Adding and withdrawing funds from EForT

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Project: EFEC
Product Owner(s): Masoud Sadjadi
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Description

EFRT-1747 - Improve user experience and interface for adding and withdrawing funds from primary EForT account VERIFIED

EFRT-1749 - Migrate and Refactor Stripe Webhook Functionality VERIFIED

Description: As a user, I would like a more streamlined experience when adding and withdrawing funds from my primary account.

Acceptance Criteria

- **Adding balance**
  - A user should be able to click the add balance "plus" sign button
  - A user should see a pop-up asking how much they would like to add
  - A user should be able to input the amount of funds they would like to add as a double or int
  - A user should be able to click the "add balance" button
  - A user should see a pop-up stating "Funds were added correctly. This transaction might take time to reflect on your balance."
  - A user should be able to see the change reflected on their balance after the transaction is validated.

- **Withdrawing balance**
  - A user should be able to click the withdraw balance "minus" sign button
  - A user should see a pop-up asking how much they would like to withdraw
  - A user should be able to input the amount of funds they would like to withdraw as a double or int
  - A user should see a pop-up stating "Funds were added correctly. This transaction might take time to reflect on your balance."
  - A user should be able to see the change reflected on their balance after the transaction is validated.

Use Case

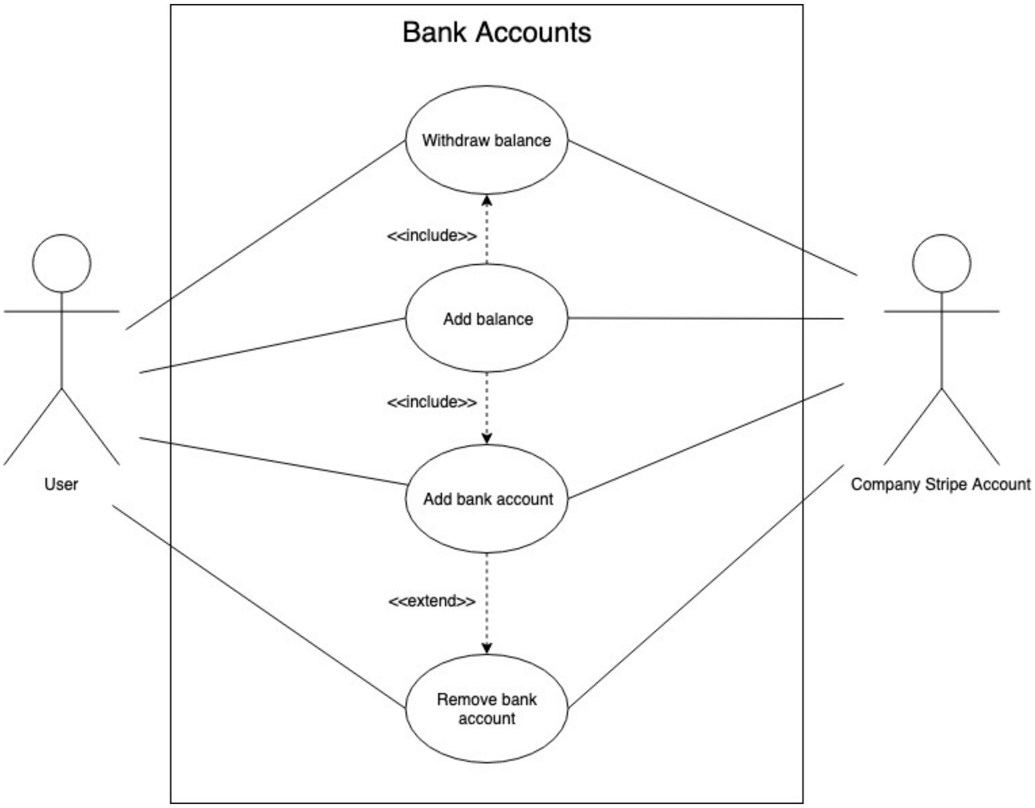
Use Case 1: Adding funds to the primary EForT account

- Actor: George (Trader User), Stripe Admin User
- Preconditions
  - George should have signed into EForT and navigated to the My Accounts bank accounts page.
  - George should have added a bank account already.
  - Stripe Admin User should have the endpoint set-up in the webhooks section of Stripe to catch Charge related events.
- Description
  - George should click the plus sign underneath the "Transfer to EForT" column.
  - George should enter the desired amount of money to transfer into EForT through a pop-up.
  - George should click the "add balance" button.
  - George should see a pop-up stating "Funds were added correctly. This transaction might take time to reflect on your balance."
  - If the Stripe Admin User set up webhooks properly and the webhook has validated the transaction and sent it back to the server, the newly added balance should be reflected in the account balance.

