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Increment 5

Java finance

User Documentation

Increment 5 Revisions

Pages Changed pages 4,8-11

Added Dashboard Overview sections after login section

Shifted all pages down.

Pages Added

none

Increment 4 Revisions

Pages Changed

All pages have been modified. Replaced all images and fixed grammatical errors.

Reworked Accounts and Goals sections to reflect changes in program.

Pages Added pages 51-54

Add Expense Export, Income Export,

Accounts Export, Goals Export.

Increment 3 Revisions

Pages Changed

none

Pages Added pages 39-50

Add Goals, Active Goals, Goals Overview

Increment 2 Revisions

Pages Changed

pages 3-4, 8-12

Pages Added pages 13-38

Modify Expense, Add Income, Modify Income,

Add Account, Delete Account, Modify Account

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# Application Overview

The Java Finance application tracks your expenses and income. The application will track the amount, payment method used, date of, and category of and also allow you to enter a custom name and description for any given expense.

When launching the application, you will be greeted by the initial login screen (Figure 1). You must use your login credentials to access to the application features (Figure 1.2).

A picture containing company name

Description automatically generated

Figure 1

Table

Description automatically generated with medium confidence

Figure 1.2

Upon initial startup the user will need to create a new user profile to add to the database. Continue to page 5 for instructions on how to add a new user.

# Creating A New User

Upon initial start of the application a user will not have any login credentials to access the application features. To begin the process of creating a new user select the “New User?” button on the lower right side of the screen. (Figure 2)

A picture containing company name

Description automatically generated

New User Button

Figure 2

In the next screen you will be presented with the “New User Registration” form (Figure 2.1). This form includes fields for User Information, Login Information, and Account Information.

## New User Form

Graphical user interface, application, Word

Description automatically generated

Cancel and return to Login screen

Reset All Fields

Required Account Info

Optional User Info

Required Login Info

Figure 2.1

|  |  |
| --- | --- |
| Field | Description |
| New Username | REQUIRED. The new Username field is where you will enter your desired Username for logging in. Username must be unique compared to other names in the database. If you enter a Username that is already taken you will be prompted in the message box “Username already exists”. |
| New Password | REQUIRED. The new Password field is where you will enter your desired password credentials for logging in. Passwords can be a total length of 255 characters and can include numbers, letters (Upper or Lower) and special characters such as: @,&,#,! |
| First Name | OPTIONAL. Enter the First name to use for your user account. The first name is limited to 45 characters. |
| Last Name | OPTIONAL. Enter the Last name to use for your user account. The last name is limited to 45 characters. |
| Account Name | REQUIRED. Account name is a required field as you must have an account to link your expenses and incomes. The Account name can be any name you would like up to 45 characters. |
| Account Type | REQUIRED. Account type is a required field as it helps to categorize you expenses and income. Account type is broken up into 4 categories, Personal, Savings, Business and Retirement. Select which ever best suits your needs. |
| Account Starting Balance | REQUIRED. The account starting balance is a Required field. This field must be entered using digits. You can use the up or down arrows to increase or decrease the amount or type the amount into the box. By default, this value is set to Zero (0) and accepts decimals. |

\*\* If you wish to empty all fields and start over, click the reset button to clear all fields. \*\*

## New User Form cont.

After all fields have been filled out, you will then click the “Submit” button (Figure 2.3). If all required fields were filled in correctly you will be prompted that the “User Profile was added successfully” (Figure 2.4). After clicking “OK” on the dialogue box, you will be redirected back to the login screen.

Graphical user interface, application, Word

Description automatically generated

Submit Form Button

Example of Completed New User Form

Figure 2.3

Graphical user interface, application, Word

Description automatically generated

Dialog box showing user profile was added successfully

Figure 2.4

# Logging In

When launching the application, you will first be presented with the login screen. Enter your login credentials to the corresponding fields (Figure 3).

Error Message box

A picture containing company name

Description automatically generated

Figure 3

\*\* If you wish to empty all fields, click the reset button to clear all fields. \*\*

If the login was successful, you will be directed to the Dashboard (figure 3.1). If login credentials were entered incorrectly, you will be made aware through the error message box.

