



MONEYMINDER

your personal finance tracker

USER GUIDE

Table of Contents

1	Introduction	4
2	What Is MoneyMinder?	4
3	Welcome Screen / Login	5
4	Sign-Up Screen / Create User Account	6
5	Financial Accounts	7
5.1	<i>What Is a Financial Account?</i>	7
5.2	<i>Financial Accounts Overview Screen</i>	7
5.2.1	<i>Setting Up a New Financial Account.....</i>	8
6	Categories	8
6.1	<i>Income Categories</i>	9
6.2	<i>Expense Categories</i>	9
7	Financial Account Management Screen	10
7.1	<i>Navigation Bar.....</i>	11
7.2	<i>Financial Account Quick Info Bar.....</i>	11
7.3	<i>Monthly Goal Status Indicator Bar.....</i>	11
7.4	<i>Transactions</i>	11
7.4.1	<i>What Are Transactions?</i>	11
7.4.2	<i>Transactions Tab.....</i>	12
7.4.3	<i>Adding a New Transaction</i>	13
7.4.4	<i>Transactions Tiles</i>	14
7.4.5	<i>Transactions Details.....</i>	14
7.4.6	<i>Editing a Transaction</i>	15
7.5	<i>Analysis Tab.....</i>	16
7.6	<i>Trends Tab</i>	17
7.7	<i>Financial Account Info Menu.....</i>	18
7.7.1	<i>Edit Financial Account</i>	18
7.8	<i>Recurring Transactions.....</i>	20
7.8.1	<i>What Is a Recurring Transactions Order?</i>	20
7.8.2	<i>Recurring Transactions Menu</i>	20
7.8.3	<i>Creating a Recurring Transaction Order.....</i>	21
7.8.4	<i>Editing a Recurring Transaction Order</i>	23
7.9	<i>Collaborators.....</i>	24
7.9.1	<i>What Is a Collaborator?</i>	24
7.9.2	<i>Collaborators Menu.....</i>	24

7.10	<i>Monthly Goal</i>	25
7.10.1	What Is a Monthly Goal?	25
7.10.2	Monthly Goal Menu.....	25
7.10.3	Setting a Monthly Goal	26
8	Navigation Bar Menu	27
8.1	<i>User Management</i>	27
8.1.1	Permissions of Owners.....	27
8.1.2	Permissions of Collaborators.....	28
8.1.3	Changing the Ownership of a Financial Account	28
8.1.4	User Account Settings	28
9	About	29
9.1	<i>Credits</i>	29

1 Introduction

Welcome to the User Guide for MoneyMinder! This comprehensive manual is designed to help you navigate and maximize the features of this financial management software.

Whether you are a seasoned user or just getting started, this guide will provide you with instructions and insights to effectively manage your financial accounts, track transactions, set goals, and collaborate seamlessly with others. From creating and categorizing transactions to analyzing your financial data and understanding the nuances of user roles, this guide is your go-to resource for making the most of MoneyMinder.

2 What Is MoneyMinder?

MoneyMinder is here to make managing your personal finances straightforward and effective. This software simplifies the often complex task of handling your money, providing an easy way to keep track of income, expenses, savings, and investments, while also promoting collaborative efforts.

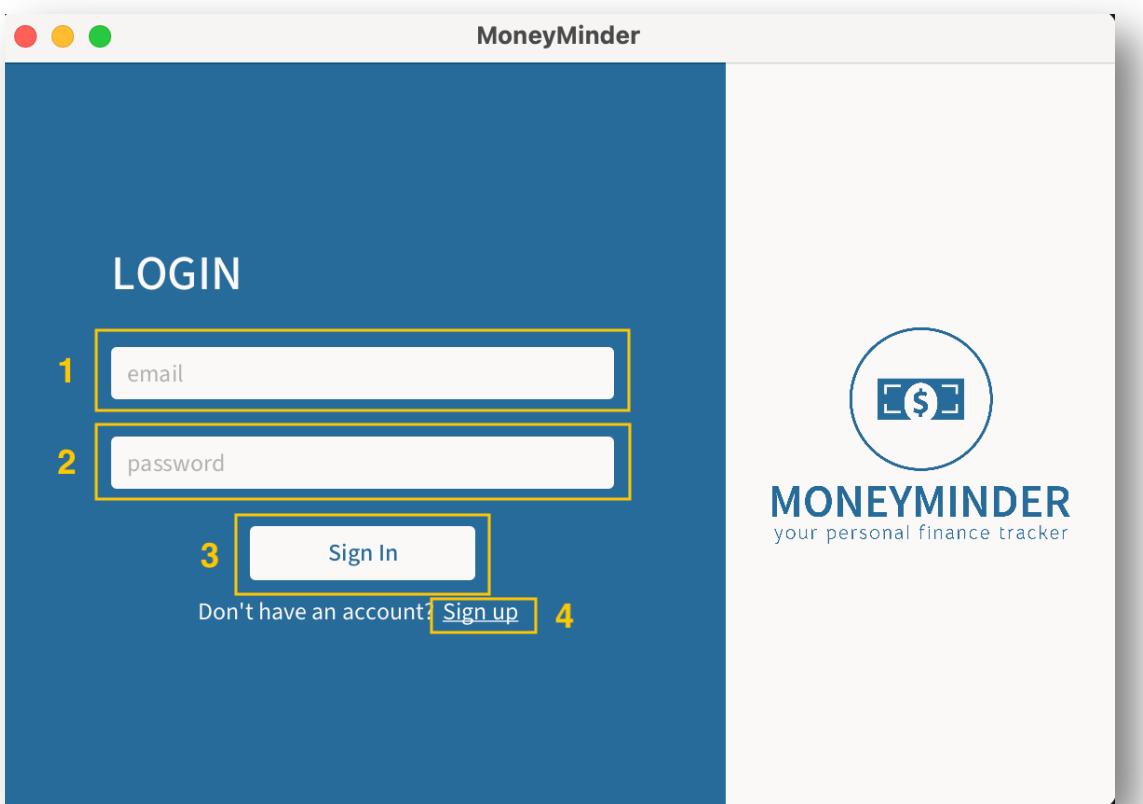
Our goal is to empower you by offering features like setting financial goals, creating budgets, and organizing transactions. You can set targets and budgets, helping you manage your finances responsibly and work towards your financial dreams.

MoneyMinder's tools allow you to categorize transactions, giving you a clear view of your spending habits. This helps you spot areas where you can make adjustments, enhancing your understanding of your finances and supporting smarter choices in managing expenses and savings.

We also understand the importance of teamwork. MoneyMinder enables collaboration, allowing you to share financial responsibilities, manage budgets together, and work towards common financial goals with your family, partner, or friends.

In essence, MoneyMinder's purpose is to simplify and enhance your financial management journey while encouraging collaboration. By providing user-friendly tools and insights, MoneyMinder equips you to take control of your financial decisions, work towards your goals, and enjoy financial peace of mind.

