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

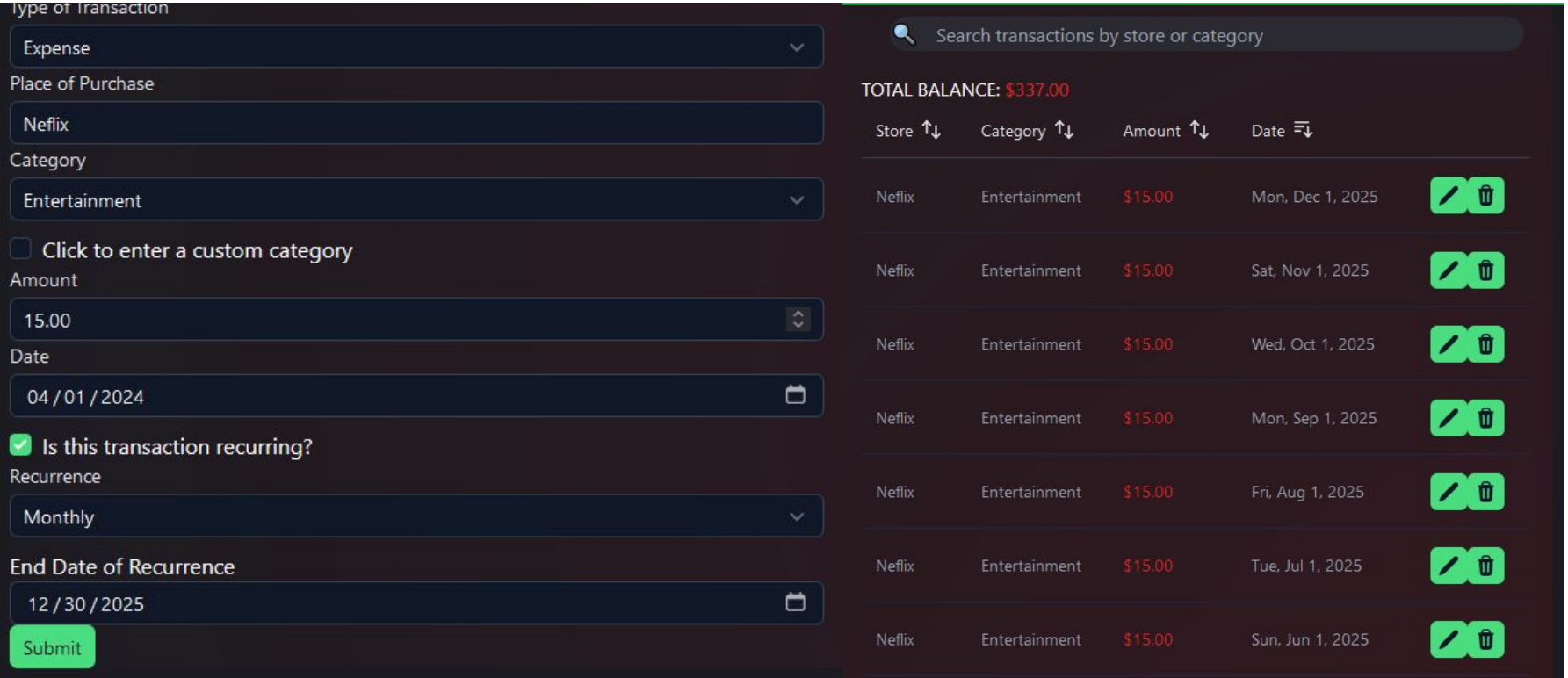
- He was happy with how we had closed out the project by making aesthetic changes by uniting several pages and making the budget swap accessible anywhere.

