicted savings or expenditure for the next 12 months

7) **Feature: 5**

**As a:** Macquarie client

**So that:** I am aware of the fastest way to receive help and/or use relevant MQ bank services at a given location

**I want to:** be able to locate the nearest branches and atms.

**GIVEN** I am logged in on the website and want to learn more about Macquarie’s services

**WHEN** I click the “More Information” button which is the 1st button on the toggle menu at the top of the page

**THEN** a map will appear on the screen

**WHEN** I enter my location on the right side of the screen

**THEN** the map will suggest nearby Macquarie Bank atms and branches

8) **Feature: 6**

**As a:** Macquarie client

**So that:** I am able to compare and reflect on my expenses

**I want to:** view the differences between my categorised expenses and that of the average person in the same age bracket

**GIVEN** I am logged in on the website and want to view the comparisons

**WHEN** I click the “Expenditure” button which is the 2nd button on the toggle menu at the top of the page

**THEN** a table will appear showing the differences between my expenses and that of the average person in the same age bracket per category.

9) **Feature: 7**

**As a:** Macquarie client

**So that:** My Bank and Transaction details are secured

**I want to:** Login into my account using Client\_Id and password

**GIVEN** that I am on the login page of the website

**WHEN** I click on the login field I am directed to the Macquarie Bank login page

**THEN** I enter my login details

**WHEN** I authorise the website to access my account

**THEN** I should be able to gain access to my personalised account within the website

10) **Feature: 8**

**As a:** Macquarie client

**So that:** No one else can get access to my account details

**I want to:** Logout of my account

**GIVEN** that I want to end the session

**WHEN** I click on the logout field

**THEN** All my data is securely removed from the website

**AND** I am logged out of my Macquarie bank account

11) **Feature:** 9a

**As a:** Macquarie client

**So that:** I am able to see any upcoming payment reminders and plan accordingly

**I want to:** View all upcoming payments in a calendar format

**GIVEN** I am logged in on the website and want to view my calendar

**WHEN** I click the "Payment Reminders" button which is the 3rd button on the toggle menu at the top of the page

**THEN** a calendar, which will give me the ability to create new reminders, and a list of all my reminders will appear

**WHEN** I hover and scroll on the google calendar

**THEN** my foregone and scheduled payment reminders will appear

12) **Feature:** 9b

**As a:** Macquarie client

**So that:** I am able to see any upcoming payment reminders and plan accordingly

**I want to:** Create scheduled payments

**GIVEN** I am logged in on the website and want to view my calendar

**WHEN** I click the "Payment Reminders" button which is the 3rd button on the toggle menu at the top of the page

**THEN** a calendar, box to create new reminder and a list of reminders will appear

**WHEN** I fill in the company's name, description and frequency and click send at the bottom right of the box

**THEN** I am able to create a scheduled reminder.

**WHEN** I click on the edit button on the right

**THEN** I am able to change the name, description or frequency of the reminder

13) **Feature:** 9c

**As a:** Macquarie client

**So that:** I am able to know and plan for my upcoming expenses

**I want to:** View, edit and delete scheduled payments in a calendar.

**GIVEN** I am logged in on the website and want to view my calendar

**WHEN** I click the "Payment Reminders" button which is the 3rd button on the toggle menu at the top of the page

**THEN** a calendar, a form that allows you to create new reminders, and a list of current reminders will all simultaneously appear

**WHEN** I scroll down to the bottom of the page

**THEN** I am able to view all my scheduled reminders.

**WHEN** I click on the edit button on the right of the chosen reminder

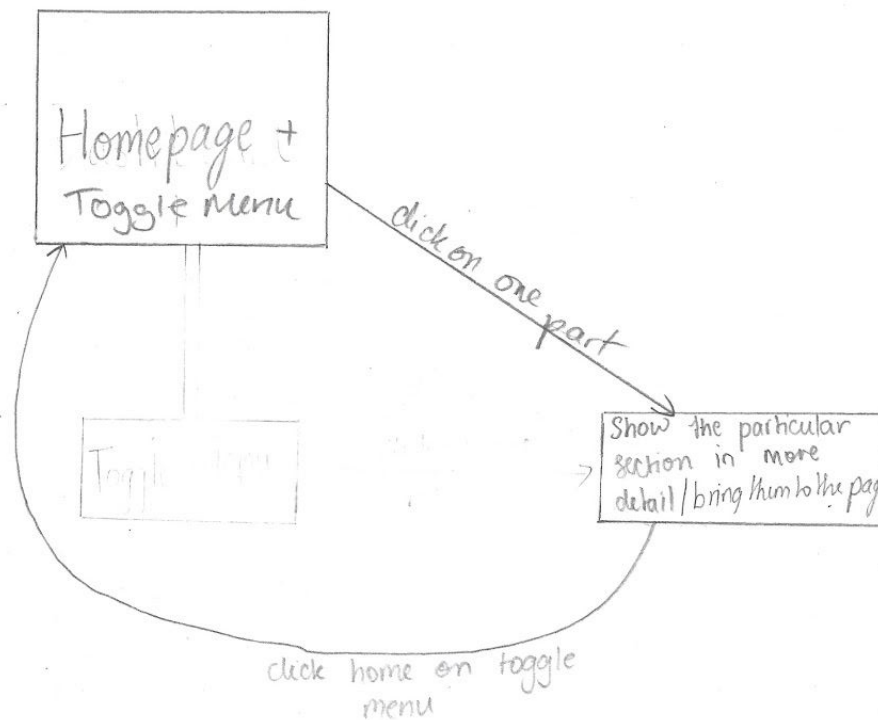
**THEN** I am able to change the name, description or frequency of the reminder

