

Free my Financials

SAM

Who are we???

Dennis Beaver

Jeffrey Harmon

Pandora Roberts

William Withers

Grant Witty

GUEST STARRING CLIENT:

Nicolas Egierski

Software

(Show code directly)

MENTOR FEEDBACK

Wants us to add our own personal additions to the project

- Future employment references
- Mentor also mentioned adding mid-iteration adding several micro stand alone features. Upon learning we did this, he suggested we kept up that.

CLIENT FEEDBACK

Entering the final stage of development, satisfied with our progress.
Here is a log of the clients iteration with the software

- Signed in as a user
- Check and view budget
- Check information page
- Created new transaction
- Confused over dropdown and viewing specs
- No moving transaction from one budget to another
- Went between transaction and specs page
- Client using software highlighted issues we might not have otherwise found
- Issues: Setting budget to default, moving transactions between budgets
- Used the software for ~10 minutes

We planning to address these with the iteration 5 features

Functional: Multiple Budgets

Free My Financials

Add Transaction

View Transactions

Edit Budget

View Budget

Calendar

Specs

Information

Logout

Budget: Default

Budgets

Start of budget:

End of budget:

TOTAL BALANCE

Store

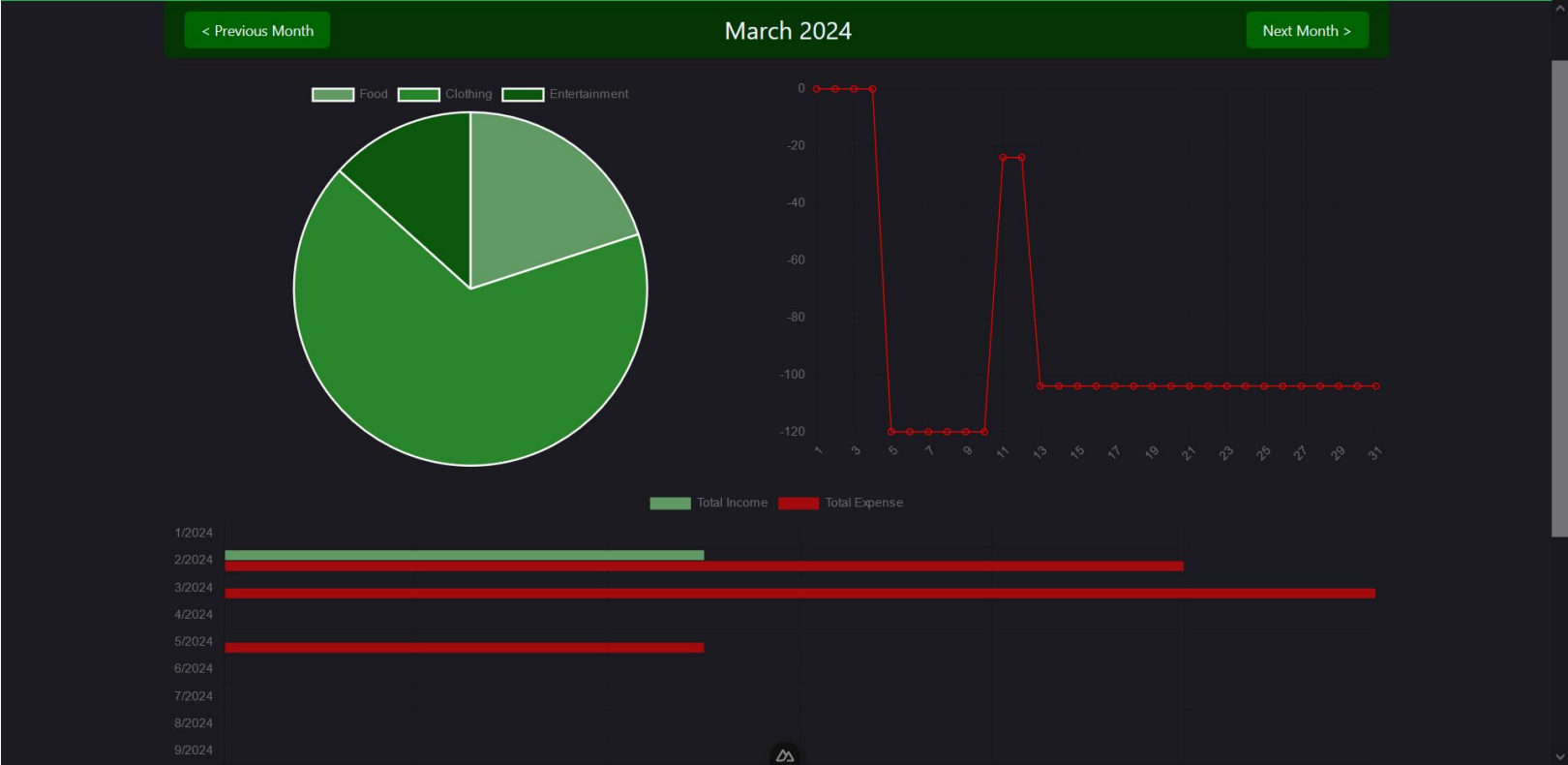
Amount

Date

Print Your budget

No items.

Functional: Specs Page



Business Requirements

Multiple budgets contribute to BR1 - Aid users ability to track finances to reach their respective financial goals.

We believe they are both part of this. Financial goals are complicated and require statistical data to verify. Putting that out for users we believe will aid them greatly

Multiple budgets allow users to specify specific goals, such as a food, project, or personal goal budget.

DOCUMENTATION

User.md:

<https://github.com/Free-My-Financials/FreeMyFinancialsSAM/blob/master/Documentation/User.md>

Development.md:

<https://github.com/Free-My-Financials/FreeMyFinancialsSAM/blob/master/Documentation/Development.md>

FUTURE-Iteration 5 features

Allow moving transactions from one budget to another

Editable Transactions

Set budget to default, or new budget when created

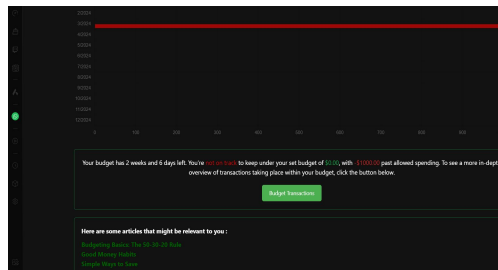
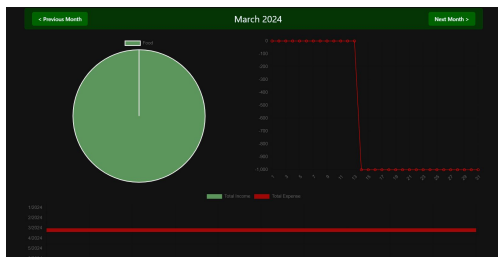
Add recurring transactions

Downloadable transaction data

TEAMWORK

- EVERYONE GETS A SLIDE

Dennis



