Financial Planner Documentation

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User Guide:

What is Financial Planner?

Financial Planner is a website created by Ryan Nixon, Ethan Shilo-Draper, and Kasey Bourdier, that helps you monitor your financial situation on the fly without spending tons of money for financial planning services.

Budget

- Create budget categories (ex. Car maintenance)
- See overall budget for that current month
- Auto Generated graphs

Expenditures

- Observe your spending patterns
- Tools to help you manage your expenditures
- The ability to add your expenses or bills

Savings

- Keep track of your savings
- Your accounts, deposits, and sources of income are all displayed here
- Auto generated graphs

Income

- Keep track of all your sources of income
- Earnings broken down by date, company, and amount

Getting Started

To get started on the Financial Planner app you'll have to visit our website where you will be greeted by our landing page.

Prerequesites

You'll need some basic financial experience to work with our application such as:

- Familiarity with handling money
- Some form of basic income
- BIll payments

Helpful skils

- Prior experience with spread sheets (Although Not required)
- Previous job that required handling money of some sort (Although Not required)

Other prerequesites

- Currently be employed or be an owner of a business (Although Not required)

If you have most of these basic skills checked then you may proceed to our Financial Planner website and create an account.

Landing Page

The landing page is where you are greeted with the details of our Financial Planner website such as about us, the functionality of our application, and account creation.

About

- Here we explain our application's goal, purpose, and the reason behind its creation.

Functionality

- Budget, Expenditures, Savings, and Income are all core components behind our websites functionality and its explanations are displayed within our landing page. View more information here

Register

- Create an account
- Add yout first name, last name, email, phone number, and password
- Validation built in

Login

- After account creation log in with your new account
- Account recovery built in

Creating An Account

After visiting our landing page you'll see a register button on the top navigation bar, there is where you'll create an account for the financial planner website.

Step 1

To register with our financial planner website you'll need to go ahead and click on the register button on the top right of the navigation bar.

Step 2

Upon entering the register page you'll see a form. Go ahead and fill out the form with your information.

Step 3

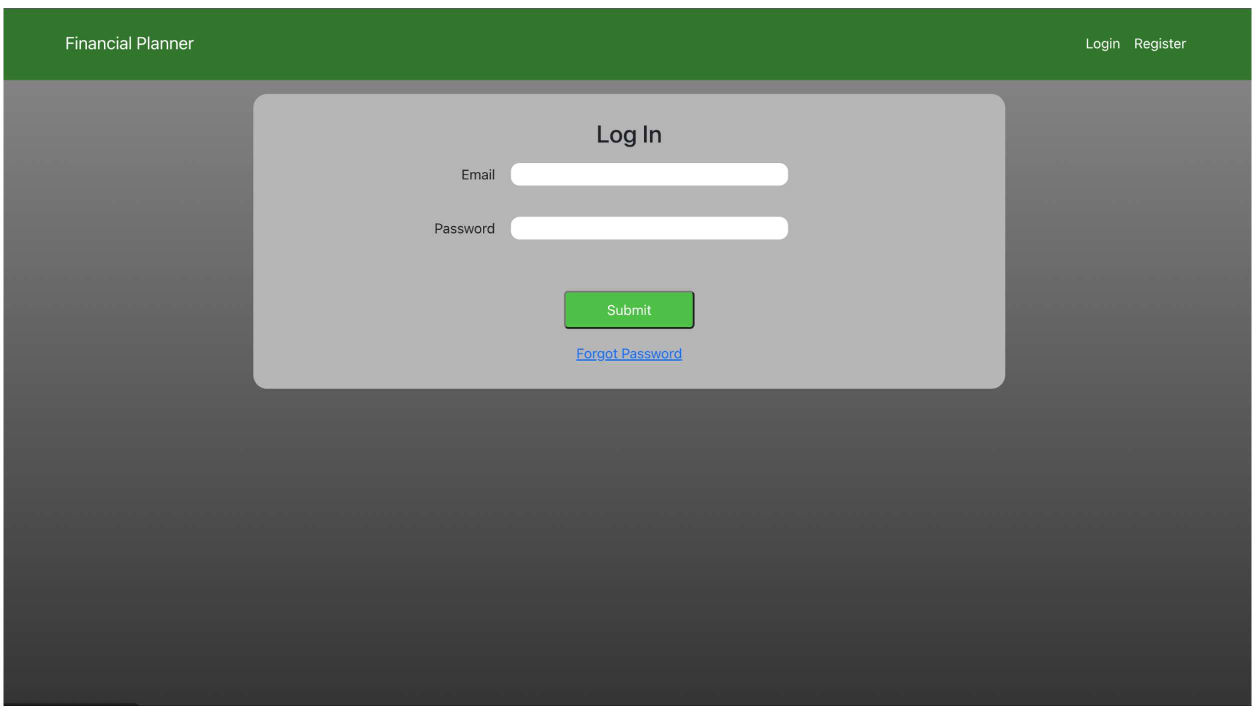
After filling out the form you can go ahead and click submit at the bottom.

