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| SPAM | Vision document – version <1.0>  SPAM: Personal Expense Consultant  ICS 499 – Capstone |

# System Overview

The Consultant will be both an immediate and an ongoing analyst and advisor in your personal monetary matters. It will help you determine whether you’re doing fine in your financial life, or you need a little guidance. It will help you plan for and achieve financial health.

# Attributes

* super-fast – you see results in moments
* security – no info will go beyond your computer/device
* encryption – all data stored locally in an encrypted file
* convenience – your choice of either speed-loading account history via our parsing engine or manual entry
* searchability – everything displayed in sortable columns, which make it super easy to look anything up
* simplicity – intuitive UI

# Key Features

* secure login
* easy updates of your account data
* manual entry option
* encryption of data
* transactions displayed in sortable columns
* quick overview and summary
* advising engine (predictions and suggestions built in)
* intuitive, well-readable GUI

# Capabilities

* easy updates: simple and fast updates of your account activity by parsing your bank-generated OFX files
* manual entry option: while it takes a little bit longer done manually, if desired, there’s no connection to the bank necessary–all data can be input by hand
* encryption: all data is encrypted before storing and encrypted just before use
* sortable columns: transactions can be sorted by any piece of information that’s part of the transaction, and then easily found in the list
* summary: your overview and account summary take just moments to complete to reveal your financial health on the fly
* advising: financial projection and suggestions tailored for you available on a whim