

# 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

The mentor helped us through some AWS defects

- He was happy with how we had closed out the project by making aesthetic changes by uniting several pages and making the budget swap accessible anywhere.

# CLIENT FEEDBACK

"Useable, functionally works. It works to be functionally able to track income and expenses over time. Its great that a user can logically compartmentalize into budgets. Being able to view expenses over time can be useful for trending spending habits, and the information page offers good insights and good practices to manage finances prudently."

- Signed in with google
- Added Transactions
- Added in Recurring transactions
- Added income
- Saw sorted by date
- Saw Budget was based on time frame
- Transactions automatically get added to relevant budget
- Edits budget successfully
- Went to print a budget
- Analyzed specs with total and monthly. Time was spent studying the date displayed on this page
- Information page was glanced at
- Creates a new budget and changed between budget
- Spent some time to understand the calendar and specs page showed all transactions
- Edited a transaction successfully
- Saw things change with editing of transactions
- Discovered filtered amounts, pleasantly amused

# Functional: Recurring Transactions

Type of Transaction

Expense

Place of Purchase

Neflix

Category

Entertainment

☐ Click to enter a custom category

Amount

15.00

Date

04 / 01 / 2024

☒ Is this transaction recurring?

Recurrence

Monthly















End Date of Recurrence

12 / 30 / 2025

Submit

Search transactions by store or category

TOTAL BALANCE: \$337.00

Store ↑↓	Category ↑↓	Amount ↑↓	Date ⇅	
Neflix	Entertainment	\$15.00	Mon, Dec 1, 2025	 
Neflix	Entertainment	\$15.00	Sat, Nov 1, 2025	 
Neflix	Entertainment	\$15.00	Wed, Oct 1, 2025	 
Neflix	Entertainment	\$15.00	Mon, Sep 1, 2025	 
Neflix	Entertainment	\$15.00	Fri, Aug 1, 2025	 
Neflix	Entertainment	\$15.00	Tue, Jul 1, 2025	 
Neflix	Entertainment	\$15.00	Sun, Jun 1, 2025	 

# Functional: Editable Transactions

Type of Transaction  
Expense

Place of Purchase  
Netflix

Category  
Entertainment

☐ Click to enter a custom category

Amount  
15























Date  
12 / 01 / 2025

☐ Is this transaction recurring?

Submit

Search transactions by store or category

TOTAL BALANCE: \$322.00

Store	Category	Amount	Date	
Neflix	Entertainment	\$15.00	Sat. Nov 1, 2025	 
Neflix	Entertainment	\$15.00	Wed. Oct 1, 2025	 
Neflix	Entertainment	\$15.00	Mon. Sep 1, 2025	 
Neflix	Entertainment	\$15.00	Fri. Aug 1, 2025	 
Neflix	Entertainment	\$15.00	Tue. Jul 1, 2025	 
Neflix	Entertainment	\$15.00	Sun. Jun 1, 2025	 
Neflix	Entertainment	\$15.00	Thu. May 1, 2025	 
Neflix	Entertainment	\$15.00	Tue. Apr 1, 2025	 
Neflix	Entertainment	\$15.00	Sat. Mar 1, 2025	 
Neflix	Entertainment	\$15.00	Sat. Feb 1, 2025	 
Neflix	Entertainment	\$15.00	Wed. Jan 1, 2025	 

main.d1p7xx1ncyc6rg.amplifyapp.com

Are you sure you want to edit transaction from Sat, Nov 1, 2025 at Neflix for \$15 in the Entertainment category?

OK Cancel

# Business Requirements

Long term budgets require long term planning. Recurring transactions full fill BR1 by allowing the user to budget for things that will happen regularly, such as a subscription service

Editable transactions work for BR1 by allowing the user to fix any typos or account for changes in transactions such as if a transaction becomes discounted



# DOCUMENTATION

User.md:

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

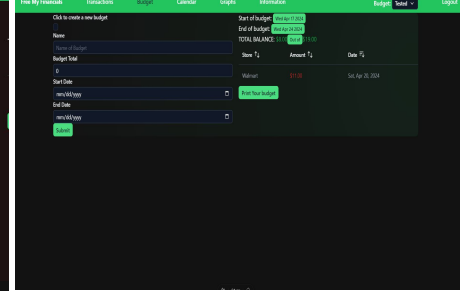
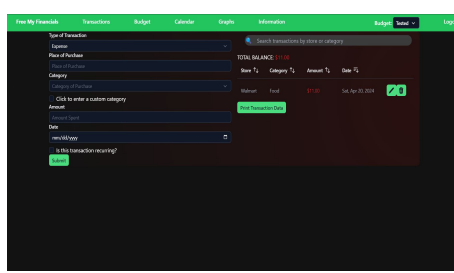
Development.md:

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

# TEAMWORK

- EVERYONE GETS A SLIDE

# Dennis



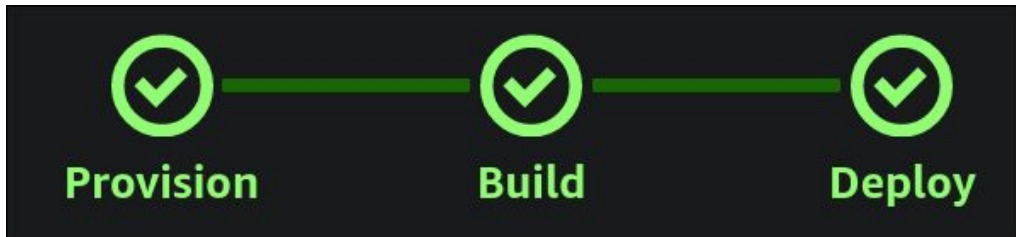
- Transaction Page Merge and Recurring + Editing Transaction
  - Combined the two transaction pages. Shows the standard add transaction page while list is empty, once transactions are saved they are displayed on the same page, side by side. Updated UI to display radial gradient with color scheme based off of current balance. Added recurrence options for transactions ranging from weekly to monthly. Also adds option to edit existing transactions.
- Budget Page Merge
  - Combined the two existing budget pages to display side by side. Added radial gradient with color scheme based on budget balance. Changes live with budget switches.
- Other Interface Changes
  - Changed the display requirements for login and get started buttons. Updates the sign in buttons to directly sign in instead of bringing you to a separate page. Updates the location of budget drop down into the header, also changed the display of drop down to display active budget. Changed home page to account for page changes, placeholders, typos, and other small QOL details.
- Bug Fixes
  - Fixed error with new categories no longer saving. Fixed error with toast notifications not appearing. Fixed error with create new budget linking to a page that no longer existed in the header and on the graphs page. Fixed submit button on budget page.

# Jeffrey

AWS Configuration and Setup

Google Authentication

Various Bug Fixes



## Welcome to Free My Financials

Free My Financials is a sophisticated web-based budgeting tool designed to shift your mindset from living paycheck-to-paycheck to a cashflow approach.

Login with Google

# William

- Non-UI code allowing for users to edit transactions
- Including some Prisma database utils and router functions

Type of Transaction

Expense

Place of Purchase

Land lord

Category

Rent

☐ Click to enter a custom category

Amount

150

Date









07/30/2024

☐ Is this transaction recurring?

Submit

Search transactions by store or category

TOTAL BALANCE: \$250.00

Store ↑↓	Category ↑↓	Amount ↑↓	Date ⇅↓	
Land lord	Rent	\$150.00	Sun, Jun 30, 2024	 
Land lord	Rent	\$150.00	Thu, May 30, 2024	 
Land lord	Rent	\$150.00	Tue, Apr 30, 2024	 
paycheck	Income	\$200.00	Fri, Apr 12, 2024	 

Print Transaction Data

# Grant

SSH keys, Nuxt in production, initial deployments on AWS EC2 and Amplify

AWS Amplify

All apps

free-my-financials

App settings

General

Amplify Studio settings

Domain management

Build settings

Previews

Notifications

Environment variables

Access control

Monitoring

Rewrites and redirects

Custom headers

Documentation

Learn how to get the most out of Amplify Hosting

1 of 5 steps complete


Hosting environments

Backend environments

This tab lists all connected branches, select a branch to view build details.

main

Continuous deploys set up



```
graph LR; A[Provision] --> B[Build]; B --> C[Deploy]; A --- B --- C; A --- B --- C
```

https://main...amplifyapp.com

Last deployment

4/15/2024, 8:15:12 PM

Last commit


Merge pull request #139 from F... | cc43690 | GitHub - main

Previews

Disabled

# Pandora

- Rounded out the last bit of coverage
- Make the budget changeable anywhere
- A button to print transaction
- The team poster



 Search transactions by store or category

Budget: Default



Logou

ore or category

mount ↑↓ Date ≡↓

\$2.00 Wed, Apr 10, 2024  

TOTAL BALANCE: \$22.00

Store ↑↓	Category ↑↓	Amount ↑↓	Date ≡↓	
1	Food	\$22.00	Wed, Apr 10, 2024	 

Print Transaction Data

# Bonus Slide

