AS Capstone Project Proposal

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Finance Tracker

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Project Description

We are proposing a website that records personal accounts such as bank accounts, credit cards,

receivables, etc. The site would feature user accounts that would be created via a sign-up form

and access via a log-in form. This site would use a combination of HTML, CSS, JavaScript, PHP

and MYSQL to allow users to interact with their account information. The user's account

information is then given multiple to view their account data such as bar graphs, pie charts and

tables.

Functionality

Site Overview

- Add Mobile/Responsive design to the website
- Revamp the technical design of the code to best practices i.e separation of concerns
- Revamp the functionality/UX (User experience) of the site to make a more responsive, intuitive, simple, efficient and professional user interface.
- Ability to link accounts
- Revamp the admin page

Admin Page

- Header
    - Displays username and greeting
    - Admin Table
        - Username
        - First Name
        - Last Name
        - Email Address
        - Last Login
        - Locked Out Button

- Assign permission whether or not the user can access the account
  - Edit Account Button
    - Add icon
    - Change people's passwords and information
    - Redirect to edit-account-admin.php
  - Delete Account Button
    - Add icon
    - Add popup message instead of redirecting to a different page
    - Redirect to delete-account-admin.php

Edit-Account Page

- Header
  - Displays username and greeting
- Home Button
  - Redirects to home.php
  - Back button to user's home page
- Update Button
  - Redirects to home.php
  - User is allowed to change the Account balance alerts, Profile colors, and account name, type and link
  - Saves changes

Home Page

- Header
  - Displays username and greeting
- Logout Button
  - Redirects to the login.php
  - Logout button to sign out
- Account Overview Table
  - Displays table of Net Worth, Cash, Recievables, and Debt
  - Predicts for each category which direction the balance is going
- Profile Overview Table
  - Displays names of profiles, their balances and futures.
    - Add the future trends next to the balances.
  - Can be clicked on to edit a particular profile
  - Add button
    - Redirects to add-profile.php
    - Adds new profile
- Settings Menu
  - Update info button

- Redirects to update-info.php
- Updates user's name and email
  - o Change Password Button
    - Redirects to change-password.php
    - Changes password
  - o Delete Account Button
    - Redirects to delete-account.php
  - o Cash Distribution Pie Chart
    - Displays the cash distribution of all the profiles by percentage in a pie chart
    - On hover displays the profile name and money value
    - Displays the percentage of total income
  - o Portfolio Bar Graph
    - Displays a bar graph of the Net Worth, Cash, Recievables, and Debt of the user account

Profile Page

- Header
  - o Displays account name and balance
- Home Button
  - o Redirects to home.php
  - o Back button to user's home page
- History of Transactions Line Graph
  - o Line graph of history of transactions
  - o For user to view how the specific profile is trending
  - o Color based on profile's background color (unless it is white)
- Profile Record Table
  - o Views all records and allows you to add, update and delete records.
  - o Radio buttons used to designate whether each record is a Deposit, Withdrawal, or Transfer
    - When you click into a new field it disables the rest
  - o Checkbox to automatically set the date of the record to NOW() or uses datepicker.js datetime picker to set a date and time.
  - o Values entered in the textboxes are validated to ensure a proper money value is entered.
  - o Add Button
    - Adds record to profile table
- Profile Settings Menu
  - o Update Profile Button
    - Redirects to edit-profile.php

- Sends to page to edit the profile
  - o Delete Profile Button
    - Redirects to delete-profile.php
    - Sends to page to confirm deletion of profile

Edit Profile Page

- Header
  - o Displays Edit Profile
- Home Button
  - o Redirects to home.php
  - o Back button to user's home page
- Update Button
  - o Redirects to home.php
  - o User is allowed to change the Account balance alerts, Profile colors, and account name, type and link
  - o Saves changes

Delete Profile Page

- Header
  - o Displays account name and balance
- Home Button
  - o Redirects to home.php
  - o Back button to user's home page
- Delete Button
  - o Redirects to home.php
  - o Deletes the records that have to do with the profile and the profile deleted

Change Password Page

- Header
  - o Displays account name and balance
- Home Button
  - o Redirects to home.php
  - o Back button to user's home page
- Change Password button
  - o Redirects to home.php
  - o Verifies the old password when correct verifies the new password if they match then the password is updated.

Delete Account Page

- Header

- Displays account name and prompts whether they want to delete their account
- Yes Button
  - Deletes Account
  - Redirects to login.php
- Cancel Button
  - Cancels action
  - Redirects to home.php

Update-info Page
- First Name Textbox
- Last Name Textbox
- Email Address Textbox
- Mini Preview of Profile
  - Small display of charts and tables with sample data to show how profile colors will look.

Add-profile Page
- Add profile information
  - Name
  - Link to sign in
  - Drop-down menu - cash, debt, receivable
- Change background color, text color, and money color
  - Automatically generate text and money color based on background color's luminosity. For improved user experience creating profiles quickly
  - Reserved color schemes for bank names
- Display sample for updated background color
- Enter high and low balance