**WHEN** I click the delete button on the right of the chosen reminder


**THEN** the reminder will be deleted

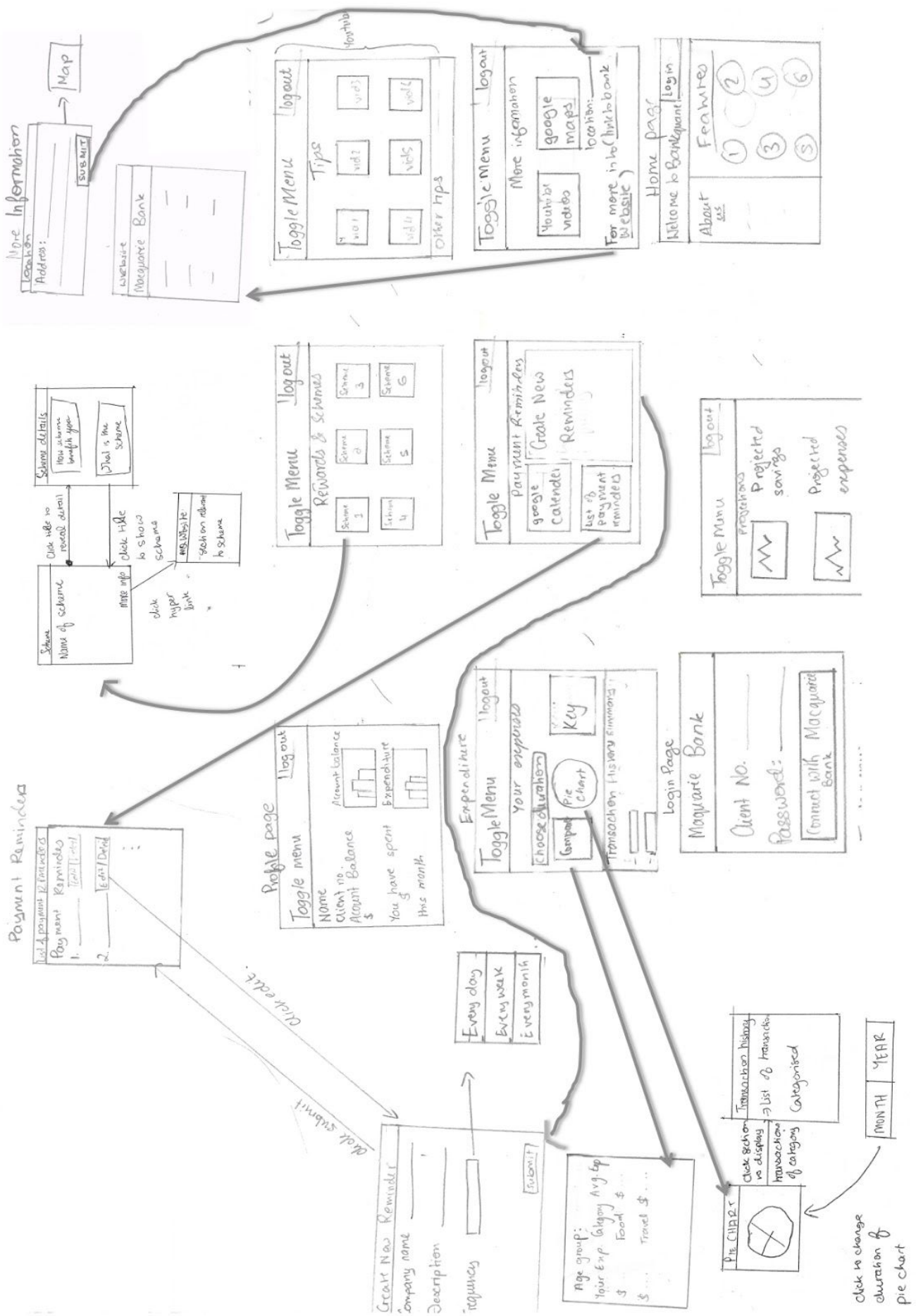
## LOW FIDELITY:

### 1) Storyboard Interactions + UI Component Sketches:

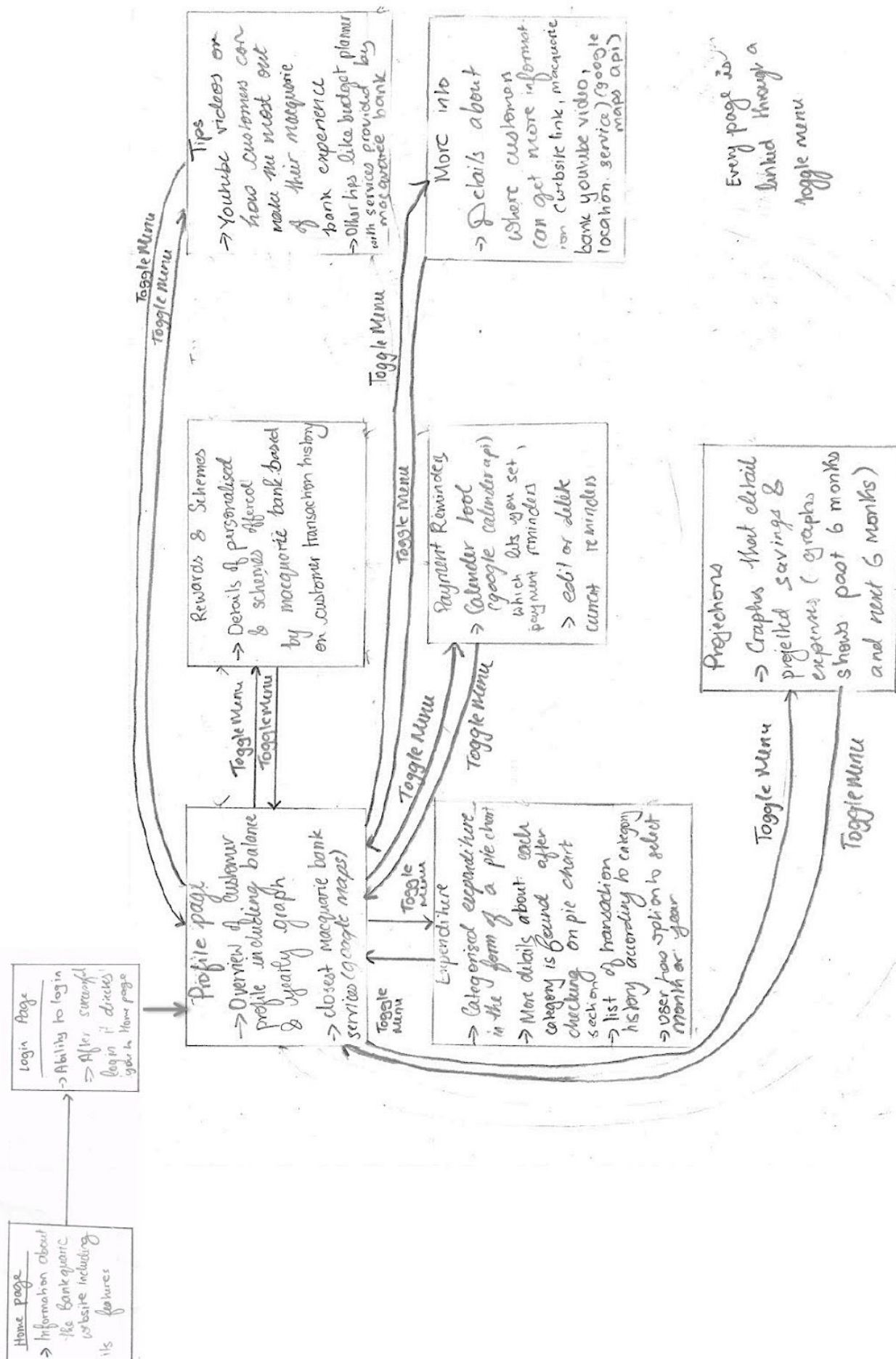


### Toggle bar

	My profile	Expenditure	Payment Reminders	Projections	Offers and schemes	Tips	Contact Macquarie	More info	Log out
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## Storyboard Interactions Graphs:



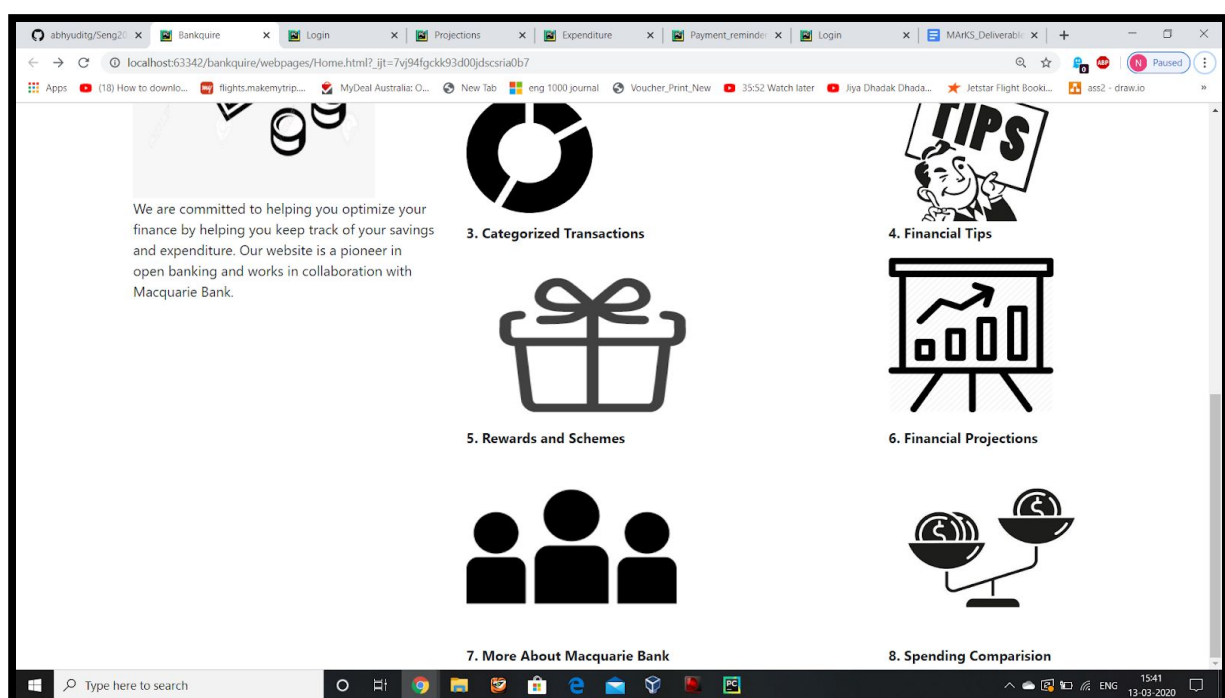
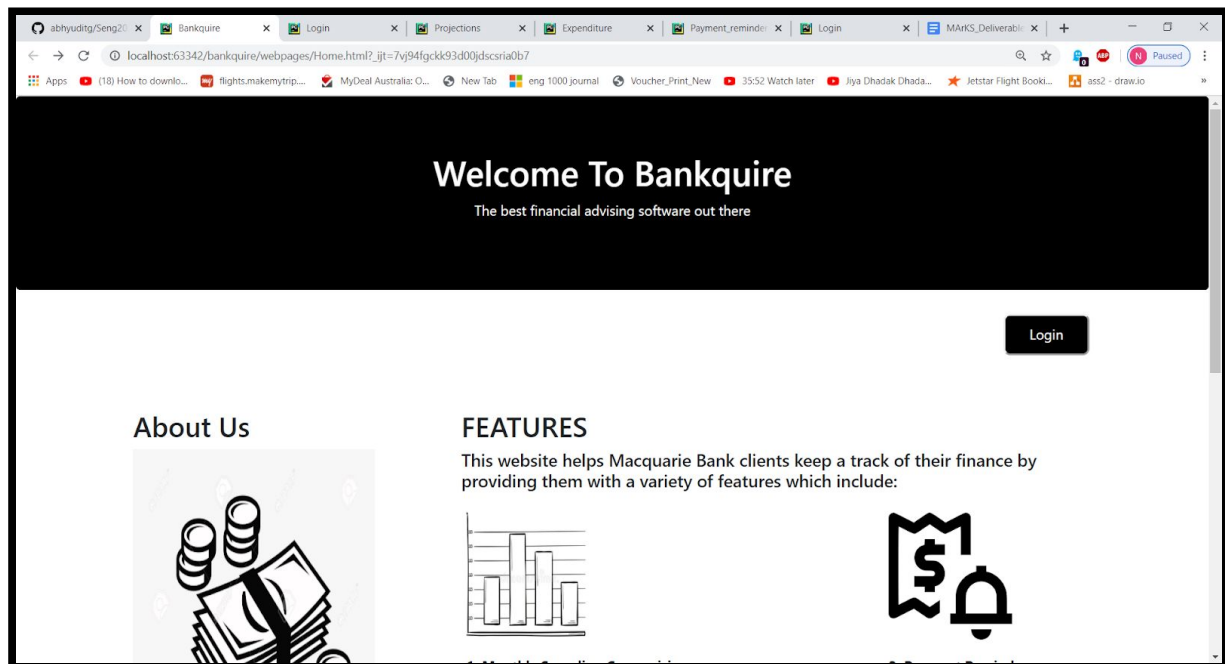