3 Welcome Screen / Login

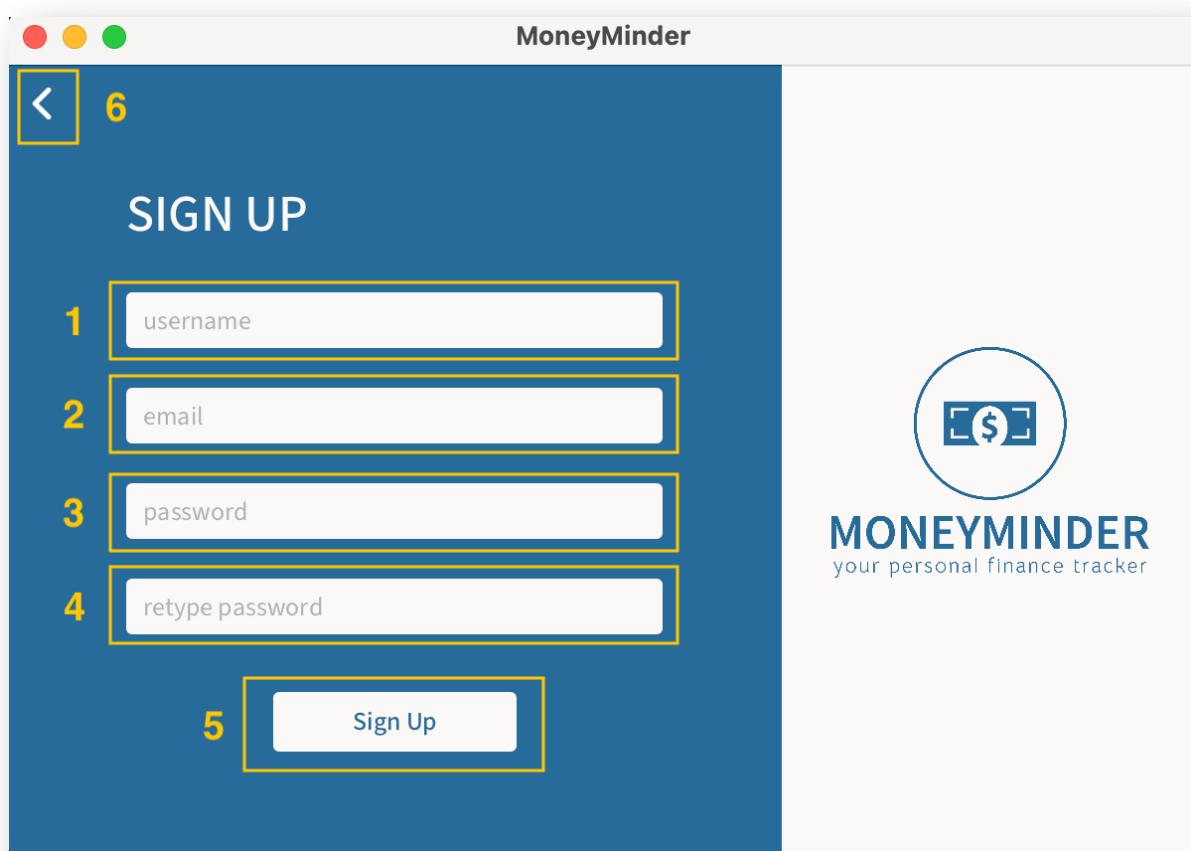


Screenshot 1: Welcome Screen

Upon launching MoneyMinder, the welcome screen provides the option to login with an existing user account. This screen includes two text fields for entering your email address **(1)** and password **(2)**. Once you've entered valid user account information, you can proceed by clicking the "Sign In" button **(3)**, which will take you to an [overview of your financial accounts](#).

To create a new user account, you can utilize the provided hyperlink labeled "Sign Up" **(4)**, which will guide you to the [sign-up screen](#).

4 Sign-Up Screen / Create User Account



Screenshot 2: Sign-Up Screen

The sign-up screen has four text fields for entering essential details to create a new user account. In the username field **(1)**, input your preferred username. In the email address field **(2)** provide a valid email address. Fields **(3)** and **(4)** are for entering a new password, which must be a minimum of 8 characters. To finalize the account creation, simply click the "Sign Up" button **(5)**. Once your account is successfully created, you'll be redirected to the [welcome screen](#). To return to the [welcome screen](#) at any point, you can use the arrow button in the upper left corner **(6)**.

5 Financial Accounts

5.1 What Is a Financial Account?

In MoneyMinder, a financial account is a virtual space where you manage and track your financial transactions and activities. It serves as a digital record of your income, expenses, savings, investments, and more. Each financial account provides a structured way to organize your financial information and gain insights into your financial flow.

Each financial account acts as a separate space where you can manage financial activities related to a particular goal, project, or aspect of your life. This segmentation enables you to maintain a clear overview. Whether it's for personal expenses, business endeavors, vacation expenses, or specific savings targets, creating different financial accounts empowers you to manage your finances with precision and efficiency.

Within a financial account, you can:

- Record and categorize transactions, such as purchases, payments, and earnings.
- Set and monitor monthly goals to manage your spending and savings targets.
- Visualize your financial data through charts and analysis tools.
- Collaborate with others by sharing access to the account and its data.
- Manage recurring transactions to automate repetitive financial activities.

In essence, a financial account in MoneyMinder centralizes your financial information, empowering you to make informed decisions, track your progress, and maintain an organized record of your financial journey.

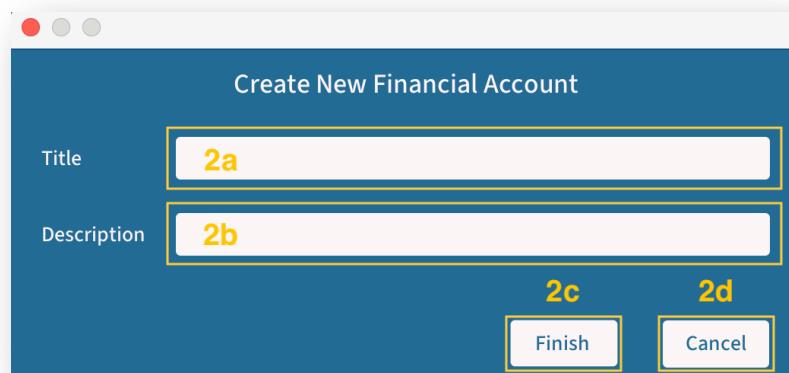
5.2 Financial Accounts Overview Screen



Screenshot 3: Financial Accounts Overview Screen

On this screen, you see an overview of your financial accounts, each displayed in a rectangular shape **(1)** showing its title and balance. Clicking a shape will lead you to the [financial account management screen](#) for that specific account. To set up a new financial account, click the yellow "New Financial Account" tile **(2)**, which opens the "[Create New Financial Account](#)" dialog. On top of the screen is the navigation bar. In the right corner of the navigation bar your username is visible. Clicking the adjacent arrow **(3)** gives a menu of options (see [navigation bar menu](#)).

5.2.1 Setting Up a New Financial Account



Screenshot 4: Create New Financial Account Dialog

The “Create New Financial Account” dialog provides two text fields to enter essential information. In the “Title” field **(2a)**, name your financial account (e.g., “Household”). Use the “Description” field **(2b)** to add more details. After entering the information, click “Finish” **(2c)** to create the account. Your new financial account will then appear as a tile in the [overview](#). If needed, cancel using the “Cancel” button **(2d)**.

6 Categories

Categories are predefined groups that help you organize and classify your [financial transactions](#) based on their nature. They provide a structured way to group similar expenses or income sources together, making it easier to understand and analyse your spending habits and financial trends. By assigning transactions to specific categories, you can gain insights into how you allocate your money and make informed decisions about your financial priorities.