Logging In

To log in the website you'll need to go to the landing page of the financial planner website. On the top right of the navigation bar you'll see the log in button.

Step 1

Upon entering the login page you'll see a form. Go aheadd and enter your credentials then click submit.



Dashboard

The dashboard is the home page, you will be directed to it once you login with your account. Here you'll see the core functionality of our website such as Budget, Savings, and Expenses. You can switch to any of these pages with shortcuts included in our dashboard.

Dashboard shortcuts:

Budget

A budget shortcut will be displayed on the dashboard with a brief description of how the budget functionality works on top of the button. To get to the budget page click the budget button on the dashboard. view more information on what budget functionality is here

Expenses

The expenses shortcut will be displayed on the dashboard with a brief description of how the expenses functionality works on top of the button. To get to the expenses page click the expenses button on the dashboard. view more information on expenditures here

Savings

A savings shortcut will be displayed on the dashboard with a brief description of how the savings functionality works on top of the button. To get to the savings page click the savings button on the dashboard. view more information on savings here

Budget

The budget page can be accessed via the dashboard or the navigation bar. Here you'll be able to create budget categories and see your overall budget with auto generated graphs.

Add Category

Once on the budget page you'll see a bottom task bar with a button that says "Add Category" once you click it fill out the the form with information (ex category: car maintenance) and then submit the form.

Delete Category

If you decide once you have a budget category that you typed in the wrong information or any other reasons, you may delete it. On the budget page navigate to the category you wish to be deleted and click the delete button for deletion of budget category.

Edit Category

If you want to change the information of your budget category you have the option to edit it. On the budget page navigate to the budget category you wish to be edited and click the edit button. A form will be displayed with your current information, go ahead and change it to your desired information.

Income

The Income page can be accessed via the navigation bar. Here you'll be able to add your different streams of income so you can better organize your income.

Add Income

Once on the income page you'll see a bottom task bar with a button that says "Add Income" once you click it fill out the the form with information (ex Gross Pay: 350.00) and then submit the form.

Delete Income

If you decide once you have a income row that you typed in the wrong information or any other reasons, you may delete it. On the Income page navigate to the row you wish to be deleted and click the delete button for deletion of income row.

Edit Income

If you want to change the information of your income row you have the option to edit it. On the income page navigate to the income row you wish to be edited and click the edit button. A form will be displayed with your current information, go ahead and change it to your desired information.

Bills

The bills page can be accessed via the navigation bar. Here you'll be able to add incoming bills you need to pay so you can better organize your bills.

Add Bills

Once on the bills page you'll see a bottom task bar with a button that says "Add Bills" once you click it fill out the the form with information (ex Bll Title: Student Loan) and then submit the form.

Delete Bills

If you decide once you have a bill row that you typed in the wrong information or any other reasons, you may delete it. On the bills page navigate to the row you wish to be deleted and click the delete button for deletion of bill row.

Edit Bills

If you want to change the information of your bill row you have the option to edit it. On the bills page navigate to the bills row you wish to be edited and click the edit button. A form will be displayed with your current information, go ahead and change it to your desired information.

Expenses

The expenses page can be accessed via the navigation bar. Here you'll be able to add your different types of expenditures so you can better organize your expenses.

Add Expense

Once on the expenses page you'll see a bottom task bar with a button that says "Add Expense" once you click it fill out the the form with information (ex Total Amount: 532.00) and then submit the form.