## HIGH FIDELITY:

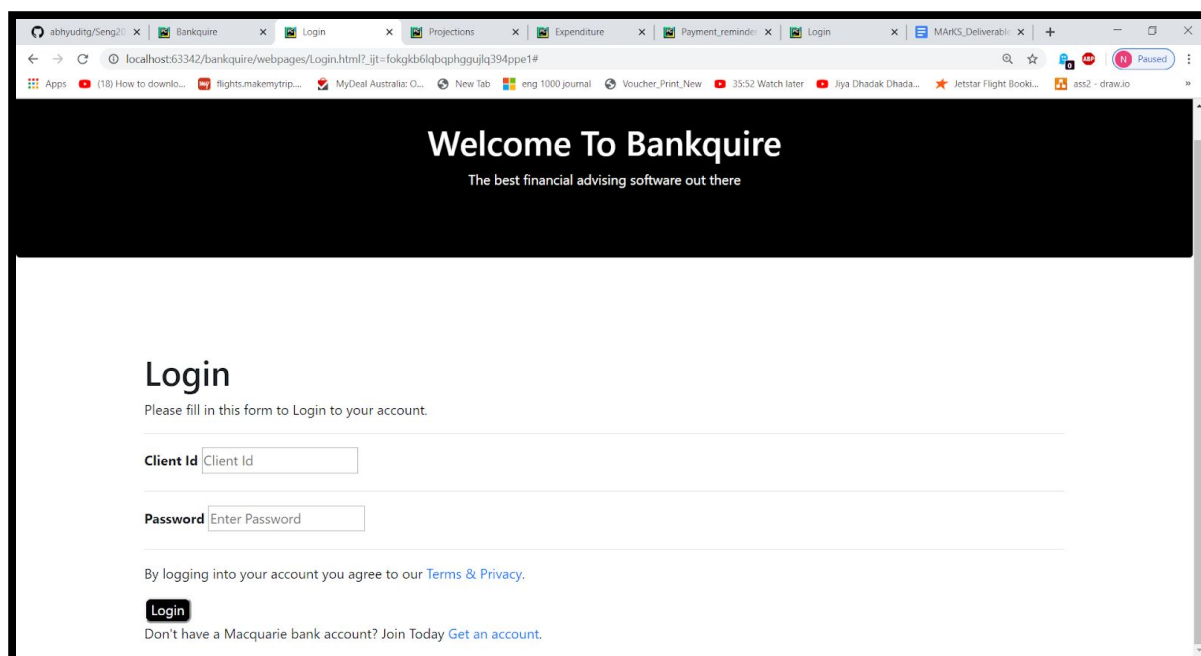
Github link:

[https://github.com/abhyuditg/Seng2021\\_MaRS/tree/master/SourceCode\\_and\\_Documentation](https://github.com/abhyuditg/Seng2021_MaRS/tree/master/SourceCode_and_Documentation)

### Homepage



## Login Page



The screenshot shows a web browser window with multiple tabs. The active tab is 'Login'. The address bar shows the URL: localhost:63342/bankquire/webpages/Login.html?\_ijt=fokgkb6lqbqphggulq394ppe1#. The page has a dark header with the text 'Welcome To Bankquire' and 'The best financial advising software out there'. Below the header is a white login form. The form has a title 'Login' and a subtitle 'Please fill in this form to Login to your account.' It contains two input fields: 'Client Id' and 'Password'. Below the fields is a 'Login' button. At the bottom of the form, there is a link to 'Terms & Privacy' and a link to 'Get an account'.

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localhost:63342/bankquire/webpages/Login.html?\_ijt=fokgkb6lqbqphggulq394ppe1#

Apps (18) How to downlo... flights.makemytrip... MyDeal Australia: O... New Tab eng 1000 journal Voucher\_Print\_New 35:52 Watch later Jiya Dhadak Dhada... Jetstar Flight Booki... ass2 - draw.io

# Welcome To Bankquire

The best financial advising software out there

## Login

Please fill in this form to Login to your account.

**Client Id**

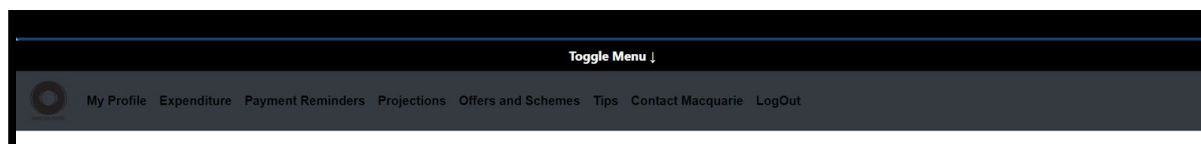
**Password**

By logging into your account you agree to our [Terms & Privacy](#).

**Login**

Don't have a Macquarie bank account? Join Today [Get an account](#).

