

# Welcome to iBudget!

We're happy to have you using our website! Here we've got an intro to quickly get you up to speed and managing your finances better than ever.

This document will take you through creating an account, navigating the website, and using all the tools we've provided here for you.

Let's take a look at the home page ([ibudget.simplefunctions.com](http://ibudget.simplefunctions.com)) :

**Navigation Bar**

**Welcome to iBudget**  
A new way to manage your expenses and keep track of where your money goes.

**Want to see more?**  
Please take that enthusiasm with you to the projects page!

**Make your life easier**  
At iBudget, we believe money is for living. So we make everything simple and streamlined. Sign up takes less than five minutes. Then iBudget automatically pulls all your financial information into one place, so you can finally get the entire picture.

**Information Safety**  
iBudget values the privacy of its clients and ensures it is always secure. That's because we use 128-bit SSL encryption-the same security that banks use-and all data is protected and validated. Plus, since iBudget is read-only, no money can be moved in or out of any account.

**Reach your goals**  
iBudget helps you reach your goals: set a budget and create a plan to reach your personal financial goals. You can track your progress online or stay up-to-date with monthly emails. And we'll help you achieve your goals faster with helpful free advice and next steps.

**A bit about the iBudget project**  
The iBudget project started out as a group project for a software engineering class. After we completed it and showed it to some of our friends we realized the big potential it has and the numerous benefits it provides to users. We decided to launch the project...

"If you need motivation to achieve financial discipline, consider iBudget. It has all the features I need and is very intuitive and easy to use."  
-- Tom Smith

**Resources and helpful links**  
Here we provide helpful links.

- Financial Planning Association
- Money Saver Magazine
- Save and Invest

**Useful Links**

iBudget™ Home | About Us | Contact | Log In | Register

## Creating an Account

First click on the **Register** link in the *Navigation Bar*. Then fill out your email and a password, make sure your password is at least 8 characters, has an upper case, lower case, numeric, and special character.

Create an account

Email:

Password:

Confirm Password:

Next

Click “Next” and then fill out your first and last name:

Create an account

First Name:

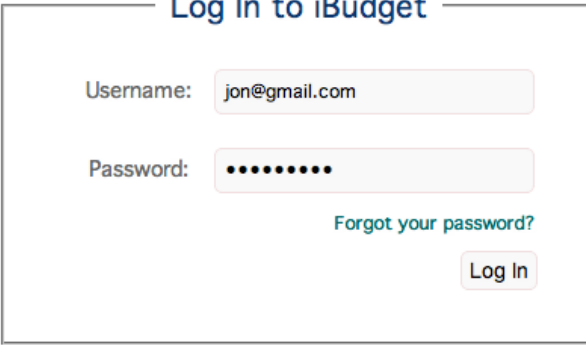
Last Name:

Register

Click “Register” and then your done! You’re now registered to use iBudget.

## Log In to your Account

Click on the **Log In** link in the *Navigation Bar*. Then fill in your registered email and your password.



The image shows a login form titled "Log In to iBudget". It contains two input fields: "Username:" with the value "jon@gmail.com" and "Password:" with a masked password represented by ten dots. Below the password field is a link "Forgot your password?". At the bottom right of the form is a "Log In" button. Below the form box is a link "Don't have an account yet? Create one here".

Log In to iBudget

Username: jon@gmail.com

Password: ••••••••••

[Forgot your password?](#)

