

Plutos

User Manual

Team #10, Plutos

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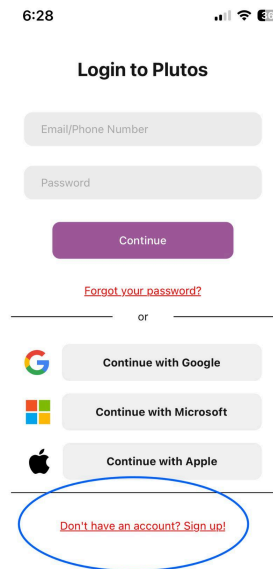
Angela Wang

March 2025

1. Onboarding and user set-up

1.1. Account Creation

Start by clicking “Don’t have an account? Sign up!” to get started with creating an account!



6:28

Login to Plutos


Email/Phone Number


Password


Continue

[Forgot your password?](#)

or

 Continue with Google

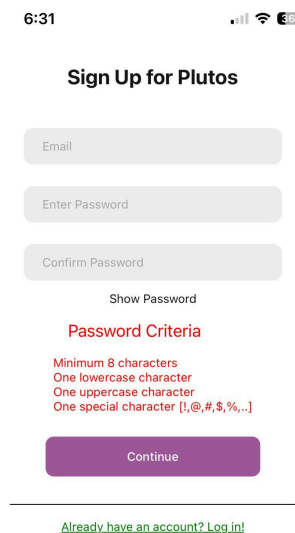
 Continue with Microsoft

 Continue with Apple

[Don't have an account? Sign up!](#)

This screenshot shows the login interface for 'Plutos'. It includes fields for 'Email/Phone Number' and 'Password', a 'Continue' button, and a link for 'Forgot your password?'. Below a horizontal separator with the word 'or', there are three social login options: 'Continue with Google', 'Continue with Microsoft', and 'Continue with Apple'. At the bottom, a link 'Don't have an account? Sign up!' is circled in blue.

Next, fill out the corresponding fields (email, password, and password confirmation) to complete your sign-up.



6:31

Sign Up for Plutos

Email

Enter Password

Confirm Password

Show Password

Password Criteria

- Minimum 8 characters
- One lowercase character
- One uppercase character
- One special character [!,@,#,\$,%,-,...]

Continue

[Already have an account? Log in!](#)

This screenshot shows the sign-up interface for 'Plutos'. It includes fields for 'Email', 'Enter Password', and 'Confirm Password', along with a 'Show Password' toggle. Below these fields, a section titled 'Password Criteria' lists requirements: 'Minimum 8 characters', 'One lowercase character', 'One uppercase character', and 'One special character [!,@,#,\$,%,-,...]'. A 'Continue' button is at the bottom, and a link 'Already have an account? Log in!' is at the very bottom.

Once you fill out the password field, the app will prompt you which password criteria you have yet met or have met.

The image shows two side-by-side screenshots of a mobile app interface for 'Sign Up for Plutos'. Both screenshots show the same form with the email 'testemail@gmail.com', password 'hello123', and a 'Confirm Password' field. Below the password fields is a 'Hide Password' link. The 'Password Criteria' section lists: 'Minimum 8 characters' (green), 'One lowercase character' (green), 'One uppercase character' (red), and 'One special character [!,@,#,\$,%,...]' (red). A purple 'Continue' button is at the bottom. Below the form is a link: 'Already have an account? Log in!'. The left screenshot has a timestamp of 6:35 and the right has 6:36.

Once password criteria have been met and you've confirmed your password, press the large "Continue" button to continue your account creation process!

