

Finance Manager User Guide

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Introduction

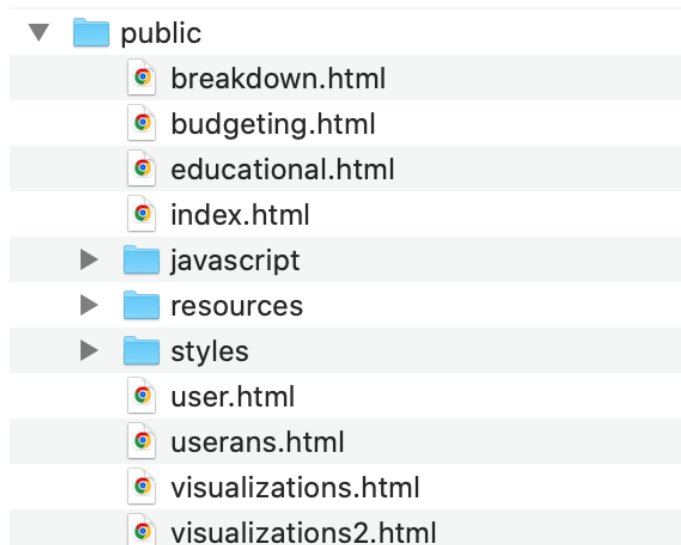
Our personal finance website provides users with a comprehensive tool for managing their finances effectively. It aims to simplify the financial management process, offering users a user-friendly platform to make informed decisions, develop healthy financial habits, and work towards their financial goals. There is a combination of features with financial tips, expense tracking, budgeting, and visualizations to aid with personal financial management.

Installation guide:

No additional installation is required besides the files included in the zip folder.

When you unzip the file, open the 'public' folder.

You should see the following files in the folder:

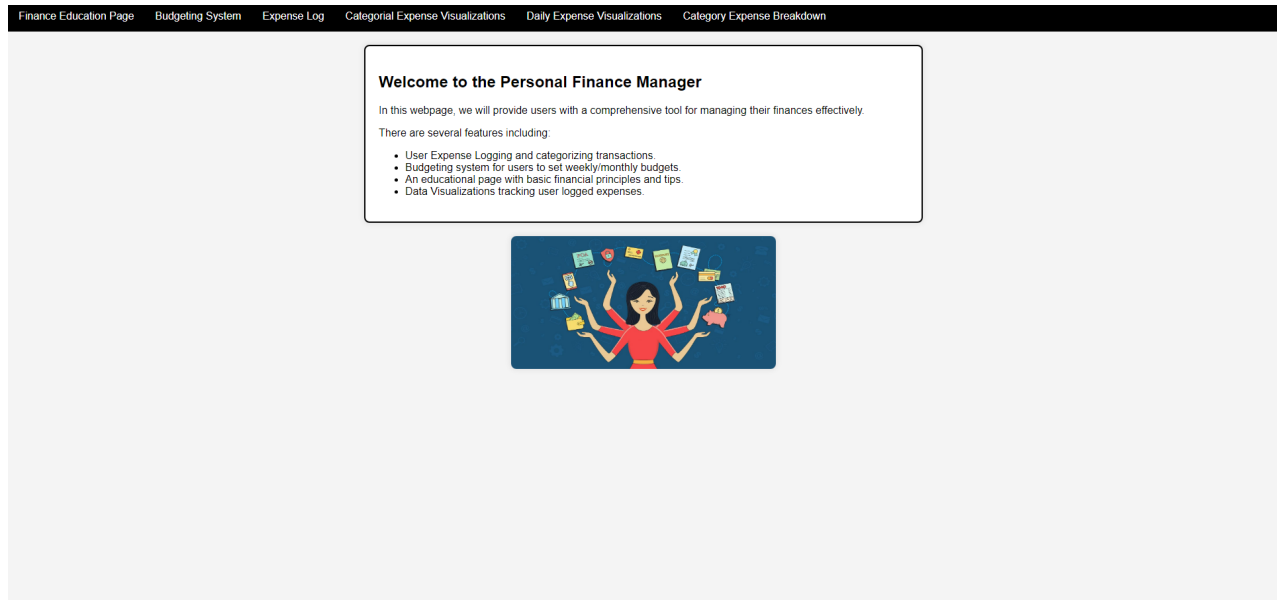


To run the program, open the index.html to start or any HTML file on either Firefox or Chrome and **disable all extensions**.

