



Financial Planner Documentation

User Guide

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Table of Contents

User Guide:

What is Financial Planner?	2
Getting Started	3
Landing Page	4
Creating An Account	5
Logging In	6
Dashboard	7
Budget	8
Income	9
Bills	10
Expenses	11
Deposits	12
Bank Accounts	13
Reports	14
Account Recovery	15

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 on financial planning services.

Budget

- Create budget categories (ex. Car maintenance)
- See the 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 broke 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.

Prerequisites

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 skills

- Prior experience with spreadsheets (Although Not required)
- A previous job that required handling money of some sort (Although Not required)

Other prerequisites

- 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 website's functionality and their explanations are displayed on our landing page. [View more information here](#)

Register

- Create an account
- Add your 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

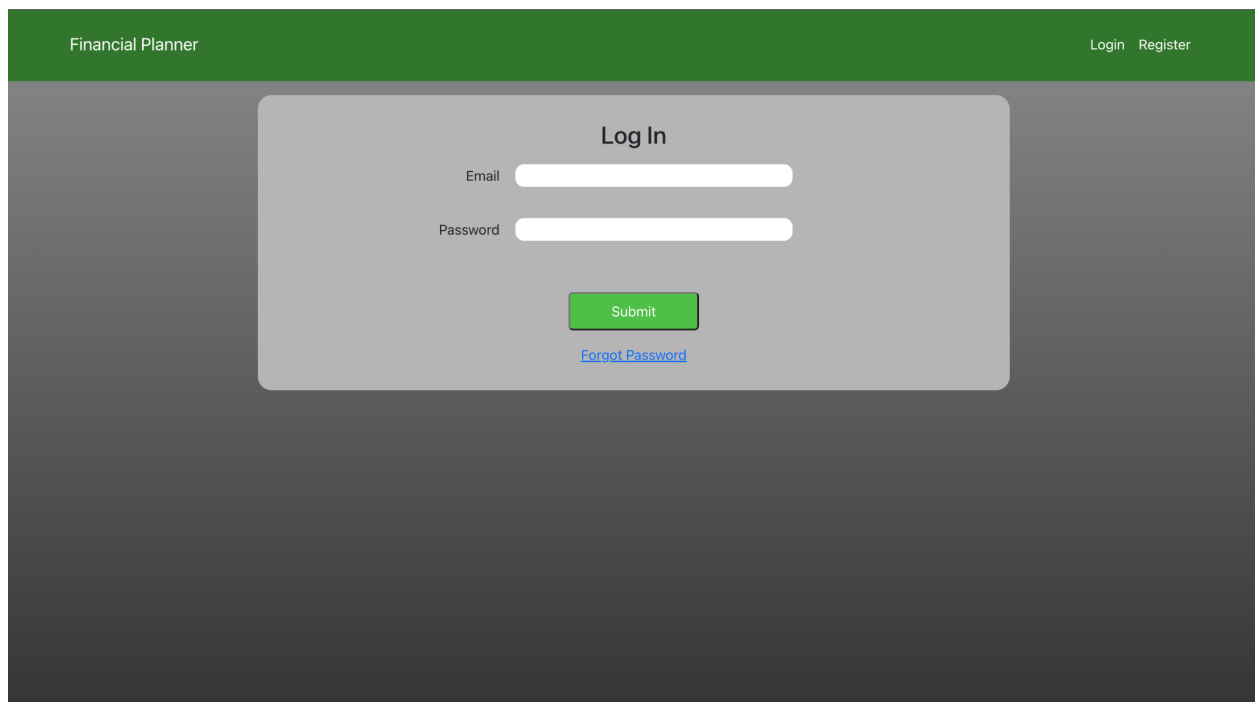
After filling out the form you can go ahead and click submit at the bottom.

Logging In

To log in to 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 ahead and enter your credentials then click submit.



The screenshot shows a web application interface for a financial planner. At the top, there is a green navigation bar with the text "Financial Planner" on the left and "Login Register" on the right. Below the navigation bar, the main content area has a dark gray background. In the center, there is a light gray rounded rectangle containing the login form. The form is titled "Log In" and includes two input fields: "Email" and "Password". Below these fields is a green "Submit" button and a blue link labeled "Forgot Password".

Dashboard

The dashboard is the home page, you will be directed to it once you log in with your account. Here you'll see the core functionality of our websites such as Budget, Savings, and Bills. 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](#)

Bills

The bills shortcut will be displayed on the dashboard with a brief description of how the bills functionality works on top of the button. To get to the bills page click the bills button on the dashboard. [View more information on bills 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 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 clicks the delete button for deletion of the 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 form with information (ex Gross Pay: 350.00) and then submit the form.

Delete Income

If you decide once you have an 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 the income row.

Edit Income

If you want to change the information on 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 form with information (ex Bill 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 for 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 the bill row.

Edit Bills

If you want to change the information on 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 form with information (ex Total Amount: 532.00) and then submit the form.

Delete Expense

If you decide once you have an 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 the expense row.

Edit Expense

If you want to change the information in 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 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 for 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 the deposit row.

Edit Deposits

If you want to change the information on 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 form with information (ex Bank Name: Chase) and then submit the form.

Delete Account

If you decide once you have an account row that you typed in the wrong information or for 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 the account row.

Edit Account

If you want to change the information in 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 can generate reports based on your budgets and accounts.

Generating reports

After navigating to the reports page you will see a dropdown menu that will 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 options you selected.

Once a report is generated you're able to generate a new one by clicking 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.

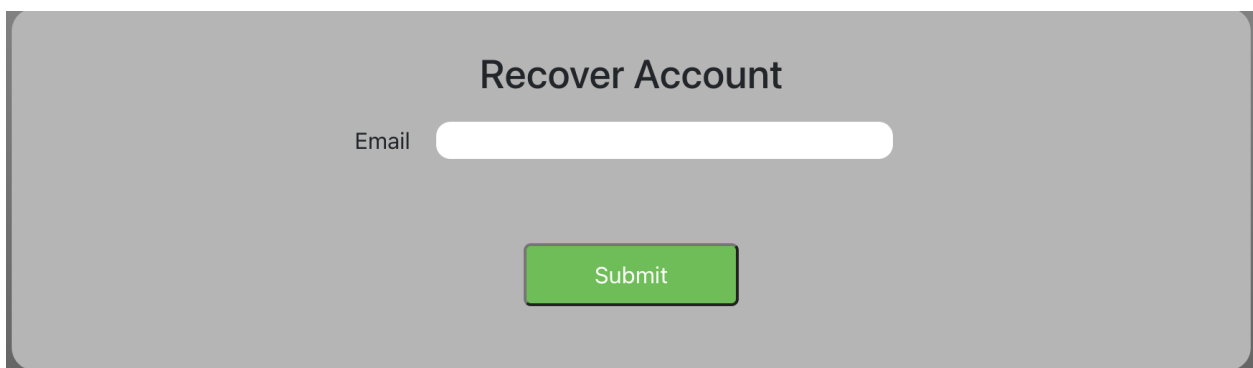
Step 1

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 at 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:

A screenshot of a web form titled "Recover Account". The form has a light gray background with rounded corners. At the top, the title "Recover Account" is centered in a bold, dark gray font. Below the title, the word "Email" is positioned to the left of a white, rounded rectangular input field. Below the input field, centered, is a green rectangular button with the word "Submit" in white text.

Step 3

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