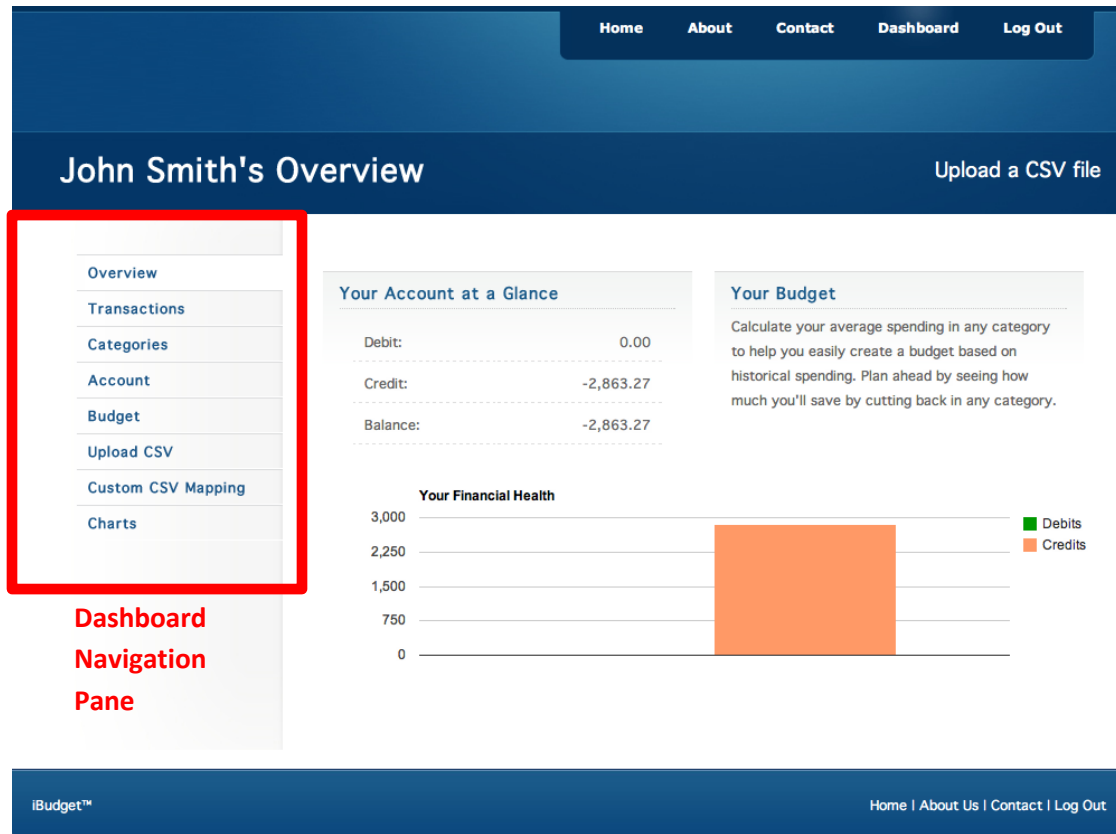
[Log In](#)

Don't have an account yet? [Create one here](#)

Click the "Log In" button and you're done.

## Dashboard

To access the dashboard, you'll have to log in to your account first. Then click on the **Dashboard** link in the *Navigation Bar*.



## Categories

You can use categories to group your transactions and assign budgets. To manage your categories click on the **Categories** link in the *Dashboard Navigation Pane*.

To add a new category, click the “Add New Category” button.

Quan Pham's Categories

Modify your categories

Overview

Transactions

Categories

Account

Budget

Upload CSV

Custom CSV Mapping

Charts

Category

Bank Fee

Deposit

Food

Interest

Lodging

Tax

Travel

Withdrawal

Add New Category

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Add Category

Name:

Save

Cancel

Select a category, enter a name and then click the “Save” button.

---

To delete a category, click the “Remove” button next to the category item you want to remove.

## Add Transactions

You can upload CSV files from any account, in fact we already have a few predefined mappings for you (we'll show you how to create more mappings next, if you need).

To upload transactions, click on **Upload CSV** in the *Dashboard Navigation Pane*.

The screenshot shows a web application interface. At the top, a dark blue navigation bar contains links: Home, About, Contact, Dashboard, and Log Out. Below this, a header section displays 'John Smith's Uploader' on the left and 'Upload a CSV file' on the right. A left-hand navigation pane lists several options: Overview, Transactions, Categories, Account, Budget, Upload CSV (which is highlighted), Custom CSV Mapping, and Charts. The main content area features a form titled 'Upload a CSV file'. This form includes a 'File' section with a 'Choose File' button and the text 'No file chosen', and a 'Mapping Type' section with a dropdown menu currently set to 'Bank Of America'. A 'Process File' button is located at the bottom right of the form.

Choose the file you want to upload, select the proper mapping and click the “Process File” button. If everything goes properly, you should see the screen below.

This screenshot shows the same 'Upload a CSV file' form as the previous one, but with an additional message: 'Imported CSV successfully' displayed in orange text above the file selection area. The 'File' section still shows the 'Choose File' button and 'No file chosen' text. The 'Mapping Type' dropdown remains set to 'Bank Of America'. The 'Process File' button is still present at the bottom right.

## Create a custom mapping for your CSV file

To create a custom mapping as discussed in the Add Transactions section, click on the **Custom CSV Mapping** link in the *Dashboard Navigation Pane*.