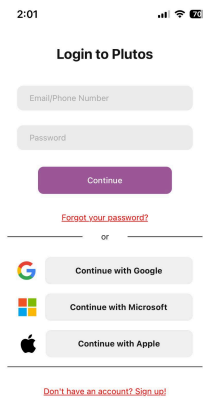
1.1.1. Onboarding

After completing the account creation, the onboarding process will begin by asking you to fill out basic personal information. Fill out all required fields marked with a `*`

The image shows a mobile app interface for 'Please Enter Your Information'. It contains several input fields: 'First name *', 'Middle name', 'Last name *', 'Sex/gender *' (with a dropdown arrow), 'Date of Birth *' (with a date picker showing 'Mar 27, 2025'), and 'Occupation *' (with a dropdown arrow). Below these fields is a checkbox labeled 'Stay signed in on this device'. At the bottom is a purple 'Create Account' button. The top of the screen shows a timestamp of 6:40 and status bar icons.

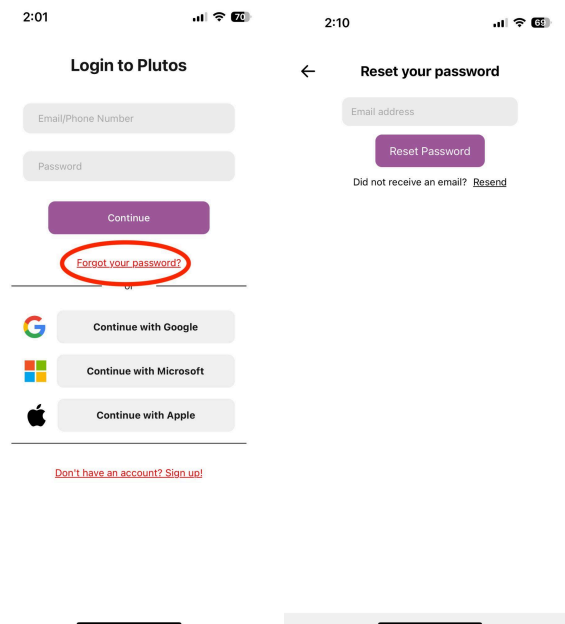
1.2. Login

You will be directed to the login page when you first launch the app. From then, enter in user credentials and then press “Continue” to access the app’s functionalities!



1.3. Password Recovery

If you happen to forget your password, click on the “Forgot your password?” link to navigate to the Password Recovery Page

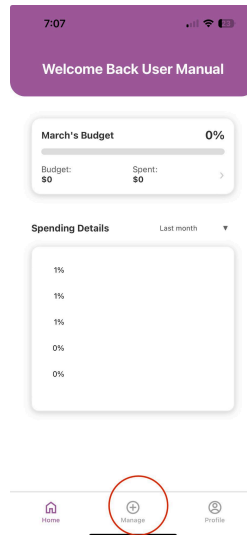


Then, enter the email used for your Plutos account to receive a password recovery link!

