User Guide — ExpenseTracker

ExpenseTracker is a simple, fast, and secure tool for managing personal and group expenses. Built entirely with Ruby on Rails, it offers features like expense tracking, group sharing, and messaging to keep your finances organized.

Getting Started

1. Access the App

- Open your web browser and go to: `url.com`
- On the homepage, click **Sign Up** or **Log In**.

2. Create or Log Into Your Account

- **New user?**
  Click **Sign Up**, then enter your email and password to create your account.
- **Existing user?**
  Click **Log In** or **Get Started**, and enter your email and password to access your dashboard.

Using the Dashboard

Once logged in, you'll land on your **Dashboard**, which includes:

- **Filters** to sort and view specific expenses
- A **Quick Summary** of your expenses
- A list of **Recent Personal Expenses** and the **Total** spent
- A list of **Recent Group Expenses** and the **Total Group Expenses** you're part of

- **Top 5 Largest Personal Expenses**
- A **Spending Graph** showing activity over the last 30 days
- A **Category Graph** showing Personal Spending by Category

ⓘ **Tip:** Click the **Info** button in the top-left corner of each section for more details.

Main Menu Navigation

At the top of the page, you'll find the main navigation menu:

- **Dashboard** – Returns you to your main dashboard.
- **All Expenses** – View and manage all your expenses.
  - Create new **Personal Expenses**
  - Import expenses in bulk via **CSV or Excel file**
- **My Groups** – Manage and join shared expense groups.
- **Messages** – Chat with group members and tag expenses in messages.
- **Backup & Restore** – Download a backup of your data or restore it from a saved file.
- **Edit Profile** – Update your account password.
- **Logout** – Securely log out of your account.

Managing Expenses

All Expenses

In the **All Expenses** section, you can:

- View all of your personal expenses

- Add new expenses one by one
- Bulk import expenses from a CSV or Excel file

Groups and Shared Expenses

Creating or Joining a Group

Go to **My Groups** to collaborate with others on shared expenses.

- To **create a group**:
    - Click **Create Group**
    - Enter the group's name
    - A **Group Join Code** will be automatically generated — share it with others to invite them
- To **join an existing group**:
    - Enter the **Group Join Code** into the **Enter Group Code** box
    - Click **Join Group**

Your active groups will appear at the bottom of the **My Groups** page.

Using Group Features

Once inside a group:

- Create **Group Expenses** that all members can see
- Select which members to **share** each expense with
    - Selecting multiple people will **split the bill evenly**

- **Leave comments** under group expenses to discuss them with the group

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Messaging

Navigate to the **Messages** page to chat with group members.

- See all **active direct messages** you've sent or received
- Start a new conversation with members from your groups
- **Tag expenses** directly in messages to reference them clearly

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Backup and Restore

To protect your data:

- Go to **Backup & Restore**
- Click **Download Backup** to save your data
- To recover from a backup, upload your saved file and click **Restore Backup**

Edit Profile & Logout

- Go to **Edit Profile** to **change your password**
- Click **Logout** at any time to securely exit your account

You're now ready to start tracking and managing your expenses effectively with ExpenseTracker!