Paprika Finance Software Users Manual

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Paprika Finance
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2018-03-19
Version 1.3

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Revision Sheet

Revision	Date	Brief Summary of Changes
Version 1.0(draft)	2018-02-19	Baseline document draft - Introduction only
Version 1.1	2018-03-07	Updated the concept of operation
Version 1.2	2018-03-19	Added most core sections of the manual
Version 1.3	2018-03-30	Tutorial images added

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1. INTRODUCTION

1.1 Document Use

The Users Manual for the Paprika Finance Software is meant to guide the user in proper and efficient use of the software, as well as provide assistance for any errors or issues with the product. The Users Manual contains key definitions and key acronyms used throughout the manual, the concept and general use of the software, and over all guidelines for software use. Guidelines include procedural steps, tutorials, key commands and navigational instructions for the app. The Users Manual also includes an error message and problem resolution section for troubleshooting, and an index for easy reference to different sections of the manual. The manual is meant to cover all topics regarding the app and use of the software.

1.2 Definitions

1.2.1 Key Definitions

Account - A storage arrangement made with a bank whereby one may deposit and withdraw money and in some cases be paid interest.

App, Application - A program or a piece of software designed and written to fulfill a particular purpose of the user.

Error - A bug, flaw, failure or fault in a program or system which produces an incorrect or unexpected result, or unintended behaviour.

Export - Sending out (in this app) a .csv file to another location outside the app.

Import - Retrieving (in this app) a .csv file from another location outside the app.

Software - the programs and other operating information used by a computer. In this manual; a program.

Transaction - An exchange, interaction or instance of buying or selling, spending or earning.

1.3 References

- Oxford University Press. *The Oxford American College Dictionary*. Published G.P. Putnam's Sons, 2002.

2. Concept of Operations

Paprika Finance is a Mobile app for Android, and is a one profile per phone app for security purposes. The Paprika Finance software is intended to make tracking transactions simple and efficient while on-the-go. Users are able to register or log in and easily access many useful banking features without the use of Wifi. Users can track transactions, categorize by spending type, and access graphs and charts to visualize transaction history. Users can also add and edit transactions, import and export .csv files to other programs and certain banks. Users can log out manually or are automatically logged out if the app is closed, for security purposes.

3. General Use

Paprika Financial App software is used to track, organize and categorize transactional data in an easy, user-friendly way. The app is meant to do so securely and efficiently.

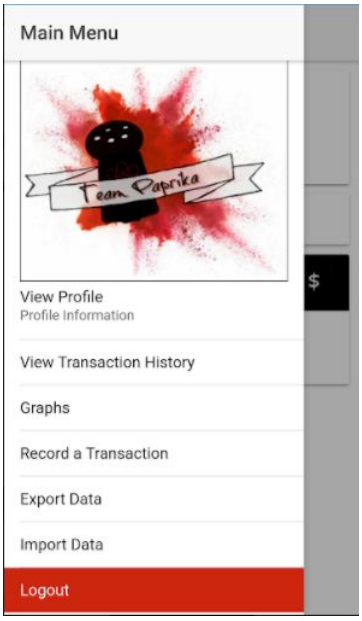
4. Procedures and Tutorials

The purpose of this manual is to guide a user through the basic steps and tasks of using this financial app and to provide a good foundation of its functionality.

To access the main menu, once registered and logged in, click the "Menu(☰)" button at the top left-hand corner of the window. From here select what you would like to do:

- View Transaction History
- View Graphs
- Record a Transaction (this can also be easily accessed by clicking the red (+) button in the bottom right-hand corner of the home screen.)
- Import Data
- Export Data

To return to the home page from any of these pages click the "Back(←)" arrow button at the top left-hand corner of the screen.



1. Register/Create account

i) On the Login page click the “Or create an account” button to connect to the Registration page.

ii) Once there, fill in the required text boxes with the appropriate information.

