Expense App

User Manual

A practical guide for managing your personal finances

Document Overview

- **Purpose:** Help you get the most out of the Expense App
- **Audience:** Users, Clients, Anyone managing personal finances
- **Last Updated:** November 2025

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1. Getting Started

What is Expense App?

Expense App is your personal finance companion that helps you:

✅ Track every dollar you spend
✅ Set and monitor budgets
✅ Reach your savings goals
✅ Make informed financial decisions

No more wondering "Where did all my money go?"

Requirements

- Active internet connection
- Valid email address

Creating Your Account

Step 1: Launch the App

When you first open Expense App, you'll see the Create Profile screen.

Step 2: Sign Up

1. Enter your name
2. Enter your email address
3. Create a secure password (minimum 6 characters)
4. Tap **Create Account**

Step 3: Start Using the App

You're all set! You'll now see your dashboard with an empty transaction list.

First Time Setup

Default Categories

- 🍔 Food
- 🚗 Transport
- 🎬 Entertainment
- 🧾 Bills
- 🏥 Health
- 🛍️ Shopping
- 📌 Other

You can customize these categories to fit your needs (more on this later).

Dashboard Overview

When you log in, you'll see your **Dashboard** with:

```
┌──────────────────────────────────┐
│   Spending Chart                 │  ← 📊 Visual overview
│   (Last 7 days breakdown)        │
├──────────────────────────────────┤
│   Search & Filter                │  ← 🔍 Find transactions
├──────────────────────────────────┤
│   Transactions                   │  ← 💰 All expenses
│   [List of your spending]        │
└──────────────────────────────────┘
```

Navigation Bar:

At the top of the dashboard, you'll find quick access to:

- 📂 Categories
- 💵 Budgets
- 📈 Charts
- 📋 Reports
- 🎯 Savings Goals
- 👤 Your Profile

2. Managing Transactions

Adding a Transaction

Adding an expense is quick and easy!

Step 1: Tap the "+" Button

Look for the floating "+" button (centered at the bottom) or the "+ Add Expense" option.

Step 2: Fill in the Details

Field	Example	Notes
Title	"Lunch at Café"	What did you spend on?
Amount	15.50	Enter the cost (numbers only)
Date	Today	When did you spend it?
Category	Food	What type of expense?

Step 3: Submit

Tap **Add Transaction** to save.

✅ Your expense is now tracked!

Example: Adding Your First Transaction

Scenario: You bought lunch for $12.50 today

1. Tap the **"+" button**
2. Enter **Title:** "Lunch at Café"
3. Enter **Amount:** 12.50
4. Select **Date:** (Today is selected by default)
5. Select **Category:** Food
6. Tap **Add Transaction**

Result: Your first expense is recorded!

Deleting a Transaction

To delete a transaction:

1. Find the transaction in your list
2. Tap on the red trashcan icon

⚠️ **Note:** Deleted transactions cannot be recovered. Be careful!

Transaction History

Searching for a Transaction:

1. Use the **Search** function at the top of the transaction list
2. Enter a keyword to search by title (e.g., "coffee", "gas")
3. Results appear as you type

Recurring Transactions

Tired of entering the same transaction every month?

Add a Recurring Expense:

1. Tap "+" **to add a transaction**
2. Fill in the details as normal
3. Toggle **Recurring: ON**
4. Select frequency:
    - Daily
    - Weekly
    - Monthly
5. Tap **Add Transaction**

Example: Netflix subscription ($15.99/month)

- Title: "Netflix"
- Amount: 15.99
- Category: Entertainment
- Recurring: YES
- Frequency: Monthly

Result: Netflix will automatically appear as a transaction every month!

3. Organizing with Categories

Why Categories Matter

Categories help you:

✅ Understand spending patterns
✅ Set targeted budgets
✅ Find transactions quickly
✅ Plan for the future

Viewing All Categories

To see your categories:

1. Tap **Categories** in the navigation bar at the top
2. You'll see all your expense categories
3. Each shows a color and icon

Creating a Custom Category

Want to track something not covered by default categories?

Step 1: Go to Categories

Step 2: Create New

1. Tap the **"+" button**
2. Enter the category name (e.g., "Pet Supplies")
3. Choose a color (visual organization)
4. Select an icon (helps with recognition)
5. Tap **Create**

✅ Your new category is ready to use!

Editing a Category

To rename or change a category:

1. Go to **Categories**
2. Find the category you want to change
3. Tap the **pencil** icon to edit
4. Update the name, color, or icon
5. Tap **Update**

Deleting a Category

To remove a category:

1. Go to **Categories**
2. Find the category you want to delete
3. Tap the **trashcan** icon
4. Select a replacement category for transactions assigned to the one you're deleting
5. Tap **Delete & Reassign**

4. Setting & Tracking Budgets

Understanding Budgets

A **budget** is a spending limit for a category.