Table

Description automatically generated with medium confidence

Figure 3.1

# Dashboard Overview

The dashboard is where you can see all your account summaries. As you add more expenses and incomes this table will be filled using those entries. To select an account to view, use the combo box on the top right of the table (Figure 3.2).

Table

Description automatically generated with medium confidence

Account combo box

Figure 3.2

After selecting an account, all of your expenses and incomes for that account will be displayed on the table. Your account balance will also be generated in the bottom center of the table (Figure 3.3).

Table

Description automatically generated with medium confidence

Account balance

Figure 3.3

## Dashboard Overview cont.

The dashboard tab also gives you access to a calculator. Click the “Calculator” button to open the calculator (Figure 3.4).

Table

Description automatically generated with medium confidence

Calculator button

Figure 3.4

Graphical user interface, application

Description automatically generated

Calculator

Figure 3.5

\*\*\* After adding or modifying a new expense, income, or account you will be required to click the “Refresh” button to update the “Overview” table. \*\*\*

## Dashboard Overview (Export Example)

To export your account statement to a file, Click the “Export” button (Figure 3.6). You will then be prompted to select a directory and set a file name (Figure 3.7).

Table

Description automatically generated with medium confidence

Export Button

Figure 3.6

Graphical user interface, application

Description automatically generated

Figure 3.7

After selecting a directory and entering a file name, click the “Export” button, the file will then be saved as an excel (xlsx) file type. You can find the file in the directory you selected. If the file was successfully saved, you will be prompted with a message saying, “Account Statement has been Exported.”

# Add New Expense

The add new Expense tab can be accessed using the left side tab “Expense”.

Expense Tab

Graphical user interface, application, Word

Description automatically generated

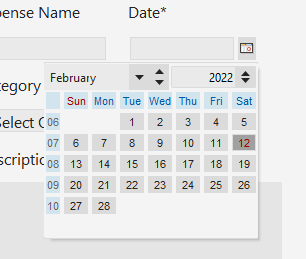
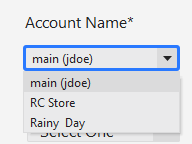
Add Expense Tab

Figure 4

|  |  |
| --- | --- |
| Field | Description |
| Expense Name | OPTIONAL. The expense name is an optional field. Here you can enter a name for your expense up to 45 Characters. |
| Date | REQUIRED. Date is a required field to select which date applies to the current expense entry. (Figure 4.1) |
| Category | REQUIRED. A drop-down menu will be populated using existing database categories. Select the best option that fits your needs. (Figure 4.2) |
| Description | OPTIONAL. The description is an optional field. Use this field to add extra information about an expense. |
| Account Name | REQUIRED. Account name drop-down will be auto populated using any accounts you have already created. (Figure 4.3) |
| Payment Method | REQUIRED. Payment method is a required field and will be auto populated using the valid payment types from the database. Options include Credit, Debit, Wire and Cash. (Figure 4.4) |
| Amount | REQUIRED. The amount field is required when adding an expense. The default value is 0. If the amount is entered incorrectly the system will default to a zero entry for that expense. |

\*\* Although some fields are optional, it is recommended that you fill in these fields as it will help to better organize your portfolio. \*\*

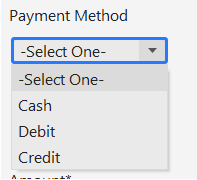
## Add New Expense cont.

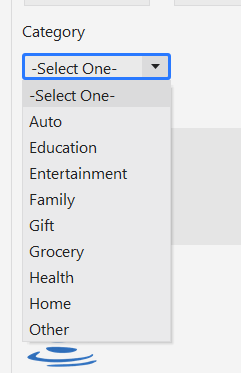


Select Account

Select Date from drop down

Figure 4.3

 Figure 4.1



Select Pay Method

Optional Categories

Figure 4.4

Figure 4.2

## Add New Expense Example

Once the Add Expense Form is filled in with correct information (Figure 4.5), click the “Commit” button to add the expense. If all fields were entered correctly, you will be notified with a screen prompt (Figure 4.6). If fields are not entered correctly, you will be prompted with a dialog box explaining the error.