## Toggle Bar:

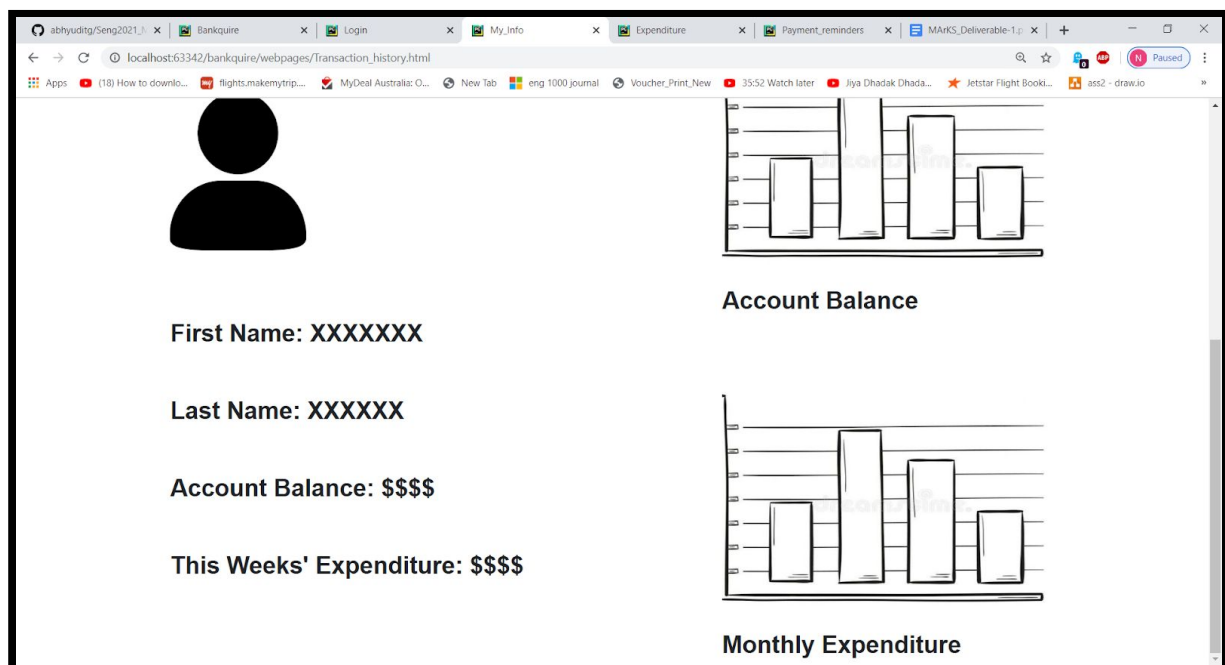
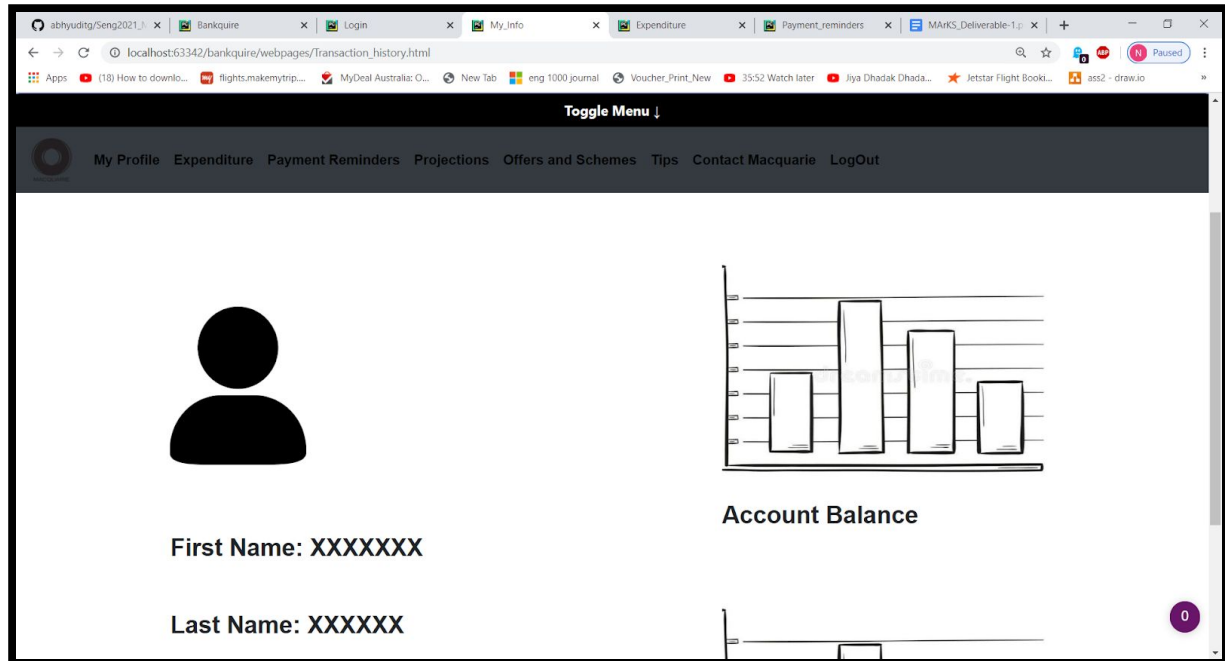


