WealthWise

User Manual (July 2025)

Revision History

Version	Date	Author	Changes Made
1.0	July 2025	Patrick Butler	Initial Release

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Introduction

Purpose of This Manual

This document is the official user manual for Wealthwise, a full-stack financial portfolio management application. Its purpose is to guide you—an end user—through all features and workflows in Wealthwise so you can efficiently track, analyze, and optimize your investments.

Intended Audience

This manual is written for Wealthwise users who are comfortable with modern web applications. No developer skills are required; however, basic familiarity with clicking through menus, entering data, and interpreting on-screen information is assumed.

What Is Wealthwise?

Wealthwise is a sleek, responsive dashboard that allows you to add and aggregate your stock and cryptocurrency holdings in real time. Key capabilities include:

- **Unified Portfolio View:** See all of your positions across multiple brokers in one place.

- **Analytics Chart:** See your overall portfolio profit and loss and money invested in the form of a chart.
- **Curated News:** See the latest news headlines for all your current positions in your portfolio.

Product Overview

Wealthwise is designed to give you a clear, consolidated view of all your investments—stocks and cryptocurrencies—so you can make informed decisions at a glance. Below you'll find a high-level description of the application and its core user-facing capabilities.

High-Level Description

Wealthwise allows users to add and aggregate their position data from multiple brokers into a single, responsive web dashboard. Once you have added your holdings, the app keeps your portfolio up to date in real time, presents interactive charts, and surfaces the latest market news relevant to your assets. Everything you need to monitor performance, spot trends, and stay on top of developments lives in one place.

Key Features

- **Unified Portfolio View**
    - Add or remove individual holdings by entering ticker symbols, quantities, and purchase prices. All changes immediately update your dashboard totals, allowing you to keep track of all your investments.

- **Analytics Chart**
    - Visualize your portfolio’s profit & loss and total investment over time. Hover over data points to see exact values on any date.

- **Curated News Feed**
    - Stay informed with the latest headlines for the stocks and cryptocurrencies you hold. News items link directly to full articles.

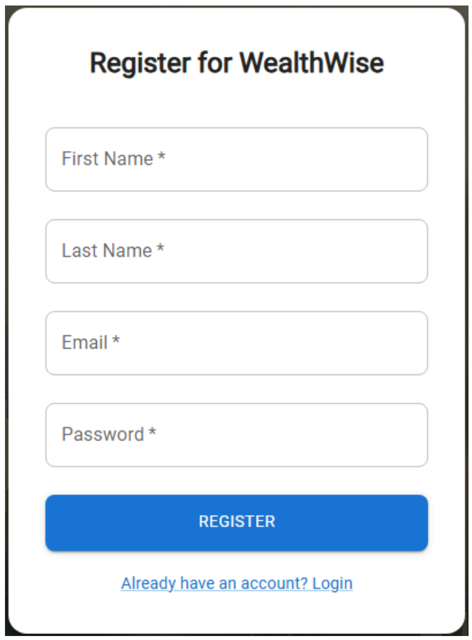
User Interface Walkthrough

This section will explain in detail how to use the Wealthwise User Interface, allowing you to get full value from the software from day one.

Creating an Account

When you land on the Wealthwise homepage, you can create an account by clicking on the “Get Started” button at the top of the screen, which looks like this:

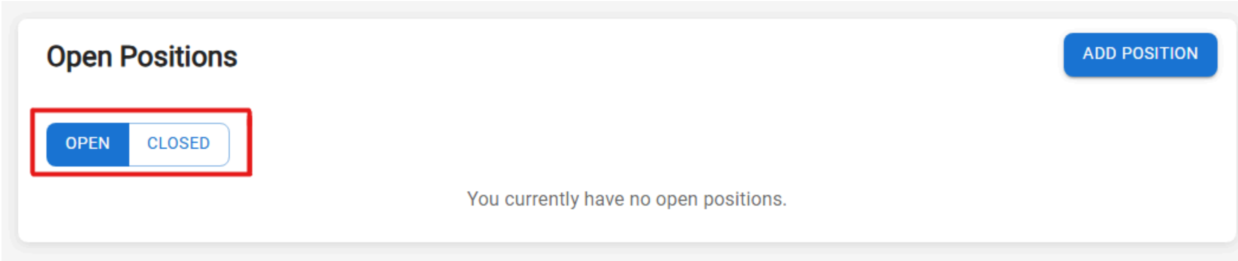
This will present you with the registration page which looks as follows:



On this form the user will be required to enter their First Name, Last Name, Email Address and they will also be required to create a password for their Wealthwise account. Once this data has been entered the user can now click the “Submit” button and they will be redirected to the Wealthwise Positions Page, and their account is successfully created!