Graphical user interface, application, Word

Description automatically generated

Reset All Fields

Commit Expense Button

Figure 4.5

Graphical user interface, application, Word

Description automatically generated

Expense Added Successfully

Figure 4.6

\*\*\*To clear all fields, click the reset button. \*\*\*

# View/ Modify Expenses

The “View / Modify Expenses” tab can be found in the “Expenses” tab on the left side of the screen. Click the “View / Modify Expenses” subtab within “Expense” tab (Figure 5).

Expense Tab

Graphical user interface, application

Description automatically generated

View / Modify Expense Subtab

Figure 5

The “Recent Expenses” table will be auto generated upon opening the “View / Modify Expenses” tab. The results will populate in the table below the “Recent Expenses” label (Figure 5.1).

Graphical user interface, application

Description automatically generated

Auto Generated Expenses

Figure 5.1

## View / Modify Expenses cont.

To sort the generated results, click on the desired column to sort from (Figure 5.2). In this example the expenses are sorted in descending order from the date.

Graphical user interface, application

Description automatically generated

Sorted Results of Generated Expenses by Date Descending

Figure 5.2

## View / Modify Expenses (Modify Expenses)

Below the “Recent Expenses” table, you will find the “Modify Expense” options (Figure 5.3). Here you can modify any information pertaining to an expense. You can change a single field at a time or multiple. For example, perhaps an amount that was previously entered is incorrect, you can select the “ExpenseID” and only modify the amount field. Or, if you wish to change the amount, account, and name of expense, that can be done as well without needing to fill in all of the modify expense options.

Graphical user interface, application

Description automatically generated

Modify Expense Buttons

Modify Expense Options

Figure 5.3

\*\*\* The “Modify Expense” fields follow the same input rules as the fields found in the “Add Expense” tab. Please reference page 8 for a complete table of correct input types. \*\*\*

**Modify Expense Buttons**

The “Export” button will export the table data to an Excel file (.xlsx).

The “Update” button will commit any changes to a selected “ExpenseID”.

The “Reset” button will clear all the fields back to default.

The “Refresh” the table data. This button should be used in case if any information is not updating correctly.

The “Delete” button will remove any selected “ExpenseID”.

## View / Modify Expenses (Update Expense Example)

Lets walk through an example of modifying an expense.

We will modify ExpenseID #1 (Figure 5.4). We will change the Name to “Mcdonalds”, Amount to “$10” and Pay Method to “credit”.

Graphical user interface, application

Description automatically generated

ExpenseID #1

Figure 5.4

First, we will select the “ExpenseID” using the ExpenseID field (Figure 5.5).

Graphical user interface, application

Description automatically generated

ExpenseID #1

ExpenseID field set to #1

Figure 5.5

## View / Modify Expenses (Update Expense Example) cont.

Now we will fill in the “Name” field with our new expense name, the “Amount” field with our new amount and use the drop-down box to change our “Pay Method” field (Figure 5.6).

Graphical user interface, application

Description automatically generated

Modified Pay Method Field

Modified Amount Field

Modified Name Field

ExpenseID #1

ExpenseID field set to #1

Figure 5.6

After all the fields are filled in that you wish to change for an expense, click the “Update” button on the right side of the screen (Figure 5.7).

Graphical user interface, application

Description automatically generated

Update Button

Figure 5.7

## View / Modify Expenses (Update Expense Example) cont.

If the expense modification was successful, you will be notified with a dialogue box saying, “Expense has been Updated!”. If not, you will be notified with a dialogue box explaining the error (Figure 5.8).

Graphical user interface, application

Description automatically generated

Expense Updated Successfully

Figure 5.8

Now we can see in the “Recent Expenses” table, ExpenseID #1 Name, Amount and Pay Method has been updated (Figure 5.9).

Graphical user interface, application

Description automatically generated

Updated Expense

Figure 5.9

\*\*\* Notice that the Expense Description was left unchanged since the Description field was left blank. Be sure to fill in all fields that may need to be updated. \*\*\*

## View / Modify Expenses (Delete Expense Example)

To delete an expense, you will first select the “ExpenseID” using the ExpenseID field.

