

Codelab Week 04 Day 04

MVP

- 'Merchants' CRUD
- 'Spending' tags CRUD.
- 'Transactions' CRUD.

Create?

Assign tags and merchants to transactions and spent.
List all transactions user has made in a single view.

Merchants

- Add new merchants.
- Edit merchant details.
- Delete merchant from list of merchants.

Tags

- Add new tags.
- Edit existing tags.
- Delete existing tags.

Transactions

- Create transaction
- Assign tag
- Assign merchant
- Assign amount spent.
- Edit transaction
- Delete transaction.

View

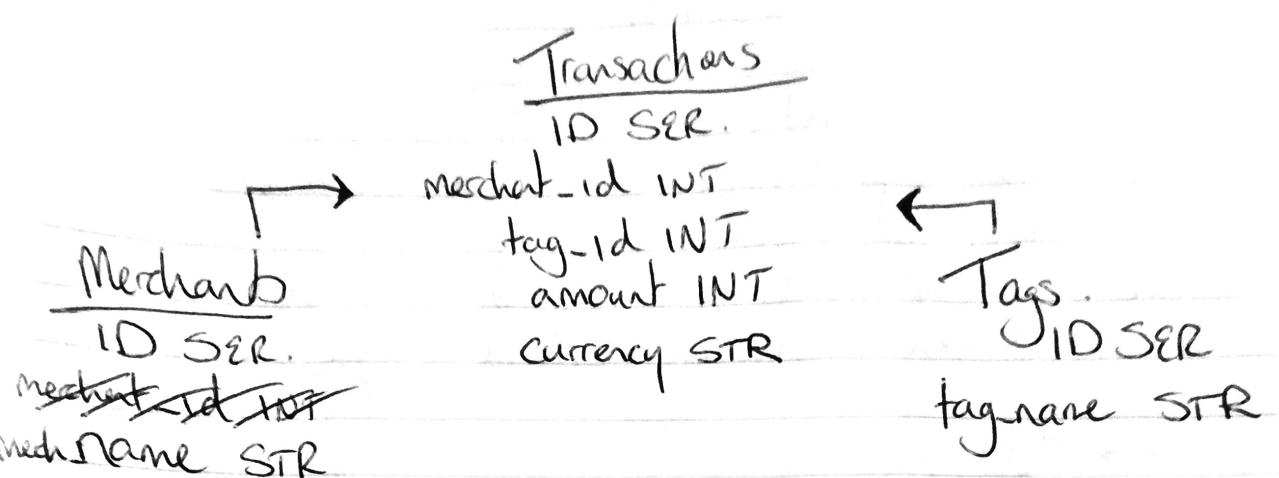
- view all transactions (tag, merchant, amount, timestamp)
-

Extensions

- add transaction timestamp + sort functionality later.
- user can create budget. Show + near or over.
- user can filter out transactions by month or category.

Develop Iteratively!

The purpose of each page (view) should reflect its goal!



models = merchants, transactions, tags

View = list transactions, welcome splash, layout, confirmation

Controller = singular for MVP.

Spitballing Spending Tracker App.

User Persona: Behaviors: works 9-5 in mid level management role



- likes to go out for lunches with friends.
- coaches girls football on Saturday.
- Spends evenings with boyfriend and dog 'Doug'
- Writes a blog on being a 20 something.

Demographic: 26 Years Old

18K income, Renter

Aberdeen

College Educated

Logistics planner for waste
management plant.

Needs and goals:

wants to track finances

would like to save for a home

would like rainy day money

wonders where her money has gone

worries she doesn't keep track of it

wants to know she isn't wasting money

wants to be reasonably frugal!

User Story

Dawna in bed

Waking up

Wants to know how
her finances doing

Still in bed.

~~Opens~~ Dawna wants

~~wants to know to~~

check her spending

to make sure nothing odd

Davina is on the train
She wants to know how much she's spent on travel



Davina wants to know how this compares to last month.

Davina is at work,
She's bought lunch from canteen
She wants to set a limit on how much she can spend on work lunches



Davina Checks how close she is to her budget for work lunches.

Davina is at work
She wants to input transaction for lunch



Davina gets frustrated with individual transactions
She wants to upload many at once.

- Davina wants to know how much she's spending by category

→ She wants to see how that compares monthly.

Davina User Needs:

User requirements vs. acceptance criteria.

- As a user I want to keep an eye on my finances so I can save for the future
User should be able to read all transactions

As a user I want to see where my money goes so that I can identify bad spending behaviours.

As a user I want to identify savings that can be made so that I can save for a house.

- As a user I want to upload multiple transactions at once.
So that I can save time.

As a user I want to categorise my transactions so that I can get a broad overview of spending

As a user I want to input transactions directly from browser
so that I can do it on all my devices.

