HIGH LEVEL DOCUMENTATION

**Batwara Platform**

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# Document Objective

This document is intended to provide a basic visual interface guide that suggests the structure of an interface and the relationships between its pages. They serve as a blueprint that defines each Web page's structure, content, and functionality. Wireframes are created before any design work is started so that the focus is on the layout without the distraction of color and visual elements.

# Purpose

The purpose of this document is to give a detailed description of the requirements for the Batwara application. It will illustrate the purpose and the complete declaration for the development of the system.

# Scope

The "Batwara" app is a simple and user-friendly tool that allows you to keep track of your spending, set a budget, and gain insights into your financial habits. With this app, you can easily add, edit, and delete your expenses, categorize them, and even attach receipts.

Additionally, you can set a monthly budget, monitor your spending against that budget, and receive alerts if you are approaching or exceeding your budget. The app also provides reporting capabilities to help you understand your spending patterns over time. All sensitive information is securely encrypted, and periodic backups are available to ensure the safety of your data.

# Roles:

* The "Batwara" application offers two different types of user accounts - **paid and free.**
* Paid users are those who subscribe to the app by paying a monthly or annual fee and have access to the full range of features offered by the app. These features include unlimited expense tracking, budget setting, report generation, and data security. Paid users can easily add, edit, and delete their expenses, categorize them, and attach receipts. They can also set a monthly budget, monitor their spending against that budget, and receive alerts if they are approaching or exceeding their budget. Additionally, paid users have access to robust reporting capabilities to help them understand their spending patterns over time.
* Free users, on the other hand, have access to limited features of the app. They can track a limited number of expenses, set a budget, and view basic reports. However, they do not have access to the full range of features available to paid users. Free users can upgrade their account to a paid subscription at any time to gain access to the full range of features offered by the "Batwara" application.

# Application:

1. User Management:
   1. Sign up/login for users
   2. Profile management for users
2. Expense Tracking:
   1. Adding, editing and deleting expenses
   2. Categories for expenses such as food, transportation, entertainment, etc.
   3. Option to add a note for each expense
   4. Option to attach receipt images
   5. Viewing expenses by date, category, or all expenses
3. Budgeting:
   1. Setting monthly budget
   2. Visual representation of expenses vs budget
   3. Alerts when expenses approach or exceed budget
4. Reports:
   1. Generating reports on expenses by category or date range
   2. Exporting reports to CSV or PDF
5. Data Security:
   1. Encryption of sensitive data such as passwords and financial information
   2. Option for periodic data backups

This scope can be further refined and expanded based on specific requirements and goals of the project.

# 3. Processes in the application:

1. User Management

Here are the steps involved in the user management process for the "Batwara" application:

* Sign Up:
  + A new user visits the "Batwara" application in playstore & downloads the app.
  + The user clicks on the "Sign Up" button and is taken to a registration page.
  + The user enters their personal information, such as name, email address, and password.
  + The user clicks on the "Sign Up" button and a verification email is sent to the provided email address.
  + The user clicks on the verification link in the email to complete the sign-up process.
* Login:
  + The user opens the "Batwara" app or website and clicks on the "Login" button.
  + The user enters their email address and password.
  + The user clicks on the "Login" button and is taken to their dashboard if their login credentials are correct.
* Profile Management:
  + The user can access their profile by clicking on their profile picture or name in the top right corner of the dashboard.
  + The user can edit their personal information, such as name, email address, and password.
  + The user can also change their subscription plan from free to paid or vice versa.
* Logout:
  + The user clicks on their profile picture or name in the top right corner of the dashboard.
  + The user clicks on the "Logout" button.
  + The user is logged out of the "Batwara" app or website.

1. Expense Tracking

Here are the steps involved in the expense tracking process for the "Batwara" application:

* Adding an Expense:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Add Expense" button in the dashboard.
  + The user enters the amount, date, category, and description of the expense.
  + The user can also attach a receipt or any supporting documentation to the expense.
  + The user clicks on the "Save" button to add the expense to their account.
* Editing an Expense:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Expenses" tab in the dashboard.
  + The user finds the expense they want to edit and clicks on it.
  + The user makes the necessary changes to the expense information.
  + The user clicks on the "Save" button to update the expense in their account.
* Deleting an Expense:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Expenses" tab in the dashboard.
  + The user finds the expense they want to delete and clicks on it.
  + The user clicks on the "Delete" button to remove the expense from their account.
* Viewing Expenses:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Expenses" tab in the dashboard.
  + The user sees a list of all their expenses, including the amount, date, category, and description of each expense.
  + The user can sort and filter their expenses by date, category, or amount.

1. Budgeting Process

Here are the steps involved in the budgeting process for the "Batwara" application:

* Setting a Budget:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Budget" tab in the dashboard.
  + The user selects a time period (e.g., monthly, quarterly, annually) for the budget.
  + The user enters the amount they want to set as their budget for the selected time period.
  + The user clicks on the "Save" button to set the budget.
* Viewing Budget Progress:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Budget" tab in the dashboard.
  + The user sees a visual representation of their budget progress, including the amount spent, amount remaining, and percent spent.
  + The user can view their budget progress for the selected time period.
* Updating the Budget:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Budget" tab in the dashboard.
  + The user finds the budget they want to update and clicks on it.
  + The user makes the necessary changes to the budget amount.
  + The user clicks on the "Save" button to update the budget.
* Deleting the Budget:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Budget" tab in the dashboard.
  + The user finds the budget they want to delete and clicks on it.
  + The user clicks on the "Delete" button to remove the budget from their account

1. Report Process

Here are the steps involved in the report generation process for the "Batwara" application:

* Selecting a Report Type:
  + The user logs into the "Batwara" app or website.
  + The user clicks on the "Reports" tab in the dashboard.
  + The user selects the type of report they want to generate (e.g., expense report, budget report, category report).
* Setting Report Parameters:
  + The user selects the time period for the report (e.g., last month, last quarter, last year).
  + The user can also select additional parameters for the report, such as specific categories or specific expenses.
* Generating the Report:
  + The user clicks on the "Generate Report" button.
  + The "Batwara" application generates the report based on the parameters selected by the user.
* Viewing the Report:
  + The user sees a visual representation of the report, including charts, graphs, and tables.
  + The user can download or print the report for their records.
* Saving the Report:
  + The user can save the report to their "Batwara" account for future reference.
  + The user can access saved reports at any time by logging into their account and clicking on the "Reports" tab.

1. Data Security

# 4. Architecture diagram

# 5. Technology stack

* Frontend Tech – React Native
* Backend – Django
* Database – PostgreSQL
* Other tools & technology – AWS

# 6. Queries/Assumptions

We are assuming that we’ll receive the employee profile data SAP HR web services

# 7. Screen design overview

* Single Sign-On
* User Profile
* Group & Expense Save.

# 8. Pending Section that we’ll be updating later

1. Wireframe.
2. Screen design.
3. Test cases.
4. Technical Description