**Monthly Home Expense Tracking (MHET)**

**Users Type**

Brother

Daughter

Daughter-in-Law

Father

Father-in-Law

Grand Father

Grand Mother

Mother

Mother-in-Law

Sister

Son

Son-in-Law

**Family Head**

As a Family Head, I want to define various expense categories so that I can track expenses by category-wise

As a Family Head, I want to create budget so that I can track the expenses against budgets

As a Family Head, I want to define expense items so that I can track expenses

As Family Head, I want to see daily expense report so that I can track and control the expenses

As Family Head, I want to generate monthly expense report so that I can plan budget more accurately

As Family Head, I want to generate expense report for a given period under different expense category so that I can analyse and plan more accurately

As Family Head, I want to be notified the new expense items entered into system along with budget and cumulative expense so that I can get real-time budget vs actual expenses

As a Family Head, I want to generate monthly budget comparison report so that I can track the trend

As a Family Head, I want to generate monthly comparison report of expenses so that I can analyse expenses pattern for future budget planning

As Family Head, I want to setup access to users of Family Expense Tracking System

As Family Head, I want to generate and download expense report for a given period

As Family Head, I want to generate and download budget report for a given period

As a Family Head, I want to restrict other users from updating budget and expenses after approval so that original budget and proposed expenses can be tracked

**Home Maker**

As a Home Maker, I want to enter the expense items so that I can track the budget and actual expenditures

As Home Maker, I want to be notified via email of new budget entry into system so that I can plan for my expenses

As Home Maker, I want to be notified via email about expense limit reached alert so that I can plan my expenses accordingly

As a Home Makes, I want to compare budget vs actual expenses for a given period so that I can understand the analyze and plan accordingly

As Home Maker, I want to generate and download expense report for a given period

As Home Maker, I want to generate and download budget report for a given period

As Home Maker, I want to enter all detailed expense forecast for a month in advance for Family Head’s review and approval

As Home Maker, I want to submit expense planned for the month for Family Head’s review and approval

As a Home Maker, I want to add, modify, delete expense forecast after receiving review feedback from Familiy’s Head so that I can resubmit the budget for approval

As a Home Maker, I want to create new budget by selecting and merging budget items from budgets submitted in past so that I can save time in creating my new budget

**Family Members**

As a Family Member, I want to submit budget request for my expenses so that I can get approval for my expenditures

As a Family Member, I want to know the budget allocated and actual expenditure so that I can monitor allocated fund to me

As a Family Member, I want to enter expense item so that I can track my budget and expenses

As a Family Member, I want to see expense items I entered so that I can track my budget and expenses

**Expense Category**

Provision

Fruits

Vegetables

Cookies

Snacks

Desserts

Restaurant

Cinema/Movies

DVD-Bluray

Cosmetics

Bathroom Cleaning

Kitchen Items

Non-Veg

Starters

Chips

Happy Hours

Taxi

Edible Oil

Dress

Books

School Fees

Car Maintenance – Petrol, Maintenance

Two-Wheeler Maintenance - Petrol, Maintenance

Medicines (Tablets, syrup, etc.)

Utility

**Expense Items**

Apple, Orange, etc.

**Expense Frequency**

Daily

Weekly

Bi-weekly

Monthly

Fiscal Month

Quarterly

Half-yearly

Yearly

Fiscal Year

Adhoc

Unplanned/Unexpected

**Income Source**

Money\_source\_type – salary, PF, loan, borrowed, mortgage, pledge, mutual fund, Bank interest, House Rent, Agriculture Income, Sale of Cattles and goats, IT Refund, Returned by borrower, Fixed Deposit (FD), Recurring Deposit (RD)

Source\_name - Infinite, Refund of Artech excess tax deducted, Muthoot finance gold loan

Amount

Date

Source\_Reference\_number

Comments