

Create Account

John Doe opens the login screen.
John Doe provides login information.
John Doe chooses the create account option.
System verifies account availability.
System creates a new account.
System establishes a steady connection.
System displays main screen.

Login

John Doe opens the login screen.
John Doe provides login information.
John Doe chooses the login option.
System verifies login information.
System establishes a steady connection.
System displays main screen.

Logout

John Doe logs in.
John Doe chooses the logout option.
System saves any open data.
System terminates steady connection.
System displays login screen.

Manage Profile

John Doe logs in.
John Doe chooses the manage profile option.
System grabs account settings.
System displays manage profile screen.
John Doe updates profile settings.
John Doe chooses the save option.
System validates new account settings.
System saves account settings.
System displays main screen.

Delete Account

John Doe logs in.
John Doe opens manage profile.
John Doe chooses the delete account option.
System prompts John Doe for the account password.
John Doe enters the account password.
John Doe chooses the delete option.
System verifies the account password.
System erases all account data.
System displays the login screen.

Link Financial Account

John Doe logs in.
John Doe opens manage profile.
John Doe chooses the link financial account option.
System prompts the user to provide the login information for the account.
John Doe chooses the financial institution and provides the account login information.
System sends the login information to the financial account service to request a connection.
Financial account service verifies the account information.
System creates a transaction for each record found in the financial account.
System displays a success message.

Create Transaction

John Doe logs in.
John Doe chooses the create transaction option.
System displays the new transaction screen.
John Doe enters transaction information.
John Doe chooses the save option.
System verifies the transaction details.
System saves the transaction.
System displays the transaction log screen.

Schedule Transaction

John Doe logs in.
John Doe chooses the schedule transaction option.
System displays the schedule transaction screen.
John Doe enters the transaction information.
John Doe chooses the save option.
System verifies the transaction details.
System sets up a recurring transaction.
System displays the main screen.

Generate Budget Report

John Doe logs in.
John Doe chooses the create budget option.
System displays the budget settings screen.
John Doe creates budget categories and assigns percentage or fixed amount values to each category.
John Doe chooses the save option.
System verifies the budget settings.
System saves the budget.
System displays the main screen.

Calculate Cash Flow

John Doe logs in.
John Doe chooses the calculate cash flow option.
System verifies that the account contains transactions.
System prompts for a timeframe to display the cash flow for.
John Doe enters a timeframe.
John Doe chooses the calculate option.
System verifies that the timeframe has transactions.
System calculates cash flow.
System displays the cash flow report.

Calculate Slippage

John Doe logs in.
John Doe chooses the calculate slippage option.
System verifies that the account contains transactions.
System prompts for a month and year to display slippage for.
John Doe chooses a month and year.
John Doe chooses the calculate option.
System verifies that there are transactions available for the given month and year.
System calculates slippage.
System displays slippage report.

Check Credit Score

John Doe logs in.
John Doe chooses the check credit score option.
System grabs account information.
System queries the credit check service with identity information from account.
Credit check service verifies account information and retrieves a credit score estimate.
System displays the credit score.

Export Data

John Doe logs in.
John Doe chooses the export data option.
System prompts the user for a save location.
John Doe chooses a save location.
System will compile an excel document containing all transaction data saved in the account.
System sends a request to the operating system to save the excel file.
Operating System saves the excel file.

Print Data

John Doe logs in.
John Doe chooses the print data option.
System sends a request to the printer service to print the cash flow screen.

Refresh Data

John Doe logs in.
John Doe chooses the refresh data option.
System sends a request to each linked financial account to perform a data sync.
System reloads the current screen.