We will delete ExpenseID #1 in this example (Figure 5.10).

Graphical user interface, application

Description automatically generated

Delete Button

ExpenseID field set to #1

Figure 5.10

Once the ExpenseID field is set to the expense you wish to delete click the “Delete” button.

If the expense has been deleted successfully you will be prompted with a dialogue box saying, “Expense has been Removed!” (Figure 5.11).

Graphical user interface, application, Word

Description automatically generated

Expense Removed

Figure 5.11

## View / Modify Expenses (Delete Expense Example) cont.

Now that the expense has been deleted you will no longer see the expense listed in the “Recent Expenses” table (Figure 5.12).

Graphical user interface, application

Description automatically generated

Updated table after deleting ExpenseID #1

Figure 5.12

## View / Modify Expenses (Export Example)

To export your expenses to a file, Click the “Export” button (Figure 5.13). You will then be prompted to select a directory and set a file name (Figure 5.14).

Graphical user interface, application

Description automatically generated

Export Button

Figure 5.13

Graphical user interface, application

Description automatically generated

Figure 5.14

After selecting a directory and entering a file name, click the “Export” button, the file will then be saved as an excel (xlsx) file type. You can find the file in the directory you selected.

If the file was successfully saved, you will be prompted with a message saying, “Expenses have been Exported”.

# ADD New Income

The add Income tab can be accessed using the left side tab “Income” (Figure 6).

Graphical user interface, application, Word

Description automatically generated

Add Income Tab

Income Tab

Figure 6

|  |  |
| --- | --- |
| Field | Description |
| Income Name | OPTIONAL. The income name is an optional field. Here you can enter a name for your income up to 45 Characters. |
| Date | REQUIRED. Date is a required field to select which date applies to the current income entry. (Figure 4.1) |
| Description | OPTIONAL. The description is an optional field. Use this field to add extra information about an income. |
| Account Name | REQUIRED. Account name drop-down will be auto populated using any accounts you have already created. (Figure 4.3) |
| Amount | REQUIRED. The amount field is required when adding an expense. The default value is 0. If the amount is entered incorrectly the system will default to a zero entry for that expense. |

\*\* Although some fields are optional, it is recommended that you fill in these fields as it will help to better organize your portfolio. \*\*

## Add New Income cont.

Graphical user interface, application

Description automatically generatedGraphical user interface, text, application, chat or text message

Description automatically generated

Select Account

Select Date from drop down

Figure 6.2

Figure 6.1

Once the Add Income Form is filled in with the correct information (Figure 6.3), click the “Commit” button to add the income. If all fields were entered correctly, you will be notified with a screen prompt (Figure 6.4). If fields are not entered correctly, you will be prompted with a dialog box explaining the error.

Graphical user interface, application, Word

Description automatically generated

Reset All Fields

Commit Income Button

Figure 6.3

\*\*\*To clear all fields, click the reset button. \*\*\*

## Add New Income cont.

Graphical user interface, application, Word

Description automatically generated

Income has been added

Figure 6.4

# View/ Modify Incomes

The “View / Modify Incomes” tab can be found in the “Income” tab on the left side of the screen. Click the “View / Modify Incomes” subtab within “Income” tab (Figure 7).

Income Tab

Graphical user interface, application

Description automatically generated

View / Modify Income subtab

Figure 7

The Recent Income table will be auto generated upon opening the “View / Modify Incomes” tab. The results will populate in the table below the “Recent Incomes” label (Figure 7.1).

Graphical user interface, application

Description automatically generated

Auto Generated Incomes

Figure 7.1

## View / Modify Expenses cont.

To sort the generated results, click on the desired column to sort from (Figure 7.2). In this example the incomes are sorted in ascending order from the date.

Graphical user interface, text, application

Description automatically generated

Sorted Results of Generated incomes by Date Descending

Figure 7.2

## View / Modify Incomes (Modify Incomes)

Below the “Recent Incomes” table, you will find the “Modify Income” options (Figure 7.3). Here you can modify any information pertaining to an Income. You can change a single field at a time or multiple. For example, perhaps an amount that was previously entered is incorrect, you can select the “IncomeID” and only modify the amount field. Or, if you wish to change the amount, date, and name of income, that can be done as well without needing to fill in all of the modify income options.