Potential features.

CRUD Merchants

CRUD Tags

CRUD Transactions

List all transactions along with running total.

MVC

Sort by time

CRUD Budget

filter transactions by month or category

extensions

Sum spending by category

Sum income

Show savings / free cash

uncategorised items should be highlighted

responsive design

export transaction to email

import/export csv

lights out

Super duper
bonus features

Potential Data (Models)

transactions

id serial

category_id (int)
Merchant_id (int)

amount int

Currency STR

Location STR.

Direct Debit B00

tags

id serial

category tag str

Merchants

id serial

Merchant-name str.

Budgets

id serial

category_id int

User

id serial

Saving goal name STR

Saving goal amount INT.

Balance INT

Quotes

quotes acc

Presentation and Styling

What I like about the apps I use:

Toast notifications

Showing balance before making decisions

CSV export

location tracking

Random quotes

What I don't like:

Fixed categories

Complex hidden pathways

Data sharing.

Styling

Serious colours - this is money, no hotline miami

Brand identity

Clear lucid information

tabular data for list view

soft edges (border radius)

Screen Design Potentials (views)

Welcome	get /
Show Transactions	get /Transactions
Create Transactions.	post /Transactions
Show Categories	get /Categories
Create Category	post /Categories
Create user	get users

Confirm entry

View individual transaction

Import/Export transactions

Create budget

Show budgets.

Copper Wire V1.0

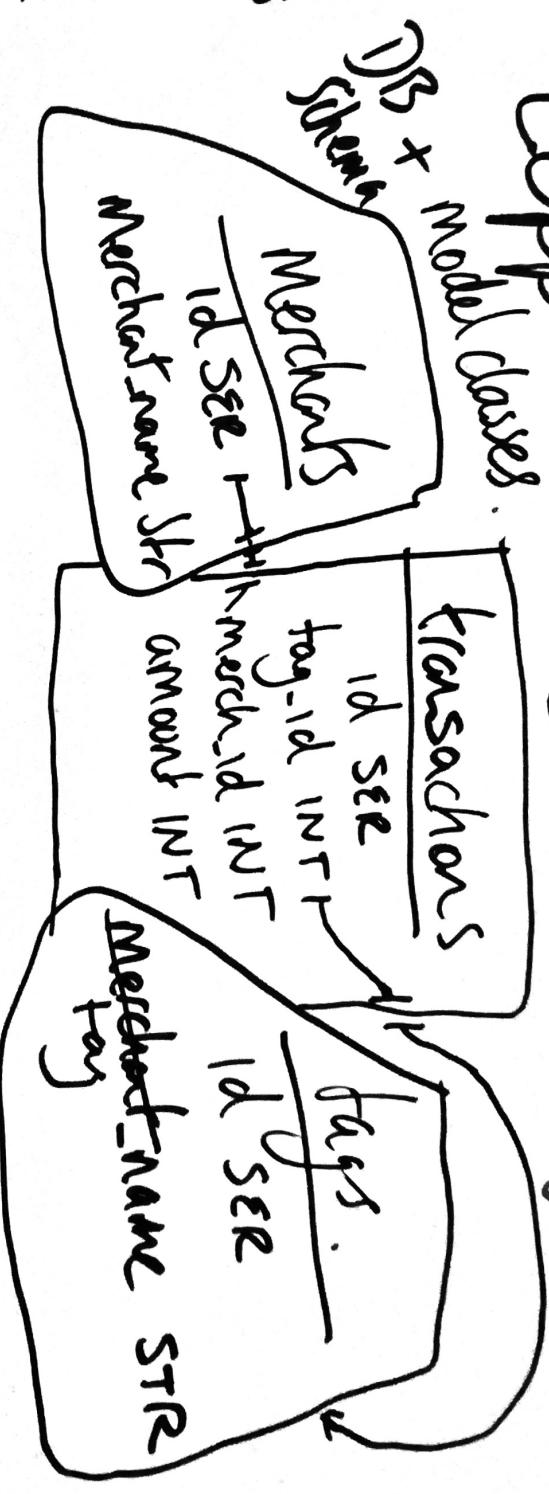
Just a bunch of forms!

CRUD MERCHANTS
CRUD TAGS
CRUD TRANSACTIONS

LIST TRANSACTIONS
AND RUNNING TOTAL

Views
Merchant

(controlled by schema)
Merchant [contains]
Transactions
Merchant [contains]
Tags



Welcome yet
Show transactions get
Create transaction get/post
Create transaction get
(from transaction get)
Show tags get Show merchant get/post
Show tags get Create merchant get/post
Create tag get Create merchant much get
Create tag get (from merchant much get)