CLIENT FEEDBACK

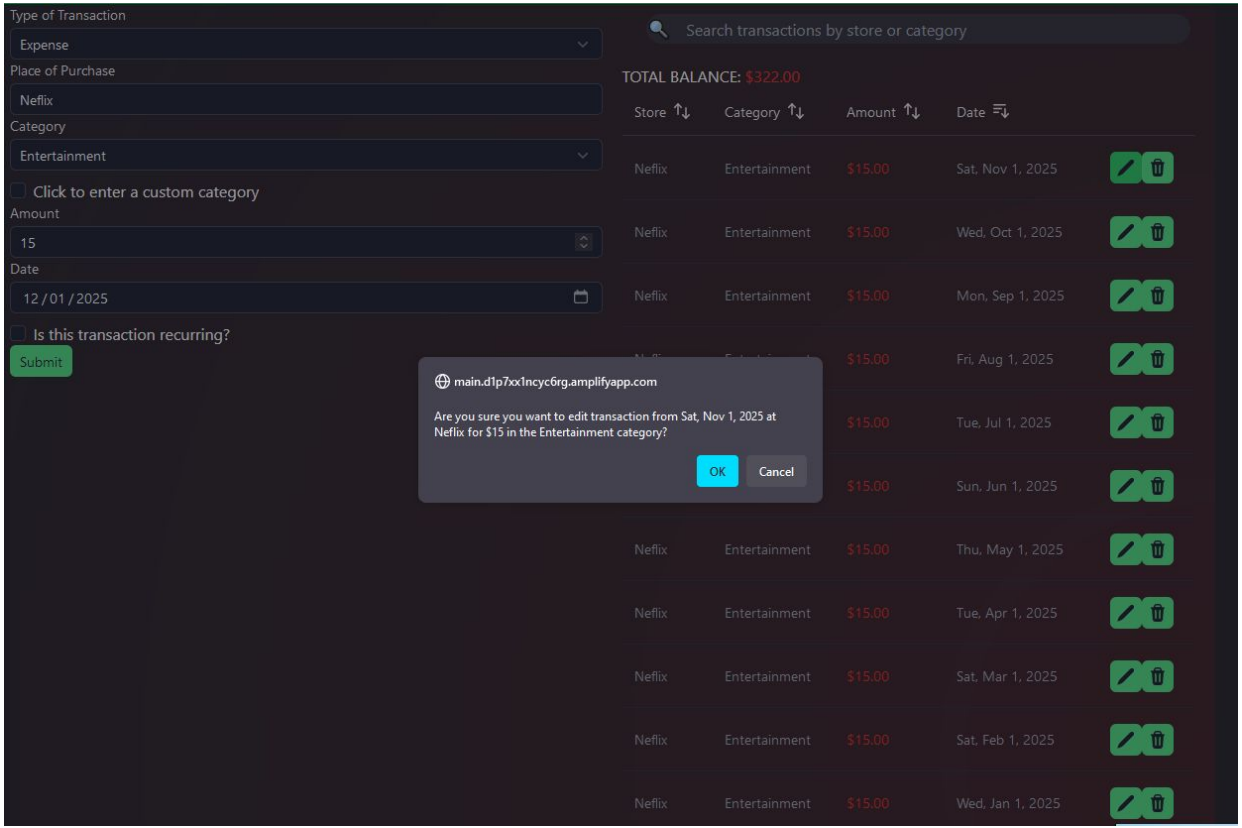
"Useable, functionally works. It works to be functionally able to track income and expenses over time. Its great that a user can logically compartmentalize into budgets. Being able to view expenses over time can be useful for trending spending habits, and the information page offers good insights and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



Functional: Editable Transactions



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

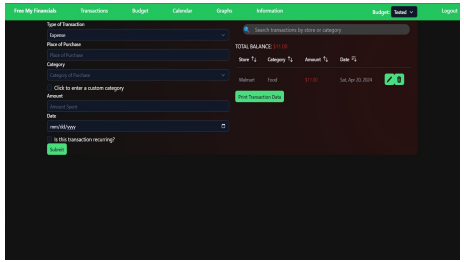
Development.md:

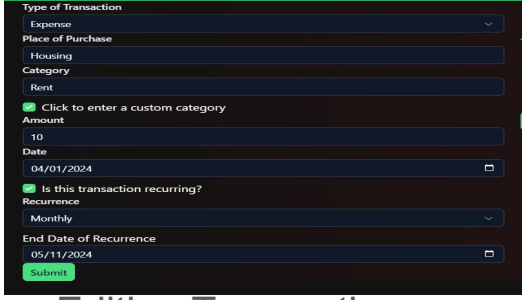
https://github.com/Free-My-Financials/FreeMyFinancialsSAM/blob/master/Documentation/Development.md