Graphical user interface, text, application

Description automatically generated

Modify Income Buttons

Modify Income Options

Figure 7.3

\*\*\* The “Modify Income” fields follow the same input rules as the fields found in the “Add Income” tab. Please reference page 19 for a complete table of correct input types. \*\*\*

**Modify Income Buttons**

The “Export” button will export the table data to an Excel file (.xlsx).

The “Update” button will commit any changes to a selected “IncomeID”.

The “Reset” button will clear all the fields back to default.

The “Refresh” the table data. This button should be used in case if any information is not updating correctly.

The “Delete” button will remove any selected “IncomeID”.

## View / Modify Incomes (Update Income Example)

Lets walk through an example of modifying an expense.

We will modify IncomeID #1 (Figure 7.4). We will change the Name to “Sale”, Amount to “$50” and Account to our examples buinsess account named “Comic Shop”.

Graphical user interface, application

Description automatically generated

IncomeID #1

Figure 7.4

First, we will select the “IncomeID” using the IncomeID field (Figure 7.5).

Graphical user interface, text, application

Description automatically generated

IncomeID #1

IncomeID field set to #1

Figure 7.5

## View / Modify Incomes (Update Income Example) cont.

Now we will fill in the “Name” field with our new income name, the “Amount” field with our new amount and use the drop-down box to change our “Account” field (Figure 7.6).

Graphical user interface, application

Description automatically generated

Modified Amount Field

Modified Account Field

Modified Name Field

IncomeID #1

IncomeID field set to #1

Figure 7.6

After all the fields are filled in that you wish to change for an income, click the “Update” button on the right side of the screen (Figure 7.7).

Graphical user interface, application

Description automatically generated

Update Button

Figure 7.7

## View / Modify Incomes (Update Income Example) cont.

If the income modification was successful, you will be notified with a dialogue box saying, “Income has been Updated!”. If not, you will be notified with a dialogue box explaining the error (Figure 7.8).

Graphical user interface, application

Description automatically generated

Income Updated Successfully

Figure 7.8

Now we can see in the “Recent Incomes” table, IncomeID #1 Name, Amount and Account has been updated (Figure 7.9).

Graphical user interface, text, application

Description automatically generated

Updated Income

Figure 7.9

\*\*\* Notice that the Income Description was left unchanged since the Description field was left blank. Be sure to fill in all fields that may need to be updated. \*\*\*

## View / Modify Incomes (Delete Income Example)

To delete an income, you will first select the “IncomeID” using the IncomeID field.

We will delete the IncomeID #1 in this example (Figure 7.10).

Graphical user interface, text, application

Description automatically generated

Delete Button

Figure 7.10

IncomeID field set to #1

Click the “Delete” button.

If the income has been deleted successfully you will be prompted with a dialogue box saying, “Income has been Removed!” (Figure 7.11).

Graphical user interface, application

Description automatically generated

Income Removed

Figure 7.11

## View / Modify Incomes (Delete Income Example) cont.

Now that the income has been deleted you will no longer see the income listed in the “Recent Incomes” table (Figure 7.12).

Graphical user interface, text, application

Description automatically generated

Updated table after deleting IncomeID #1

Figure 7.12

## View / Modify Income (Export Example)

To export your incomes to a file, Click the “Export” button (Figure 7.13). You will then be prompted to select a directory and set a file name (Figure 7.14).

Graphical user interface, text, application

Description automatically generated

Export Button

Figure 7.13

Graphical user interface, application

Description automatically generated

Figure 7.14

After selecting a directory and entering a file name, click the “Export” button, the file will then be saved as an excel (xlsx) file type. You can find the file in the directory you selected.

If the file was successfully saved, you will be prompted with a message saying, “Incomes have been Exported.”

# Account Tab

The Account tab can be accessed using the left side tab “Account” (Figure 8). In the Account tab you can add an account or remove / modify your accounts. When modifying an account, you can change the “Account Name” or “Account Type”. This can be done separately or together.