Overall Money Saving Tips	Cutting Unnecessary Spending	Good Budgeting Habits
<p>How to Stop Overspending Money</p> <p>This article provides some basic tips and tricks on how you can save money and still have a good time, ranging from sales tips, savings goals, and accountability.</p> <p>How to Avoid Overspending</p> <p>This article by FPC banking provides a list of tips to help you in the process of avoiding those unnecessary purchases, with information on budgeting, and some things to avoid.</p> <p>This article written by Daffodil lists some serious (and some rather amusing!) tips on how you can save money, with tips on how to identify needs versus wants.</p>	<p>Reducing Spending</p> <p>This article gives a list of some of the classic pitfalls people stumble into on their money saving journey, read this for some things to look out for.</p> <p>How to Save Money</p> <p>This article takes a look at the mental health side of money spending habits. While this article might not be relevant to everyone, it certainly is for those who have struggled with financial abuse, or frequently spend money to make themselves feel better.</p> <p>This article by Merit Bank gives a short list of tricks to avoid purchasing unnecessary things such as fast food or other impulse buys.</p>	<p>Set Your Goals</p> <p>This article helps to set a good budgeting habit with dedicated amounts for needs, wants, and goals. It also provides context on what should typically be considered a need versus a want.</p> <p>Discover Banking</p> <p>This article by Discover banking provides some good tips on how you can budget and stay on top of your finances. The article also lists some good advice on ways to financially plan for the unexpected.</p> <p>Bank of America</p> <p>This article by Bank of America gives a few good ways of cutting down on spending and creating a budget, as well as providing some solid resources for ways to automate your money saving journey.</p>

- Specs Page

- Implemented several graphs to showcase the user's spending habits. The page features a pie chart that displays category division for each month, a line graph that displays daily fluctuation throughout each month, and a line graph showing each month over the course of the selected year, displaying side by side views of income vs expense for each month. Also features a brief budget summary, informing the user of whether they are on track or not.