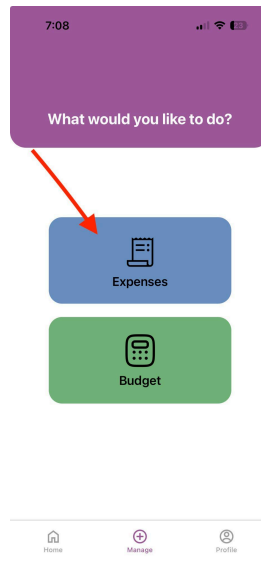
2. Expenses

2.1. View expenses

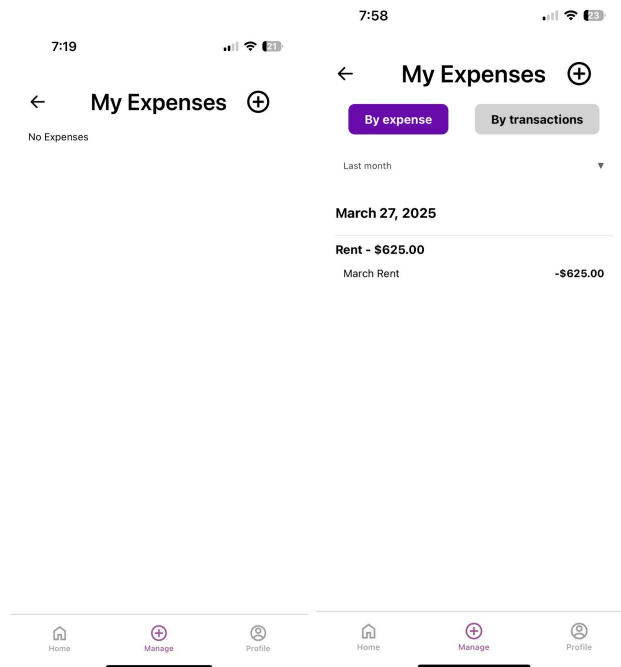
Let's view our expenses by navigating to the "Manage" page by clicking the plus icon in the navbar at the bottom.



Next from the Manage page, click on "Expenses" to navigate to the Expenses page

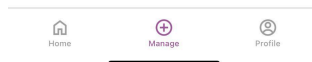
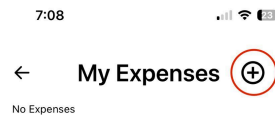


Once navigating to the expenses page, the app will either show `No Expenses` if you have no expenses entered. Or display all your expenses, categorized by date, then expense category.

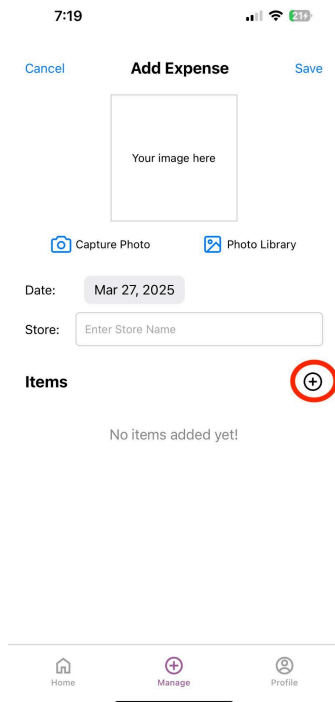


2.2. Create an expense

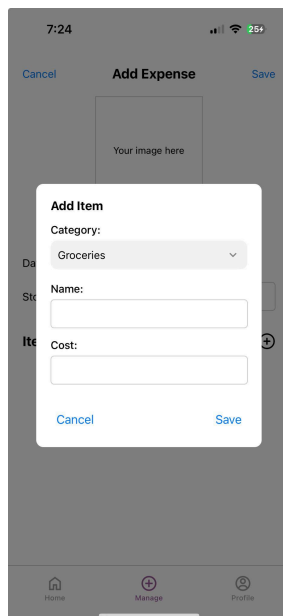
First, click on the plus icon at the top right of the Expenses page to navigate to the `Add Expense` page.



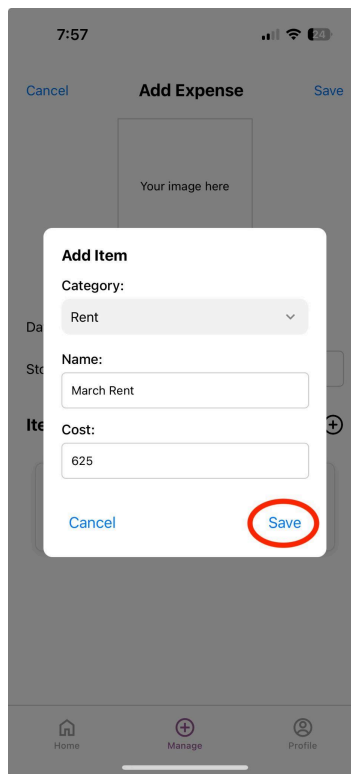
Once on the `Add Expense` page, click on the plus icon to manually add an expense