Graphical user interface, application

Description automatically generated

Account tab

Figure 8

|  |  |
| --- | --- |
| Field | Description |
| Account Name | REQUIRED. Account name is a required field as you must have an account to link your expenses and incomes. The Account name can be any name you would like up to 45 characters. |
| Account Type | REQUIRED. Account type is a required field as it helps to categorize you expenses and income. Account type is broken up into 4 categories, Personal, Savings, Business and Retirement. Select which ever best suits your needs. |
| Account Starting Balance | REQUIRED. The account starting balance is a Required field. This field must be entered using digits. You can use the up or down arrows to increase or decrease the amount or type the amount into the box. By default, this value is set to Zero (0) and accepts decimals. |

## Account (Add Account Example)

When adding a new account, the account name, type and starting balance fields are required (Figure 8.1).

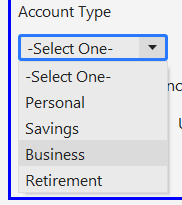
Graphical user interface, application

Description automatically generated

Required Fields

Figure 8.1

In this example we will add a new account named “New Checking”. First, we will input the new name in the “New Account Name” field, then using the drop-down menu, selected the “Account Type” (Figure 8.2) and finally add a new “Account Starting Balance” then we will click the “Commit” button (Figure 8.3).

Graphical user interface, application

Description automatically generated

Figure 8.2

Figure 8.3

Commit Button

Figure 8.2

## Account (Add Account Example) cont.

If the new account was added successfully, you will be prompted with a dialogue box saying, “New Account Added Successfully!” (Figure 8.4).

Graphical user interface, application

Description automatically generated

Account added Successfully

Figure 8.4

## Account (Modify Account Example)

To modify an account name or type you will first select the account to modify using the drop-down menu in the top right corner of the “Modify Account” box (Figure 8.5).

Graphical user interface, application

Description automatically generated

Select Account to Modify

Figure 8.5

When modifying an account, you can change the “Account Name” or “Account Type”. This can be done separately or together.

In this example we will change our examples personal account named “main(joe)” to “Joes Checking” and account type to “Personal” (Figure 8.6).

Graphical user interface, application

Description automatically generated

Commit Button

Figure 8.6

## Account (Modify Account Example) cont.

After the fields are filled in, we will click the “Commit” button (Figure 8.6). If the account was updated successfully, you will be prompted with a dialogue box saying, “Account Updated Successfully!” (Figure 8.7).

Graphical user interface, application

Description automatically generated

Account Updated Successfully

Figure 8.7

## Account (Modify Account Example) cont.

Now if we go back to our “Income “tab and check our “Recent Incomes” table we will first click the “Refresh Button” and then we will see the updated account changes. Figure 8.8 shows before the update. Figure 8.9 shows after the updated was made.

Graphical user interface, text, application

Description automatically generated

Before account modifications

Figure 8.8

Graphical user interface, text, application

Description automatically generated

Refresh Button

After account modifications and clicking “Refresh “button

Figure 8.9

\*\*\* Be sure to click the “Refresh” button after the initial viewing of “Recent Expenses” and “Recent Incomes” after any account changes are made \*\*\*

# View/Modify Account Tab

The Remove accounts can be found in the “View/Remove” sub-tab of the Account tab. Here you can view all your accounts, export the accounts table, and remove accounts (Figure8.10).

Graphical user interface, text, application

Description automatically generated

View/Remove Accounts sub-Tab

Account Tab

Figure 8.10

To remove an account, you will select one of your accounts from the drop-down menu and click the “Delete” button (Figure 8.11).

Graphical user interface, text, application

Description automatically generated

Select Account from drop-down

Figure 8.11

## Account (Remove Account Example) cont.

Graphical user interface, text, application

Description automatically generated

Account Selected

Delete Button

Figure 8.12

IMPORTANT: REMOVING AN ACCOUNT WILL ALSO REMOVE ALL EXPENSES AND INCOMES LINKED TO THAT ACCOUNT! MAKE SURE YOU HAVE THE CORRECT ACCOUNT SELECTED!

If the account was deleted successfully, you will be prompted with a dialogue box saying, “Account Deleted Successfully!” (Figure 8.13).

