Goals and Scope

The following document will lay out the goals and scope that I have for the redesign of uFincs.

Goals

The primary goal of the redesign is to make uFincs look like something that I'm proud to show off. Currently, the macro layout and micro design decisions are shit enough that I'm not happy with them.

If I had to list what I'm not happy with, it would be the following:

- The UI looks like garbage on mobile. What with the tables being completely non-responsive and the header/footer bars just feeling really tacked on.
- I hate the tables. All of them. They all suck. I especially hate the 'filter' header over the Transactions table. I know these could look and work so much better on desktop, but especially on mobile.
- The `Account Details` page is basically worthless right now. It just shows the total balance (information that can be gained from the `Accounts List` page) and the a filtered list of transactions (which *should* be obtainable from the `Transactions` page, but isn't because of the lack of good filtering).
- Speaking of which, the `Accounts List` page is just so pointless. The nav sidebar is super useless and the split tables of Accounts seem so discordant. They don't provide enough useful information and the colored headers are just ugly.
- Actually, the use of the 4 different type colors (asset, debt, income, expense) everywhere is also just really ugly. Like I said above, the table headers being colored like this is *barf*, and the type picker for Transactions being individually colored segments is also *barf*.
    - I think we need to move to just using the colors on the icons and using neural colors otherwise.
- The Home page is just a mess with the useless `Recent Transactions` table and the far too big and far too ugly charts.
    - Just about the only thing I do kinda like is the accounts summary section. But that's mostly because I stole it from Refactoring UI...
- I also mostly like the `Import Transactions` UI. Particularly the stepper. But again, that's only because I stole the UI.

    - However, it sucks because it's not mobile responsive. Now how likely it is that someone will be importing transactions on their phone... doesn't matter, because the whole thing needs to look good on mobile.

- I'm not particularly enthralled by the header navigation. It's... ok, at best. I really need to come up with a logo though...

- The totally random use of pink for the primary action gets pissing me off. Like, I get *why* I did it, it just doesn't really work.

- Also, based on the feedback from.. the people.. it seems like they'd rather the `New` dropdown was just 'Transaction' and 'Account'. So... yeah... there's that.

- Honestly, the whole app just needs more features. It's so empty right now: create a transaction, view net worth is basically where it starts and ends. Which I mean, I guess that's fine as far as I'm concerned, but the whole analytics/forecasting side seems to be pretty important to people, so...

- The style of inputs (i.e. Material inputs) *needs* to change. Need to go back to basics with just nice big inputs.

- Speaking of inputs, I don't know how I feel about the `New Account/Transaction` forms.

    - Specifically relating to how they slide out from the side, I think I still quite like it? I mean, the alternatives are, what, a modal dialog or a dedicated page? I really don't like modal dialogs and it seems overkill to give it an entire page, so I guess slide in sidebar is fine?

    - In terms of the layout of the form, I think that has been addressed by the points above (particularly how out-of-theme the inputs are and the type picker).

- The lack of user settings (and settings in general) also needs to be addressed.

- We're going to need onboarding... I cry.

- Also, the lack of microinteractions (animations, transactions, etc) needs to be addressed.

- Toast notifications, while pretty good right now, could do with a facelift.

So... after all that, what are the goals of the redesign?

- Make uFincs something I'm proud to show off.

- Make the entire application responsive, mobile-first.

- Make the entire experience more consistent.

- Add some new small features, particularly relating to analysis and forecasting.

Scope

The following is a rehashing of the features that currently exist as well as those that don't. This will be the scope of the redesign.

Existing Stories

- I want to CRUD transactions.
- I want to CRUD accounts.
- I want to log in/sign up/logout.
- I want to see an overview of my accounts and their balances.
- 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 import transactions from a CSV.
- I want to see duplicates when importing transactions.
- I want to autocomplete transactions when creating them.
- I want to use the app offline.
- I want to see errors if I didn't fill out a form correctly.
- I want to sort transactions by column.
- I want to see an account's transactions when viewing the account.
- Charts:
  - Expenses over time for current month
  - Expenses by type for current month
  - Net worth over time for current year

New Stories

- I want to see absolute/percentage change amounts on the Home page balance summaries.
- 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.

- I want a command palette.
- I want recurring transactions.
  - I want transactions that recur every X days/weeks/months/year.
  - I want transactions that recur every X weeks on weekday Y.
  - I want transactions that recur on date X of every month.
  - I want transactions that recur on date X of every year.
  - I want transactions that recur on the first day of every month.
  - I want transactions that recur on the last day of every month.
  - I want to specify when the first transaction should happen.
    - I want this value to be autofilled with the first instance from the schedule I've provided.
  - I want transactions that recur X times.
  - I want transactions that stop recurring on date X.
  - I want transactions that recur forever.
- I want to see a chart of an account's balance over time when viewing the details of the account.
- I want to see my net worth at that point-in-time when viewing transactions (on the Transactions page).
- I want to see the account's balance at that point-in-time when viewing an account's details.
- 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 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.
- I want better toast notifications.
- I want to see an indicator of whether I am offline or online with all changes persisted.
- I want to manage my Import Profiles in my user settings.
- I want to see an estimate of how much I will spend/make this month on charts (e.g. on the expenses/income chart)

- 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.
- 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 be to edit the transactions in the transactions table directly.
- 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 to create Transactions from the Transactions page.
- I want to create Accounts from the Accounts page.
- I want to be able to change my password.
- I want to be able to create another transaction from the form.
- I want to be able to create another account from the form.
- I want pagination on the transactions table.
    - I also want to see the total number of transactions for the given period.
- 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 to see the absolute/percentage change in net worth at that point-in-time when viewing transactions (on the Transactions page).
- I want to see a breakdown of income/expense totals on the Transactions page.
- I want a chart to forecast my net worth into the future.
- I want to be able to apply bulk actions to transactions while importing them.

  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.
- I want a chart of my cash flow for the month.
- I want to be able to delete my account.
- 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.
- I want to be able to create new accounts from the New Transactions form.
    - i.e. in the accounts dropdown, I want the option to create an account.
- I want to be able to apply bulk actions in the Transactions table.
    - e.g. reassign accounts, change descriptions, change amounts, delete, etc
    - Considering I want this for Transactions Import, it might come to the Transactions table just as a matter of consequence...
- I want to see a list of upcoming transactions on my dashboard.

Stories Moved out of Scope

I have decided to move the calendar view out of scope of the redesign. While it is certainly an important feature, I feel like it's too much to add onto the redesign. Therefore, it will be one of the more high priority features post-redesign *(aka never)*.

- I want to see a calendar of my transactions.
    - I want to see the transactions on a date when I click on the date.
- I want to be able to switch between calendar and list views of transactions.
- 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.