

# **Expense Tracking**

## User Guide

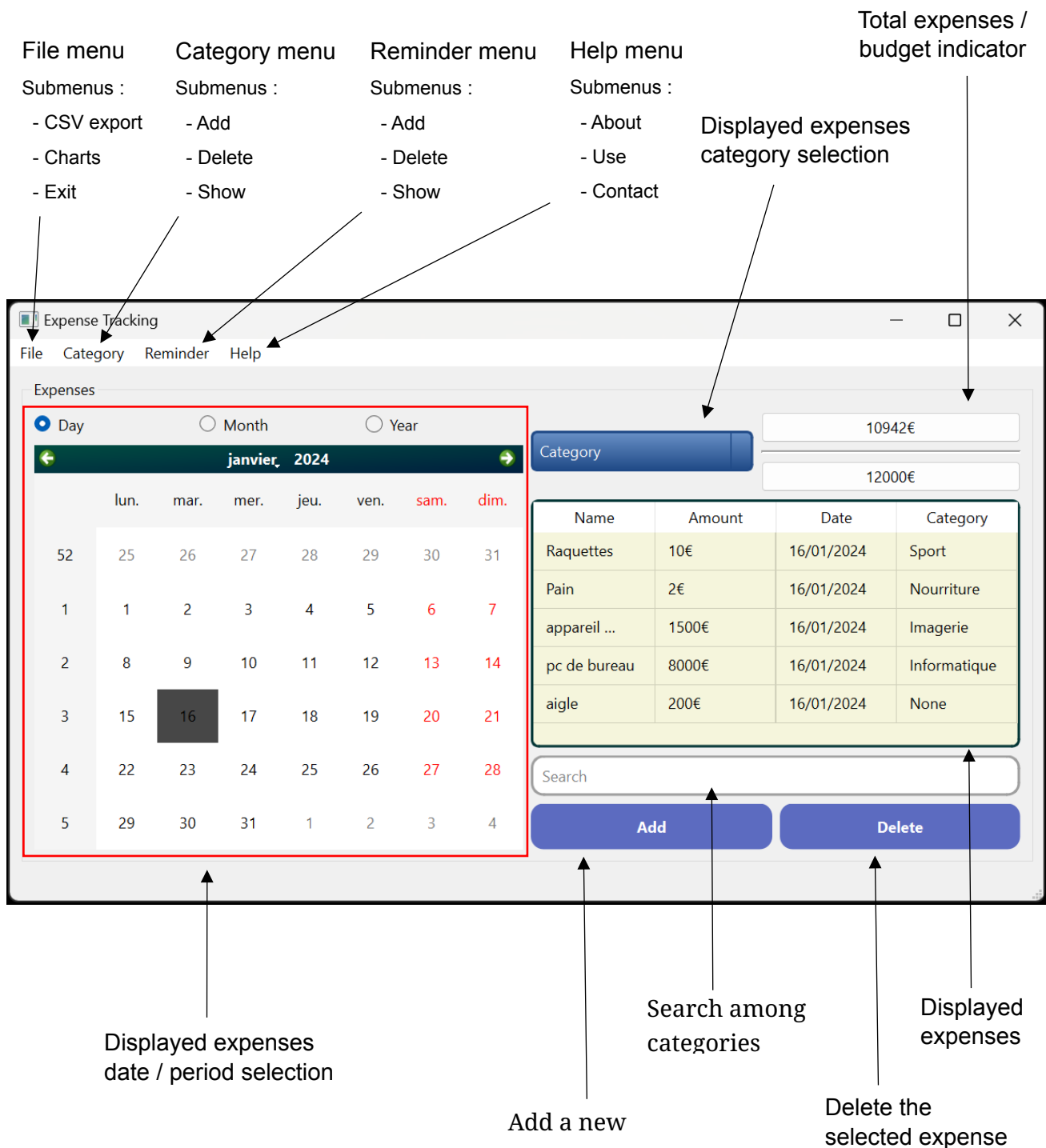
# User Guide

## Expense tracking application

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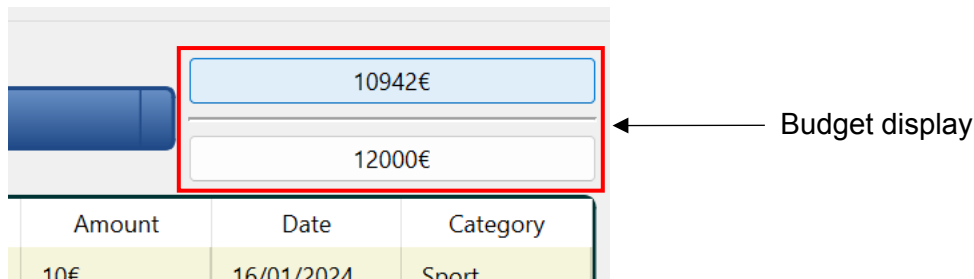
# Interface overview