After a successful deletion of an account, the account will no longer appear in the drop-down menus for account selection. Graphical user interface, application

Description automatically generated

Account Deleted Successfully

Figure 8.13

## Account (Export Account Example)

To export your Accounts to a file, Click the “Export” button (Figure 8.14). You will then be prompted to select a directory and set a file name (Figure 8.15).

Graphical user interface, text, application

Description automatically generated

Export Button

Figure 8.14

Graphical user interface, application

Description automatically generated

Figure 8.15

After selecting a directory and entering a file name, click the “Export” button, the file will then be saved as an excel (xlsx) file type. You can find the file in the directory you selected. If the file was successfully saved, you will be prompted with a message saying, “Accounts have been Exported”.

# Add Goals

The “Add Goals” tab can be accessed using the left side tab “Goals” (Figure 9).

Graphical user interface, application, Word

Description automatically generated

Goals Tab

Add Goals Tab

Figure 9

|  |  |
| --- | --- |
| Field | Description |
| Goal Name | REQUIRED. The Goal name is a required field. Here you can enter a name for your Goal up to 45 Characters. |
| Target Date | REQUIRED. Target Date is a required field to select what date you wish to achieve this goal. (Figure 4.1) |
| Target Amount | REQUIRED. Target Amount is a required field. Here you will enter the amount you wish to save for your goal. Amount must be greater than zero (amount > 0). |
| Amount Saved Already | OPTIONAL. The default value is 0. If the amount is entered incorrectly the system will default to a zero entry for that amount saved. This amount helps to estimate your weekly savings goal |
| Description | OPTIONAL. The description is an optional field. Here you can enter details about your goal up to 140 characters. |

Once the Add Goal Form is filled in with the correct information (Figure 9.1), click the “ADD” button to add the Goal. If all fields were entered correctly, you will be notified with a screen prompt (Figure 9.2). If fields are not entered correctly, you will be prompted with a dialog box explaining the error.

## Add Goal (Add Goal Example)

Graphical user interface, application, Word

Description automatically generated

ADD Goal Button

Reset All Fields

Figure 9.1

\*\*\*To clear all fields, click the reset button. \*\*\*

Graphical user interface, application, Word

Description automatically generated

Goal has Been Added

Figure 9.2

\*\*\*The tracking of goals is limited to 5 Goals. Once those 5 goal slots are occupied you will not be able to add more goals until you delete a previous goal. \*\*\*

## Add Goal (Using the Est Weekly Savings Generator)

To calculate your estimated weekly savings amount you first need to enter a “Target Date” and “Target Amount”. The “Amount Saved Already” field is optional but does affect this calculation, be sure to add any savings you already have! Next, click the “Generate Amount” button. The result will display between the “Generate Amount” button and “Est. Weekly Saving Amount” label (Figure 9.3).

Graphical user interface, application, Word

Description automatically generated

Generated Amount

Generate Amount Button

Figure 9.3

\*\*\* The Estimated Weekly Savings amount will assist in selecting a reasonable Target Date for your goal. You don’t need to worry about remembering this number, you will be able to access it again in the “Active Goals” tab. \*\*\*

# Active Goals

The “Active Goals” sub-tab can be accessed using the left side tab “Goals” (Figure 9.4).

Graphical user interface, application

Description automatically generated

Goals Tab

Active Goals Tab

Figure 9.4

The “Active Goals” tab actively tracks your progress of your goal. As mentioned earlier you are limited to 5 goals. These Goals will populate the radio buttons to the left of the screen. Your current completion precentage will be displayed to the right of your goals name (Figure 9.5).

Graphical user interface, application

Description automatically generated

Goal Details

Progress Bars

Goals will populate here

Figure 9.5

## Active Goals (Adding to Goal) cont.

When selecting a goal its details will be displayed on the right side of the screen.

To add an amount saved to your goal, select which goal you would like to add to, then enter a number into the “Amount to Add” Box. This amount will be added to your current savings amount stored in the database. If you enter zero in the “Amount to Add” box, you will be prompted with a message saying, “Nothing to Add!” (Figure 9.7).

Your progress bar will update after pressing the “Add” button (Figure 9.9).