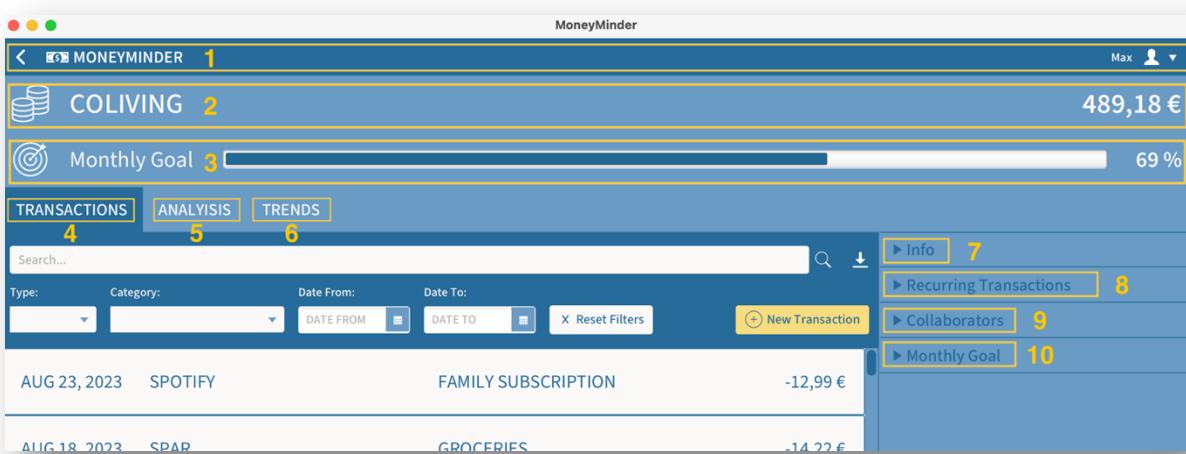
6.1 Income Categories

- **Salary & Wages:** Earnings from employment, regular pay checks.
- **Business Income:** Income generated from a business venture or self-employment.
- **Freelance Income:** Earnings from freelance work or independent contracts.
- **Social Security & Benefits:** Income from government programs or benefits.
- **Rental Income:** Earnings from renting out property or assets.
- **Investment Income:** Returns from investments such as stocks, bonds, and funds.
- **Dividends & Interest:** Earnings from dividends and interest on investments.
- **Gifts & Bonuses:** Additional income received as gifts or bonuses.
- **Reimbursements:** Money refunded for expenses previously paid.
- **Alimony:** Financial support paid to a spouse after separation.
- **Other Income:** Miscellaneous sources of income not covered above.

6.2 Expense Categories

- **Food & Dining:** Expenses related to groceries, dining out, and meals.
- **Housing & Rent:** Costs associated with housing and rental payments.
- **Utilities:** Expenses for essential services like electricity, water, and gas.
- **Public Transport & Taxis:** Spending on transportation, public transit, or taxi fares.
- **Car Expenses:** Costs linked to owning and maintaining a vehicle.
- **Health and Medical:** Expenditures on healthcare services and medical needs.
- **Hygiene & Personal Care:** Costs for personal care and grooming products.
- **Entertainment & Leisure:** Spending on entertainment and leisure activities.
- **Shopping & Retail:** Expenses for shopping and retail purchases.
- **Vacation & Travel:** Costs associated with travel and vacations.
- **Gifts:** Money spent on gifts for others.
- **Communication & Media:** Expenses for communication services and media subscriptions.
- **Education:** Costs related to education and learning.
- **Debt & Loans:** Payments towards debts and loans.
- **Alimony Payments:** Financial support payments to a separated spouse.
- **Savings & Investments:** Contributions to savings accounts and investments.
- **Insurance:** Costs for insurance coverage.
- **Taxes:** Payments for taxes, including income and property taxes.
- **Fees:** Various fees and charges.
- **Other Expenses:** Miscellaneous expenditures not covered above.

7 Financial Account Management Screen



Screenshot 5: Financial Account Management Screen

This screen provides tools for effective financial account management, helping you track your income and expenses.

The [navigation bar](#) (1) sits at the top, followed by [some information about the financial account](#) (2), and the [status of your monthly goal](#) (3).

Below, there are three tabs: "[Transactions](#)" (4), "[Analysis](#)" (5), and "[Trends](#)" (6), which you can switch by clicking.

On the right side, a sidebar holds four menus: "[Info](#)" (7), "[Recurring Transactions](#)" (8), "[Collaborators](#)" (9), and "[Monthly Goal](#)" (10). Clicking expands each menu individually.

You can find details explanations for each component in the following sections.

7.1 Navigation Bar



Screenshot 6: Navigation Bar

In the right corner of the navigation bar, your username is displayed. Clicking the adjacent arrow (**1a**) opens a menu with various options (see [navigation bar menu](#)). In the left corner of the navigation bar is a white arrow (**1b**) that takes you back to the [overview of all your financial accounts](#).

7.2 Financial Account Quick Info Bar



Screenshot 7: Financial Account Overview Bar

This bar shows the title (**2a**) and balance (**2b**) of your financial account.

7.3 Monthly Goal Status Indicator Bar



Screenshot 8: Monthly Goal Status Indicator

This indicator is only visible when a monthly goal has been set for the financial account. A progress bar (**3a**) visually displays your goal's progress. It is based on the percentage of your monthly target budget already spent during the current month. The percentage is also shown as a number next to the progress bar (**3b**). If you've spent over 80% of your target, the bar turns yellow. If you've met or exceeded your goal, it turns red. To learn about setting a monthly goal, refer to the section "[‘Monthly Goal’](#)".

7.4 Transactions

7.4.1 What Are Transactions?

Transactions are the individual actions that involve the flow of money into or out of your financial account. They represent any financial activity, such as earnings, purchases, and payments. Each transaction typically includes details like the date, description, [category](#), amount, the source, or recipient of the money. Keeping track of transactions helps you monitor your financial activities and maintain an accurate record of your finances.

7.4.2 Transactions Tab

The screenshot shows the 'TRANSACTIONS' tab with various filters and transaction history.

- Search bar (2):** A search input field with a magnifying glass icon and a download icon.
- Type: (3):** A dropdown menu for filtering transaction type.
- Category: (4):** A dropdown menu for filtering transaction category.
- Date From: (5) and Date To: (6):** Date pickers for defining a date range.
- Reset Filters (7):** A button to reset all applied filters.
- New Transaction (8):** A button to create a new transaction.
- Transactions List (9):** A list of transactions with columns for Date, Merchant, Category, Description, and Amount.

Date	Merchant	Category	Description	Amount
AUG 23, 2023	SPOTIFY	9	FAMILY SUBSCRIPTION	-12,99 €
AUG 18, 2023	SPAR		GROCERIES	-14,22 €
AUG 15, 2023	FOODORA		THAI FOOD	-43,21 €
AUG 10, 2023	NETFLIX		SUBSCRIPTION	-9,99 €
AUG 7, 2023	AMAZON		COFFEE MACHINE	-86,23 €
AUG 6, 2023	OEKOSTROM		ELECTRCITY	-186,00 €