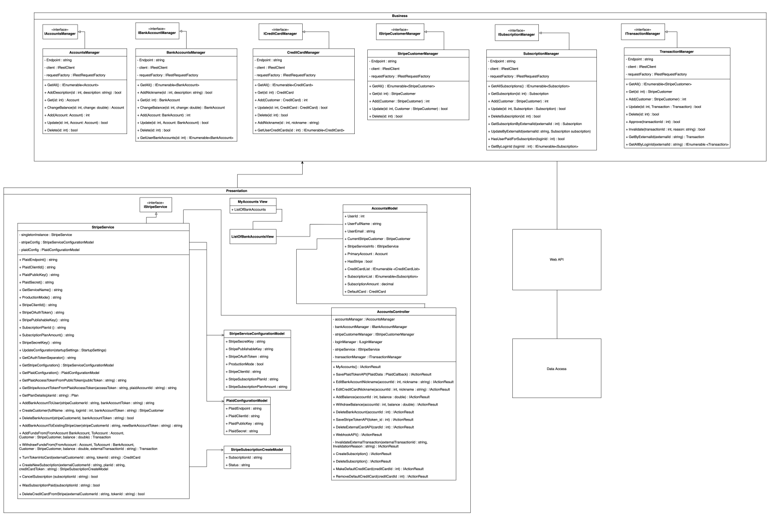
Use Case 2: Withdrawing funds from primary EForT account

- Actor: George (Trader User), Stripe Admin User
- Preconditions
  - George should have signed into EForT and navigated to the My Accounts bank accounts page.
  - George should have added a bank account already.
  - Stripe Admin User should have the endpoint set-up in the webhooks section of Stripe to catch Charge related events.
  - George should have added funds to his EForT account already.
- Description
  - George should click the minus sign underneath the "Transfer to Account" column.
  - George should enter the desired amount of money to transfer back to his bank account.
  - George should click the "withdraw balance" button
  - George should see a pop-up stating "Funds were withdrawn correctly. This transaction might take time to reflect on your balance."
  - If the Stripe Admin User set up webhooks properly and the webhook has validated the transaction and sent it back to the server, the withdrawn balance should be reflected in the account balance.

