

# WalletCLi - User Guide

By: Team W17-2 Since: Aug 2019 Licence: MIT

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# 1. Introduction

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Welcome to **WalletCLi**!

**WalletCLi** is a text-based (Command Line Interface) expenses/loan application that caters to NUS students and staff who prefer to use a desktop application for managing their expenses and loans.

**WalletCLi** allows its users to record their daily expenses and loans, and enables easy creation, editing and deletion. Users can also pre-set their budget, and **WalletCLi** will automatically track your current expenses to ensure that its users expenses stay within their stated budget. Expenses and loans can be efficiently managed via our intuitive category system.

**WalletCLi** is optimized for those who prefer to work with a Command Line Interface (CLi) and/or are learning to work more efficiently with CLi tools. Additionally, unlike traditional expenses/wallet applications, **WalletCLi** utilizes minimal resources on the user's machine while still allowing users to manage their expenses and keep track of their loans swiftly and efficiently.






## 2. About this User Guide

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This user guide provides a quick start guide for you to easily setup install **WalletCLi**, documentation of all various features **WalletCLi** offers, frequently asked questions and a summary of the available commands. To navigate between the different sections, you could use the table of contents above.

For ease of communication, this document will refer to expenses/loans/contacts that you might add into the planner as *data*.

Additionally, throughout this user guide, there will be various icons used as described below.

	This is a tip. Follow these suggested tips to make your life much simpler when using <b>WalletCLi</b> !
	This is a note. These are things for you to take note of when using <b>WalletCLi</b> .
	This is a sign-post dictating important information. These are information that you will surely need to know to use <b>WalletCLi</b> efficiently.
	This is a sign-post informing caution. Please take note of these items and exercise some care.
	This is a rule. Ensure that you follow these rules to ensure proper usage of <b>WalletCLi</b> .

## 3. Features

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This section displays the features that you can expect from **WalletCLI**.

### Expenses System

- Add records of your expenses.
  - You may include records of your past expenses or any impending expenses.
- Manage these records by editing or deleting them.
- Tag and view your expenses with predefined categories
- Include recurring expenses. Recurrence rate can be either daily, weekly or monthly.
  - **WalletCLI** will automatically duplicate and fill up the records up to the end of the current month.

### Loan System

- **WalletCLI** allows you to add loans that is referenced to a contact.
- After you have settled the loans, you can mark it as settled.
- If there are any changes to your loans, you can also edit your loans with reference to the loan ID.
- **WalletCLI** also allows you to delete loans whether it is settled or unsettled.

### Contact System

- **WalletCLI** allows you to add contact details such as phone number so that you can tag your loans to them.

### Notification and Reminder System

- **WalletCLI** will show you a list of unsettled loans after it starts up and will start an auto reminder every 30 minutes by default.
- You can set the timings for the auto reminder. In addition, you can turn the reminders off or on when you need to.
- **WalletCLI** will also keep track of your budget and expenses, and notify you when your expenses are close to the budget you set. Likewise, when you exceed your budget, **WalletCLI** is capable to notify you as well.

## 4. Quick Start

This section guides you through the installation of **WalletCLi** and provides a few example commands you may try.

1. Ensure you have Java version 9 or later installed in your Computer.
2. Download the latest jar file from <https://github.com/AY1920S1-CS2113T-W17-2/main/tree/master/build/libs>
3. Copy the file to the folder you want to use as the home folder for your planner.
4. Open command prompt (cmd) in your planner home folder
5. Start the app by running the jar file with the following command:  
`run java -jar {jar file name}`
6. You should see the GUI appear in a few seconds.