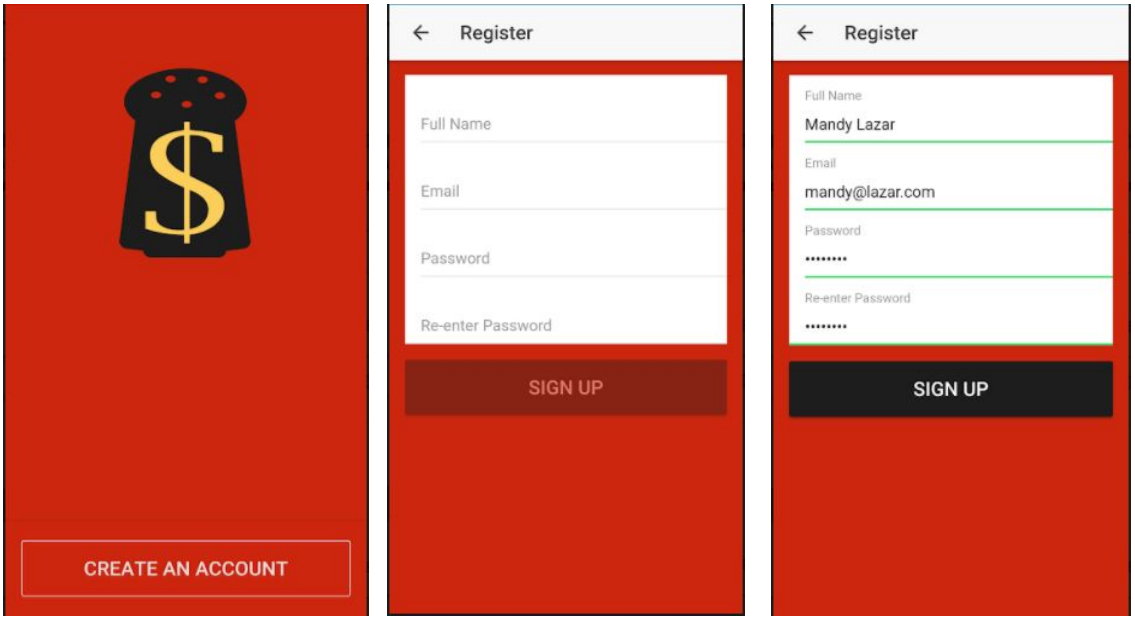
-Email must be a valid email

-Password must be at least 8 characters in length

iii) Click the “Sign-up” button to confirm registration.

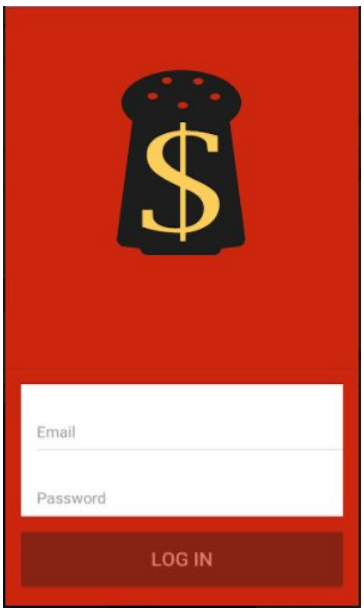
iv) This will redirect to the home page Transaction History.

⚠ If there is an invalid value given for any of the fields, an error message will appear stating the issue.