Understanding the Portfolio Page

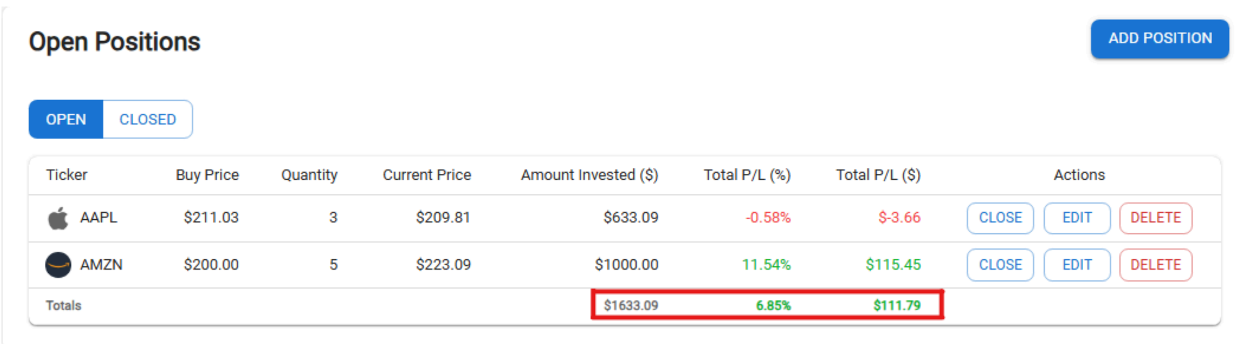
The portfolio page is where the user can add, edit and delete their asset positions. The user can switch between the “Open Positions” (Currently open positions) and “Closed Positions” (Positions that are closed) tables by selecting the “Open” and “Closed” buttons as seen below:



The portfolio page has three main totals at the bottom of each of the tables, which are:

- Amount Invested ($) - This is the total amount invested into all positions in the current table that the user is on.
- Total P/L (%) - This is the total profit/loss percentage of all positions in the current table.
- Total P/L ($) - This is the total profit/loss Dollar amount of all positions in the current table.

A visual representation of these totals can be seen here:

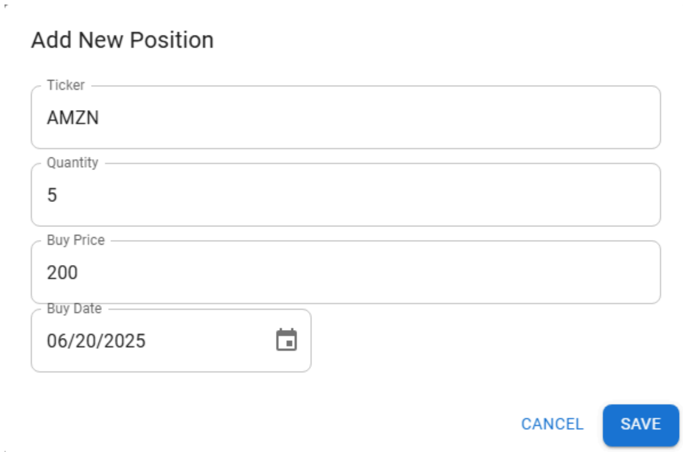


Ticker	Buy Price	Quantity	Current Price	Amount Invested ($)	Total P/L (%)	Total P/L ($)	Actions
AAPL	$211.03	3	$209.81	$633.09	-0.58%	$-3.66	CLOSE EDIT DELETE
AMZN	$200.00	5	$223.09	$1000.00	11.54%	$115.45	CLOSE EDIT DELETE
Totals				$1633.09	6.85%	$111.79	

Please note that the totals on the Open Positions Table and the Closed Positions table are independent of each other.

