

## **Criterion A: Planning**

### **1. The scenario**

The client explained to me that he had trouble budgeting his money and struggled with balancing the expenses of his needs and wants. Deciding how and where to spend money was the client's biggest problem as he had a hard time keeping track of the various monthly bills that he receives along with the other expenses such as groceries and eating out. These bills would range from basic needs such as rent, electricity and water bills to luxuries such as Netflix, Spotify Premium and other streaming services. The client has expressed to me that his current method of budgeting is tedious and ineffective as he keeps track of his finances in a notebook, admitting that he often fails to update it. The current process of managing his money is unsuccessful as several transactions are unaccounted for as the client doesn't keep it up consistently. Due to this the client isn't entirely aware of how his spending is affecting his total finances and savings which can lead to excessive spending. The little amounts, though they don't seem much at the time, add up and that money can go towards paying off a car or house. In order to help my client better manage his finances I offered him an application that will automate the process and help him keep better track of his money

### **2. The rationale for the proposed solution**

An application that budgets the user's finance by keeping track of his monthly/annual bills, salary and computing the budget for his recreational purposes such as his grocery/food. The user inputs his salary and monthly bills along with the date of when they come through. The user also inputs all the other purchases he makes. The application will tell the user if they are close to spending over the budget. The user can also check to see if he can afford a certain thing. For example, The user can check to see if he can afford a 50 dollar dinner and the application will let him know that he can't at the current time because he has a spotify bill and electricity bill due in the next 3 days. This application will solve the user's problem by providing an easy and efficient way for the user to log his finances. The user will also be able to know if he can afford something or if he is almost over budget. This makes the application ideal as not only does it provide the user with a systematic way of allocating his finance but also prevents them from overspending.

### **3. Success criteria**

1. User inputs income once, states whether is monthly or weekly and the program accounts for that amount without the user having to input it again.
2. Income is added to the amount total at the right date
3. User can input several monthly bills such as rent and netflix once the program accounts for that amount every month without the user having to input it again.

4. Billed amount is deducted on the correct dates
5. User is able to cancel/delete the monthly bills if needed
6. User is able to input one time bills such as movie tickets or dinner.
7. User can ask whether they can afford a certain item
8. Application considered total amount, any bills due in the near future and answers the user
9. Application will let the user know if they are spending too much and are close to spending over the budget for the week
10. The user can set an amount they want to save rendering that money untouchable so the money is saved.
11. The GUI will make the application easy and pleasant to use