The screenshot shows a dark toggle bar with a 'Toggle Menu' button and a list of links: 'My Profile', 'Expenditure', 'Payment Reminders', 'Projections', 'Offers and Schemes', 'Tips', 'Contact Macquarie', and 'LogOut'.

Toggle Menu ↓

My Profile Expenditure Payment Reminders Projections Offers and Schemes Tips Contact Macquarie LogOut

## Profile Page



## Expenditure

abhyudig/Seng2021... x Bankquire x Login x My\_Info x Expenditure x Payment\_reminders x MARKS\_Deliverable-1... x

localhost:63342/bankquire/webpages/Expenditure.html?\_ijt=qqk2st9l3qish39brf4gsu4s0#

Apps (18) How to downlo... flights.makemytrip... MyDeal Australia: O... New Tab eng 1000 journal Voucher\_Print\_New 35:52 Watch later Jiya Dhadak Dhada... Jetstar Flight Booki... ass2 - draw.io

### Your Expenses

Please choose the Duration:

From:

To:

Comparison:

Age Group: 16 - 24

Category	Your Spendings	Others Spendings
Category1	\$\$\$	\$\$\$
Category2	\$\$\$	\$\$\$
Category3	\$\$\$	\$\$\$
Category4	\$\$\$	\$\$\$

Expenses:

Expense	Percentage
Rent	25%
Car	20%
Bills	15%
Savings	15%
Food	10%
Clothes	5%
Entertainment	5%
Miscellaneous	5%

abhyudig/Seng2021... x Bankquire x Login x My\_Info x Expenditure x Payment\_reminders x MARKS\_Deliverable-1... x

localhost:63342/bankquire/webpages/Expenditure.html?\_ijt=qqk2st9l3qish39brf4gsu4s0#

Apps (18) How to downlo... flights.makemytrip... MyDeal Australia: O... New Tab eng 1000 journal Voucher\_Print\_New 35:52 Watch later Jiya Dhadak Dhada... Jetstar Flight Booki... ass2 - draw.io

Comparison:

Age Group: 16 - 24

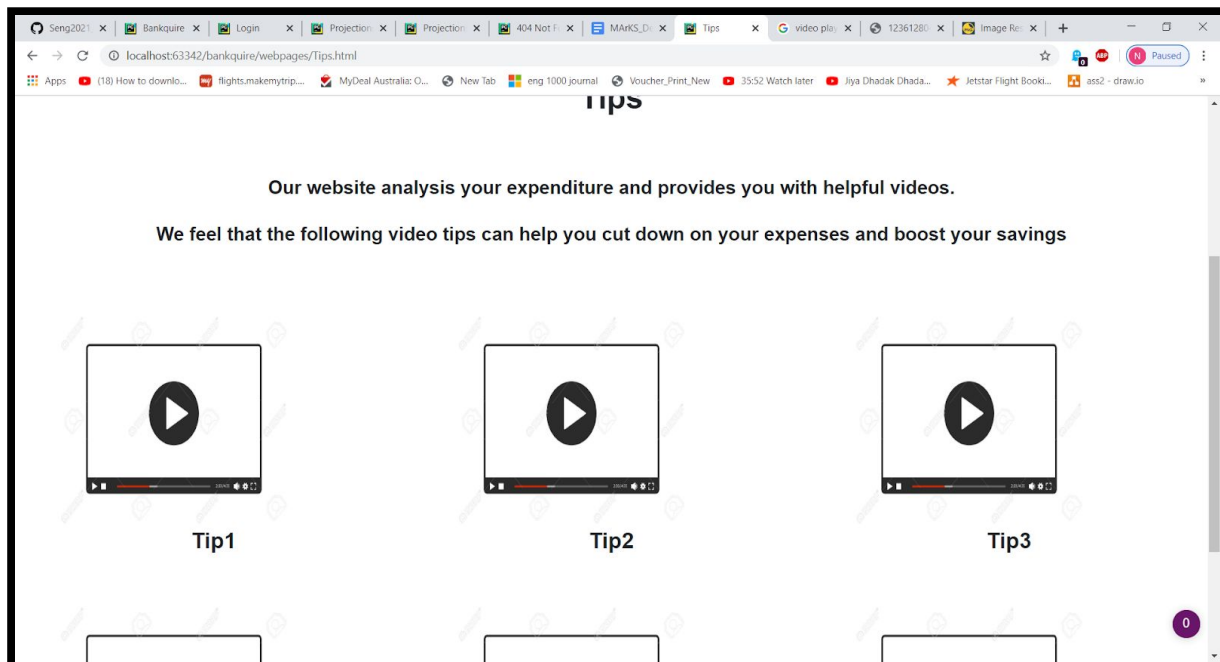
Category	Your Spendings	Others Spendings
Category1	\$\$\$	\$\$\$
Category2	\$\$\$	\$\$\$
Category3	\$\$\$	\$\$\$
Category4	\$\$\$	\$\$\$
Category5	\$\$\$	\$\$\$
Category6	\$\$\$	\$\$\$