Features

Index Page

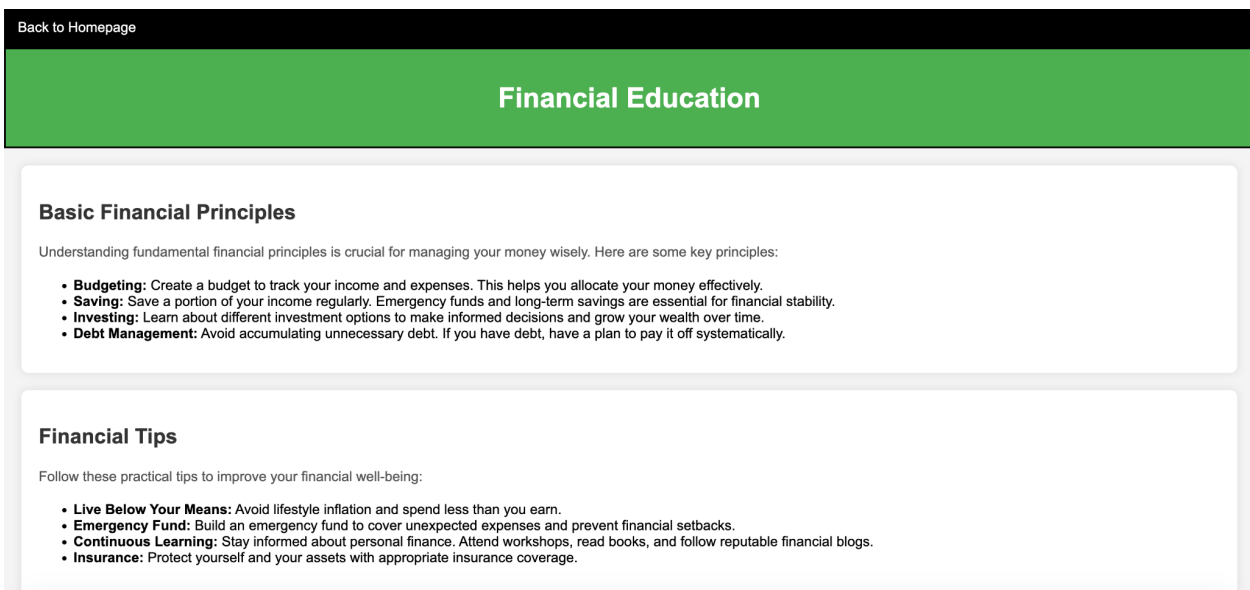
When you run the index.html, you should be taken to the index page.



The index page has a short description of the project's features and a navbar at the top with links to every other website page. The navbar links are laid out in the recommended order to run them (left to right) for full use of the program, but you can click on any of them anytime.

Financial Education Page

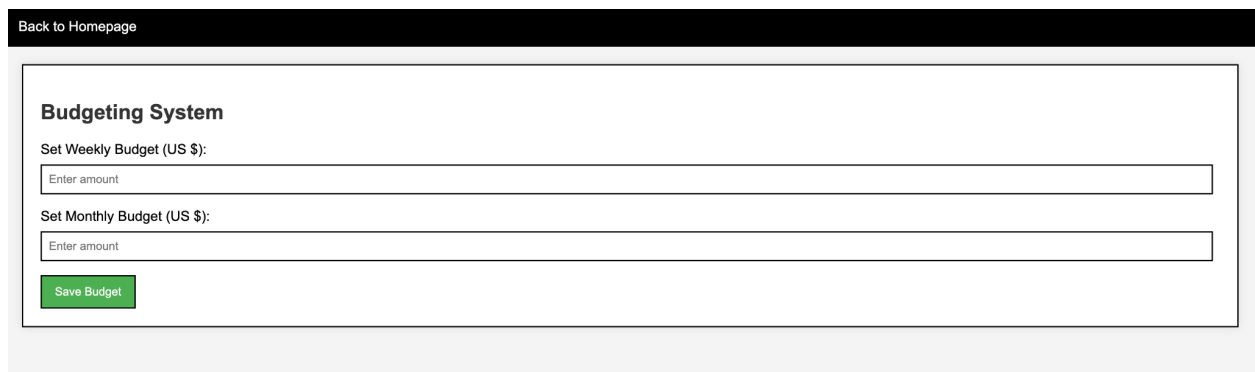
When you run educational.html or click on the "Finance Education Page" tab of the navbar, you should be redirected to this page:



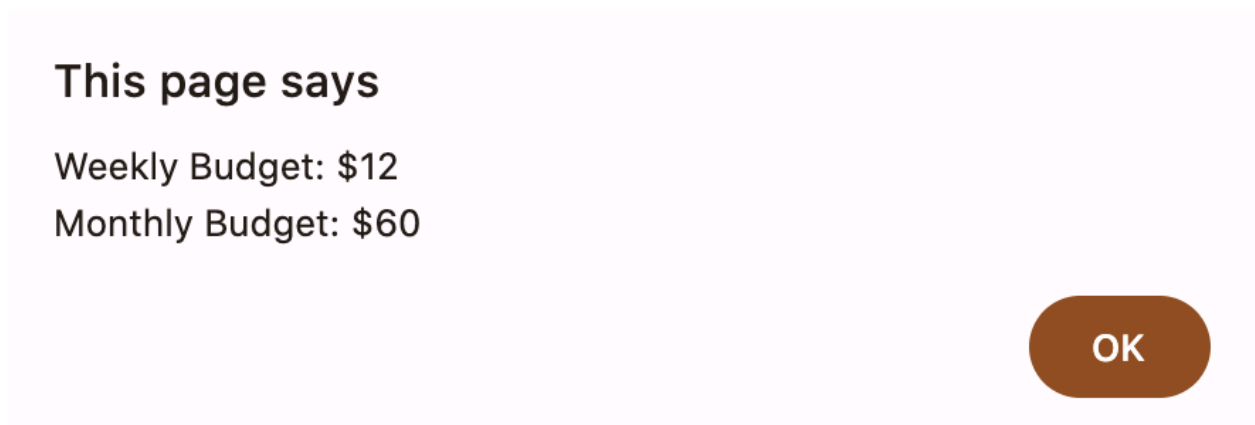
The financial education page is a static page with basic financial tips and principles for you to read, like an article. The navbar also features the “Back to Homepage” tab, redirecting you to the index page when clicked. The “Back to Homepage” tab is featured on every website besides the index page.

Budgeting System and Expense Log

When you run budgeting.html or click on the “Budgeting System” tab of the navbar, you should be redirected to this page:

The screenshot shows a web interface for a budgeting system. At the top, there is a black navigation bar with the text "Back to Homepage" in white. Below this is a white rectangular form area. Inside the form, the title "Budgeting System" is displayed in bold. There are two input sections: "Set Weekly Budget (US \$):" followed by a text input field containing the placeholder "Enter amount", and "Set Monthly Budget (US \$):" followed by another text input field containing the placeholder "Enter amount". At the bottom left of the form is a green button with the text "Save Budget" in white.

The budgeting system page lets you set your weekly and monthly budgets (in US \$). Upon entering numbers in the fields and clicking the “Save Budget” button, the page will alert you with a popup of what you just entered and set your weekly and monthly budgets.

The screenshot shows a light purple confirmation popup dialog. It has a title "This page says" in bold. Below the title, it displays "Weekly Budget: \$12" and "Monthly Budget: \$60". In the bottom right corner, there is a brown rounded rectangular button with the text "OK" in white.

If you enter a value that is not a real numerical value above or equal to zero, you will be prompted with an alert and have to reenter your budget.