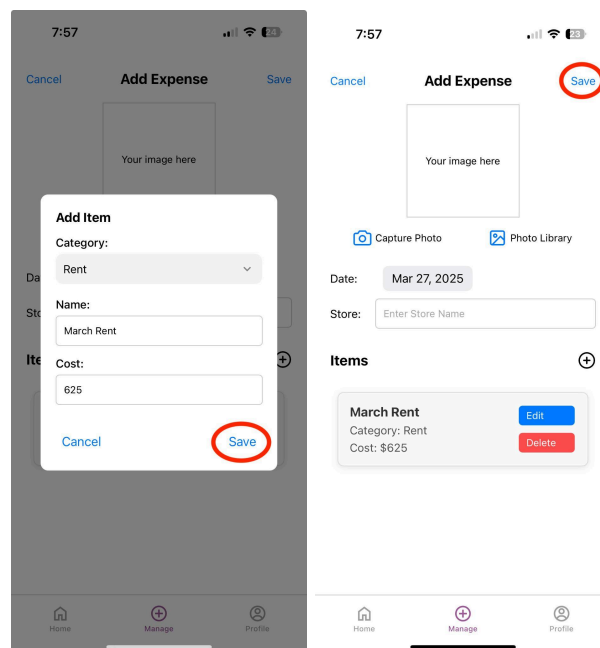
Then, a modal will pop up, prompting you to fill out fields related to your expense



Once you've filled out the expense, press 'Save' in the bottom right



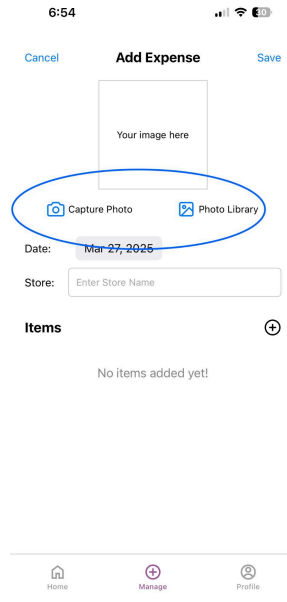
Then, in the add expense view, all expenses for the current transaction will be displayed



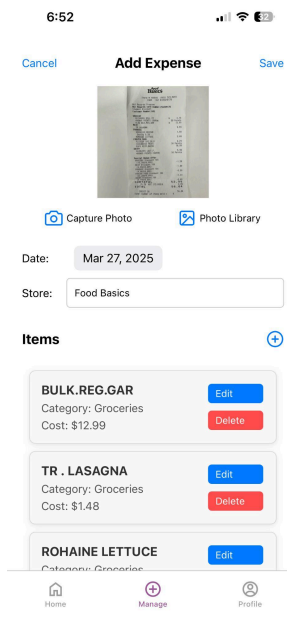
Finally, click 'Save' in the top right corner to save the transaction and its corresponding expenses!

2.3. Scan receipt to parse expenses

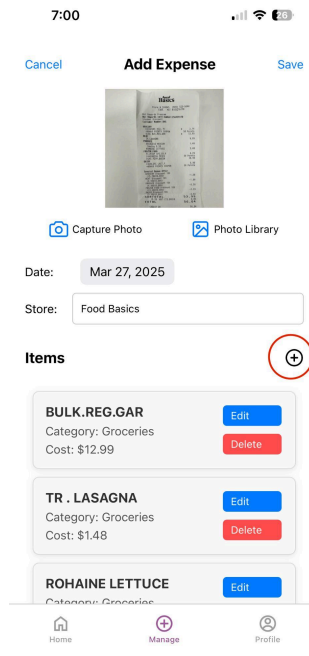
Similar to section 2.2, click on the plus icon to navigate to the `Add Expense` page. Then click on either `Capture Photo` or `Photo Library` to either take a photo of your receipt in real time or upload a photo of your receipt respectively.



After you upload your receipt, the app will parse your receipt before displaying all scanned items!



If the app happens to miss any expenses, click the plus icon similar to section 2.2 to add any missed expenses.