- Information Page

- A simple page showing several articles along with a brief summary of each. This ties into the app's purpose of educating the user on how to be financially literate. These articles also tie into the specs page, and will display relevant articles according to the user's spending habits.

- Bug Fixes

- Fixed error with budget resetting on page refresh and empty transactions being stored and displayed upon income transaction addition.

Jeffrey

ESLint + Prettier

Multiple Budgets

```
1 export async function getBudgetById(id: string) {
2   return await prisma.budget.findUnique({
3     where: {
4       id,
5     },
6   })
7 }
8
9 export async function getBudgetsByUserId(userId: string) {
10   return await prisma.budget.findMany({
11     where: {
12       userId,
13     },
14   })
15 }
```

```
1 module.exports = {
2   env: {
3     browser: true,
4     es2021: true,
5     node: true,
6   },
7   extends: [
8     'eslint:recommended',
9     '@nuxt/eslint-config',
10    'plugin:@typescript-eslint/recommended',
11    'plugin:vue/vue3-recommended',
12    'prettier',
13  ],
14  parserOptions: {
15    ecmaVersion: 'latest',
16    parser: '@typescript-eslint/parser',
17    sourceType: 'module',
18  },
19  plugins: ['@typescript-eslint', 'vue'],
20  rules: {
21    'vue/multi-word-component-names': 'off',
22    'vue/padding-line-between-blocks': ['error', 'always'],
23  },
24 }
```

Budget: March 2024 Budgets ▾

Start of budget: Fri

End of budget: Sun

TOTAL BALANCE: \$2

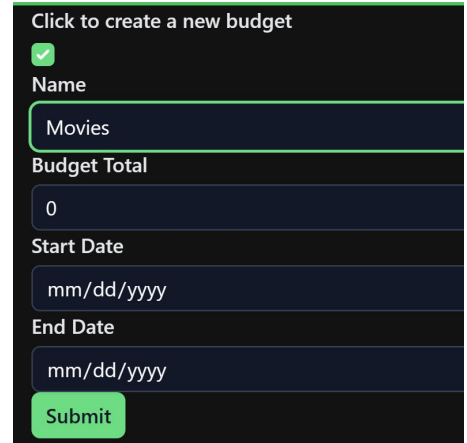
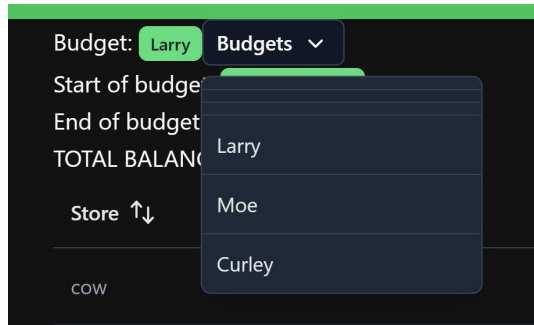
Store ↑↓