Adding a Stock/Crypto Position

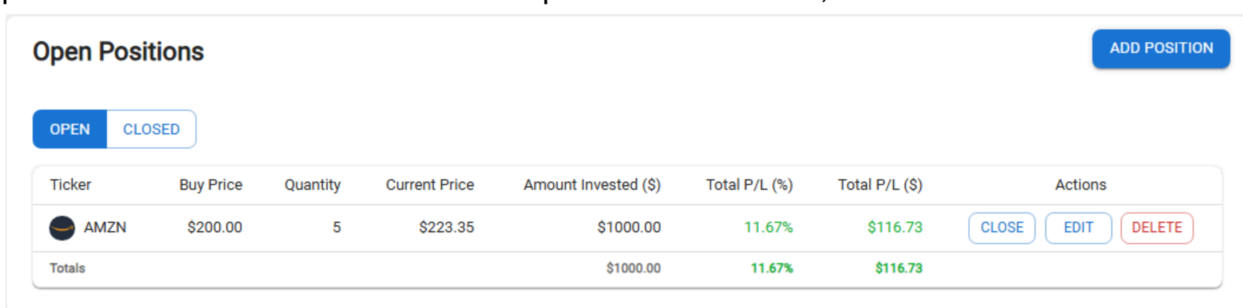
In order for the user to see all the data of their positions, they will be required to enter their positions into the Positions table. To do this select the “Add Position” button, they will be greeted with the following popup window:



In this window you will be required to enter the following:

- **Ticker -** This is the symbol that the asset the user is holding is identified by, for example, Amazon is known as AMZN.
- **Quantity -** This is the amount of units/shares of the asset that the user purchased.
- **Buy Price -** This is the price that the asset was when the user purchased it.
- **Buy Date -** This is the date that the user purchased the asset (The buy date allows the Analytics chart to visually display your profit and loss chart over time).

Once this data has been entered the user can now click on the “Save” button, their position will now be entered into the Open Positions Table, which will look like this:



Open Positions

ADD POSITION

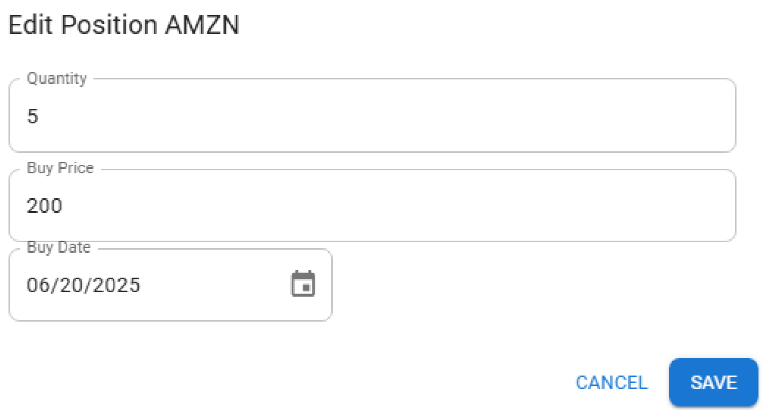
OPEN CLOSED

Ticker	Buy Price	Quantity	Current Price	Amount Invested ($)	Total P/L (%)	Total P/L ($)	Actions
AMZN	$200.00	5	$223.35	$1000.00	11.67%	$116.73	CLOSE EDIT DELETE
Totals				$1000.00	11.67%	$116.73	

As you can see above, Wealthwise will pull the image of the asset you have added, it will also pull the current price and the user’s portfolio value will be automatically determined at the bottom of the table, this table will update automatically as the prices for your positions change, allowing you to always know the state of your investments.

Editing a Position

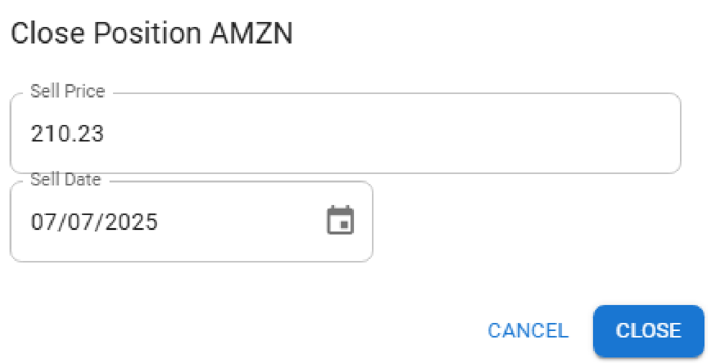
To edit a position in the table, the user select the corresponding “Edit” button, for the position that they would like to edit, clicking this button will show the following popup:



The user can edit any of the data they would like to change and then click the “Save” button. Their position and all of its relevant data will now be updated accordingly.