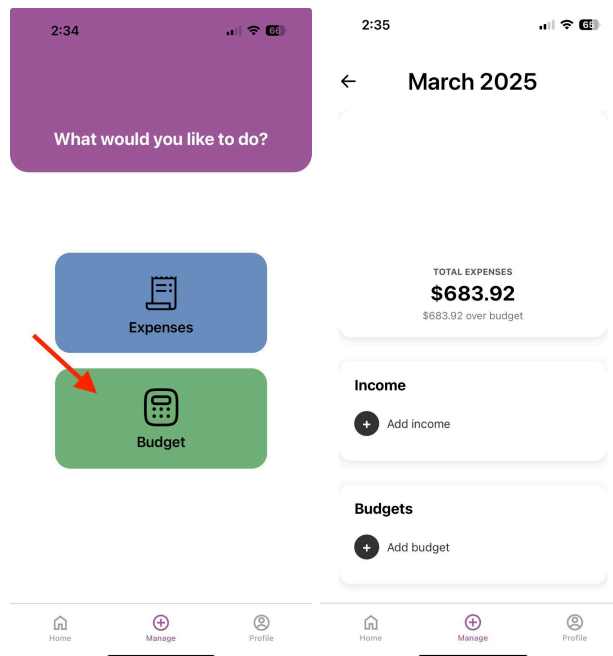


Also if there's a mistake in an expense, or a typo, you may delete or edit each expense by pressing the corresponding button for each expense!

Finally, click the `Save` button in the top right, similar to section 2.2, to save your expenses!

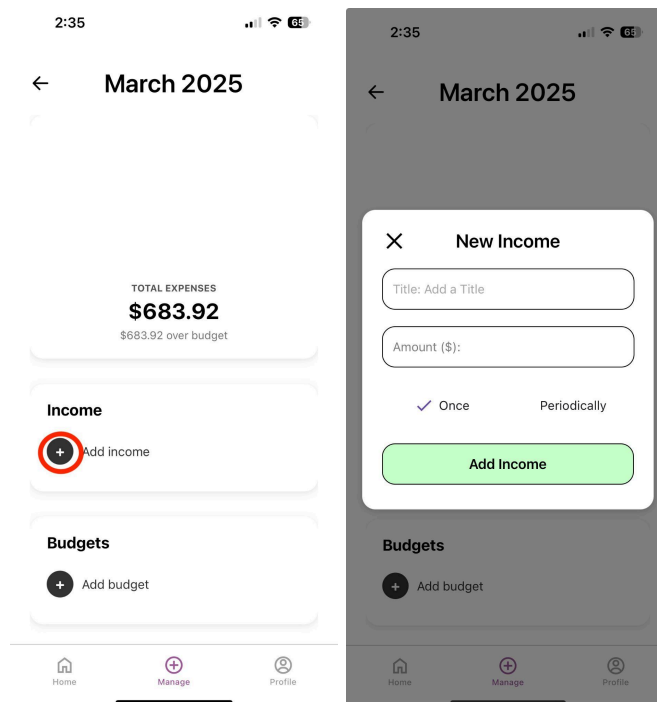
3. Budgeting and Income

To navigate to the budgeting and income section of the app, click on “Budget” from the manage page