Default

March 2024

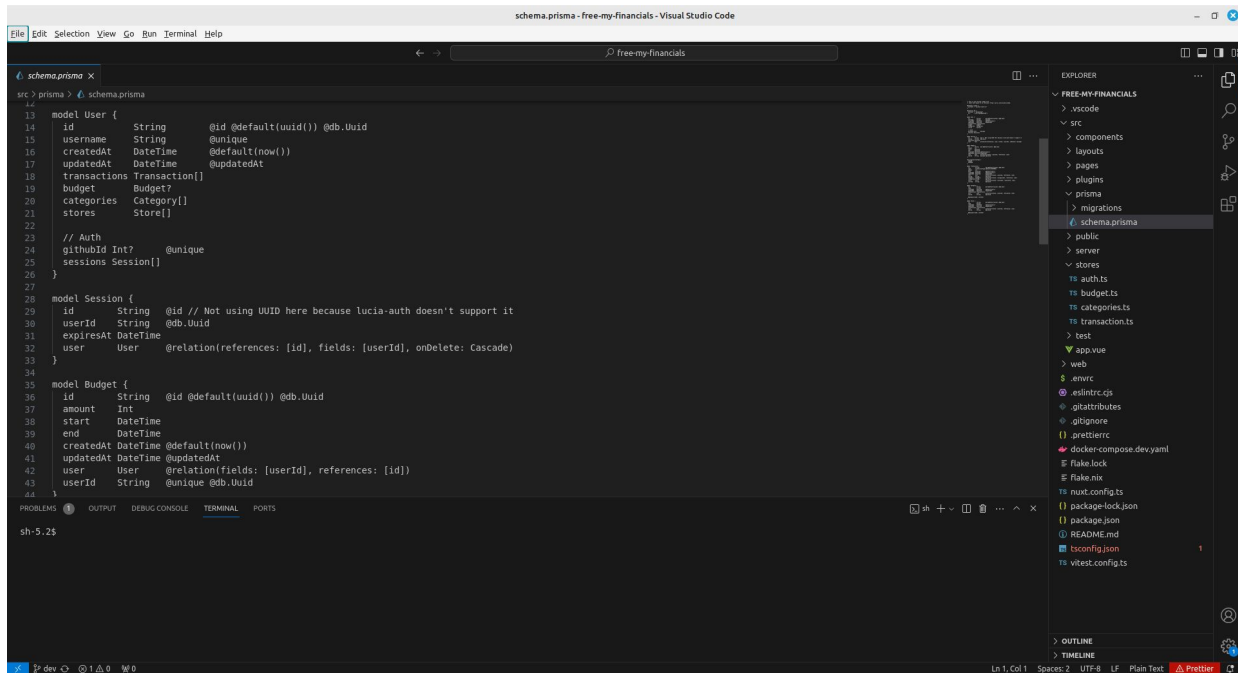
William

- Fixed the link in the login button on the header bar
- Then most of my work time was spent working on letting users rename and create new budgets, alongside most of the process of switching the active budget with assistance from Jeffrey who finished it up

A screenshot of a form titled "Click to create a new budget" with a green checkmark icon. The form has several input fields: "Name" (containing "Movies"), "Budget Total" (containing "0"), "Start Date" (containing "mm/dd/yyyy"), and "End Date" (containing "mm/dd/yyyy"). At the bottom is a green "Submit" button.

Grant

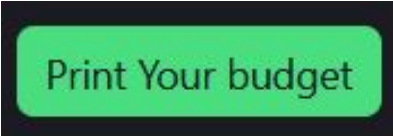
Update Prisma schema to allow for multiple budgets



```
src > prisma > schema.prisma
13 model User {
14   id      String   @id @default(uuid()) @db.Uuid
15   username String    @unique
16   createdAt DateTime @default(now())
17   updatedAt DateTime @updatedAt
18   transactions Transaction[]
19   budget   Budget?
20   categories Category[]
21   stores   Store[]
22
23   // Auth
24   githubId Int?    @unique
25   sessions Session[]
26 }
27
28 model Session {
29   id      String   @id // Not using UUID here because Lucia-auth doesn't support it
30   userId  String    @db.Uuid
31   expiresAt DateTime
32   user    User      @relation(references: [id], fields: [userId], onDelete: Cascade)
33 }
34
35 model Budget {
36   id      String   @id @default(uuid()) @db.Uuid
37   amount  Int
38   start   DateTime
39   end     DateTime
40   createdAt DateTime @default(now())
41   updatedAt DateTime @updatedAt
42   user    User      @relation(fields: [userId], references: [id])
43   userId  String    @unique @db.Uuid
44 }
```

Pandora

- First half of the iteration, all in on increasing coverage, including, figuring out how to do coverage in our tech stack, increasing our current coverage to 47%. This was harder than expected.
- Based on mentor feedback, I took the time to research other budgeting software. From this I found many ideas for the feature backlog and added them to our github issues, such as an issue for the info, specs, pages.
- On similar feedback. I added a small bit of code to the budget page to make it printable with the click of a button.



Print Your budget

Bonus Slide