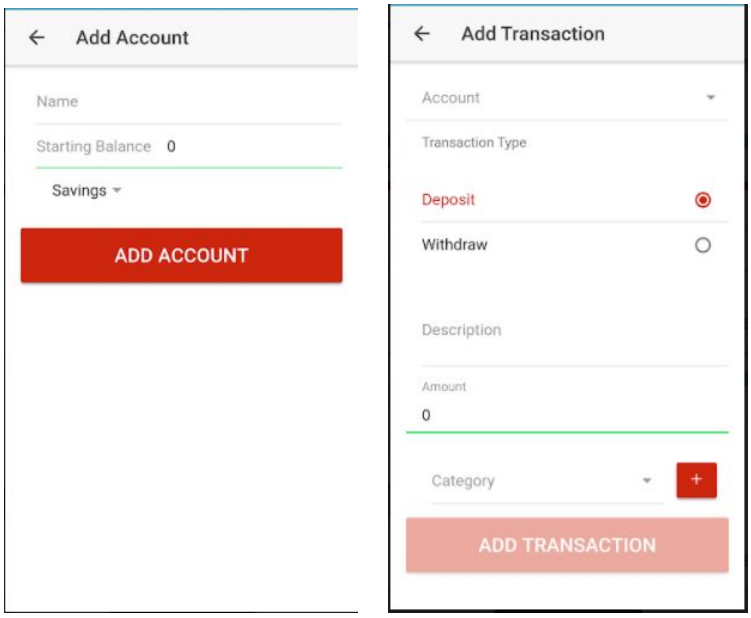


2. Login
   i) Provide the appropriate login information in the text boxes and click “Login”.
   ii) This will redirect to the home page Transaction History.

⚠ If there is an invalid value given for any of the fields, an error message will appear stating the issue.



3.
   a) Record transaction
      i) Select the account type (i.e. “Savings”,”Chequing”).
         *Account types can be added from Home
      ii) Select the transaction type (i.e. “Deposit”, “Withdraw”).
      iii) Enter a description about the transaction.
      iv) Enter an amount.
      v) Choose a category for the transaction (optional).
         -There is an option to manually add a category if necessary.
      vi) Click the “Add Transaction” button to add to the list.



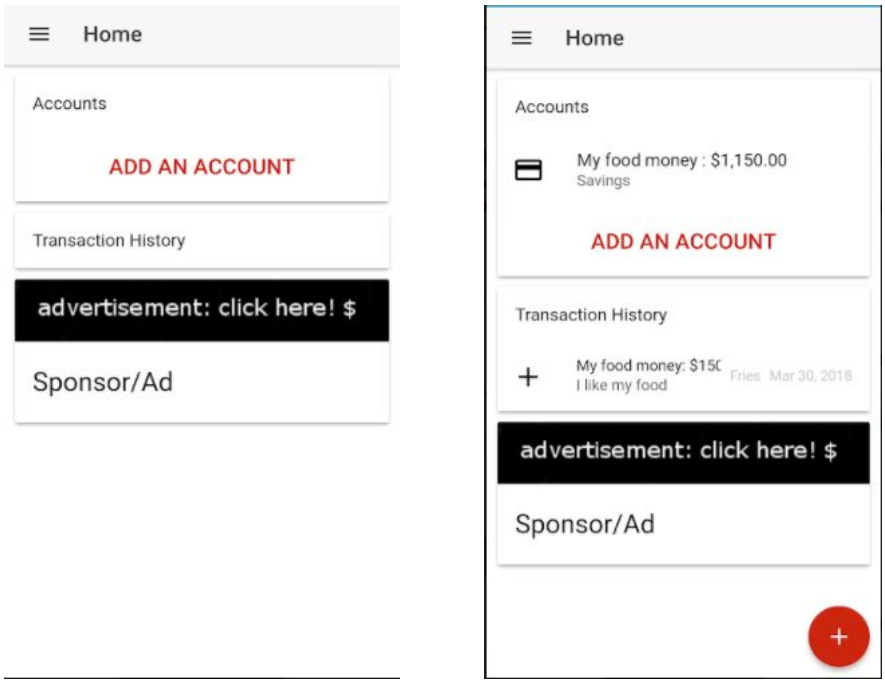
b) View transaction history

i) This is the homepage containing transactions with their details.

ii) To edit a specific transaction click on the transaction and this will redirect to the edit transaction page.

iii) View instructions i - v for adding a transaction.

iv) Click the “Save Changes” button to save cahnges to the list.