Use Case Diagram

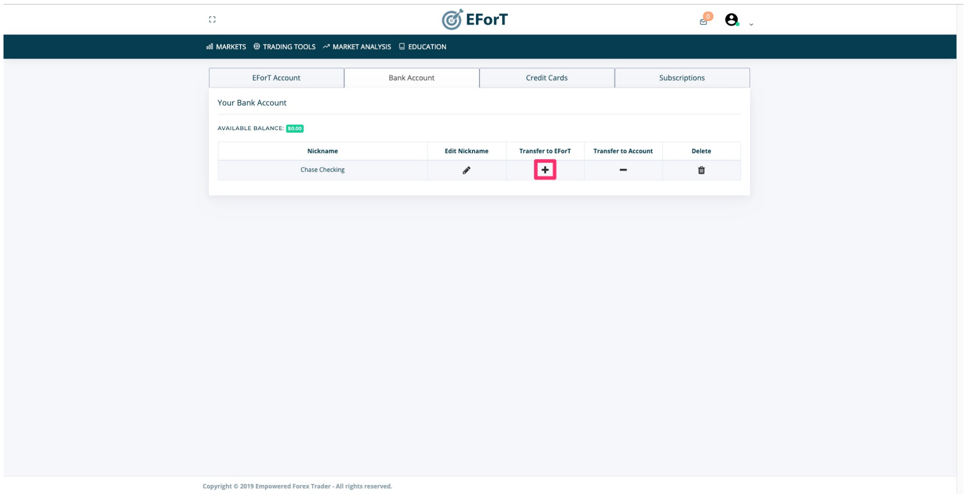


Class Diagram



Visual User Guide

Adding Funds

1. 
EForT
MARKETS
TRADING TOOLS
MARKET ANALYSIS
EDUCATION
EForT Account
Bank Account
Credit Cards
Subscriptions
Your Bank Account
AVAILABLE BALANCE:
Nickname
Edit Nickname
Transfer to EForT
Transfer to Account
Delete
Chase Checking
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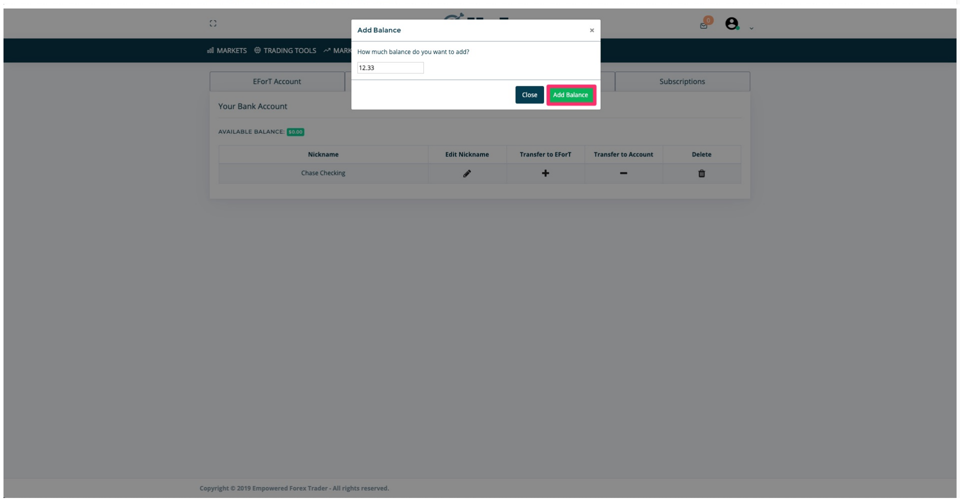
2. 
Add Balance
How much balance do you want to add?
12.33
Close
Add Balance
Your Bank Account
Nickname
Edit Nickname
Transfer to EForT
Transfer to Account
