**User Manual** **for**

**WalletTrail**

Web-Based Scripting CSIS 3280-001

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# Introduction

**WalletTrail** is an expense management application that is built using Laravel. The main aim of this project is to create an easy and quick way for tracking a user’s income and expenses. This app will help users to plan their monthly budget by adding their day-to-day expenses, making their life easier.

# Features

1. Login and Register the user.
2. Creating and Updating custom categories for each user.
3. Creating and Updating Expenses using custom categories.
4. Creating and Updating Income using custom categories.
5. Generating monthly reports by income/expenses and categories.
6. Generating a graph representation of income/expenses using third-party API.
7. Ability to log in as Administrator.
8. Admin portal can see the user lists.
9. Admin has the option to export the users list as CSV file.

# Details Of Screens

1. **Register**

A person can register themselves as a user (non-admin). They have to add their name, email and password for registering. This email and password will be used for logging in.

1. **Login**

User or Admin can log in to their respective accounts using email and password. They both will navigate to their Dashboards where they can will have different menu options where they can register. They can log out anytime after clicking on their name at the top right corner and then clicking on logout.

1. **User/Admin – Dashboard**

This is the landing page after logging in where the user is greeted. We have multiple options on the side bar menu that the user can choose to do.

1. **User - Income Categories**

On this screen users can see a list of their income categories. They will be able to edit or delete the category. User can also add new category by clicking on Add New button on top which then will take the user to Add screen where they can add new category by typing in the name and clicking Save. The Edit button will take the user to Edit screen and they can change the name of the category and click Save.

1. **User – Income**

On this screen users can see a list of their incomes. They will be able to edit or delete the income. User can also add new income by clicking on Add New button on top which then will take the user to Add screen where they can add new income entry by selecting the category name from drop down, entering the amount and date in the form and clicking Save. The Edit button will take the user to Edit screen and they can make changes and click Save.

1. **User - Expense Category**

On this screen users can see a list of their expense categories. They will be able to edit or delete the category. User can also add new category by clicking on Add New button on top which then will take the user to Add screen where they can add new category by typing in the name and clicking Save. The Edit button will take the user to Edit screen and they can change the name of the category and click Save.

1. **User – Expenses**

On this screen users can see a list of their expenses. They will be able to edit or delete the expenses. User can also add new expense by clicking on Add New button on top which then will take the user to Add screen where they can add new entry by selecting the category name from drop down, entering the amount and date in the form and clicking Save. The Edit button will take the user to Edit screen and they can make changes and click Save.

1. **User - Monthly Reports**

This screen will show the monthly summary of the user’s incomes and expenses. From top, the user can select which month they want to see the report for. By default it will show for current month. We can see the total income and expense for that month and we can see the amounts for individual categories for them as well. Below them, we can pie charts that will help the user to quickly visualize the stats based on the category.

1. **Admin - Users**

Admin can select the Users tab on the left menu. After clicking they can see the list of users in the system. They will be able to export this list as a CSV file by clicking on the Export button on the top.