Closing a Position

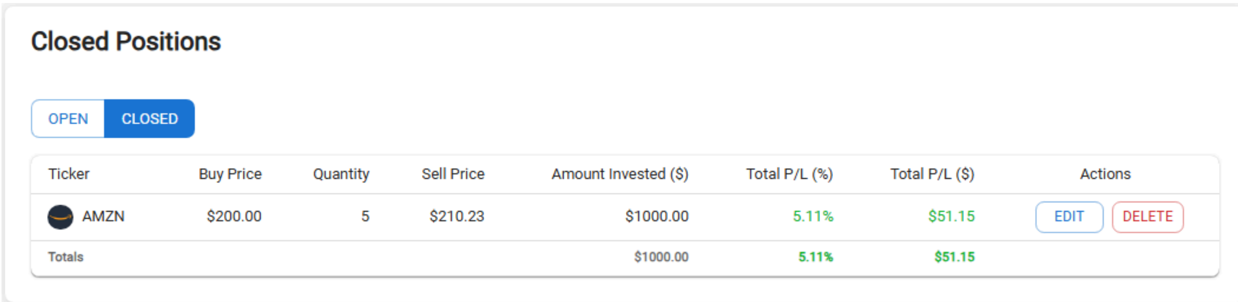
When the user closes a position on their broker, they can also close their position on Wealthwise, allowing them to stay on top of the current state of their investments! To close a position, the user can click on the corresponding “Close” button next to the position they would like to close. When this button is clicked, the user will be greeted with the following popup window:



In this window, the user will be required to enter the following:

- **Sell Price -** This is the price that the user sold this position at on their broker.
- **Sell Date -** This is the date that the user sold this position.

Once this data has been entered the user can click on the “Close” button and their position will now be closed on the Wealthwise system. The closed position should now no longer be visible in the “Open Positions” table and should be visible in the “Closed Positions” table, as seen below:

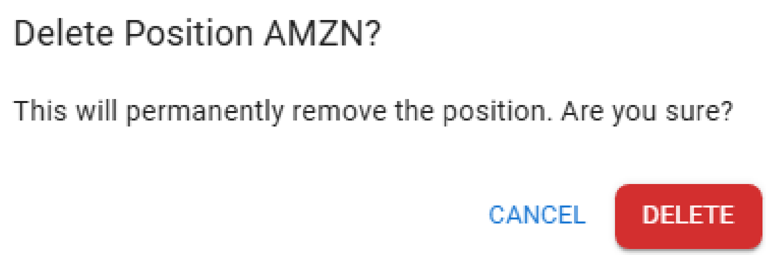

Closed Positions

OPEN CLOSED

Ticker	Buy Price	Quantity	Sell Price	Amount Invested ($)	Total P/L (%)	Total P/L ($)	Actions
AMZN	$200.00	5	$210.23	$1000.00	5.11%	$51.15	EDIT DELETE
Totals				$1000.00	5.11%	$51.15	

Deleting a Position

To delete a position from the “Open Positions” or “Closed Positions” table the user can select the corresponding “Delete” button. When this button is selected the user will be greeted with a popup window to confirm deletion which will look as follows:



If the user would like to confirm deletion of the position they must press the “Delete” button and their position will be deleted, otherwise the user can select the “Cancel” button and the deletion of the position will be cancelled.

Understanding the Analytics Page

The Analytics page is where the user can see a chart showcasing the profit and loss of their current closed positions. The open positions are not currently included in the data on this page.

This page has multiple levels of data that are available to the user, which are namely:

- Total Money Invested - This is the total amount of money that the user has invested into each of their positions (open and closed positions).
- Total P/L ($) - This is the total profit and loss in the form of dollars that the user has based on all their closed positions.
- Total P/L (%) - This is the total profit and loss in the form of a percentage that the user has based on their closed positions.
- Profit Chart - This chart visually displays the user's profit and loss dollar amount in the form of a line chart, the user can change the timeline of the chart by choosing either 12 months, 6 months, 3 months and 1 month.