Screenshot 9: Transactions Tab

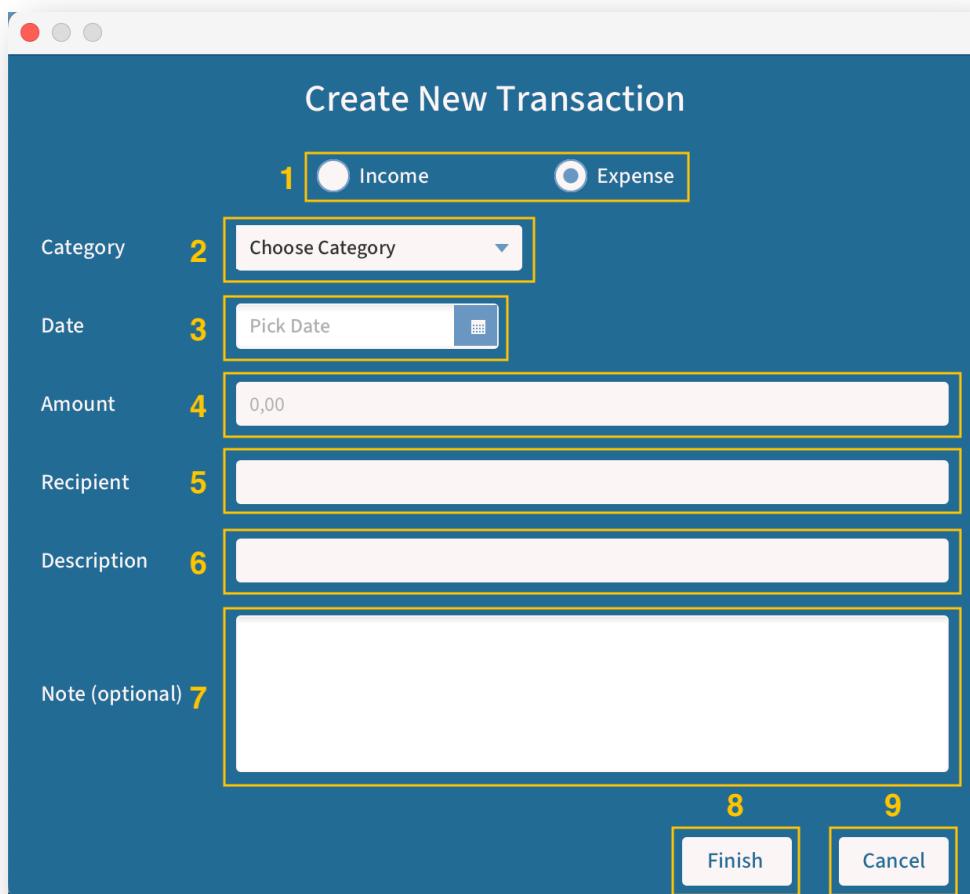
In this tab, you'll find a list of all financial account transactions (9). Each transaction is presented within a rectangular tile (for more details refer to [Transactions](#)). At the top, there are various tools for navigation, downloading transactions, and creating new ones:

- Search bar (2):** You can utilize the search bar (2) to filter transactions by search terms. Clicking the magnifier next to it or hitting enter narrows the list to matching transactions.
- Filter by Type: (3):** Additionally, you can filter by transaction type (income/expense) using the "Type" dropdown menu. Once selected the filter will be applied automatically.
- Filter by Category (4):** To narrow down by category, choose from the "Category" dropdown menu. Once selected the filter will be applied automatically.
- Filter by Date Range (5) and (6):** You can also utilize the date pickers "Date From" and "Date To". These tools allow you to define a specific range of dates for filtering transactions.
- Reset Filters (7):** To reset filters, click the "Reset Filters" button.

- **Export/Download Transactions (2):** For downloading all transactions to your computer, click the download icon, leading to a dialog that prompts file saving with a .CSV format.
- **Add New Transaction (8):** For adding a new transaction, use the yellow "New Transaction" button. This opens the "[Create New Transaction](#)" dialog, allowing input of transaction details.

7.4.3 Adding a New Transaction

Transactions can be added manually by using the “Create New Transaction” dialog or automatically through a “[Recurring Transactions Order](#)”. For more Information on recurring transactions orders, please refer to the [corresponding section](#).



Screenshot 10: Create New Transaction Dialog

The "Create New Transaction" dialog gathers all necessary details to record a new transaction in the account. Follow these steps:

- Choose the transaction type by selecting the corresponding radio button (1).

- Once the type is chosen, use the "Category" dropdown menu (2) to select a category.
- Select the transaction date (3). Note that future dates cannot be used.
- In the "Amount" field (4), input the monetary value of the transaction. Decimal numbers can be entered using commas or periods.
- Depending on the transaction type, provide "Recipient" or "Source" in the corresponding field (5).
- Describe the transaction in the "Description" field (6).
- You may also add an optional note (7)

To finalize, click the "Finish" button (8), or cancel by using the "Cancel" button (9) if needed.

7.4.4 Transactions Tiles



Screenshot 11: Transaction Tile

In MoneyMinder, transactions are displayed in rectangular tiles. These tiles include the transaction date (A), the recipient (for expenses) or source (for income) (B), a description (C), and the transaction amount (D). Negative amounts represent expenses, while positive amounts represent earnings.

7.4.5 Transactions Details



Screenshot 12: Expanded Transaction Tile

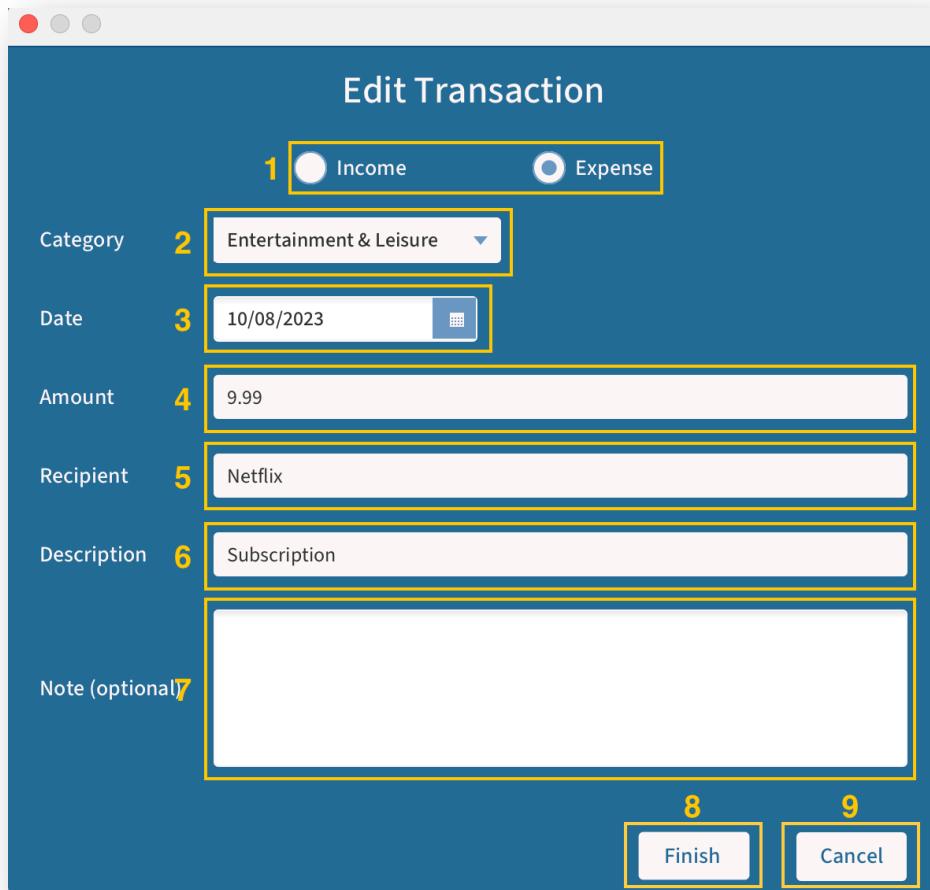
For more detailed insight into a specific transaction, click its corresponding tile. This action expands the tile to reveal all related information. The expanded view includes:

- **(E)** Transaction type
- **(F)** [Category](#)
- **(G)** Origin (manually by the user or automatically by a [recurring transaction order](#))
- **(H)** Recipient or source
- **(I)** Description
- **(J)** Notes, if provided

In addition, the expanded tile offers options to edit or remove the transaction.