This page says

Please enter a budget that is not negative and a real numerical value



This feature is important for later when you log your expenses on the expense log page. To get to the expense log page, return to the index page and click the “Expense Log” tab on the navbar. You can also go to the expense log page through the three visualization/breakdown pages, which feature a “Back to Expense Log” tab on their navbar.

Back to Homepage

Expense Log

Description:
<input type="text"/>
Amount: (US \$)
<input type="text"/>
Category:
<input type="text" value="Food"/>
Select the date of transaction:
<input type="text" value="mm/dd/yyyy"/>
<input type="button" value="Submit"/>

Clear Expenses

The expense log page allows you to log your expenses with a description of your spending, the cost in US \$, the category of which you spent, and the date of the spending. When you click “Submit” or run `userans.html`, you will be redirected to an expense table. You can also click the “Clear Expenses” to clear all expenses you have logged in the past.

If you log an amount that is not a positive real numerical value, the page will display an alert, and you will have to reenter another amount in US \$.

This page says

Please enter an amount above 0



If you log a cost greater than the weekly or monthly budget you set, you will be alerted that you have exceeded your weekly/monthly budget on the webpage after you click submit.

This page says

You have exceeded your weekly budget



This page says

You have exceeded your monthly budget



Expense Table

This is what the expense table (userans.html) looks like after logging two sample expenses.

Back to HomepageBack to Expense LogCategorial Expense VisualizationDaily Expense VisualizationCategory Expense Breakdown

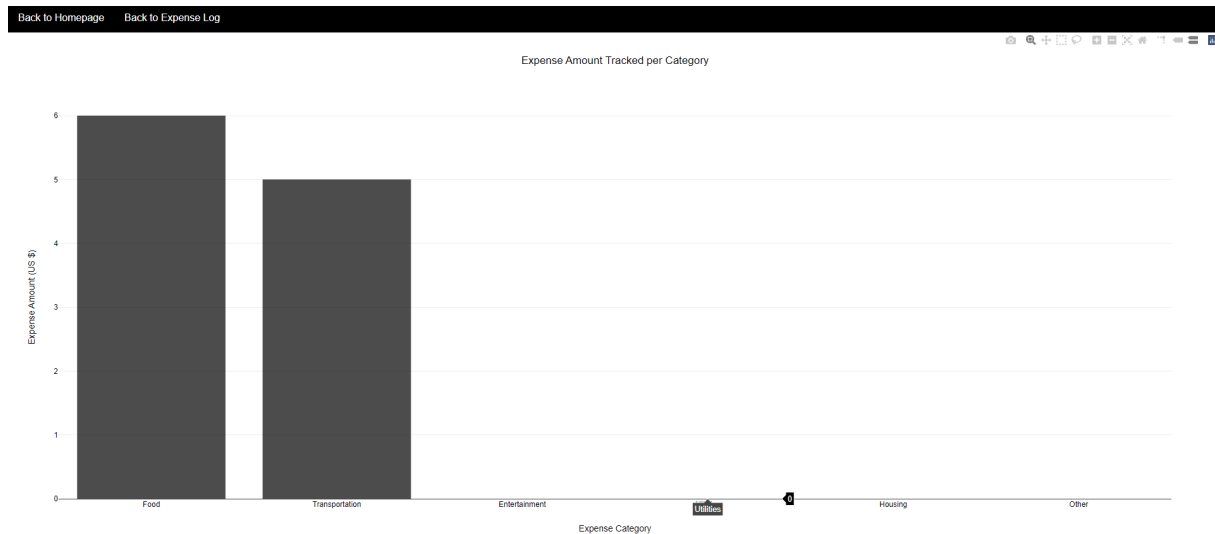
Expense Table						
Description	Amount	Category	Date			
Bought some apples	6 \$	food	01-04-2024			
Called an Uber	5 \$	transportation	01-03-2024			
Total	Food Percentage	Entertainment Percentage	Housing Percentage	Transportation Percentage	Utilities Percentage	Other Percentage
11 dollars	0.5454545454545454	0	0	0.45454545454545453	0	0
Average amount spent per day			Average amount spent per week			
5.5			11			