Upload file for preview

Please Keep File below 200 Lines, approximately 2Kb

File

Choose File No file chosen

0%

Preview

Preview

Choose a file then click the “Preview” button. You should now see a preview of the file you want to create a mapping for, like below.

Upload file for preview

Please Keep File below 200 Lines, approximately 2Kb

File

Choose File stmt.csv

100%

Preview

Starting Row:0

Mapping Name

Please Enter the Column # into each field for mapping.  
Enter just the number.

Transaction Date

Description

Amount

Create Custom Mapping

Preview

Clearly the first few lines of the file should not be uploaded, as you adjust the “Starting Row” as highlighted below, you’ll see the preview adjust appropriately.

Upload file for preview

Please Keep File below 200 Lines, approximately 2Kb

File

Choose File

stmt.csv

100%

Preview

Starting Row 3

Mapping Name

Please Enter the Column # into each field for mapping.  
Enter just the number.

Transaction Date

Description

Amount

Create Custom Mapping

Preview

Column 0	Column 1	Column 2	
Total debits		-2863.27	
Ending balance as of 04/08/2012		1042.33	
Date	Description	Amount	Running Bal.
03/21/2012	Beginning balance as of 03/21/2012		1105.60
03/21/2012	Monthly Fee for BofA Essentials	-6.00	1099.60
03/26/2012	CVS	-28.71	1070.89
03/27/2012	STAR MARKET	-27.46	1043.43
04/02/2012	STAR MARKET	-25.44	1817.99
04/02/2012	CVS	-16.97	1801.02
04/04/2012	Check 149	-1250.00	2551.02
04/06/2012	Bank of America Credit Card Bill Payment	-1508.69	1042.33



Once you've determined the starting row, fill in a name for your mapping, and fill in the column numbers for the 3 columns needed. In the case below, column 0 contains the Dates, column 1 has the description, and column 2 contains the transaction Amount.

Upload file for preview

Please Keep File below 200 Lines, approximately 2Kb

File

Choose File stmt.csv

100%

Preview

Starting Row:8

Mapping Name

Please Enter the Column # into each field for mapping.  
Enter just the number.

Transaction Date

Description

Amount

Create Custom Mapping

Preview

Column 0	Column 1	Column 2	Column 3
03/21/2012	Monthly Fee for BofA Essentials	-6.00	1099.60
03/26/2012	CVS	-28.71	1070.89
03/27/2012	STAR MARKET	-27.46	1043.43
04/02/2012	STAR MARKET	-25.44	1817.99
04/02/2012	CVS	-16.97	1801.02
04/04/2012	Check 149	-1250.00	2551.02
04/06/2012	Bank of America Credit Card Bill Payment	-1508.69	1042.33

Once you've filled this information in, click "Create Custom Mapping" and you're all set.

## Transactions

Once you've uploaded at least one CSV file, you can view, edit, or delete any of your transactions. Click on the **Transactions** link in the *Dashboard Navigation Pane*.

### John Smith's Transactions

Transaction Details

Overview

Transactions

Categories

Account

Budget

Upload CSV

Custom CSV Mapping

Charts

New Edit Delete Copy CSV Excel PDF Show 25 entries Search:

ID	Trans. Name	Category	Trans. Date	Amount
11	Monthly Fee for BofA Essentials		Mar 21, 2012	-6.00
12	FIVE HORSES TAVERN		Mar 26, 2012	-28.71
13	STAR MARKET		Mar 27, 2012	-27.46
15	STAR MARKET		Apr 02, 2012	-25.44
16	CVS		Apr 02, 2012	-16.97
18	Check 149		Apr 04, 2012	-1250.00
19	Bank of America Credit Card Bill Payment		Apr 06, 2012	-1508.69

Showing 1 to 7 of 7 entriesFirst Previous 1 Next Last

You can sort and search the transactions. You can also create new transactions or edit/delete a selected transaction. You can also export your transactions by using the “Copy”, “CSV”, “Excel”, or “PDF” buttons.