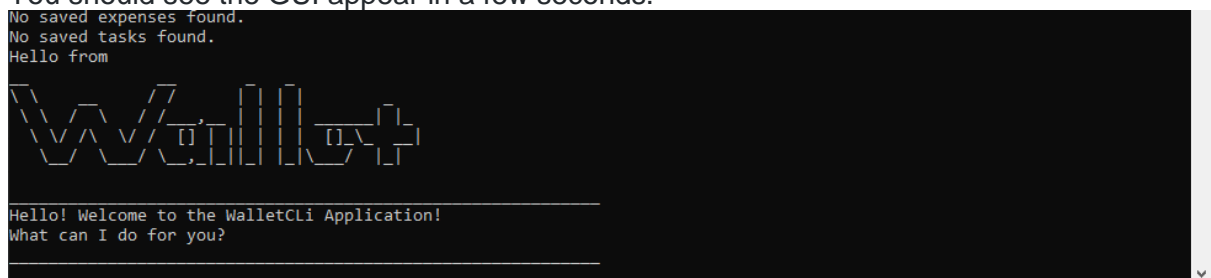


Figure 1: GUI screen upon starting **WalletCLi**



Commands are not case-sensitive.

7. Type the command in the command box and press **Enter** to execute it.  
For example: typing **help** pressing **Enter** will open the help window.
8. Here are some other commands you can try:
  - **Set budget 1000** : **WalletCLi** takes note of this budget and reminds you when you are close to or have exceeded the budget.
  - **List expense** : List all expenses in **WalletCLi**
  - **List expense /sortby date** : List all expenses in order of date specified in the expenses
  - **Bye** : Exits the application
9. Refer to Section 4, Features for details of each command.

## 5. Commands

This section explains the commands that you can use to interact with the different features and systems of **WalletCLI**.

### Command Format

- Words in UPPER\_CASE are the parameters to be supplied by you. For example, in `/r DAILY`, `DAILY` is a parameter which can be used as the recurrence rate.
- Items in square brackets are optional. For example, in `add expense <DESCRIPTION> <AMOUNT> <CATEGORY> [/on <date>] [/r <RECURRENCE RATE>]`, `/on <DATE>`, `/r <RECURRENCE RATE>` is a parameter that may be omitted.

### Identifiers and Parameters

Identifiers in **WalletCLI** are designed to be short and easy to memorise. Once you are familiarised with them, you will be intuitive to use the parameters. The table of Identifiers and Parameters and their descriptions below is useful for your reference as you jump right into grasping the system.

Identifier	Parameter	Description	Format	Example
/sortby	LEND	Sorts loans based on user lending money	Text	/sortby lend
	BORROW	Sorts loans based on user borrowing money	Text	/sortby borrow
	DATE	Sorts expenses or loans by date specified in expenses or loans	Text	/sortby date
	CATEGORY	Sorts expense or loans by their specified category	Text	/sortby category
/on	DATE	Date of expense	Text	/on 20/01/2019
/r	RECURRING	Frequency of expenses	Text	/r daily
/d	DESCRIPTION	Description of a <i>Loan</i>	Text	/d interest rate 10%

	DETAILS	Details of contact	Text	/d friend
/p	PHONE NUMBER	New contact phone number (Edit Feature)	Text	/p 91234567
/a	AMOUNT	New loan amount (Edit feature)	Number	/a 1000
/n	NAME	New name of Contact (Edit feature)	Text	/n David



While the table shows you all the identifiers and parameters that **WalletCLI** uses, there are some commands that do not make use of identifiers nor parameters. The view command is one such exception that make use of keywords that must be typed in a specific order.

## 5.1 Viewing help: *help*

There are different help sections included in **WalletCLI** that can help you if you are unsure of the command syntax. Access any of the section by keying in its index or enter 0 to exit the help shell.

Format: help

```
help
Need help? The following help sections are available:
1.General
2.Expense
3.Loans
4.Contacts
5.Command History

Note the following when reading help sections:
<> indicates required parameters for command
[] indicates optional parameters for command

Key in help section number (enter 0 to exit):
3
```

Figure 5.1.1: Help section

## 5.2 Listing data: *list*

You can list and view your current Contacts, Loans and Expenses in **WalletCLI** depending on your command.