Why set budgets?

✅ Prevent overspending
✅ Achieve financial goals
✅ Get alerts when approaching limits
✅ Plan monthly spending

Setting a Budget

Step 1: Go to Budgets

Tap **Budgets** in the navigation bar.

Step 2: Create New Budget

1. Tap **"+" or "Add Budget"**
2. Create a **name**
3. Enter your **spending limit** (e.g., $500)
4. Select a **type** (overall spending or category-specific)
5. Select a **frequency** (weekly, monthly, quarterly, yearly, custom)
6. Select **start** and **end dates**
7. Tap **Create Budget**

✅ Your budget is now active!

Monitoring Your Budget

View budget status:

1. Go to **Budgets**
2. See each category's:
    - Budget limit
    - Current spending
    - Percentage used
    - Days remaining

Color coding:

- Green: 0-50% of budget used (Good!)
- Yellow: 50-99% of budget used (Careful)
- Red: 100%+ of budget used (Over)

Budget Alerts

You'll receive alerts when:

1. You reach 50% of your budget
2. You reach 75% of your budget
3. You reach 90% of your budget

Staying on Track:

- Check budgets daily or weekly
- Review categories that are turning yellow
- Adjust spending if needed
- Update budget limits if necessary

Updating a Budget

To change your budget:

1. Go to **Budgets**
2. Tap on the **pencil icon** on the budget
3. Update the desired field(s)
4. Tap **Save Changes**

Removing a Budget

To stop tracking a budget:

1. Go to **Budgets**
2. Tap on the **trashcan icon** of the budget you want to delete
3. Choose **Delete**

The category will remain; you just won't have spending limits.

5. Analyzing Your Spending

Charts & Visualization

Visual analysis helps you understand spending patterns.

Pie Chart (Category Breakdown)

Shows where your money went over a specified period of time.

What it shows:

- Each category as a slice showing percentage of total spending
- Color-coded for easy recognition

How to find it:

1. Go to **Charts**
2. Select a date range
3. Filter by budgets if desired
4. Look for the **Pie Chart** (Category Breakdown)

Spending Trends

View your overall spending patterns:

1. Go to **Charts**
2. Look for **Spending Trends**
3. See your spending over the last 7 days, 30 days, 3 months, or custom time period
4. Identify patterns and changes

What to look for:

- Upward trends (spending increasing)
- Seasonal patterns (higher in winter, etc.)
- Monthly patterns (e.g., always high on payday)

Budget Performance Report

See exactly how much you spent per category:

1. Go to **Charts**
2. Look for **Budget Performance**
3. See overall budget
4. See which budgets have been exceeded, met or are on track

Time Period Filter

View data for different periods:

1. At the top of the charts page
2. Select your time period:
    - Last 7 days
    - Last 30 days
    - This month
    - Last 3 months
    - Custom date range

6. Savings Goals

What are Savings Goals?

Savings Goals help you save money for future purchases.

Examples:

- Vacation: Target $2,000
- Car down payment: Target $5,000
- Emergency fund: Target $10,000
- Laptop: Target $1,200

Creating a Savings Goal

Step 1: Go to Savings Goals

Tap **Savings Goals** in the navigation bar.

Step 2: Create Goal

1. Tap **"+" or "Create Goal"**
2. Enter **goal name** (e.g., "Summer Vacation")
3. Enter **target amount** (e.g., $2,500)
4. Set **target date** (optional, when you want it by)
5. Tap **Save goal**

✅ Your goal is now active!

Tracking Progress

View your savings goals:

1. Go to **Savings Goals**
2. Each goal shows:
    - Goal name
    - Target amount ($2,500)
    - Current savings ($850)
    - Progress percentage (34%)
    - Visual progress bar

Adding to a Goal

To add money to a savings goal:

1. Go to **Savings Goals**
2. Tap on the "+" (Contribute) button
3. Enter amount (e.g., $100)
4. Tap **Add**

Editing a Goal

To change a goal:

1. Go to **Savings Goals**
2. Tap on the **pencil icon** of the goal you want to edit
3. Update:
    - Goal name
    - Target amount
    - Current amount
    - Description
    - Target date
4. Tap **Save changes**

Completing a Goal

When you reach your target:

1. The goal shows as 100% complete
2. You'll see a congratulations message

7. Financial Reports

What are Reports?

Reports provide detailed summaries of your spending over any time period.

Uses for reports:

- Review your finances
- Plan next month's budget
- Export for taxes
- Share with accountant
- Print for records

Generating a Report

Step 1: Go to Reports

Tap **Reports** in the top navigation bar.

Step 2: Create New Report

1. Tap "+" **or "Generate Report"**
2. Select **date range** (last 7 days, last 30 days, this month, last 3 months, or custom)
3. Tap **Generate Report**

Your report will be created in seconds!

