User Requirements:

Creating an account:

* Ability to view/manage financial accounts(1.a)
* Ability to create an account(1.b)
* Ability to log into account(1.c)

Financial Information:

* Ability to enter financial information(2.a,1.b)
* Ability to enter subscriptions(2.c)
* Ability to create funds to save up towards(2.d)
* Ability to enter cost of said to-do list activity(2.g.i)
* Ability to check off tasks on the to-do list(2.g.ii)
* App is sorted into modules(2.b)
* Ability to make a to-do list(2.g)
* Ability to sort subscriptions based off various criteria(2.e)
* Ability to view income allocation and change it.(2.f)

Tips:

* App provides tips as you explore(3.a)
* App has a tip recommending the user first set up monthly expenses(3.a.i)
* App can teach finance(3.b)
* App gives suggestions about extraneous subscriptions(3.b.iii.1)

User Dashboard:

* Ability to see how much subscription costs on a monthly basis(4.g)
* Ability to see progress towards fund(4.d)
* Able to see projected balance after each activity is completed(4.a.i)
* Ability to see notifications(4.b)
* Can check balance in app(4.a)
* Can see recent purchases in app(4.c)
* Can see upcoming payments in app(4.e)
* Can see next income date(4.f)
* App shows how much user should spend on a weekly basis according to their financial goals(4.a.ii)
* Ability to see subscription costs as a lump sum per month(4.g)

Notifications:

* Ability to send notifications to the user about upcoming payments.(5.a)
* App shows notifications about upcoming payments upon logging in(4.b)
* Can interact with notifications to get more information about the payment(4.b)

Savings:

* Ability to go to a “savings screen”(6.a)
  + Saving screen shows what user is saving for(6.b)
* Savings screen shows how much user has currently saved towards their goal(6.b.i)
* User is shown how long saving towards their goal will take based on current allocation(6.b.ii)
* Ability to add new savings goals(6.c)

System requirements:

1. Creating an account
   1. Ability to view/manage financial accounts
   2. Ability to create an account
      1. Set secure password
      2. Enter username
      3. Enter current balance
      4. Enter current income
      5. Enter paid date
   3. Ability to log into account
      1. Security
2. Financial Information
   1. Ability to enter financial information
      1. On account creation(see 1.b) mainly but in a “settings screen” as well(same info as 1.b) if the user needs to update after account creation
   2. App is sorted into modules
      1. Saving
      2. Account Information
      3. Subscriptions
      4. Learning (Advice)
   3. Ability to enter subscriptions
      1. Cost of subscription and how often it renews
   4. Ability to create funds to save up towards
      1. Amount to save
      2. How much each period
      3. See 6 for more details about functionality and UI
   5. Ability to sort subscriptions based off various criteria
      1. Cost
         1. Low to high
         2. High to low
      2. Alphabetically
         1. A-Z
         2. Z-A
   6. Ability to view income allocation and change it.
      1. Create categories of spending
      2. Adjust how much spending on each category
         1. Pie chart(percentages)
         2. Or numbers
   7. Ability to make a to-do list
      1. Ability to enter cost of said to-do list activity
      2. Ability to check off tasks on the to-do list
3. Tips
   1. App provides tips as you explore
      1. App has a tip recommending the user first set up monthly expenses
   2. App can teach finance
      1. Investing in stocks
      2. How to watch account balance
      3. Importance of watching subscriptions
         1. App gives suggestions about extraneous subscriptions
4. User Dashboard
   1. Can check balance in app
      1. Able to see projected balance after each activity is completed
      2. App shows how much user should spend on a weekly basis according to their financial goals
   2. Ability to see notifications
      1. Choose what notifications they want to see
      2. And how they want the notifications behave
      3. Can interact with notifications to get more information about the payment
   3. Can see recent purchases in app
      1. How much
      2. And where the money was spent
   4. Ability to see progress towards fund
      1. Progress bar gets filled in as they get closer to the goal
      2. Can see progress as a percentage as well
   5. Can see upcoming payments in app
      1. For what
      2. when
   6. Can see next income date
      1. Countdown to date
      2. As well as dd/mm/yyyy format
   7. Ability to see subscription costs as a lump sum per month
      1. As well as each individual
      2. Can Sort as per 2.h
5. Notifications
   1. Ability to send notifications to the user about upcoming payments.
      1. Customize what
      2. and how
6. Savings:
   1. Ability to go to a “savings screen”
      1. Also see notes about module arrangement in 2.b
   2. Saving screen shows what user is saving for
      1. shows how much user has currently saved towards each of their goals
         1. Similar if not the same system as 4.a
      2. User is shown how long saving towards each of their goals will take based on current allocation
   3. Ability to add new savings goals
      1. Enter amount to save
      2. How much to save each period
         1. Can set amount to save based on how long they want it to take to save
         2. Or just enter a number
         3. Or percentage of income per pay period

Platform writing:

For our budget manager software, we are planning to develop a mobile app. Our reasoning is that since many people track their financial information such as their bank account on their phones nowadays, we thought it would be best to allow users to manage their budget with their phones as well by making an app. Additionally, since an increasing number of people pay using their mobile devices, this would make for added convenience in keeping track of purchases, since these people can log the purchases immediately after they make them. Or, if we had enough time, we could maybe try and integrate the app with Apple Pay somehow (though we do acknowledge that this is very unlikely to end up in our final result). None of us have much experience with mobile app development, however. We are planning on learning the Swift programming language in order to develop the app. We have chosen to focus on programming for the IOS platform out of convenience for ourselves. Out of everyone in the group, Niyati has the most experience with databases. Her experience is mainly with using MongoDB, so we may find that using that program may be best for handling data in our app. However, that may change as we make further development progress.

Word Count: 213 words

**In addition, new this week,** I would like a brief explanation of **who did what** work on P3 (who made the first draft of each document, etc). Just one explanation for the group is fine.

Teddy made the doc and wrote out the requirements.

The initial splitting of system requirements into categories was done by Niyati.

The work on organizing the system requirements was mostly done by Ben, but the entire group did check his work.

The entire group did collaborate on organizing the initial requirements in a Zoom meeting.

Samantha wrote the 200 word platform writing. Teddy helped proofread some of it.

Progress review. Each group member should answer the following questions:

* Were you assigned a role this week? If so which one?

Teddy’s answer: Project Manager

Ben’s answer: Scheduler

Samantha’s answer: We have been keeping with the roles we were initially assigned. My role is the scribe.

Niyati’s Answer: Miscellaneous Managet

* Is the team making satisfactory progress toward completion of this assignment in a timely manner?

Ben’s answer: yes

Teddy’s answer: Yes

Samantha’s answer: yes, I think so

Niyati’s answer: yes

* Is every member of the team honoring the terms agreed to in the team contract?

Ben’s anser: yes

Teddy’s answer: Yes

Samantha’s answer: yes

Niyati’s answer: yes

* Are there any issues or conflicts the team is working to resolve?

Ben’s answer: no

Teddy’s answer: No

Samantha’s answer: no

Niyati’s answer: no

* Do you need to conference with me on any issues?

Ben’s answer: no

Teddy’s answer: No

Samantha’s answer: no

Niyati’s answer: no