Delete
Chase Checking
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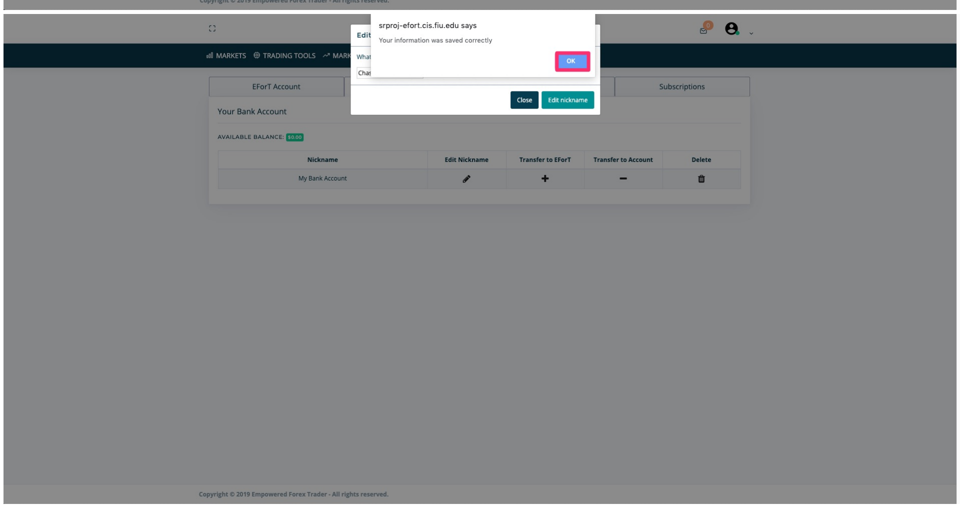
3. 
srproj-efort.cis.fiu.edu says
Your information was saved correctly
OK
Close
Edit nickname
Your Bank Account
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Transfer to EForT
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Delete
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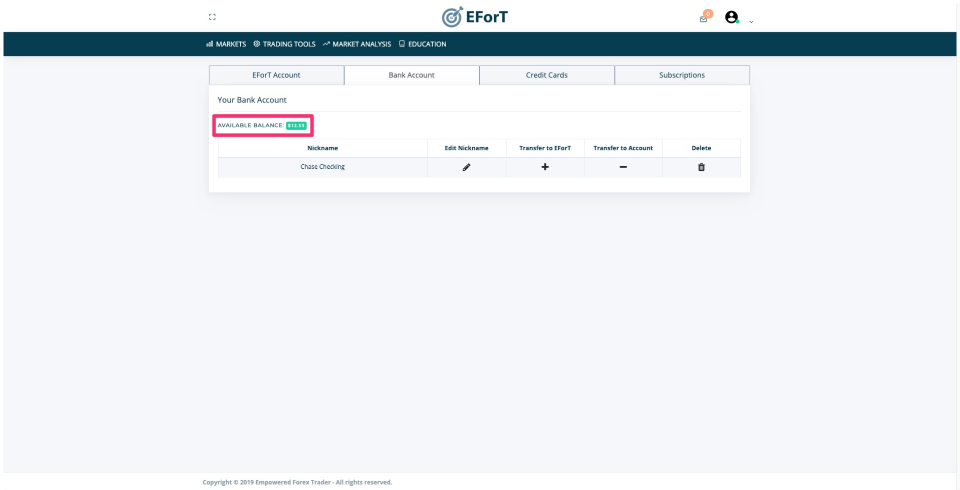
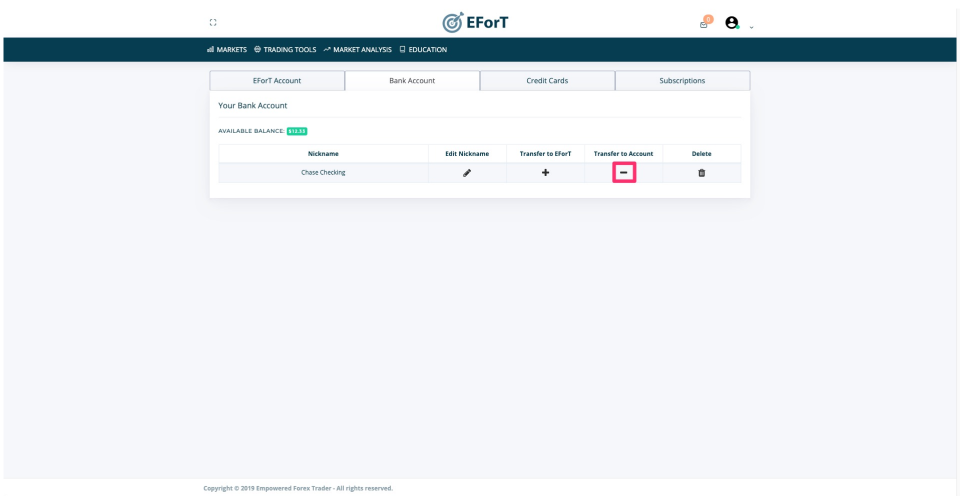
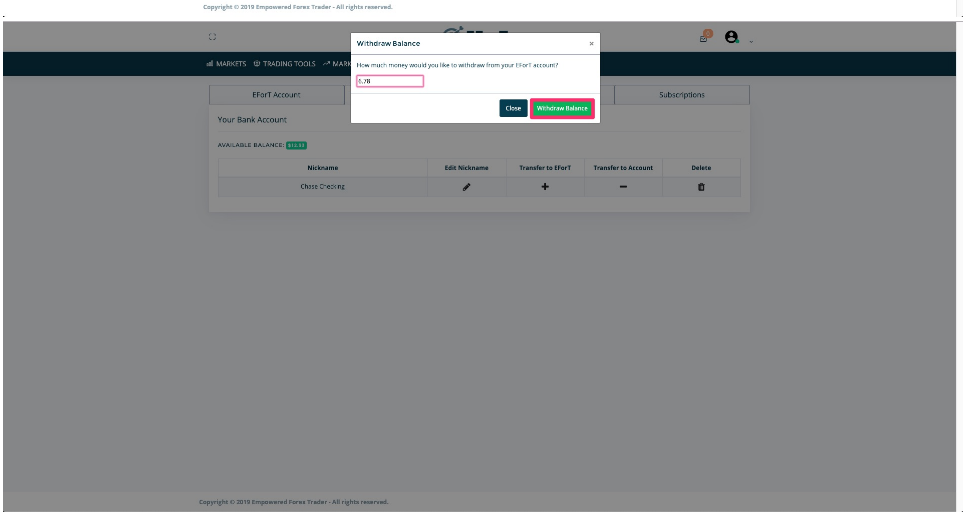
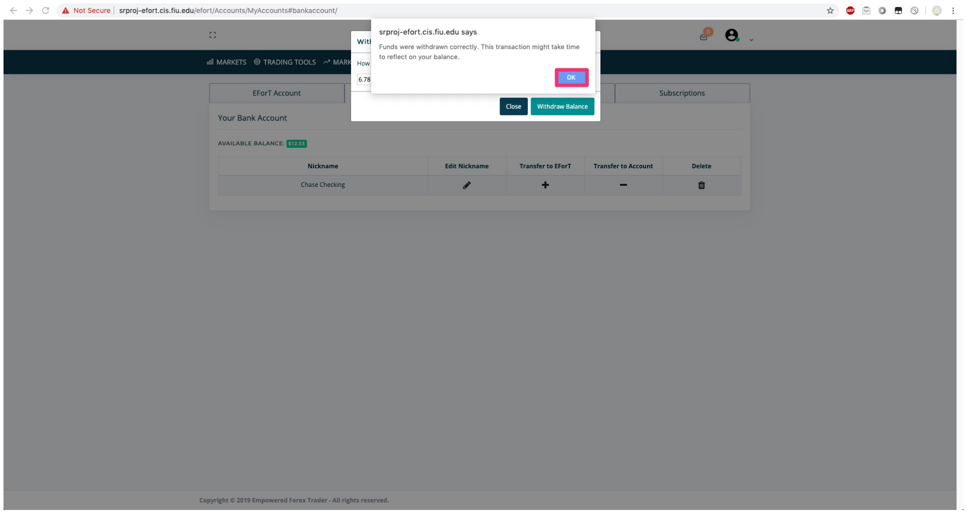
4. 