\*\*\* This box does not replace the entire savings amount. It only adds to the number to the current savings amount previously stored. \*\*\*

Graphical user interface, application

Description automatically generated

Populated Goal Details

Add Button

“New Car” goal selected

Amount to Add

Figure 9.6

Graphical user interface, application

Description automatically generated

Figure 9.7

## Active Goals (Adding to Goal) cont.

If the amount was added successfully, you will be prompted with a message saying, “Amount Added!” (Figure 9.8).

Graphical user interface, application, Word

Description automatically generated

Amount added successfully

Figure 9.8

Graphical user interface, application

Description automatically generated

Updated Progress Bar

Figure 9.9

## Modify an Active Goal

When selecting a goal its details will be displayed on the right side of the screen. The goal details also keep track of your estimated weekly savings amount and will update with any modification done to a goal. These fields are not able to be changed unless the “Edit” button is first pressed. Pressing this button will unlock the fields and allow them to be modified (Figure 9.10).

Graphical user interface, application

Description automatically generated

Fields are locked

Edit Button

Figure 9.10

Graphical user interface, application

Description automatically generated

Fields are unlocked

Figure 9.11

\*\*\* Fields are unlocked after clicking the “Edit” button. \*\*\*

## Modify an Active Goal (Example) cont.

Once the fields are unlocked you can use the “Goal Detail” fields to modify the name, target date, target amount, amount saved and description for the selected goal. Let’s change the name and date of our “New Car” goal. We will change the name to “Toyota Corolla”, the date to “07-20-2022” and amount saved to “5000”, and then click the “Update” button (Figure 9.12). Graphical user interface, application

Description automatically generated

Modified amount saved

Modified name

Modified date

Cancel Button

Update Button

Figure 9.12

\*\*\* The “Goal Details” fields follow the same input rules as the fields found in the “Add Goal” tab. Please reference page 39 for a complete table of correct input types. \*\*\*

To cancel a modificiation, click the “Cancel” button. This will lock the fields. The fields will reset once the goal is selected again. If the modification was successful, you will be prompted with a message saying, “Goal has been Updated!” (Figure 9.13). Graphical user interface, application

Description automatically generated

Goal Updated successfully

Figure 9.13

## Modify an Active Goal (Example) cont.

After this modification we can see the changes regarding the goal we modified. The goal name, target date and amount saved has changed to the data we entered. We can also see that our progress bar has updated as well as our estimated weekly savings goal amount (Figure 9.14) Once clicking the “Update” button and the goal is successfully modified the fields will return to a locked state.

Graphical user interface, application

Description automatically generated

Updated goal name and progress bar

Updated Goal details

Updated Weekly Savings Goal

Figure 9.14

# Goals Overview

The “Goals Overview” tab can be accessed from “Goals” tab (9.15). In the “Goals Overview” tab you can view all your goals in a table. Using the table, you can delete selected goals. You can also export the table to a file.

Graphical user interface, application

Description automatically generated

Goals Overview sub-tab

Goals tab

Figure 9.15

## Removing an Active Goal (Example)

To remove an Active Goal, enter the goals “ID” number into the box labeled “ID”. Then click the “Delete” button (Figure 9.16).

Graphical user interface, application

Description automatically generated

Delete Button

ID box

Id box

Figure 9.16

If the goal was deleted successfully, you will be prompted with a message saying, “Goal has been Removed!” (Figure 9.17).

Graphical user interface, application, Word

Description automatically generated

Removal successful

Figure 9.17

## Removing an Active Goal (Example) cont.

Once the goal has been removed it will no longer appear in the goal list (Figure 9.18).

Graphical user interface, application

Description automatically generated

Figure 9.18

## Goal Overview (Export Example)

To export your Goals to a file, Click the “Export” button (Figure 9.19). You will then be prompted to select a directory and set a file name (Figure 9.20).

Graphical user interface, application

Description automatically generated

Export Button

Figure 9.19

Graphical user interface, application

Description automatically generated

Figure 9.20

After selecting a directory and entering a file name, click the “Export” button, the file will then be saved as an excel (xlsx) file type. You can find the file in the directory you selected. If the file was successfully saved, you will be prompted with a message saying, “Goals have been Exported”.