Format for listing all data: list all [</sortby <PARAMETER>>]

Format for listing Contacts: list contact

Format for listing Loans: list loan [</sortby <PARAMETER>>]

Format for listing Expenses: list expense [</sortby <PARAMETER>>]

Format for listing Recurring Expenses: list recurring [</sortby <PARAMETER>>]

Format for listing data by specific date: `list <DATE>`

Examples:

- `list all /sortby date`

Shows a list of every expenses and loans sorted by the dates specified in each data added

- `list loan /sortby lend`

Shows a list of loans input in **WalletCLi** sorted by lending loans (As a user you specified that you lent money)

- `list expense /sortby category`

Shows a list of expenses in **WalletCLi** sorted to each of their specific categories.

- `list contact`

Shows a list of contacts in **WalletCLi**

```
list contact
```

Here are the contacts in your list:

ID	Name	Phone	Detail
3	Mary	8728 1831	sister

Figure 5.2.4: Listing contacts



The default results of **list** command is sorted by the date you added the data into **WalletCLi**.

## 5.3 Adding Data: *add*

You can either add Contacts, Loans or Expenses to **WalletCLi** depending on your command.

Format for adding Contacts: `add contact <NAME> [/d <DETAILS>] [/p <PHONE NUMBER>]`

Format for adding Loans: `add loan <DESCRIPTION> <AMOUNT> [<date>] </l or /b>`

Format for adding Expenses: `add expense <DESCRIPTION> $<AMOUNT> <CATEGORY> [/on <date>] [/r <RECURRENCE RATE>]`

Examples:

- `add contact Mary /p 8728 1831 /d sister`

Adds a single contact that consists of the name as Mary, a description of Mary being your sister and her phone number, i.e. number 1728 1831.

```
add contact Mary /p 8728 1831 /d sister
```

Got it. I've added this contact:  
[ID: 3]Mary sister 8728 1831

Figure 4.3.1: Adding contacts

- `add loan lunch $100 21/09/2019 /b /c 2`

Adds a single loan; you borrowed 100 dollars for lunch on the 21st September 2019. And by default, it will be indicated that the loan has not been settled.

Figure 4.3.2 Adding Loans

- `add expense textbooks $500 necessities`  
Adds a single expense of textbooks worth 500 dollars today and place them under the necessity category as a one-time expense.
- `add expense Phone Bill $30 Bills /on 10/10/2019 /r monthly`  
Adds a single monthly recurring expense of bills worth 10 dollars starting from the 1st of February 2019.

```
add expense Phone Bill $30 Bills /on 10/10/2019 /r monthly
```

Got it. I've added this expense:

ID	Description	Category	Date	Amount	Recurring
9	Phone Bill	BILLS	2019-10-10	\$30.00	MONTHLY

Figure 4.3.2.1: Example of adding an expense



Omitting the date sets the default expense as today (The day you key in your expenses)



**WalletCLI** does not dictate your expenses, thus allowing the same descriptions to exist in the user's expenses and loans.

## 5.4 Editing Data: *edit*

You can either edit your Contacts, Loans or Expenses to **WalletCLI** depending on your command.

Format for editing Contacts: `edit contact <CONTACT ID> [</n NEW NAME>] [</d NEW DETAILS>] [</p NEW PHONE NUMBER>]`

Format for editing Loans: `edit loan <LOAN ID> </d NEW DESCRIPTION> </a NEW AMOUNT> </t NEW DATE> [</l or /b>] [</c> ID OF CONTACT]`

Format for editing Expenses: `edit expense <EXPENSE ID> [/d <DESCRIPTION>] [/t <DATE>] [/a <AMOUNT>] [/c <CATEGORY>] [/r <RECURRENCE RATE>]`

Examples:

- `edit contact 4 /n John /p 81727183 /d brother 123@abc.com`  
Edits a single contact by changing the name to John, updating his phone number, i.e. number 81727183 and changing the details to John's email as well as indicating him as brother.

```
edit contact 4 /n John /p 81727183 /d brother 123@abc.com
```

Successfully edited this contact:  
[ID: 4]John brother 123@abc.com 81727183

Figure 5.4.1: Edit contact



- `edit loan 1 /d dinner /a 10.50 /t 10/10/2019 /c 1`
- `edit expense 2 /a 4.50 /c food /r daily`



```
edit expense 2 /a 4.50 /c food /r daily

Successfully edited this expense:
-----
| ID | Description | Category | Date | Amount | Recurring |
|----|-----|-----|-----|-----|-----|
| 2 | Dinner | FOOD | 2019-10-01 | $4.50 | DAILY |
|----|-----|-----|-----|-----|-----|
```

Figure 5.4.2: Example of editing an expense

	Use <b>list</b> command to view your loans, expenses or contacts first to retrieve the ID before editing.
	For <b>edit contact</b> , to remove details and phone number from a contact, type “/d” and “/p” respectively without any arguments at the back e.g. <i>edit contact 5 /p</i>

## 5.5 Deleting Data: *delete*

You can either delete your Contacts, Loans or Expenses to **WalletCLi** depending on your command.

Format for deleting Contacts: `delete contact <CONTACT ID>`

Format for deleting Loans: `delete loan <LOAN ID>`

Format for deleting Expenses: `delete expense <EXPENSE ID>`

Examples:


- `delete contact 4`

```
delete contact 4

Noted. I've removed this contact:
[ID: 4]John brother 123@abc.com 81727183
```

Figure 5.5.1: Delete contact

- `delete loan 1`
- `delete expense 2`

	Use <b>list</b> command to view your loans, expenses or contacts first to retrieve the ID before deleting.
---	--

## 5.6 Completing Loans: *done*

You can mark your loans as settled in **WalletCLi**.

Format: `done loan <LOAN ID>`



Examples:

- `done loan 2`

## 5.7 Setting Budget: *budget*

You can set your budget for each month in **WalletCLI**.

Format: budget <AMOUNT> <MONTH/YEAR>

	Setting budget \$0 <MONTH/YEAR> will remove the budget entry.
	<b>Budget</b> involves only expenses, loans are not part of your budget!

Examples:

- Budget \$400 02/2019

## 5.8 Viewing Schedules or Statistics: *view*

You can view your budget or statistics for each month in **WalletCLI**.

Format for viewing schedules: view budget <MONTH/YEAR>

Format for viewing statistics: view stats <DATE>

Examples:

- view budget 02/2019
- view stats

## 5.9 Setting Reminders: *reminder*

You can enable or disable reminders for loans, upcoming expenses and remaining budget for the month in **WalletCLI**. You can also set how often you should get reminded by **WalletCLI**.

Format for enabling reminders: reminder on

Format for disabling reminders: reminder off

Format for setting frequency: reminder set <TIME IN SECONDS>

Examples:

- reminder set 3600

## 5.10 Viewing command history: *history*

You can view the history of previously executed commands in **WalletCLI**.

Format: history

## 5.11 Redo previous command: *redo*

You can redo the previous command executed in **WalletCLI**.

Format: redo

## 5.12 Undo previous command: *undo*

You can undo the previous command executed in **WalletCLI**.

Format: undo

## 6. Future Enhancements [coming in v2.0]

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Though the current implementation has much flexibility, there is more that can be done to elevate user experience to the next level. These are some possible enhancements:

1. Allowing users to make direct transactions from **WalletCLi** when shopping online.
2. You can create and edit your own commands in **WalletCLi**
3. **WalletCLi** can sync with the user's bank account to provide more convenience and more monitoring
4. Users can receive cashbacks when they save money to further lower their expenses

## 7. FAQ

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This section provides answers to some frequently asked questions of users.

Q: Where are my data stored?