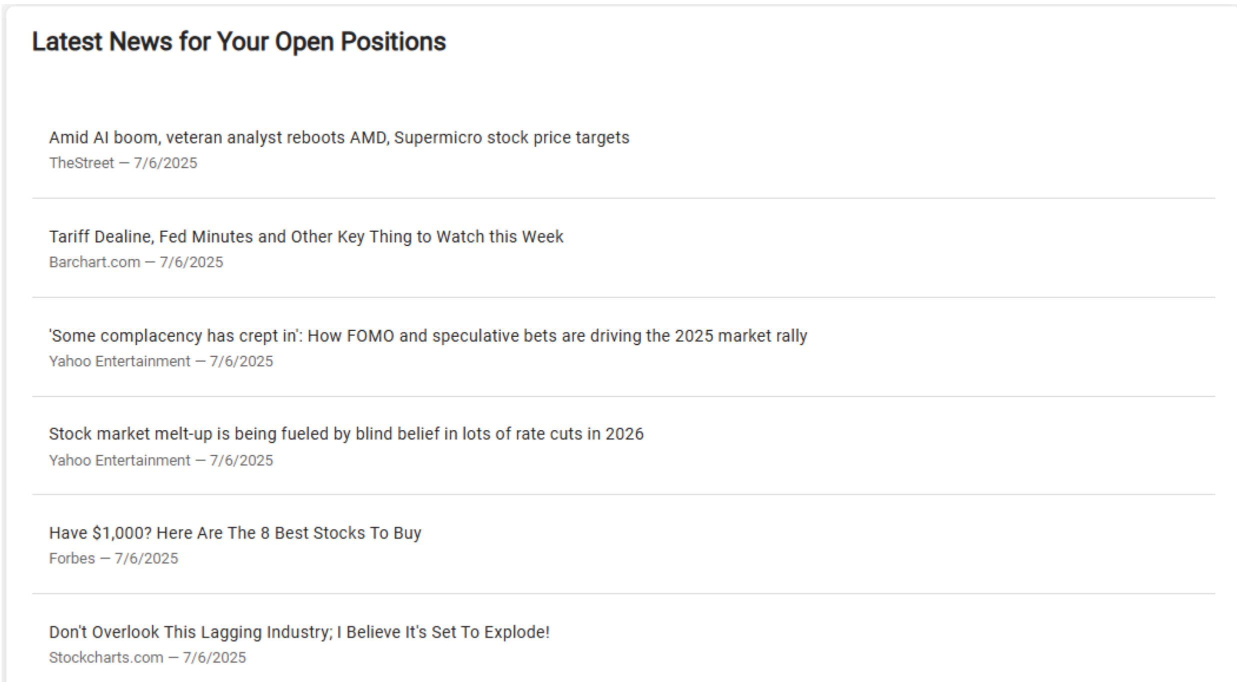
A visual representation of this page can be seen here:

In the above image the Total Money Invested is represented with a red border, the Total P/L ($) is represented with a blue border, the Total P/L (%) has a green border and the Profit Chart is represented with the orange border.

Understanding the News Page

The news page enables users to see the latest curated news headlines for all of their current open positions, allowing them to know what is happening with the companies/assets they have their money invested in.

The user is required to have open positions in order to see the curated news. A visual representation of the news page can be seen here:



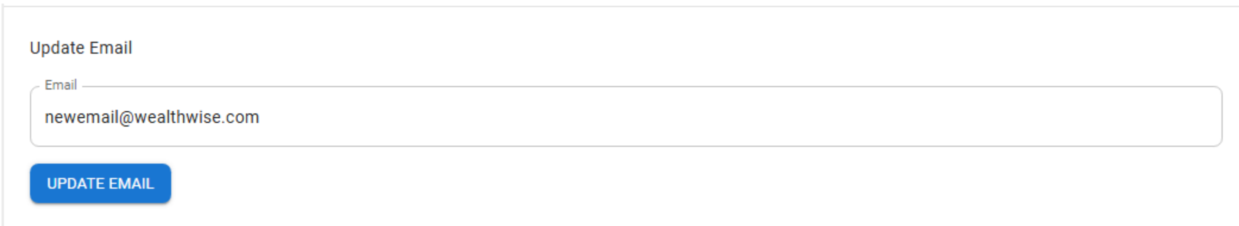
The user can click on any of the news headlines and they will be redirected to the full article in a separate tab in their browser, allowing them to keep up to date with the latest news around their portfolio.

