

Use Cases

Use Case: See account information

Primary Actor: User

Trigger: User wants to see their account information

Main Success Scenario:

1. User logs into website
2. Data is posted on the first screen after logging in

Extensions:

- 1a. User fails to log into website

Use Case: Set a budgeting goal

Primary Actor: User

Trigger: Set goal button

Main Success Scenario:

1. User clicks on button to set a goal
2. System redirects user to another page/pop-up box
3. User types in goal information
4. System saves goal to their profile

Extensions:

- 2a. System loads wrong page/pop-up box
- 3a. User enters invalid data
- 4a. System fails to save information

Use Case: See past goal performance

Primary Actor: User

Trigger: Past performance button

Main Success Scenario:

1. User clicks on past performance button
2. System redirects to past-performance page

Extensions:

- 2a. System loads wrong page

Use Case: Manipulate data view

Primary Actor: User

Trigger: User manipulates the way data is viewed

Main Success Scenario:

1. User clicks on drop-down box
2. User selects which view they would like to switch to

Extensions:

- 2a. User doesn't select an option. No changes made.

Use Case: Transaction categorization

Primary Actor: User

Trigger: User wants to see their transactions by category

Main Success Scenario:

1. Transactions will be categorized automatically

Extensions:

Use Case: Transfer money

Primary Actor: User

Trigger: When user creates a savings goal

Main Success Scenario:

1. User creates a savings goal
2. The dollar amount specified in the savings goal will be transferred from a checking account to a savings account of their choosing

Extensions:

- 1a. User gives invalid data. Re-prompt user for valid data.

Use Case: View spending goals

Primary Actor: User

Trigger: User wants to see their spending goals

Main Success Scenario:

1. User clicks on spending goals tab
2. System redirects to spending goals page

Extensions:

- 2a. System loads wrong page

Use Case: Create transaction

Primary Actor: User

Trigger: User wants to create a new transaction

Main Success Scenario:

1. User clicks on transactions tab
2. User clicks on create new transaction button
3. User enters all information of new transaction
4. System saves new transaction

Extensions:

- 3a. User enters invalid data. System re-prompts user for valid data.
- 4a. System fails to save updated transaction

Use Case: Edit transaction

Primary Actor: User

Trigger: User wants to edit any part of a transaction (name, category, amount, etc.)

Main Success Scenario:

1. User clicks on transactions tab
2. User clicks on specific transaction in the transactions list
3. User edits information of transaction
4. System saves updated transaction information

Extensions:

- 3a. User enters invalid data. System re-prompts user for valid data.
- 4a. System fails to save updated transaction

Use Case: Create a transaction category

Primary Actor: User

Trigger: User wants to create a new transaction category

Main Success Scenario:

1. User clicks on new transaction/edit transaction
2. User can type in their own category
3. System saves new category

Extensions:

- 3a. System fails to save new category

Use Case: Budget goal rewards

Primary Actor: User

Trigger: User wants to be rewarded for meeting budget goal rewards

Main Success Scenario:

1. System finds that the user has met their budget goal(s)
2. System rewards user

Extensions:

- 2a. System fails to reward user properly

Use Case: Category overspending

Primary Actor: User

Trigger: User wants to know when they've overspent in a certain category

Main Success Scenario:

1. User enters a transaction that goes over their budget in specific category
2. System notifies user that they've overspent in the category

Extensions:

Use Case: Transaction time range

Primary Actor: User

Trigger: User wants to see transactions in a specific time range

Main Success Scenario:

1. Users clicks on transactions tab
2. User clicks on transactions calendar
3. User enters a start date and an end date
4. System shows the user the transactions in the specified time range

Extensions:

- 1a. User enters invalid dates. User can click on calendar dates.

Use Case: Transaction grouping

Primary Actor: User

Trigger: User wants to be able to group transactions by tags

Main Success Scenario:

5. User enters a start date and an end date
6. System shows the user the transactions in the specified time range

Extensions:

- 1a. User enters invalid dates. User can click on calendar dates.

Use Case: Credit card balance

Primary Actor: User

Trigger: User wants to view their credit card balance(s)

Main Success Scenario:

1. User logs into website
2. Credit card information is displayed on the first page

Extensions:

- 1a. User fails to log into the website

Use Case: External credit card balance

Primary Actor: User

Trigger: User wants to view their external credit card balance(s)

Main Success Scenario:

1. User connects external credit card account information to the system
2. System verifies user's account information
3. System displays balance(s) of user's external credit card(s)

Extensions:

- 1a. User fails to link external credit card

Use Case: Upcoming bills

Primary Actor: User

Trigger: User wants to see their upcoming bills

Main Success Scenario:

1. User clicks on bills tab
2. System displays a list of bills as well as a calendar view

Extensions:

Use Case: Budgeting tips

Primary Actor: User

Trigger: User wants to see budgeting tips based on their spending habits

Main Success Scenario:

1. User clicks on budget tab
2. System suggests budgeting tips based on their spending habits

Extensions:

Use Case: Search transactions

Primary Actor: User

Trigger: User wants to be able to search their transactions

Main Success Scenario:

1. User clicks on transactions tab
2. User clicks in the search bar, above the transactions list
3. User enters name, category, amount, etc.
4. System filters through matching transactions and displays them back to the user

Extensions:

- 3a. Search results turn up empty. User begins a new search.

Use Case: View loans

Primary Actor: User

Trigger: User wants to see their loan(s) information

Main Success Scenario:

1. User logs into website
2. Loans are displayed on main page
3. User also has option to link external loans to the system

Extensions:

- 3a. User fails to link external loans or enters invalid information

Use Case: View retirement account(s)

Primary Actor: User

Trigger: User wants to see how much money they've saved in their retirement account(s)

Main Success Scenario:

1. User connects their retirement account(s) information to the system
2. System shows the user the account(s) information

Extensions:

- 1a. User fails to connect their retirement account(s) or enters invalid information

Use Case: Share progress

Primary Actor: User

Trigger: User wants to share their savings progress

Main Success Scenario:

1. User clicks on share button
2. System shares user's savings progress with selected users

Extensions:

Use Case: Compare spending

Primary Actor: User

Trigger: User wants to compare how much they've spent in various months/years

Main Success Scenario:

1. User clicks on budget or transactions tab
2. User clicks on compare spending button
3. System displays spending habits by year
4. User can adjust time range

Extensions: