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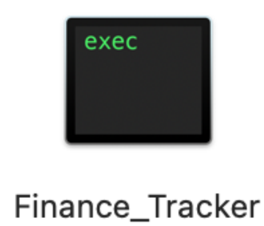
Finance Tracker Application User Guide

Overview:

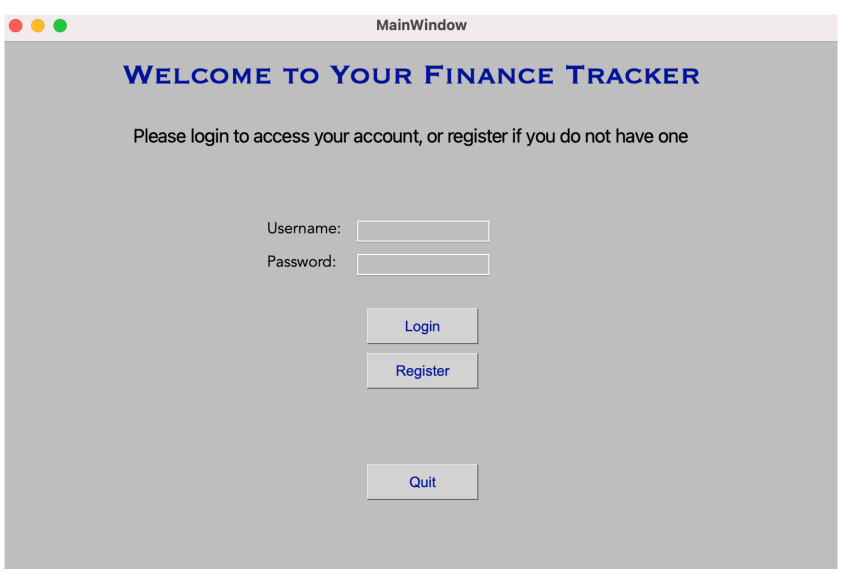
Finance Tracker is an application for MacOS devices for keeping track of your income and expenses in an organized environment with graphing capabilities to help you visualize the rate of finance flow. After registering, any data you add will be saved automatically upon logout so that you can return to it at any time. Features include creating data entries with customizable categories and subcategories to organize your data, the option to delete existing entries, the ability to display all of your data or only data in a particular category, and the ability to graph all, or by category, your income and expenses over time.

How to Use the Application:

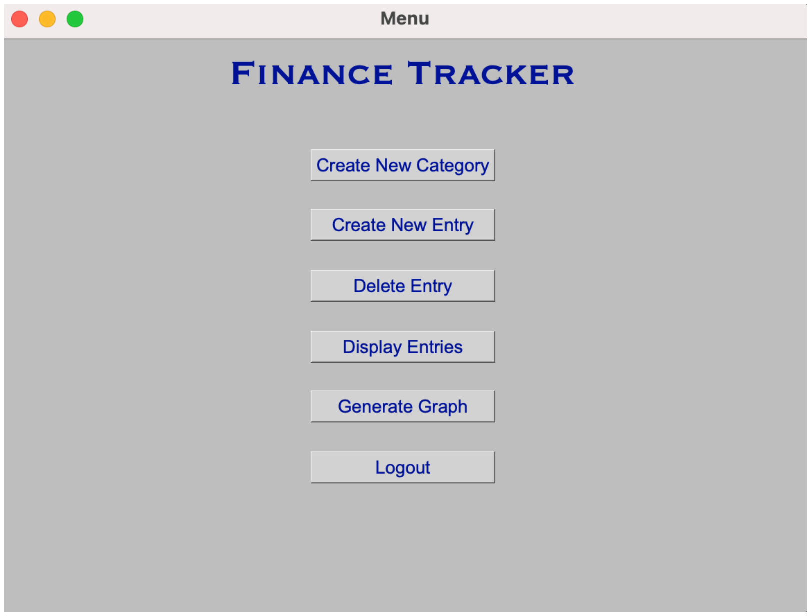
After you have downloaded the software, right click on the application, then select "Show Package Contents". Open the folder labeled "Contents", then the folder inside it named "MacOS". Double click on the icon shown below.



The application will open to a login screen. Enter your desired username and password, then click "Register". If a pop up window tells you that the username already exists, pick a new one and try again.

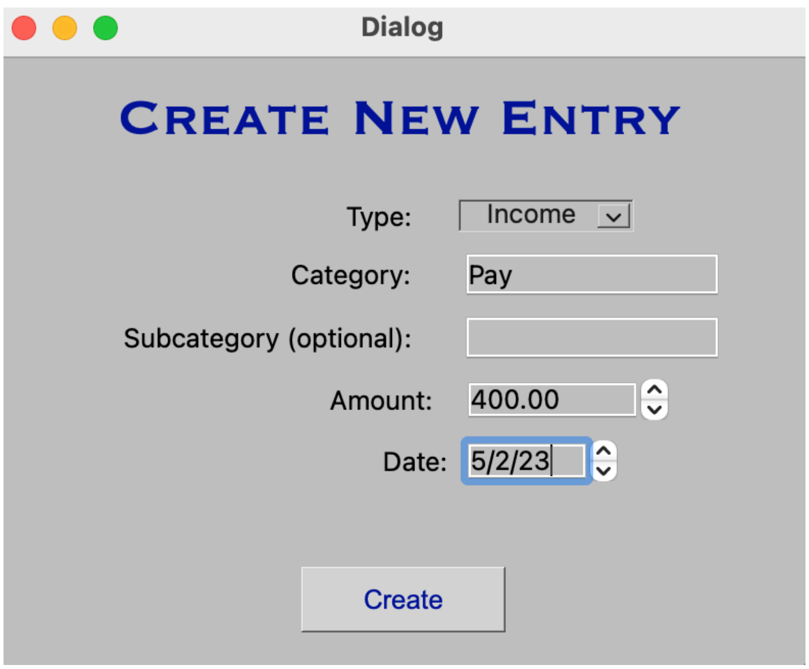


Once you have successfully registered, you will be shown the menu depicted below.

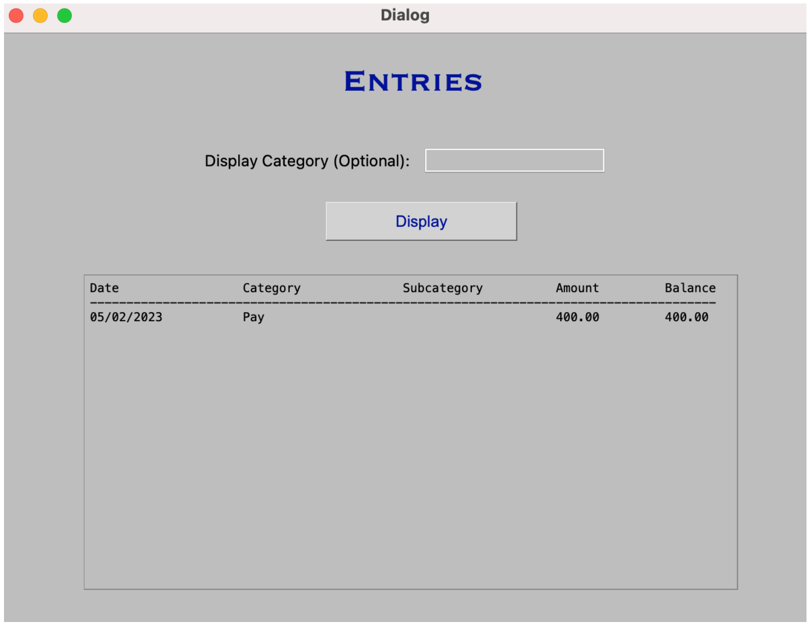


To add a new category for future use, click the "Create New Category" button. Enter a title for your new category. If you wish, you may also simultaneously create a subcategory of that category. For example, if you make a category called "Automobile", you might want to have a few subcategories for various types of expenses, such as "gas", "insurance", or "maintenance". Click "Create" to add the category (and subcategory if you chose) to your data. In the future, you can add more categories and subcategories using the same process. If you want to add a new subcategory to an existing category, simply type in the title of the category you want to add it to, then in the Subcategory field, type the title of the new subcategory you want. When you are ready to return to the menu, click the red circle in the top left corner to close the Create New Category pop-up window.

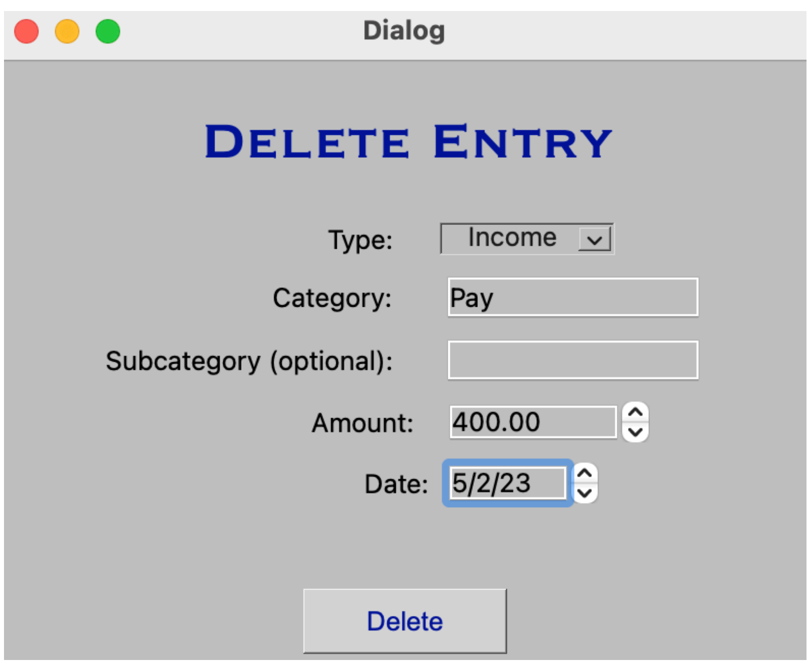
To add a new finance data entry to your account, click the “Create New Entry” button in the main menu. First, choose the entry type— either income or expense. When you view your data later, income will show up as positive values and expenses will show up as negative values. Next, type in the name of the category this entry should go in. You can either type in a previously created category, or type in the name of a category you wish to create. If the category does not already exist, it will be created automatically for you. If you want, you may add a subcategory for your entry. Similarly, if the subcategory you type does not already exist in the specified category, it will be created automatically for you. Now type in the amount of the entry. For income entries, this will be how much money was added to your account. For expenses, this will be how much money is withdrawn. Finally, add in the date of the transaction. Dates are set to the 21st century, so marking the year as 23 will show up as the year 2023. Once you have filled in the date, click the “Create” button. Your new entry has now been added to your account. Click the red circle in the top left corner to close the Create New Entry pop-up window.



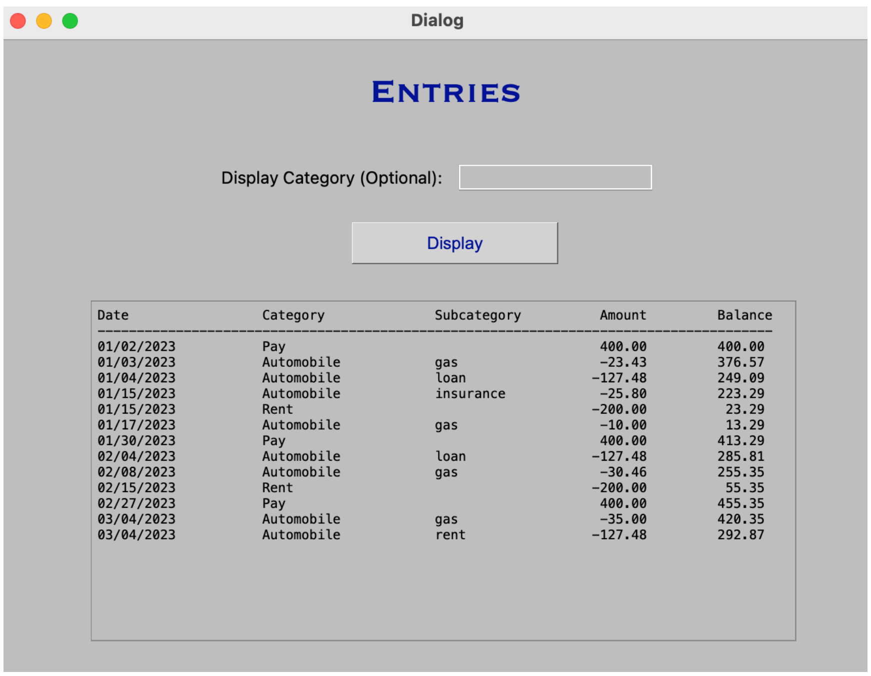
To view your new entry, click the “Display Entries” button in the main menu. In the pop-up window, click the “Display” button. Your entry will appear in the large rectangle below the button.



Close the Entries window by clicking the red circle in the top left corner. Now click the “Delete Entry” button in the main menu. Type in the details of the entry you created earlier, then click “Delete”.

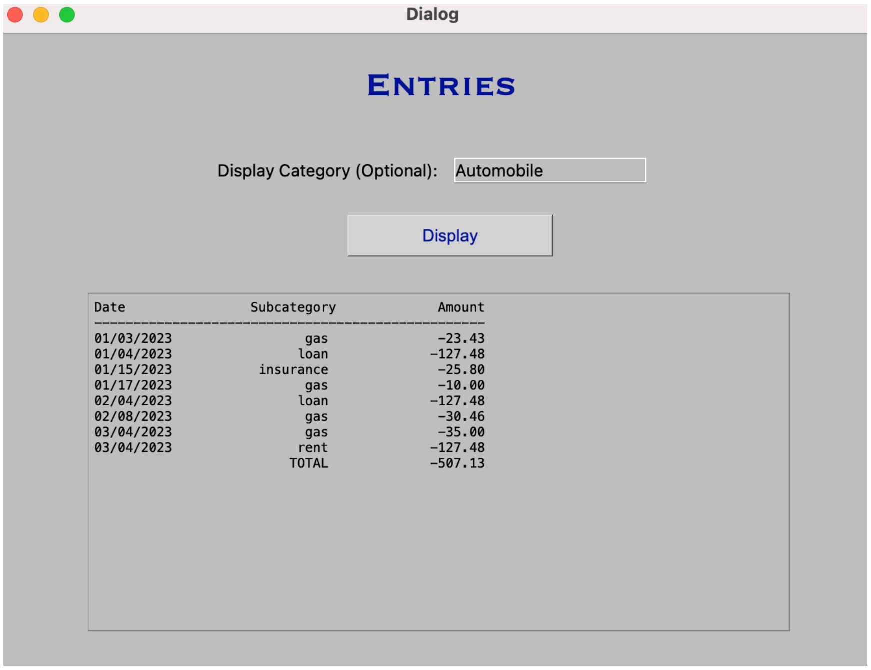


The entry has now been removed from your account. Close the Delete Entry window and click the “Display Entries” button again. Click “Display”. The large rectangle where your entry was displayed before will now contain no entries, only the header labels. Close out of this window and go back to the “Create New Entry” page. Try adding a few more entries, then return to the Entries Page and click “Display”. Notice, the balance category in the far right. The balance displays the total amount in your account as of each entry added. The entries are organized by date, with the earliest transactions listed first, and the latest transactions listed last.

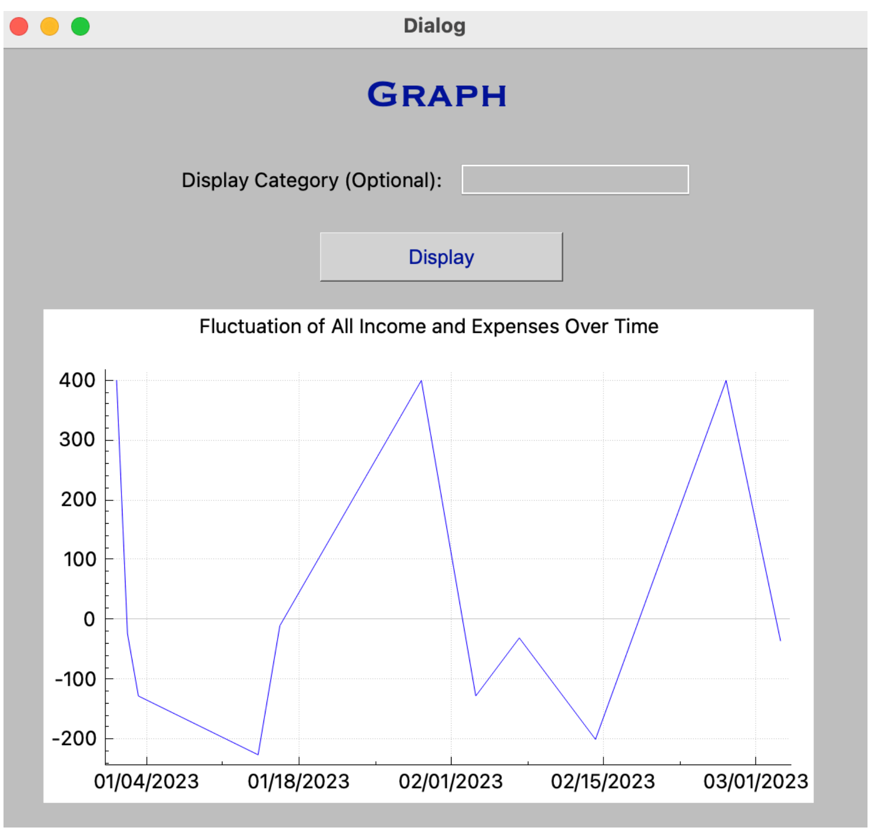


Date	Category	Subcategory	Amount	Balance
01/02/2023	Pay		400.00	400.00
01/03/2023	Automobile	gas	-23.43	376.57
01/04/2023	Automobile	loan	-127.48	249.09
01/15/2023	Automobile	insurance	-25.80	223.29
01/15/2023	Rent		-200.00	23.29
01/17/2023	Automobile	gas	-10.00	13.29
01/30/2023	Pay		400.00	413.29
02/04/2023	Automobile	loan	-127.48	285.81
02/08/2023	Automobile	gas	-30.46	255.35
02/15/2023	Rent		-200.00	55.35
02/27/2023	Pay		400.00	455.35
03/04/2023	Automobile	gas	-35.00	420.35
03/04/2023	Automobile	rent	-127.48	292.87

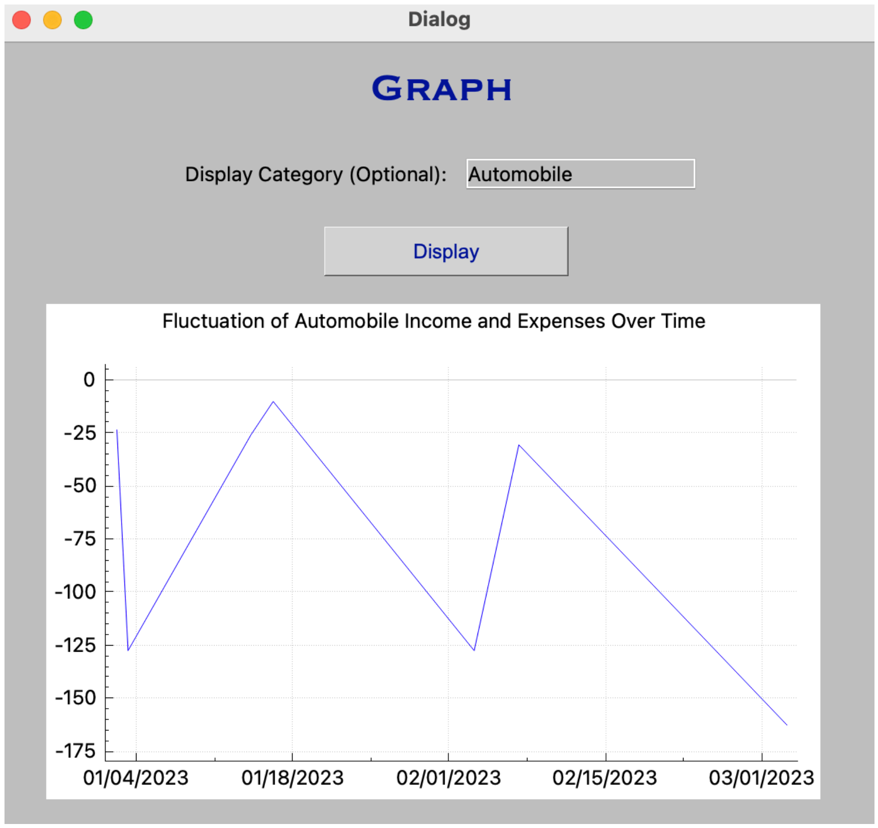
You can also choose to display only the entries in a particular category. Type in the name of one of your categories in the textfield above the button, then click “Display”. Only the entries in that category will appear in the rectangle. For clarity, expenses are shown as negative.



Close out the Entries window and click on the “Generate Graph” button in the main menu. Automatically, a graph of all of your income and expenses over time will be displayed. If multiple entries exist on the same date, their total will be summed in the graph for that day.



Similarly to displaying entries, you can also graph only the subset of data in a particular category by typing in the name of the category desired in the textfield above the button, then clicking the “Display” button. Once again, expenses are displayed as negative values for clarity.



Close out the graphing window. Finally, click the “Logout” button in the main menu. Clicking “Logout” ensures that your data is saved and you can return to your entries to view and add to them at any point in time by logging in again. After you click “Logout”, you will be returned back to the Login page. To return to your account, simply type in your username and password, then click the “Login” button. Finally, when you are ready to quit the application, you can click the “Quit” button in the Login page.