Overview

Checklist

- Login Form
- Sign Up Form
- Transaction Forms
- Account Forms
- Transactions Page
- Accounts List
- Account Details
- Transactions Import Form
- Onboarding
- User Settings
- Account Summaries
- User Dropdown
- Toasts
- Modals
- System Status Indicator
- Command palette
- Charts
- Navigation

Coloring Checklist

Note: When displaying percentage/absolute changes for expenses and liabilities, should the colors for positive/negative be swapped?

- That is, should green be 'negative' and red be 'positive'? Because you want expenses and liabilities to be going down?

- I think so.
- That'll be something important to keep in mind -- the semantics of colors and what they're really trying to convey.
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Login/Sign Up Form

- I want to log in/sign up.

Transaction Forms

- I want to create/update transactions.
- I want to autocomplete transactions when creating them.

- I want recurring transactions.
- I want to be able to specify a reference number for a transaction.
- I want to be able to specify notes for a transaction.
- I want to see errors if I didn't fill out a form correctly.
- I want to be able to create another transaction from the form.
- I want to sort transactions by column.

Account Forms

- I want to create/update accounts.
- I want to see errors if I didn't fill out a form correctly.
- I want to be able to create another account from the form.

Transactions Page

- I want to read/update/delete transactions.
- I want to see a monthly view of transactions.
- I want to see all of my transactions.
- I want to filter my transactions by type.
- I want to see totals for types when viewing the Transactions page.
- I want to see absolute/percentage change amounts for transaction types when viewing the Transactions page.trans
- I want to see my net worth at that point-in-time when viewing transactions (on the Transactions page).
- I want to see the absolute/percentage change in net worth at that point-in-time when viewing transactions (on the Transactions page).
- I want to search the transactions table.
- I want to have special queries when searching the transactions table to specify things like `from:Food` or `to:chequing`.
- I want to be to edit the transactions in the transactions table directly.
- I want to create Transactions from the Transactions page.
- I want pagination on the transactions table.

- I want to see a breakdown of income/expense totals on the Transactions page.

Removed

- I want to be able to switch between calendar and list views of transactions.
  - The calendar view has been moved to out of scope of the redesign.

Accounts List

- I want to read/update/delete accounts.
- I want to create Accounts from the Accounts page.

Account Details

- I want to see a chart of an account's balance over time when viewing the details of the account.
- I want to see an account's transactions when viewing the account.
- I want to see the account's balance at that point-in-time when viewing an account's details.
- I want to see an estimate of an account's balance by end-of-month on its details page.
- I want to see an account's running balance when viewing its list of its transactions.

Removed

- I want to be able to switch between calendar and list views of transactions.
  - The calendar view has been moved to out of scope of the redesign.
- I want to see an estimate of an account's balance on any particular day when viewing the calendar view of an account's transactions.
  - The calendar view has been moved to out of scope of the redesign.

Transactions Import Form

- I want to import transactions from a CSV.
- I want to see duplicates when importing transactions.
- I want to be able to apply bulk actions to transactions while importing them.

Onboarding

- I want to be onboarded when creating a new user account. That is, I want to specify my Accounts, be given the option to import transactions, and have things explained to me.
- When specifying my accounts, I want to be able to select from some predetermined accounts to add to my account, while also being able to create new ones.

User Settings

- I want to manage my Import Profiles in my user settings.
- I want to be able to change my password.
- I want to be able to delete my account.
- I want to export all of my transactions/accounts as a CSV.
- I want to export all of my transactions/accounts as JSON.
- I want to make a backup of my uFincs data.
- I want to restore a backup of my uFincs data.

Account Summaries + Dashboard

- I want to see an overview of my accounts and their balances.
- I want to see absolute/percentage change amounts on the Home page balance summaries.
- I want to see a list of upcoming transactions on my dashboard.

User Dropdown

- I want to log out.

Toasts

- I want better toast notifications.
- I want to delete transactions.
- I want to delete accounts.

Modals

- I want to delete accounts.

System Status Indicator

- I want to use the app offline.
- I want to see an indicator of whether I am offline or online with all changes persisted.
- I want to see a list of all changes (activity) I've done in the app.
- I want to see which changes are synced and which aren't.

Command Palette

- I want a command palette.

Charts

Types:

- Expenses over time
- Expenses by type
- Net worth over time
- # of income transactions over time
- # of expense transactions over time
- % change of [metric (e.g. net worth)] over time
- Forecasted net worth
- Cash flow

Stories:

- I want to see an estimate of how much I will spend/make this month on charts (e.g. on the expenses/income chart).
- For charts like "expenses this month", I want to see a total value, with an absolute/percentage change from last month.
- For charts like "expenses by type this month", I want to see the dollar value for an expense type when hovering over the type, along with an absolute/percentage change from last month.
- I want to be able to change the date range for any chart or table.
- I want a chart to see the number of expense transactions over time.
- I want a chart to see the number of income transactions over time.

- I want a chart to see the changes in the percentage changes of [metric (e.g. net worth)] over time.
- I want a chart to forecast my net worth into the future.
    - This can be done by just looking at recurring transactions.
- I want a chart of my cash flow for the month.

Navigation

- The app.

Transactions Calendar

- I want to see a calendar of my transactions.
    - I want to see the transactions on a date when I click on the date.