Withdrawing Funds

1. 

2. 

3. 
Not Secure | srproj-efort.cis.fiu.edu/efort/Accounts/MyAccounts#bankaccount/
srproj-efort.cis.fiu.edu says
Funds were withdrawn correctly. This transaction might take time to reflect on your balance.
OK
Close
Withdraw Balance
MARKETS
TRADING TOOLS
EForT Account
Subscriptions
Your Bank Account
AVAILABLE BALANCE:
Nickname
Edit Nickname
Transfer to EForT
Transfer to Account
Delete
Chase Checking
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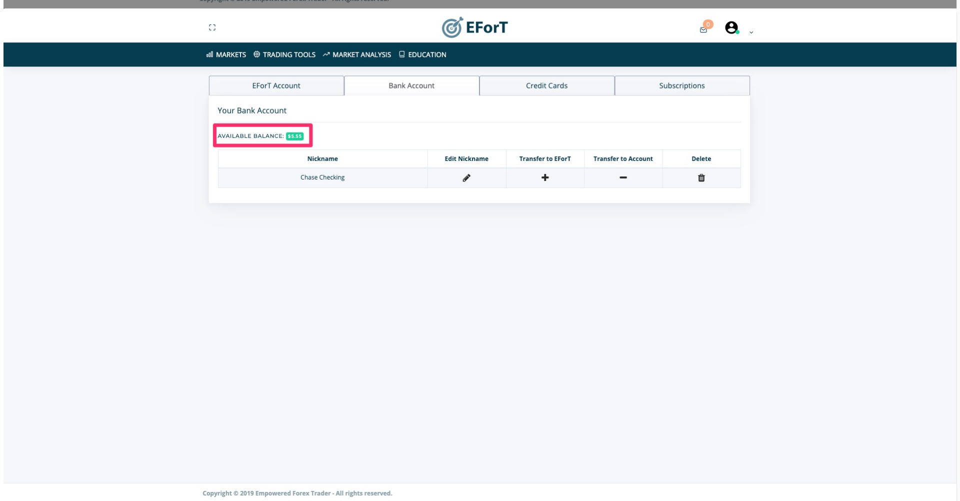
4. 
EForT
MARKETS
TRADING TOOLS
MARKET ANALYSIS
EDUCATION
EForT Account
Bank Account
Credit Cards
Subscriptions
Your Bank Account
AVAILABLE BALANCE:
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