The expense table includes your past logged expenses with the description, cost, category, and date you input on the expense log page. It also includes total spending along with your average

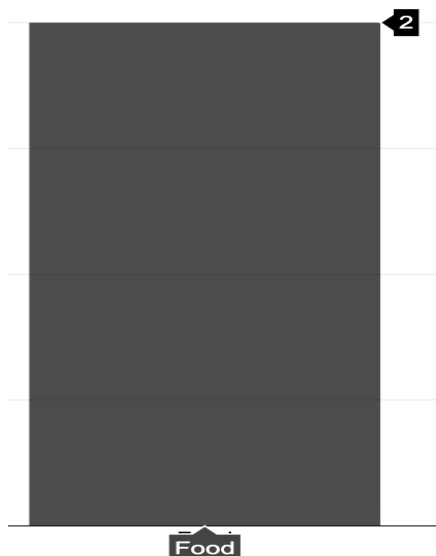
daily and weekly spending. Finally, it calculates the percentage of your total spending in each category.

Categorical Expense Visualizations

When you run visualizations.html or click on the “Categorical Expense Visualizations” tab of the navbar, you should be redirected to this page:



This visualization records the total expense amounts in US \$ you have recorded based on their respective categories. The X-axis represents the different categories for expenses, while the Y-axis represents the Expense Amounts in US \$. If you hover over a specific bar, it will display its specific y-axis value.

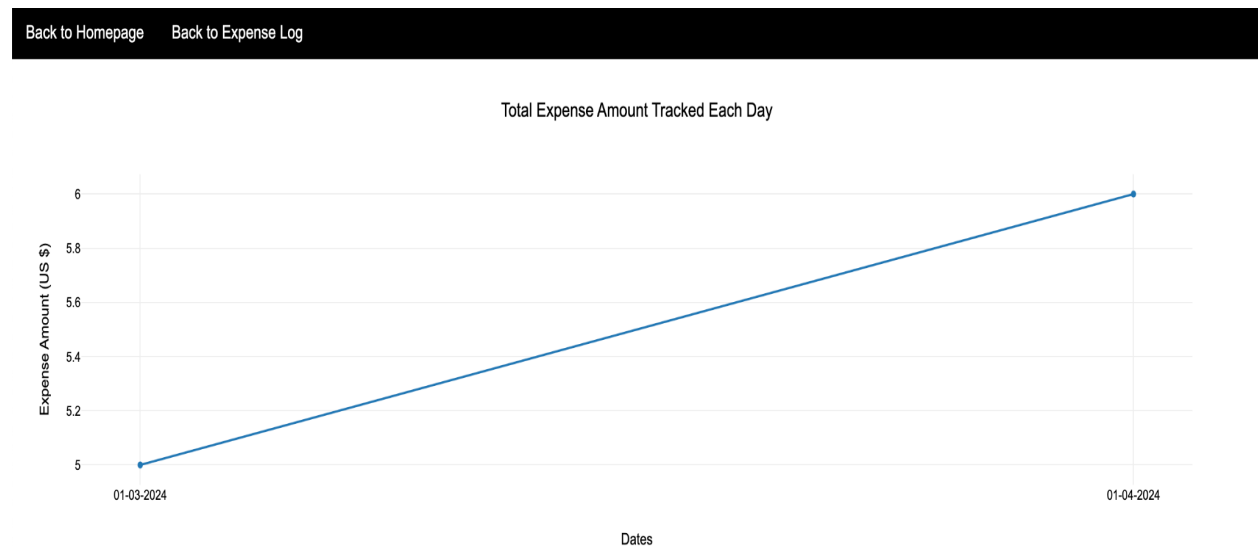


This visualization and the following visualizations were made with Plotly, meaning that if you hover your mouse over the top right of the page, you will see several features, such as downloading the graph, zooming in and out, and rescaling.