Report Contents

Your report includes:

Summary Section:

- Total spending
- Spending averages
- Highest spending category
- Number of transactions

Category Breakdown:

- Each category with amount
- Percentage of total

Insights:

- Budget performance
- Spending trends

Exporting Your Report

Save as PDF or CSV:

1. Go to **Reports**
2. Tap on a report
3. Tap the 3 vertical dots in the upper right corner
4. Choose **Export as PDF** or **Export as CSV**
5. File saves to your device
6. Share, print, or email as needed

Sharing a report:

1. Create your report
2. Tap the report to view it
3. Tap the 3 vertical dots in the upper right corner
4. Choose **Print/Share PDF**
5. Print or save to your device

8. Advanced Features

Search Functionality

Find any transaction quickly:

1. Tap the **Search** button
2. Enter keyword to search by transaction name
3. Results appear in real-time

Search tips:

- Searches are **not case-insensitive**
- Partial matches work ("cof" finds "coffee")
- Search across all categories
- Results automatically sorted by date (oldest first)

Filtering Transactions

Narrow down your transactions:

1. On the transaction list (home page)
2. Choose filter criteria:
    - **By Category:** Food, Transport, etc.
3. Choose sorting criteria:
    - **By Date**
    - **By Amount**
    - **Ascending** order
    - **Descending** order
4. Results update instantly

Sorting Options

Organize your transaction view:

1. Tap **Sort**
2. Choose:
    - **Date (Newest first)** - Default
    - **Date (Oldest first)**
    - **Amount (High to low)**
    - **Amount (Low to high)**
    - **Category**
    - **Title (A to Z)**

Profile Management

View and edit your profile:

1. Tap on the **profile icon** in top navigation bar
2. See your:
    - Name
    - Email
    - Phone
    - Profile picture

Update profile:

1. Go to your profile
2. Choose **Edit Profile**
3. Update name, phone number, or profile picture
4. Tap **Save**

Security & Privacy

Your data is protected by:

✅ Secure login (encrypted password)
✅ Data encryption in transit
✅ Firestore security rules
✅ No data sharing with third parties

Best practices:

- Use a **strong password** (8+ characters, mix of letters/numbers)
- Don't share your **login credentials**
- Log out on shared devices
- Review account activity regularly

Backing Up Your Data

Automatic backups:

- Your data is automatically backed up to cloud
- No action needed from you
- Accessible from any device with your login

9. Troubleshooting

Technical Issues

App Won't Load

1. Check internet connection
2. Restart the app
3. Restart your phone
4. Reinstall app if needed

Transactions Not Saving

1. Check you have internet connection
2. Verify you're logged in
3. Try submitting again
4. Restart app if issue persists

Can't Log In

1. Verify email address is correct
2. Check CAPS LOCK is off
3. Check internet connection

Quick Reference Guide

Navigation Bar Map

```
Dashboard (Home)
│
├─ Categories
│   ├─ View all categories
│   └─ Create/edit/delete categories
│
├─ Budgets
│   ├─ View all budgets
│   └─ Create/edit/delete budgets
│
├─ Charts
│   ├─ Pie chart (spending by category)
│   ├─ Spending trends
│   └─ Budget performance
│
├─ Reports
│   ├─ View all reports
│   ├─ Generate/delete reports
│   ├─ Share or print reports
│   └─ Export as PDF or CSV
│
├─ Savings Goals
│   ├─ View all goals
│   ├─ Create/edit/delete goals
│   └─ Contribute toward goals
│
└─ Profile
    ├─ View profile
    ├─ Edit/delete profile
    └─ Logout
```

Data Entry Tips

Entering Amounts:

- Enter numbers only: 25.50 (not $25.50)
- Use decimal for cents: 15.99
- Whole dollars don't need decimals: 25 (not 25.00)

Entering Dates:

- Tap calendar icon for date picker
- Or type in format: MM/DD/YYYY
- Future dates allowed for planned expenses

Entering Categories:

- Tap dropdown to select
- Can only select one per transaction

Ready to Take Control?

You have everything you need:

✅ A powerful tracking tool
✅ Visual insights into your spending
✅ Budget controls
✅ Savings goal tracking
✅ Financial reports

All that's left is taking the first step.

Start today. Log your first expense. Set your first budget. Create your first goal.

Your financial health starts now! 🎉

Need Help?

Resources available:

📧 **Email Support:** diniusa1@mymail.nku.edu

🌐 **Online Guides:** https://github.com/Anna-Dinius/ASE-456-Expense-App/tree/main/docs

Congratulations!

You now have the knowledge to:

✅ Track every expense
✅ Set and monitor budgets
✅ Visualize spending patterns
✅ Reach savings goals
✅ Make informed financial decisions

Start using Expense App today and take control of your finances!

End of User Manual