Clicking "Edit" **(M)** opens a [dialog for modifying transaction details](#), while "Remove" **(L)** permanently deletes the transaction from your account. Deleted transactions are not recoverable. To close the expanded view, use the "Close" button **(K)**.

7.4.6 Editing a Transaction



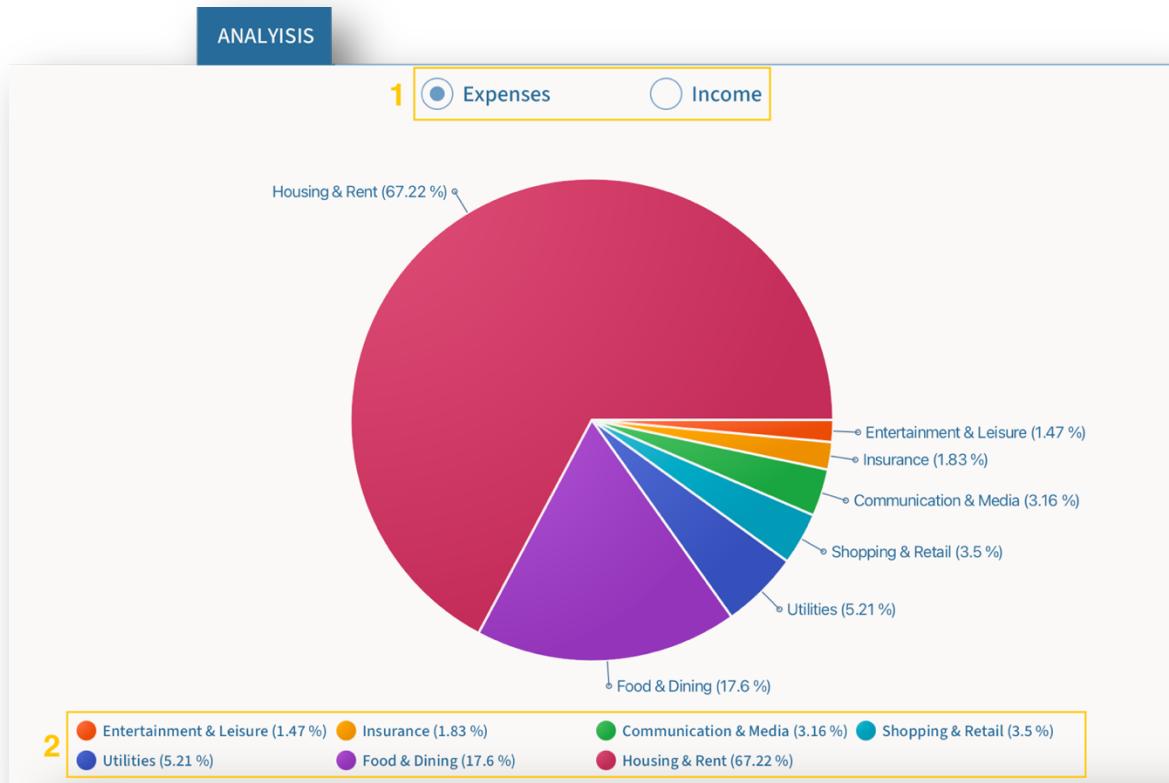
Screenshot 13: Edit Transaction Dialog

The "Edit Transaction" dialog allows you to modify an existing transaction within the account:

- Adjust the transaction type by selecting the relevant radio button **(1)**.
- Use the "Category" dropdown menu **(2)** to pick a different category.
- Modify the transaction date **(3)**. Note that future dates cannot be used.
- In the "Amount" field **(4)**, adjust the monetary value of the transaction. Decimal numbers can be entered using commas or periods.
- Depending on the transaction type, modify "Recipient" or "Source" in the corresponding field **(5)**.
- Revise the transaction's description in the "Description" field **(6)**.
- Optionally, add or edit a note **(7)**.

To confirm changes, click the "Finish" button **(8)**. If needed, use the "Cancel" button **(9)** to exit.

7.5 Analysis Tab



Screenshot 14: Analysis Tab

The analysis tab offers insights into your expenditures and earnings through a pie chart illustrating category distribution of transactions. You can alternate between "Income" and "Expense" pie charts by selecting the corresponding radio button (1).

The pie chart legend (2) displays transaction categories and their respective shares in your financial account as percentages.

7.6 Trends Tab

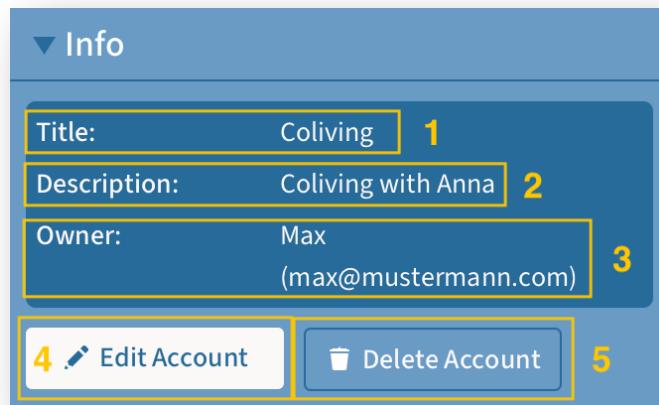


Screenshot 15: Trends Tab

The trends tab displays a bar chart depicting your total monthly income and expenses over several months. This enables you to track and understand the patterns and changes in your financial flow.

To customize the chart's duration, use the spinner (A). You can select a range of 1 to 12 months for display.

7.7 Financial Account Info Menu

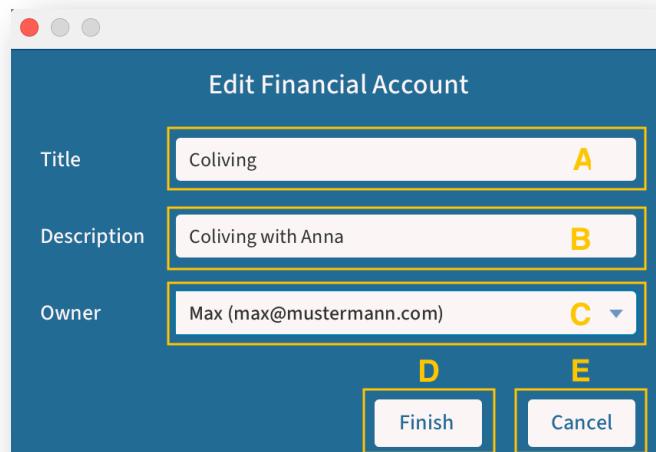


Screenshot 16: "Info" Menu

The expanded "Info" menu on the right side of the [financial account management screen](#) displays the financial account's title (1), description (2), and the owner's username and email (3).

If you are the financial account owner, you will see the "Edit Account" (4) and "Delete Account" (5) buttons. Clicking "Edit Account" (4) opens the ["Edit Financial Account" dialog](#). Pressing "Delete Account" (5) permanently removes the entire financial account, including transactions, recurring transactions, and monthly goals. Collaborators' access is also revoked. Only the financial account owner can perform edits or deletions. For more details about the distinctions between owners and collaborators, please refer to the ["User Management"](#) section.

7.7.1 Edit Financial Account



Screenshot 17: Edit Financial Account Dialog

The "Edit Financial Account Dialog" allows owners to enact changes. You can modify the account's title (**A**) and description (**B**). Additionally, an alternative owner can be chosen from the "Owner" dropdown menu (**C**). This menu displays all collaborators of the financial account. Select the "Finish" button (**D**) to save account changes. To cancel, use the "Cancel" button (**E**).