A: All your data are stored in the /data directory.

Q: How do I transfer my data to another computer?

A: In order to transfer your data to another computer, you should:

1. Install the app on the other computer
2. Transfer /data from your old **WalletCLi** folder and place it into the new **WalletCLi** folder.

## 8. Command Summary

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This section provides a quick reference for all commands available in **WalletCLi**.

### 8.1 General Commands

Here is a list of general commands that you might find useful in helping you to use and configure **WalletCLi**:

Task	Purpose	Command Format	Example
Help	Displays the User guide	help	help
Exit	Exits the application	bye	bye
Set budget	Sets budget for the given month	budget <AMOUNT> <DATE>	Budget \$400 02/2019
Set reminder	Enable or disable reminders, and change reminder interval.	reminder </on or /off or /t <RATE>>	reminder /t 30min

View statistics	View statistics of expenses for given month	view stats <DATE>	view stats 02/2019
Redo	Redo the previous command executed	redo	redo
Undo	Undo the previous command executed	undo	undo
View command history	View the command history	history	history

## 8.2 Viewing Data Commands

Here is a list of commands for viewing your data in **WalletCLi**:

Task	Purpose	Command Format	Example
List expenses	List all expenses in the application	list expense	list expense
List loans	List all loans in the application	list loan	list loan
List contacts	List all contacts in the application	list contact	list contact
List all	List all expenses, loans and contacts in the application	list all	list all
List data with specific date	List all expenses and loans with the specified date	List <DATE>	List 01/01/2019

## 8.3 Expense Management Commands

Here is a list of commands for managing your expenses in **WalletCLi**:

Task	Purpose	Command Format	Example
Add expense	Add an expense into the application	add expense <DESCRIPTION> <AMOUNT> <CATEGORY> [/on <date>] [/r <RECURRENCE RATE>]	add expense bills \$10 bills /on 01/02/2019 /r monthly
Edit expense	Edit an expense	edit expense <EXPENSE ID> [/d <DESCRIPTION>] [/t <DATE>] [/a <AMOUNT>] [/c <CATEGORY>] [/r <RECURRENCE RATE>]	edit expense 2 /a 4.50 /c food /r daily
Delete expense	Delete an expense	delete expense <EXPENSE ID>	Delete expense 2

## 8.4 Loan Management Commands

Here is a list of commands for managing your loans in **WalletCLI**:

Task	Purpose	Command Format	Example
Add loan	Add a loan into the application	add loan <DESCRIPTION> <AMOUNT> [<date>] </l or /b>	add loan lunch \$5.00 01/01/2019 /l
Edit loan	Edit a loan	edit loan <LOAN ID> </d NEW DESCRIPTION> </a NEW AMOUNT> [</l or /b>] [</c> ID OF CONTACT]	edit loan 0 /d dinner /a \$50.00 /l /c 1
Delete loan	Delete a loan	delete loan <LOAN ID>	delete loan 2

## 8.5 Contact Management Commands

Here is a list of commands for managing your contacts in **WalletCLI**:

Task	Purpose	Command Format	Example
Add contact	Add a contact into the application	add contact <NAME> [</d DETAILS>] [</p PHONE NUMBER>]	add contact david /d friends /p 12345678
Edit contact	Edit a contact	edit contact <CONTACT ID> [</n NEW NAME>] [</d NEW DETAILS>] [</p NEW PHONE NUMBER>]	edit contact 1 /n notdavid /d sister /p 87654321
Delete contact	Delete a contact	delete contact <CONTACT ID>	delete contact 2

## 8.6 Porting Data Commands

Here is a list of commands for exporting or importing data in **WalletCLI**:

Task	Purpose	Command Format	Example
Export data	Exporting data(either loans or expenses) to csv	export <loans or expenses>	Export loans
Importing data	Importing data (either loans or expenses) from csv	import <loans or expenses> <filename>	Import expense mar_expense.csv