You can add a category (see Category section of this document) to a transaction by selecting the transaction and clicking the “Edit” button.

categories

account

budget

upload

custom

charts

ID	Trans. Name	Category	Trans. Date	Amount
1888	Monthly Fee for BofA Essentials		Mar 21, 2012	-6.00
1890	CVS		Mar 26, 2012	-28.71
1891	STAR MARKET		Mar 27, 2012	-27.46
				-25.44
				-16.97
				-1250.00
				-1508.69

Edit entry

Trans Name:

Monthly Fee for BofA Essentials

Category:

Bank Fees

Trans. Date:

Mar 21, 2012

Amount:

-6.00

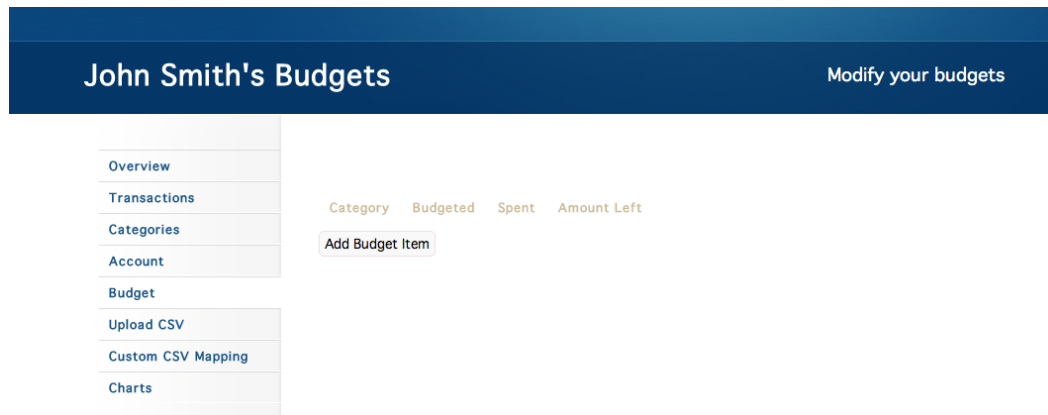
Update

Select a category and then click the “Update” button.

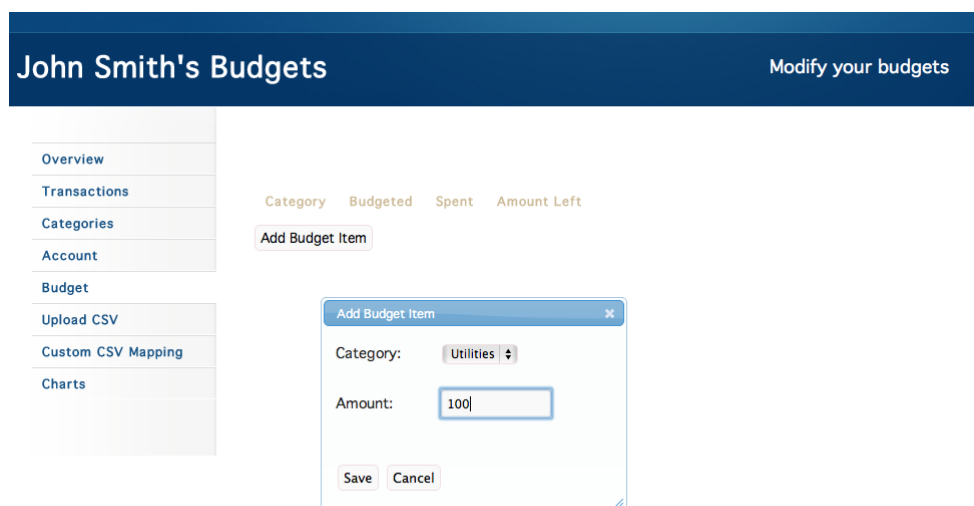
## Budgets

Budgets can be used to track your monthly spending on any Category you've created. When you create a budget, you select a category and a monthly allowance, you can then view all the budgets you've created and see how much you've spent in the current month on each budget, versus the amount you've allotted.

To manage budgets, click on the **Budget** link in the *Dashboard Navigation Pane*.



To add a budget item, click the “Add Budget Item” button. Then select a category, enter an allowance amount, and then click the “Save” button.



To delete a budget item, click the “Remove” button next to the budget item to delete.

John Smith's Budgets

Modify your budgets

Overview

Transactions

Categories

Account

Budget

Upload CSV

Custom CSV Mapping

Charts

Category

Budgeted

Spent

Amount Left

Utilities

\$100.00

\$0

\$100

Add Budget Item

Remove

## Charts

We've provided some helpful charts to visualize your transactions. To view these charts, click on the **Charts** link in the *Dashboard Navigation Pane*.