Expenses:

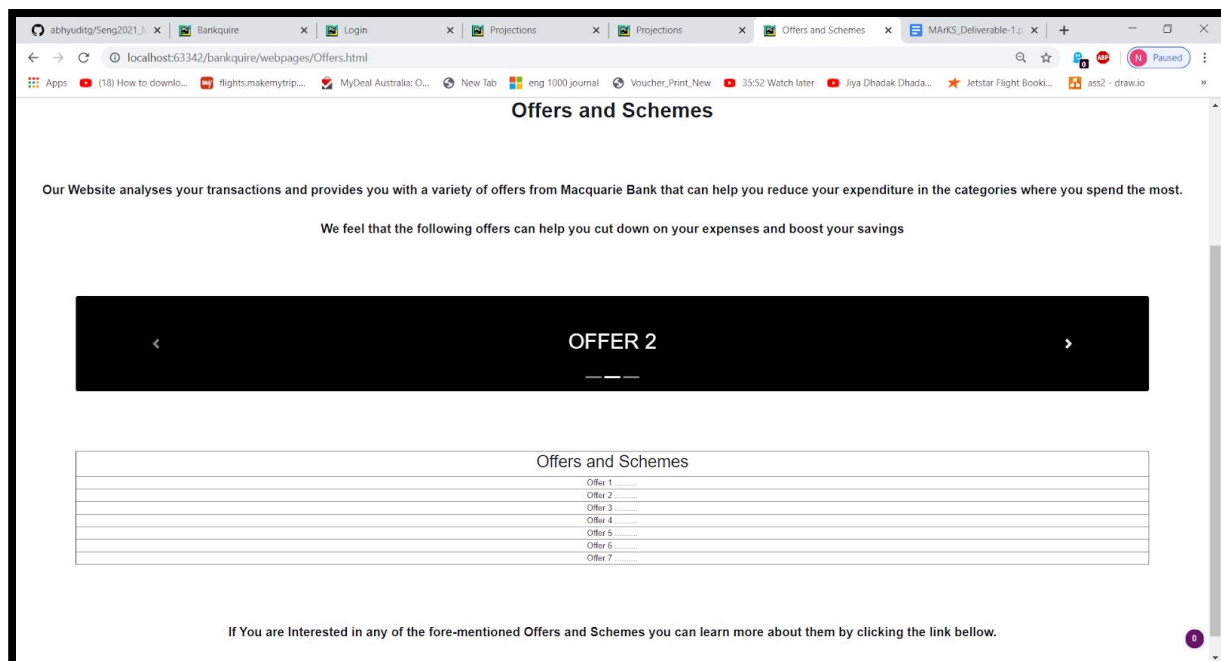
Expense	Percentage
Rent	25%
Car	20%
Bills	15%
Savings	15%
Food	10%
Clothes	5%
Entertainment	5%
Miscellaneous	5%

Transactions
Transaction 1
Transaction 2
Transaction 3
Transaction 4
Transaction 5
Transaction 6
Transaction 7

## Tips



## Offers and Schemes:



## Projections:

**Projections**

Our Website Uses state of the art algorithms to project your Savings and Expenses based on your transaction history, spend habits and up-coming payments.

In order to view your projections please choose the duration of the projection.

**Weekly**

Projected Savings  
\$\$\$

Projected Expenditure  
\$\$\$

**Monthly**

Projected Savings  
\$\$\$

Projected Expenditure  
\$\$\$

**Yearly**

Projected Savings  
\$\$\$

Projected Expenditure  
\$\$\$

## Payment Reminders:

**Payment Reminders**

Our website allows you to keep a track of your upcoming payments. This Can be done by creating a payment reminder.

**Payment Reminders**

Description	Amount	Date
Description1	\$\$\$	DD1/MM1/YY1
Description2	\$\$\$	DD2/MM2/YY2
Description3	\$\$\$	DD3/MM3/YY3
Description4	\$\$\$	DD4/MM4/YY4
Description5	\$\$\$	DD5/MM5/YY5

**Create New Reminders**

[Click Here !](#)

Description:

Payment Date:

MM/DD/YYYY

**Upcoming Payments**

**More information:**