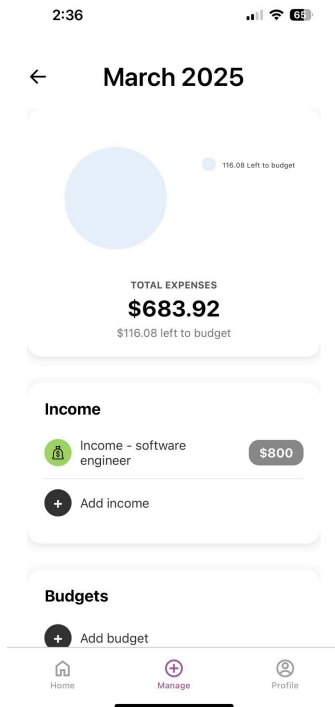


3.1. Income

Click on the plus icon next to “Add Income” to add an income

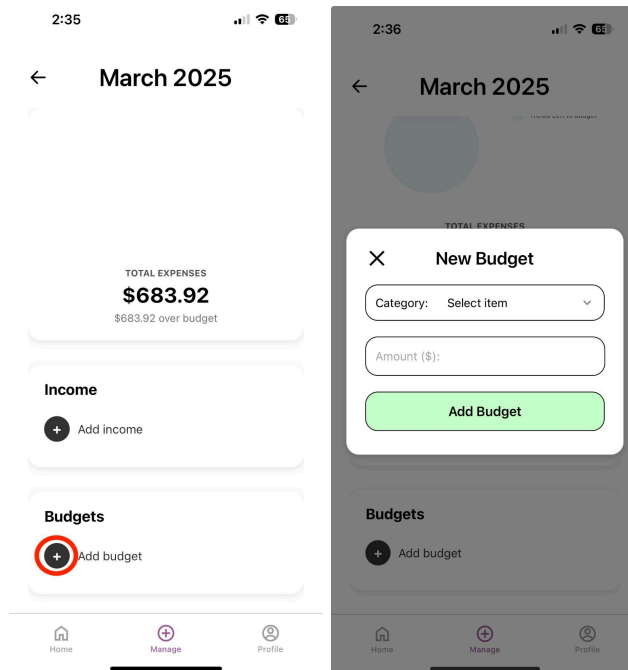


The app will then prompt you to enter details regarding the income you want to add. Fill out those fields and click “Add Income” when you’re done to add your income!

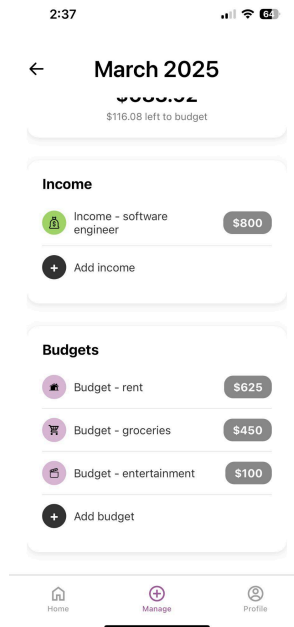


3.2. Budgeting

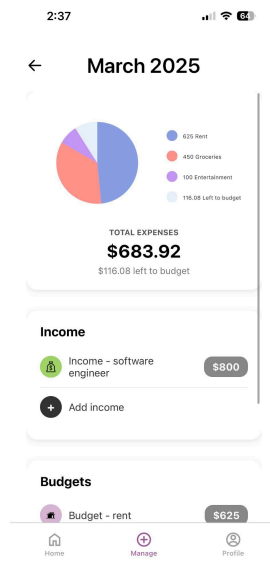
Click on the plus icon next to “Add Budget” to add a budget



The app will then prompt you to enter details regarding the budget you want to add. Fill out those fields and click “Add Budget” when you’re done to add your budget!