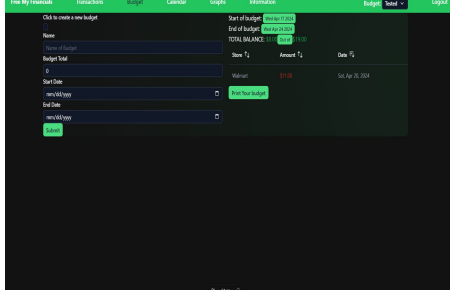
TEAMWORK

- EVERYONE GETS A SLIDE

Dennis







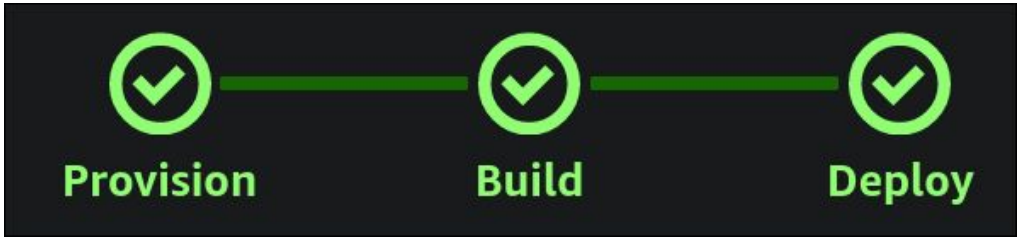
- Transaction Page Merge and Recurring + Editing Transaction
  - Combined the two transaction pages. Shows the standard add transaction page while list is empty, once transactions are saved they are displayed on the same page, side by side. Updated UI to display radial gradient with color scheme based 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.