If you intend to transfer ownership to a user not listed in the "Owner" dropdown (**C**), you must first add them as a collaborator to the financial account. The ["Collaborators"](#) section provides information on how to proceed.

Should you alter the account's owner, your role shifts to that of a collaborator. Consequently, your ability to modify the financial account is restricted; however, you can still participate in transactions and recurring transactions. For more details about the distinctions between owners and collaborators, please refer to the ["User Management"](#) section.

7.8 Recurring Transactions

7.8.1 What Is a Recurring Transactions Order?

A recurring transaction order refers to a set of instructions that dictate the automatic creation of a specific [financial transaction](#) at regular intervals. This arrangement simplifies the process of handling repetitive transactions, such as monthly rent payments or quarterly subscription charges. Recurring transaction orders eliminate the need for manual input each time and ensure that these transactions are executed consistently without user intervention. Users can define the interval, amount, recipient/source, description, and other details of the transaction in a recurring transaction order, and the system carries out the transaction according to the specified schedule.

7.8.2 Recurring Transactions Menu

The screenshot shows a blue-themed application window titled "Recurring Transactions". At the top right, there is a yellow number "1". The main area contains a list of eight recurring transaction orders:

Interval	Description	Action Buttons
monthly	Contribution from Anna	
monthly	Contribution from Max	
monthly	Family Subscription	
monthly	Home Insurance	
monthly	Rent	
monthly	Subscription	
monthly	WI-FI	
quarterly	Electricity	

At the bottom left is a white button labeled "+ Add Order". To the right of the button are three yellow numbers: "2", "3", and "4".

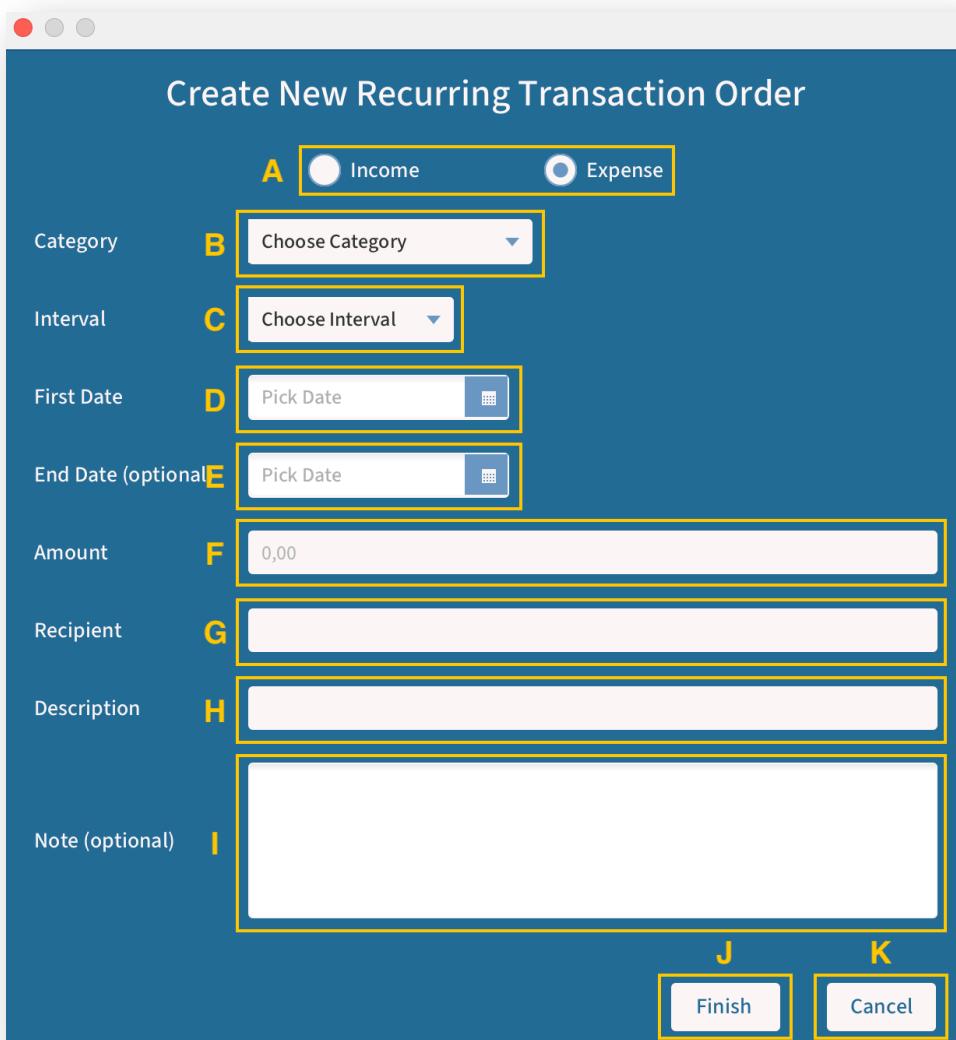
Screenshot 18: Recurring Transactions Menu

The expanded "Recurring Transactions" menu on the right side of the [financial account management screen](#) exhibits a list of active recurring transaction orders **(1)**, if applicable. Each entry presents the interval and description of the transaction order.

On each line, you'll find a pencil icon **(2)** and a garbage bin icon **(3)**. The pencil icon **(2)**, when clicked, opens [the "Edit Recurring Transactions Order"](#) dialog, enabling changes to the order. Clicking the garbage bin icon **(3)** permanently deletes a recurring transaction order.

Lastly, a "Add Order" button **(4)** directs you to the ["Create Recurring Transaction Order"](#) dialog for generating new recurring transaction orders.

7.8.3 Creating a Recurring Transaction Order



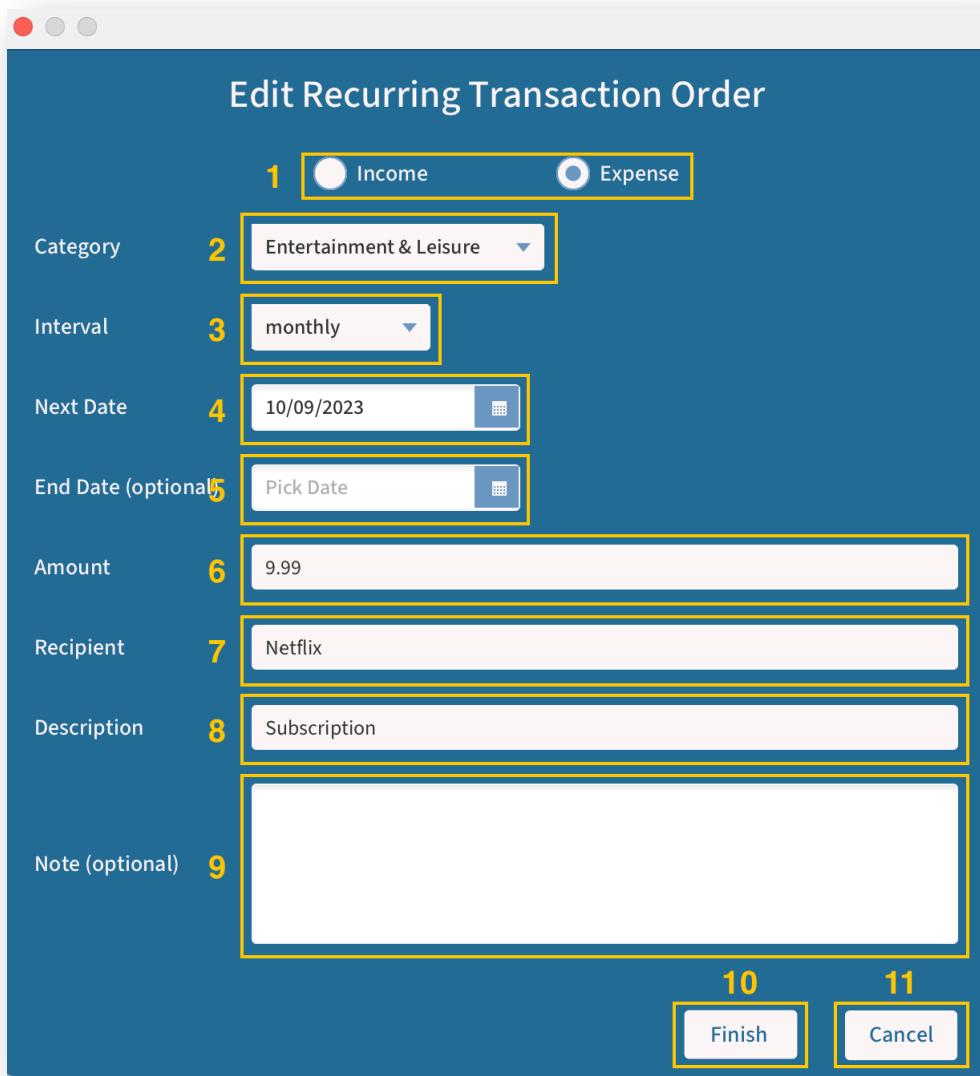
Screenshot 19: Create Recurring Transaction Order Dialog