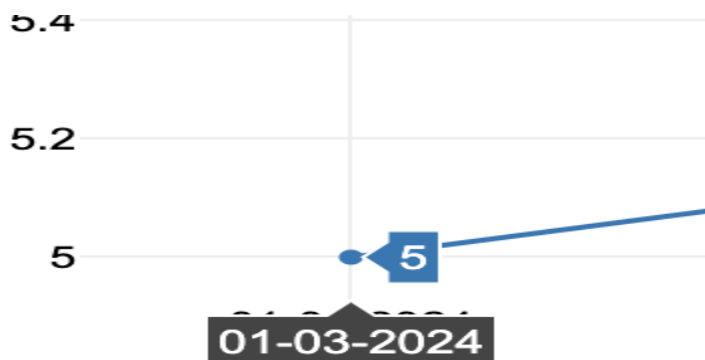


Daily Expense Visualizations

When you run visualizations2.html or click on the “Daily Expense Visualizations” tab of the navbar, you should be redirected to this page:



This visualization tracks the total expense amounts you have recorded daily in US \$. It compiles your transactions in one day and adds them up. On the X-axis are all the dates you have logged, while on the Y-axis are the total expense amounts recorded on that day. A blue line connects each data point. When you hover your mouse around one of the data points, you can see its corresponding expense amount.

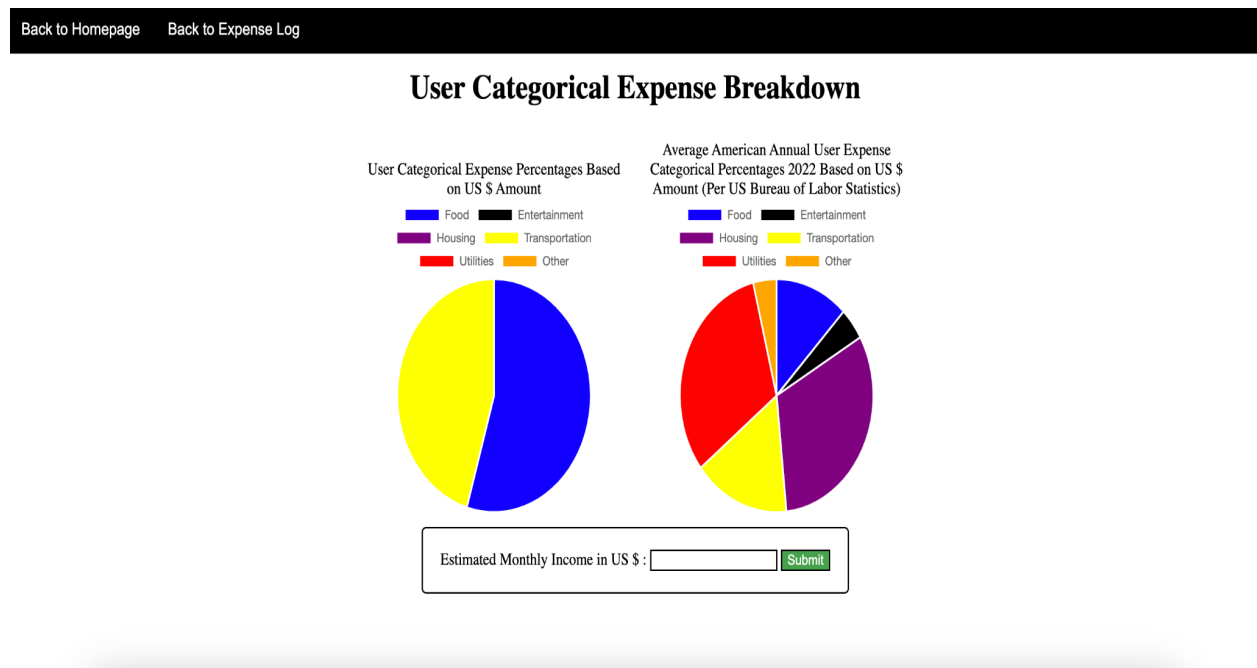


This visualization and the following visualizations were made with Plotly, meaning that if you hover your mouse over the top right of the page, you will see several features, such as downloading the graph, zooming in and out, and rescaling.