Delete Expense

If you decide once you have a expenses row that you typed in the wrong information or any other reasons, you may delete it. On the expenses page navigate to the row you wish to be deleted and click the delete button for deletion of expense row.

Edit Expense

If you want to change the information of your expenses row you have the option to edit it. On the expenses page navigate to the expense row you wish to be edited and click the edit button. A form will be displayed with your current information, go ahead and change it to your desired information.

Deposits

The deposits page can be accessed via the navigation bar. Here you'll be able to add your different types of deposits so you can better organize your deposits.

Add Deposits

Once on the deposits page you'll see a bottom task bar with a button that says "Add Deposit" once you click it fill out the the form with information (ex Deposit date: 9/23/23) and then submit the form.

Delete Deposits

If you decide once you have a deposit row that you typed in the wrong information or any other reasons, you may delete it. On the deposits page navigate to the row you wish to be deleted and click the delete button for deletion of deposit row.

Edit Deposits

If you want to change the information of your deposit row you have the option to edit it. On the deposit page navigate to the deposit row you wish to be edited and click the edit button. A form will be displayed with your current information, go ahead and change it to your desired information.

Bank Accounts

The bank accounts page can be accessed via the navigation bar. Here you'll be able to add different accounts. Account information such as bank name, account type, monthly fees, and more will all be displayed here.

Add Account

Once on the bank accounts page you'll see a bottom task bar with a button that says "Add Account" once you click it fill out the the form with information (ex Bank Name: Chase) and then submit the form.

Delete Account

If you decide once you have a account row that you typed in the wrong information or any other reasons, you may delete it. On the bank accounts page navigate to the row you wish to be deleted and click the delete button for deletion of account row.

Edit Account

If you want to change the information of your account row you have the option to edit it. On the bank accounts page navigate to the account row you wish to be edited and click the edit button. A form will be displayed with your current information, go ahead and change it to your desired information.

Reports

The reports page can be accessed via the navigation bar. Here you'll be able to generate reports based on your budgets and accounts.

Generating reports

After navigating to the reports page you will see a dropdown menu which wil give you the option to generate two different types of reports:

- Tabular reports
- Graphical reports

After selecting one of the two options a report will be generated for you based on one of the two option you selected.

Once a report is generated you're able to generate a new one by c;licking the (New Report) button on the page.

Account Recovery

In case you've forgotten your password we got you covered with our account recovery functionality. To view the account recovery functionality you'll need to enter the login page.

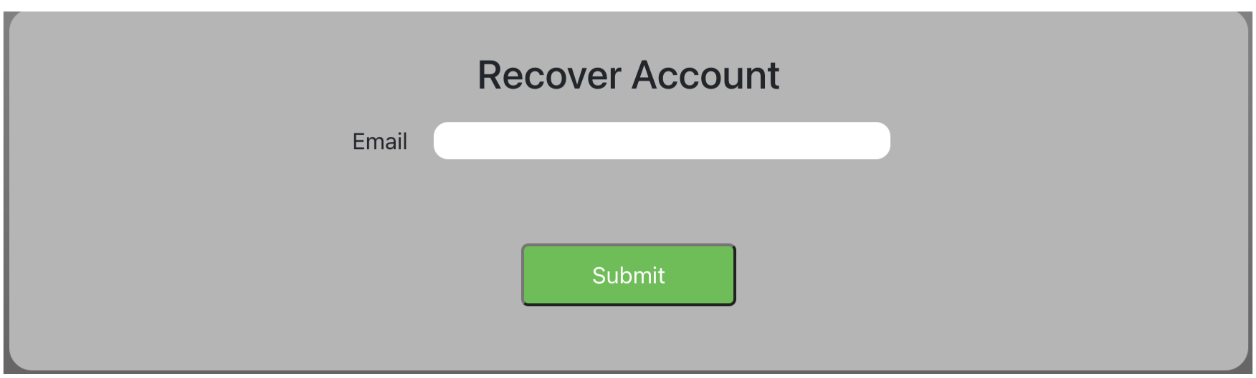
Step 1

Upon entering the login page you'll see a form but instead of logging in this time you will need to click the forgot password link in the bottom of the submit button.

Step 2

Go ahead and enter your email into the recover account page.

You will see a page similar to this:



Step 3

Once email has been entered you will be able to reset your password to a new one.