

Story UFC-134: Transaction Import History

The following document will go over the design of the Transaction Import Fast Adjustments feature, as outlined in Story ticket UFC-102.

Description

As a user, I want the transactions import process to be smart about remembering how to map account values from the raw CSV file to target accounts.

Ideally, I'd also want it to be smart and try and associate transaction descriptions for certain import profiles to certain transaction types (and target accounts?).

That is, given a certain description, a certain import profile, a certain sign (magnitude) of the amount, and a certain account, it should be smart enough to re-associate future transactions to the type/target account that I chose a first time.

Acceptance Criteria

For reference, the following are the acceptance criteria for this ticket:

- I want past import information to be used to determine how to automatically map raw CSV accounts to target uFins accounts.
 - For example, if I have imported a transaction that originally had an account value of "CANADA", but I chose that the uFins account was "Payroll", then future transactions should automatically pick "Payroll" when they come across "CANADA" again.
- I want past import information to be used to determine how to automatically map raw CSV descriptions to transaction descriptions.
 - For example, if I have imported a transaction that originally had a description of "Customer Transfer Dr.", but I chose that the uFins description was "Transferred money to savings", then future transactions should automatically input "Transferred money to savings" as the description for "Customer Transfer Dr." (but I should still have a way to see the original description and have the ability to substitute it back).
- I want past import information to be used to determine what type a transaction should have.
 - For example, if I have imported a transaction with a certain description, a certain magnitude of amount, and a certain account value, and I chose a certain

type for the transaction, then it should re-associate those values with that type for future transactions.

Design Brainstorming

TODO

Design (Finalized)

TODO

Tasks

- TODO