## Manage your Account

If you need to reset your password or change the name associated with your account you can do this in the Account section. To manage your account, click on the **Account** link in the *Dashboard Navigation Pane*.

### John Smith's Account Info

Overview

Transactions

Categories

Account

Budget

Upload CSV

Custom CSV Mapping

Charts

First Name:

John

Last Name:

Smith

Update Name

Password:

Repeat Password:

Submit

Date registered: Friday, May 4, 2012 at 12:09:57 PM

Fill in the information you'd like to change and then click on the appropriate button.

## Contact Us

If you'd like to send us any feedback you can do this on the Contact page. To get to the contact page, click on the **Contact** link in the *Navigation Bar*.

Please fill out the form below:

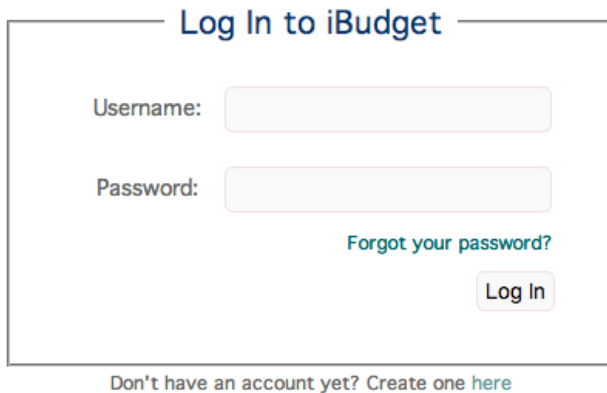
Name:	<input type="text" value="John Smith"/>
Email:	<input type="text" value="jon@gmail.com"/>
Message:	<div><div>Send us feedback!!</div><div></div></div>
<input type="button" value="Send"/>	

Fill in your name, email, and message, and then click the "Send" button. You can send feedback even if you aren't logged in.

## Forgot your Password?

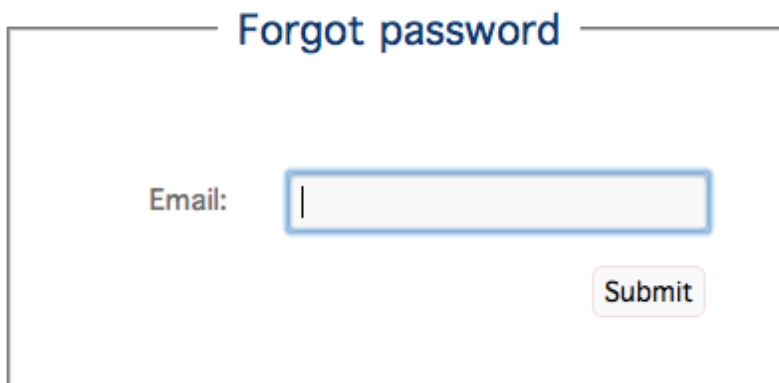
If you forget your password, don't worry, you can reset it through the email address you used as your account name.

From the Log In screen (**Log In** link on the *Navigation Bar*) click the "Forgot your password?" link.



The form is titled "Log In to iBudget" in blue text. It contains two input fields: "Username:" and "Password:". Below the password field is a link "Forgot your password?" in blue text. At the bottom right is a "Log In" button. At the bottom left is a link "Don't have an account yet? Create one here" in blue text.

Enter the email address you use to log in and click the "Submit" button.



The form is titled "Forgot password" in blue text. It contains one input field labeled "Email:". Below the input field is a "Submit" button.



You should receive an email shortly, like the one below:

Hey, we heard you forgot your iBudget password.

Use the following link within the next 24 hours to reset your password:

[http://ibudget.simplefunctions.com//reset\\_password.php?username=jon@gmail.com&pid=41bbdd6801e7425de96605951a736f94ab059ae8e1204e60d80dd65440224e8b](http://ibudget.simplefunctions.com//reset_password.php?username=jon@gmail.com&pid=41bbdd6801e7425de96605951a736f94ab059ae8e1204e60d80dd65440224e8b)>click here to reset your password.</a>

Thanks,  
The iBudget Team

Click on the link, and you'll find yourself at the Reset Password page. Enter a new password (remember passwords have to be at least 8 characters, must contain an upper case, lower case, numeric, and special character) and then click the "Submit" button.

Reset password

Password:

Repeat Password:

Submit

Your password is now reset, and you can use this new password to continue to access your account.