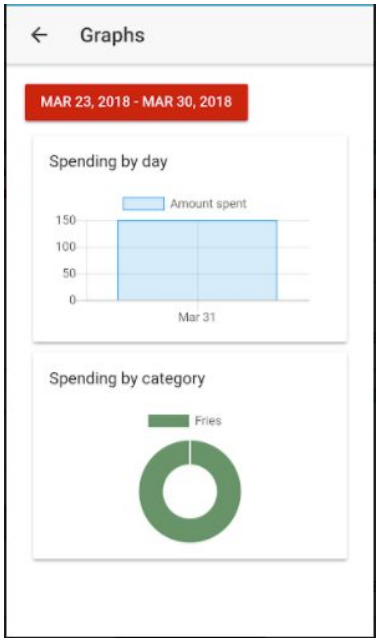


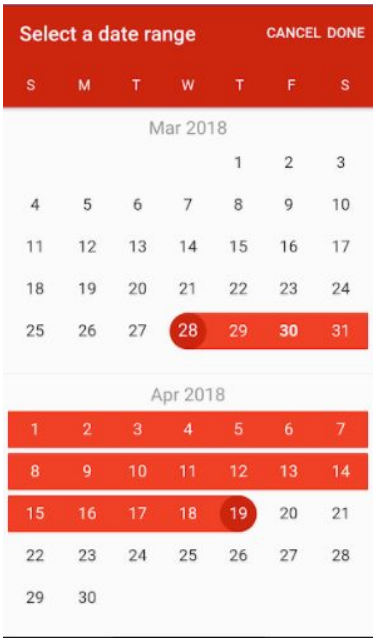
c) View graphical information

i) Choose a start and an end date by clicking the date button at the top of the window and selecting the dates from the calendar.

ii) Transaction information for that time period will appear in graphs and charts.

iii) Drag mouse over/or click charts to see more information.



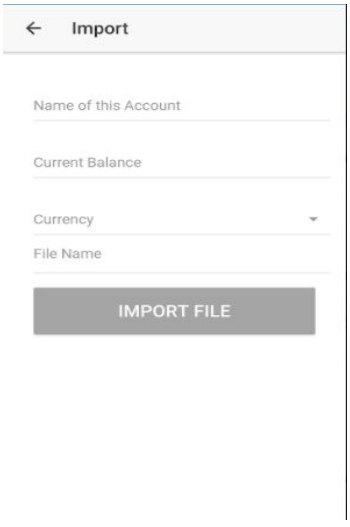


d) Import/export data

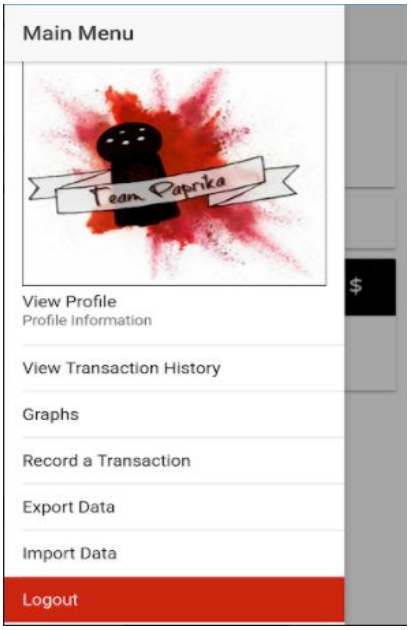
i) To import a .csv, fill in the appropriate text fields, providing Account Type/Name, Current Balance, Currency and File Name.

ii) Click the “Import File” button.

iii) To export, follow the same instructions on the Export Data page.



4. Logout
   i) Select the main menu and click the "Logout" button or simply close the app.



5. Navigational Features

The primary navigation of the app is by clicking/tapping/touching the labeled buttons, which will redirect the user to the selected page. If using a laptop or desktop, the Tab button on a keyboard can be used to jump to the next input value amd the Enter key on a keyboard can be used to apply/submit the input values.

Common features:

- Menu button (☰)
- Back button (←)
- Add button (+)
- Warning/Error icon (⚠)

6. Error Messages and Problem Resolution

When an error is encountered an error message should appear with given instructions for the user to follow. Also refer to the error/warning (⚠) sections in the manual for extra support.

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