Understanding the Profile Page

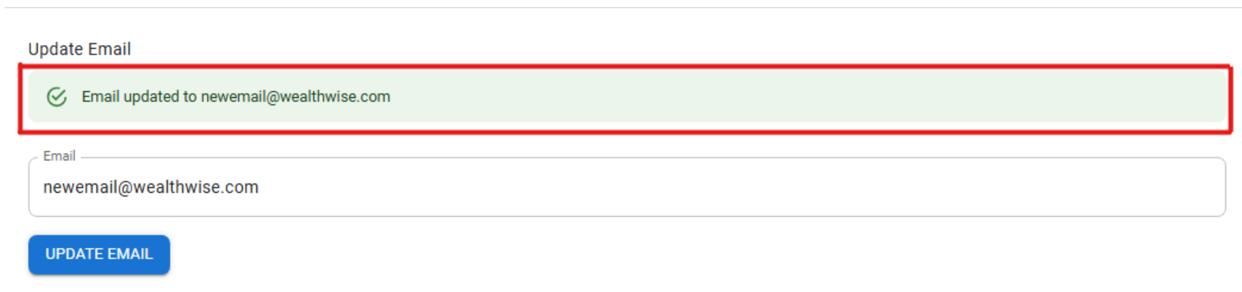
The profile page allows users to update their email address, password and it also gives the user the option to delete their account should they wish to do so.

Updating the User's Email:

To update their email address, the user must enter their new email address in the textbox under "Update Email", once their new email has been entered, the user must then click the "Update Email" button. A visual representation of this can be seen here:



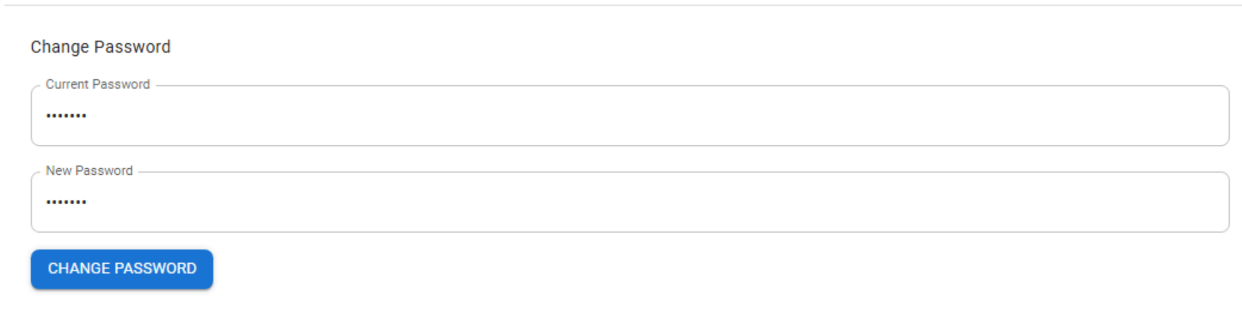
When the user's email has updated successfully, they will be greeted with a success message, which will look as follows:



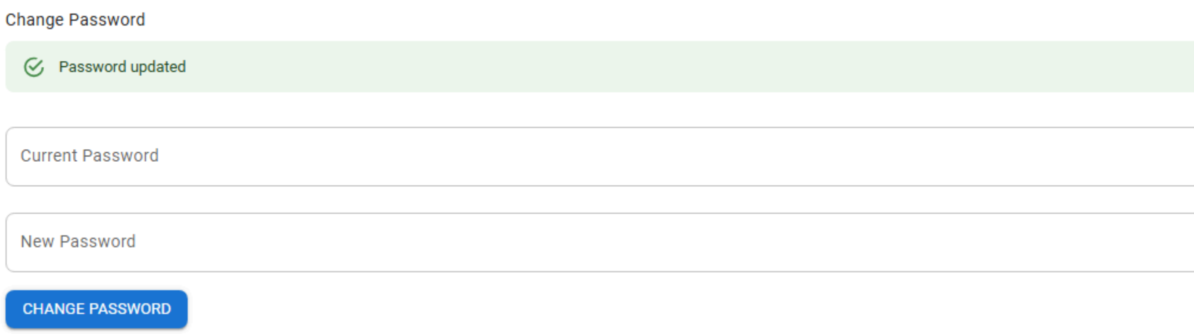
Should the user not be able to update their email, they will be greeted with a descriptive message, informing them why, as can be seen here:

Updating the User's Password

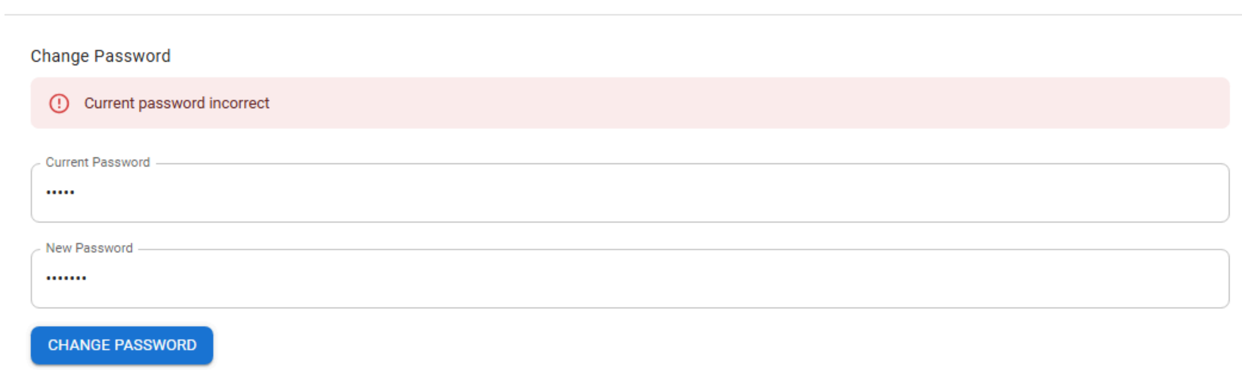
To update their password, the user must enter their current password followed by their new password in the textboxes under “Change Password”, They must then select the “Change Password” button for their password update to take effect. A visual representation of this can be seen here:



When the user’s email has updated successfully, they will be greeted with a success message, which will look as follows:

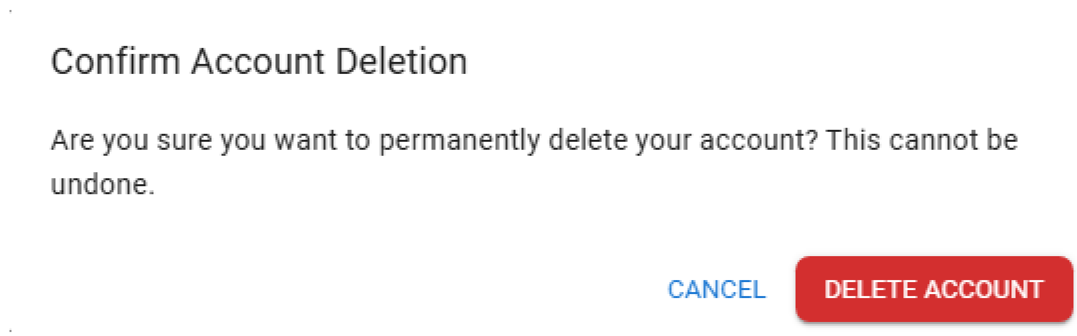


Should the user not be able to update their email, they will be greeted with a descriptive message, informing them why, as can be seen here:



Deleting the User’s Account

Should the user want to permanently delete their account, they can do so by clicking the “Delete Account” button at the very bottom of the profile page. When this button is clicked the user will me shown a popup asking them to confirm their account deletion, which will look like this:



The user must select the “Delete Account” button and their account will successfully be deleted. Should the user not want to delete their account, they can select the “Cancel” button and their account will not be deleted.

Glossary

Definitions of key terms and acronyms used in this manual:

- User - The user is the end-user using the application.
- Position - A position is when a user has an active investment in a stock or commodity.
- Profit - The amount of money the user has gained in their investment.
- Loss - The amount of money the user has lost in their investment.
- Stock - A share in the ownership of a company
- Crypto - Cryptocurrency is digital or virtual money that uses cryptography for security.
- Portfolio - A collection of stocks or Crypto Currency owned by an investor.