The "Create Recurring Transaction Order" dialog collects essential information to activate a new recurring transaction order within the financial account. Here's a step-by-step guide:

- Choose the transaction type by selecting the relevant radio button **(A)**.
- After selecting the type, use the "Category" dropdown menu **(B)** to choose a [category](#).
- Select an interval from the "Interval" dropdown menu **(C)**. This determines how often the order will be executed — the options are "monthly," "quarterly," "semiannually," and "yearly."
- Choose the date of the first transaction **(D)** for the order. If you select a past date, the order will immediately execute as many times as intervals have passed since then.
- Optionally, define an end date **(E)**. After this date, the order will be automatically removed. If no end date is chosen, the order will continue indefinitely.
- In the "Amount" field **(F)**, input the monetary value of the transaction. Decimal numbers can be entered using commas or periods.
- Depending on the transaction type, provide "Recipient" or "Source" in the corresponding field **(G)**.
- Describe the transaction in the "Description" field **(H)**.
- You may also add an optional note **(I)**

To finalize, click the "Finish" button **(J)**, or cancel by using the "Cancel" button **(K)** if needed.

7.8.4 Editing a Recurring Transaction Order



Screenshot 20: Edit Recurring Transaction Order Dialog

The "Edit Recurring Transaction Order" dialog allows you to modify an existing recurring transaction order. Note that any changes will only affect order executions made after the edits; prior transactions created by the recurring transaction order remain unchanged.

- Adjust the transaction type by selecting the appropriate radio button (1).
- Use the "Category" dropdown menu (2) to pick a different [category](#).
- Select a new interval from the "Interval" dropdown menu (3).
- Modify the date of the next transaction (4) for the order. If you select a date in the past, the order will immediately execute as many times as intervals have passed since then.

- Optionally, establish or alter the end date **(5)**. After this date, the order will be removed automatically. Without an end date, the order continues indefinitely.
- In the "Amount" field **(6)**, adjust the transaction's monetary value. Decimal numbers can be entered using commas or periods.
- Depending on the transaction type, modify the "Recipient" or "Source" in the corresponding field **(7)**.
- Revise the order's description in the "Description" field **(8)**.
- Optionally, add or edit a note **(9)**.

To confirm, click the "Finish" button **(10)**. If necessary, use the "Cancel" button **(11)** to exit.

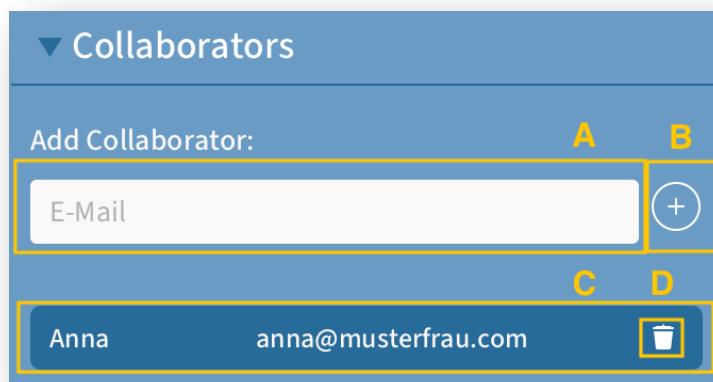
7.9 Collaborators

7.9.1 What Is a Collaborator?

A collaborator is a MoneyMinder user who has been granted access to a shared [financial account](#). Collaborators can contribute to the management of the account, such as adding, editing, or viewing [transactions](#), as well as the management of [recurring transaction orders](#) and contributing to financial analysis.

Collaborators might include family members, partners, or colleagues who need to jointly manage or monitor the financial activities within the account. However, collaborators typically have more limited permissions compared to the account owner, who retains administrative control over the financial account.

7.9.2 Collaborators Menu



Screenshot 21: Collaborators Menu

The expanded "Collaborators" menu on the right side of [the financial account management screen](#) displays a list of collaborators (**C**), if the financial account has been shared with other users. Each entry presents the collaborator's username and email.

If you are the financial account owner, an option to add new collaborators will be available. To do so, simply enter the email of a MoneyMinder user in the “E-Mail” text field (**A**) and press enter or click the plus icon next to the text field (**B**).

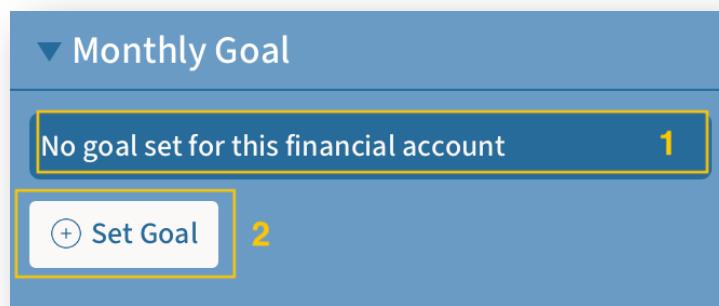
Owners will also see a garbage bin icon (**D**) next to each collaborator in the list. Clicking this icon will revoke the user's access to the financial account. For more details about the distinctions between owners and collaborators, please refer to the ["User Management"](#) section.

7.10 Monthly Goal

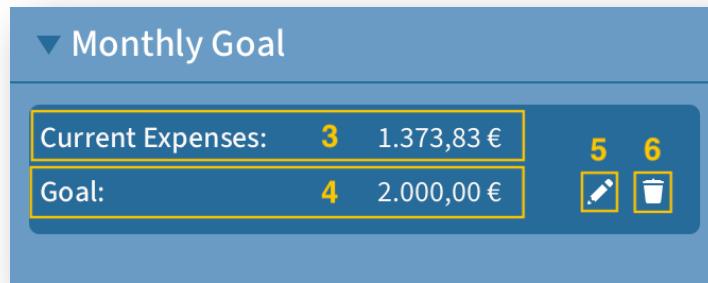
7.10.1 What Is a Monthly Goal?