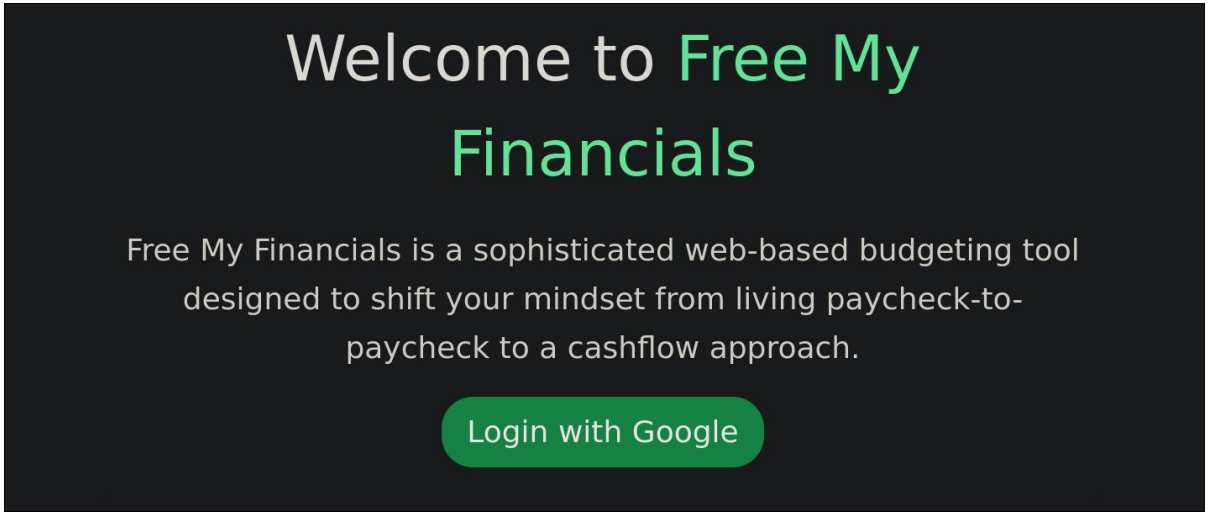
Jeffrey

AWS Configuration and Setup

Google Authentication

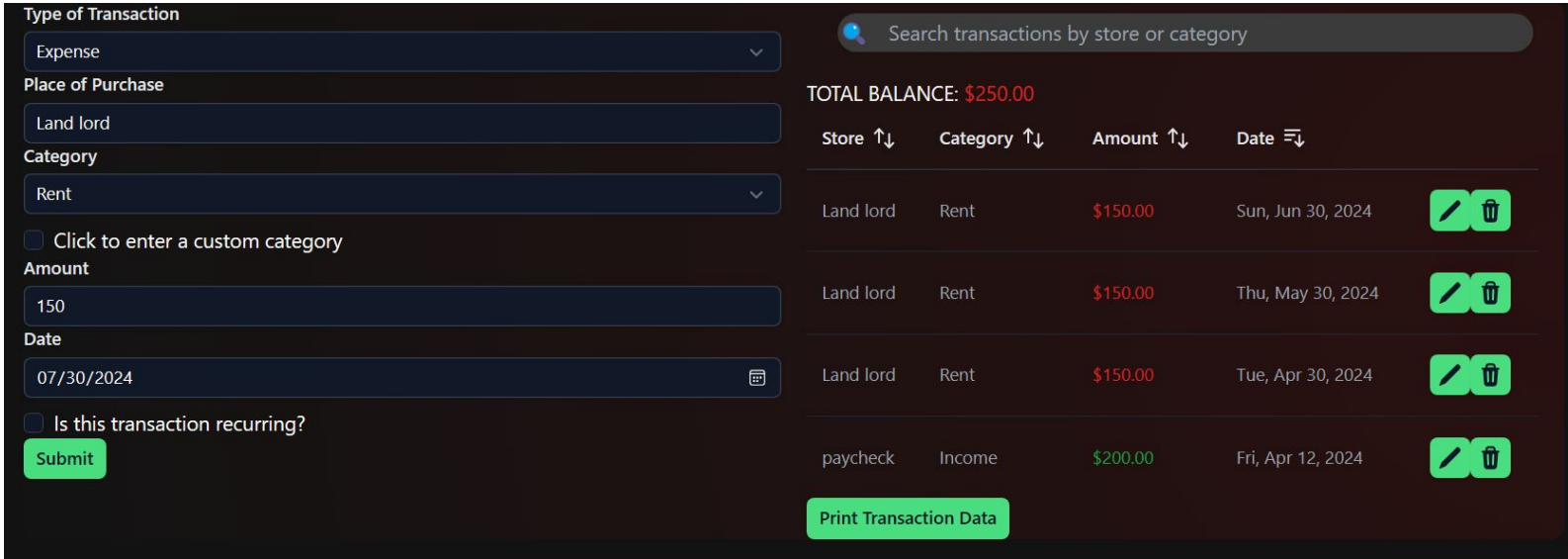
Various Bug Fixes





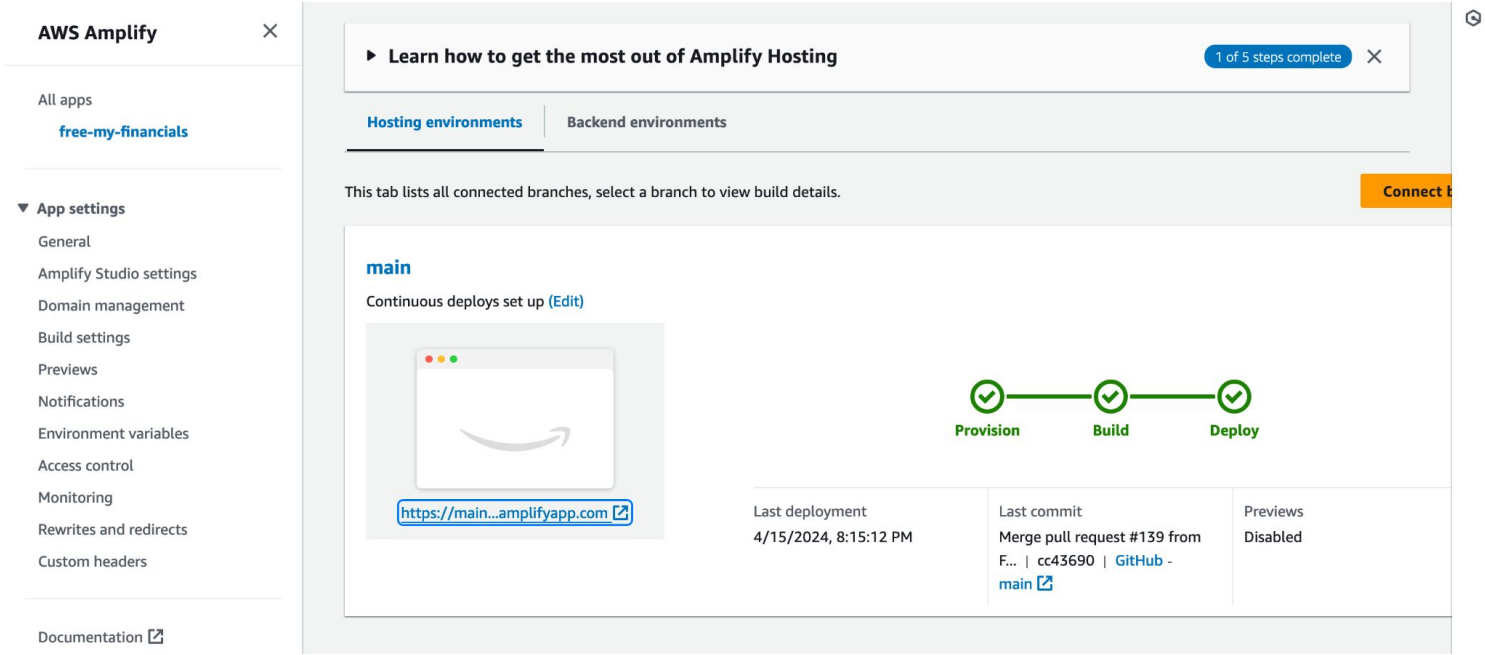
William

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