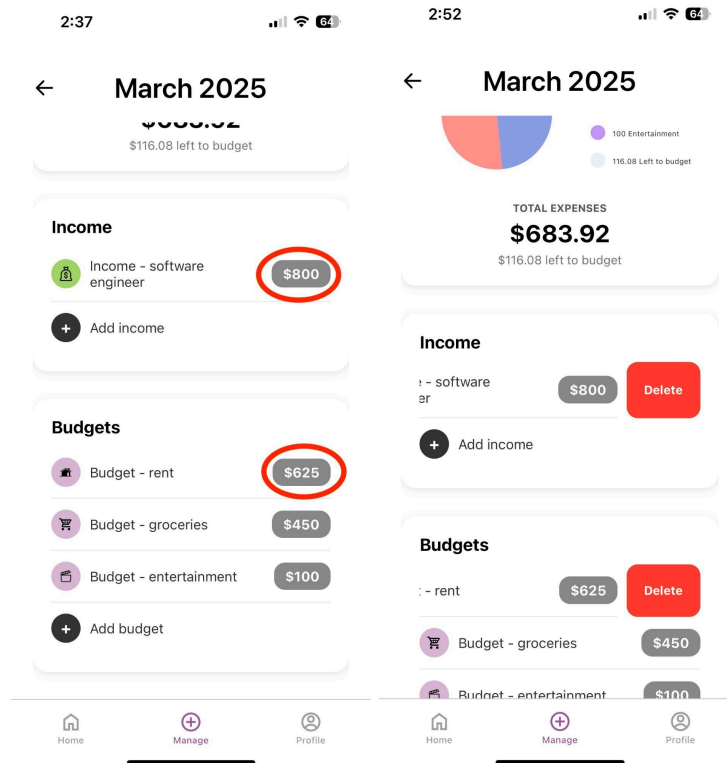
Once you’ve set up your budgets and incomes you can view them all in this section, as well as having a detailed chart to display how much of your income you have budgeted.



To view more detailed metrics regarding each budget category, including what expenses you’ve expensed in each category, how much you’ve spent in each category and how much remaining budget you have in each budget category, view the [metrics](#) section of the manual.

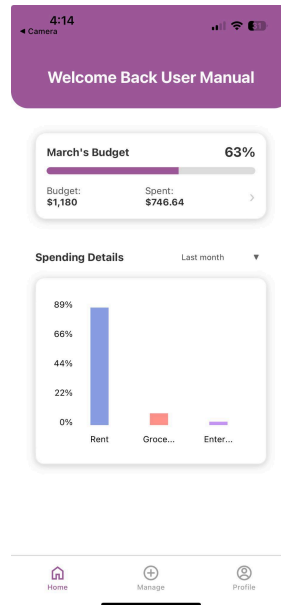
3.3. Editing and Deleting

To edit or delete an income or budget, click on the value to edit either an income or budget (which brings up the corresponding modal). To delete, swipe left on an income or budget which will display a “Delete” button to press to delete an item.

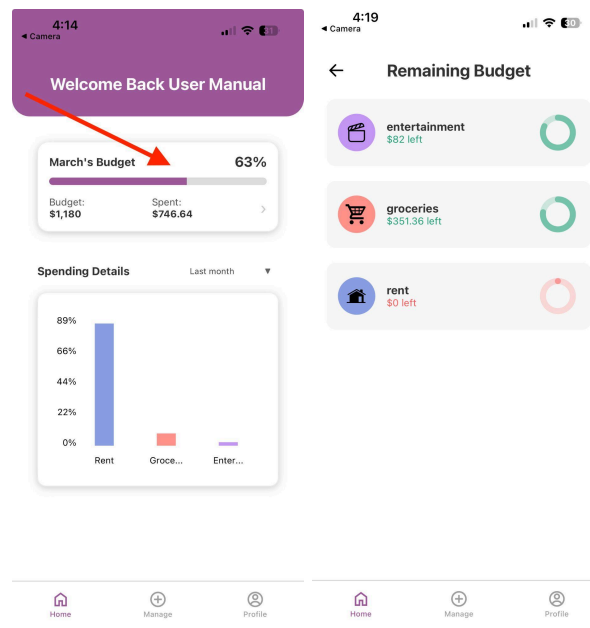


4. Metrics

There are a few metrics you can view in the Plutos app including spending habits (percentage of expenses spent on spending categories X, Y and Z), budget progress (what percentage of your budget have you spent in total and per category) and overall income to budget metrics (how much of your income is budgeted and how much you have remaining to budget)



Clicking on “March’s Budget”, we can see how much budget we have remaining for each spending category



Press any spending category cards in the “Remaining Budget” screen to view all monthly expenses related to the corresponding spending category and the sum total.