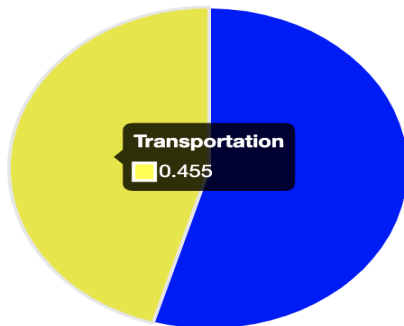
User Expense Categorical Breakdown

When you run `breakdown.html` or click on the “Category Expense Breakdown” tab of the navbar, you should be redirected to this page:



This page displays a breakdown of your recorded expenses. On the left is a pie chart depicting each category’s percentage of your total expense amount (based on US \$). A key matches each color to a category (i.e., blue is food, and orange is other). On the right is another pie chart depicting the categorical percentages of an average American’s expenses in 2002 (the source of this data is the US Bureau of Labor Statistics). Hovering over a piece of these charts will display its specific category and percentage.

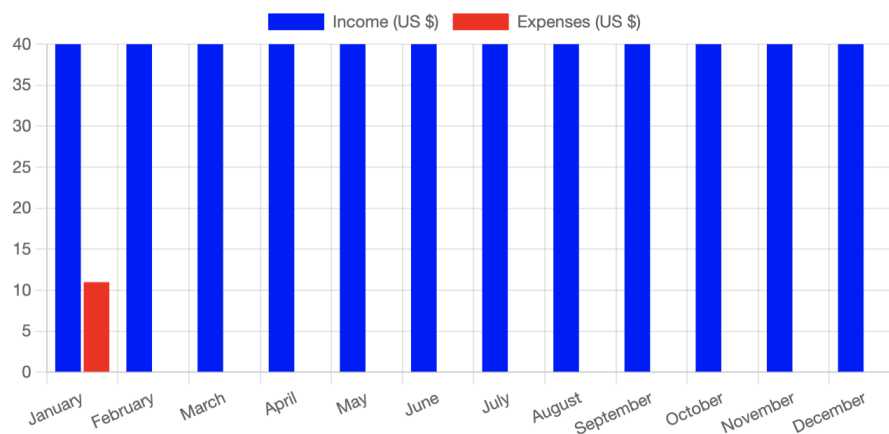
User Categorical Expense Percentages Based on US \$ Amount



A box on the page prompts you to enter your estimated monthly income in US \$. If the entered value is not a positive real numerical value, then there will be an alert, and you must enter another value. Text in a box will also show you your average monthly profit.

If you enter an approved value, the page will display a bar graph depicting your monthly income

Estimated Monthly Income in US \$:



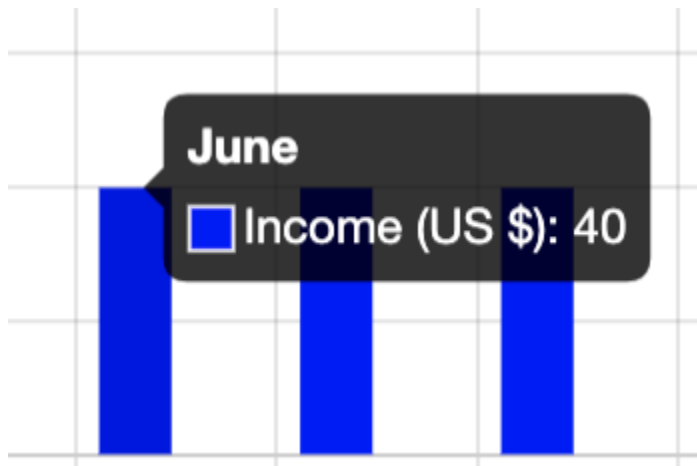
Your average monthly profit is 39.08 \$

and total monthly expenses.



There is a key describing what each color represents.

Additionally, if you hover over a specific bar, it will display its month and respective income.



After you submit, you will see that the button will change to display reset. If you press reset, the bar graph, profit text, and entered income value will disappear. You will then have a chance to reenter an income value and generate a new graph.