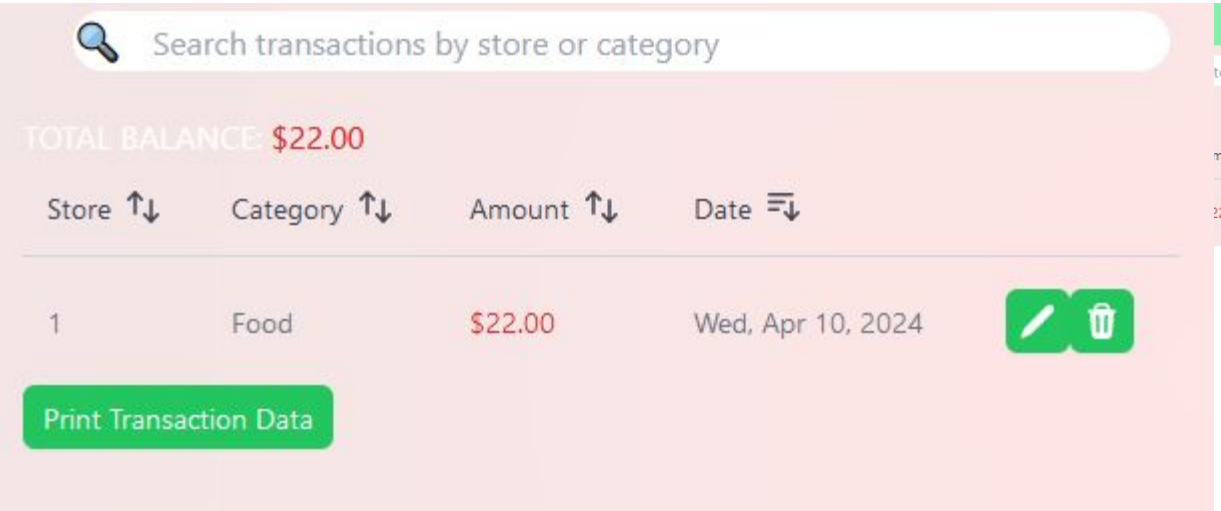
Grant

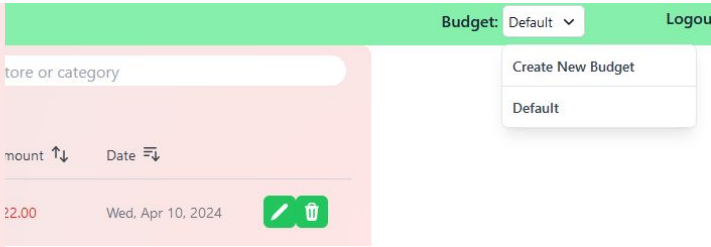
SSH keys, Nuxt in production, initial deployments on AWS EC2 and Amplify



Pandora

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





Bonus Slide