A monthly goal refers to a predetermined financial target that you set for your expenses within a given month. It represents a desired spending limit you aim to reach. Monthly goals help you allocate your funds effectively, track your progress, and ensure that you're managing your finances in alignment with your objectives. By monitoring your actual spending against your monthly goal, you can gain insights into your financial habits and make informed decisions to maintain your financial health.

7.10.2 Monthly Goal Menu



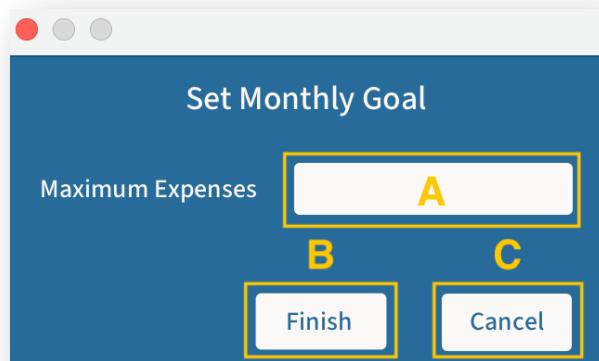
Screenshot 22: Monthly Goal Menu (no goal set)



Screenshot 23: Monthly Goal Menu (goal set)

The content of the expanded "Monthly Goal" menu on the [financial account management screen](#) varies based on whether a goal has been established. If no goal is set, you will see informative text **(1)** indicating the absence of a goal. For account owners, a "Set Goal" button **(2)** is visible. Clicking this opens the ["Set Monthly Goal" dialog](#). If a goal is already set, you'll find details about this month's expenses **(3)** and your defined goal amount **(4)**. Account owners also have a pencil icon **(5)** and a garbage bin icon **(6)**. Clicking the pencil icon **(5)** lets you set a new goal in the ["Set Monthly Goal" dialog](#). Selecting the garbage bin icon **(6)** deletes the monthly goal.

7.10.3 Setting a Monthly Goal



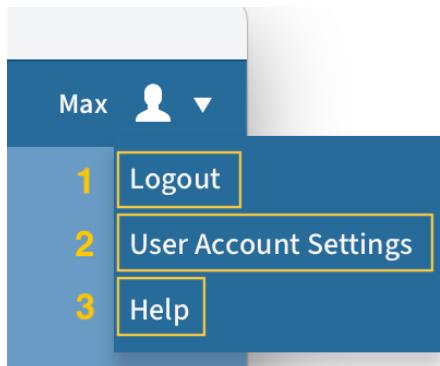
Screenshot 24: Set Monthly Goal Dialog

The "Set Monthly Goal" dialog presents a single text field **(A)** where you can input the maximum allowable expenses for the designated month. Decimal numbers can be entered using commas or periods. After entering the desired amount, you can either click the "Finish" button **(B)** to confirm the goal or use the "Cancel" button **(C)** to discard the changes.

8 Navigation Bar Menu

This menu offers three options:

- **Logout (1):** This logs you out of your user account and takes you back to the [welcome screen](#).
- **User Account Settings (2):** Selecting this opens the "[Edit User Account](#)" dialog (see [User Management](#)).
- **Help (3):** Clicking here opens the User Guide for assistance.



8.1 User Management

In MoneyMinder, each financial account is governed by two distinct user roles with specific permissions: owners and collaborators. A user can hold the role of owner for one financial account while simultaneously being a collaborator for another. This flexible setup allows users to have varying degrees of control and contribution across different financial accounts, aligning with their responsibilities and needs.

8.1.1 Permissions of Owners

Owners hold administrative control over [the financial account](#). They possess the authority to make significant changes, including:

- Setting and modifying the financial account's details, such as title and description.
- Deleting the financial account permanently.
- Creating, editing, and deleting [transactions](#), [recurring transactions](#), and [monthly goals](#).
- Adding and removing [collaborators](#).
- [Changing ownership](#) of the financial account.

8.1.2 Permissions of Collaborators

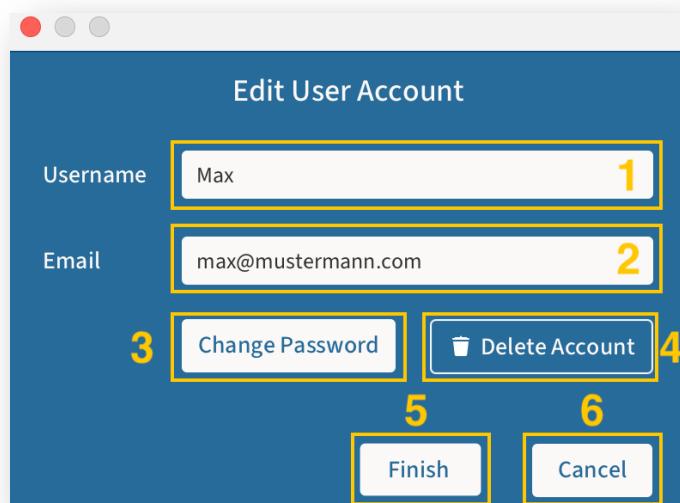
Collaborators have limited rights and access within the financial account. Their capabilities include:

- Adding, editing, and deleting [transactions](#) and [recurring transactions](#).
- Participating in financial analysis and viewing the [monthly goal](#).

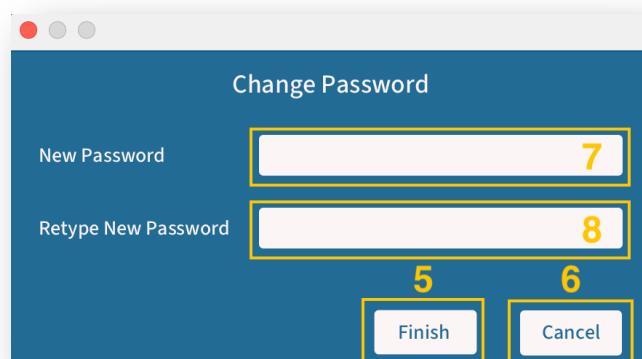
8.1.3 Changing the Ownership of a Financial Account

The ownership of the financial account can be changed within the [“Edit Financial Account” dialog](#). Please refer to the section [“Financial Account Info Menu”](#) for more information about this.

8.1.4 User Account Settings



Screenshot 25: Edit User Account Dialog



Screenshot 26: Change Password Dialog

The "Edit User Account" dialog allows you to modify your account details. You can update your username **(1)** and email **(2)** using the provided text fields.

Use the "Delete Account" button **(4)** to permanently remove your user account. However, this is only possible if you're not an owner of shared financial accounts. If you intend to delete your user account, ensure you [transfer ownership of any shared financial accounts](#) you own.

Clicking the "Change Password" button **(3)** opens the "Change Password" dialog. This dialog provides two text fields to set a new password **(7)** and **(8)**. The password must be a minimum of 8 characters.

To apply the changes in the dialogs, click "Finish" **(5)**. Alternatively, use "Cancel" **(6)** to discard any modifications. After the modifications you will be taken back to the [welcome screen](#), where you can login with your updated user credentials.

9 About

Hello, I am Nicole Perak, the creator behind MoneyMinder. With a passion for crafting practical solutions, I've designed and implemented this software to simplify your financial management.

MoneyMinder reflects my dedication to providing you with a user-friendly tool that can empower you on your financial journey. Thank you for choosing my software, and I hope it proves to be a valuable asset for your financial goals.

Best regards,
Nicole Perak
Developer & Product Designer

9.1 Credits

Icons used in MoneyMinder are provided by Icons8 (<https://icons8.de>). Their contribution to enhancing the visual elements of this application is much appreciated.