# Monthly budget management

## 1. Budget display on the main window

This is how the budget is displayed on the main window:

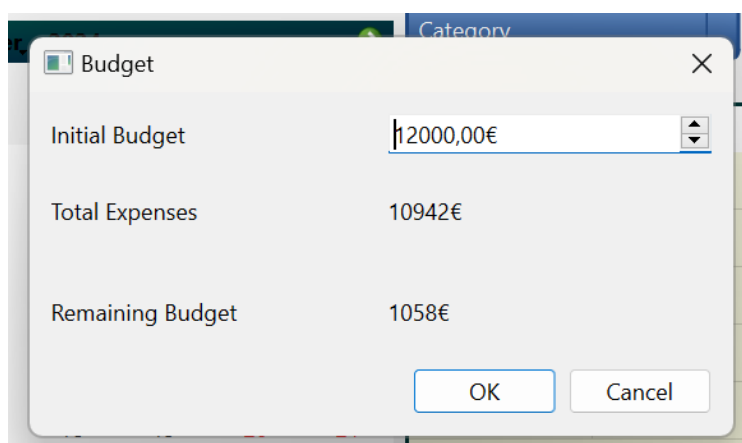


The top value is the total amount of all expenses for the selected month.

The bottom value is the total amount of the monthly budget that was chosen by the user.

## 2. Budget management window

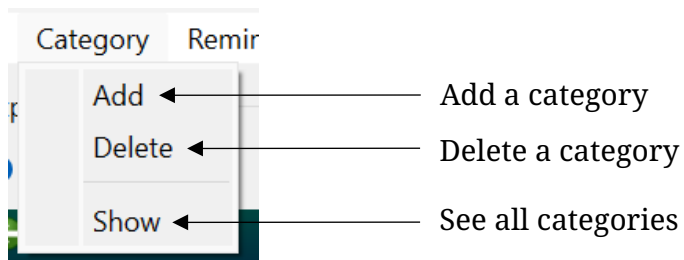
By clicking either on the top or bottom value, you can access the budget management window:



The initial budget is the current monthly budget and can be changed at any time by the user. The remaining budget is “initial budget – total expenses”.

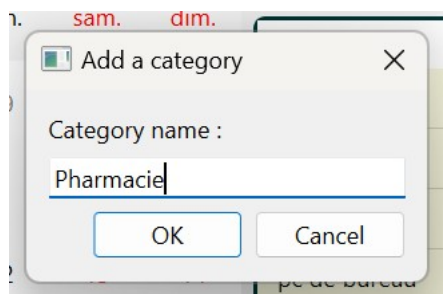
# Categories

## 1. The category menu

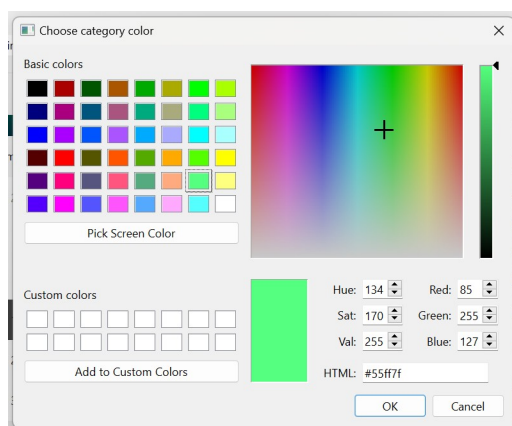


## 2. Add a category

First you will have to choose a name for the category:

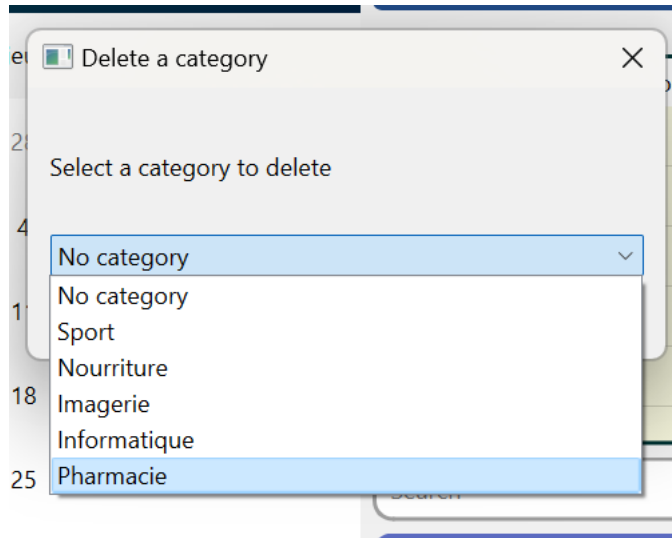


Then you will have to choose a color for the category:

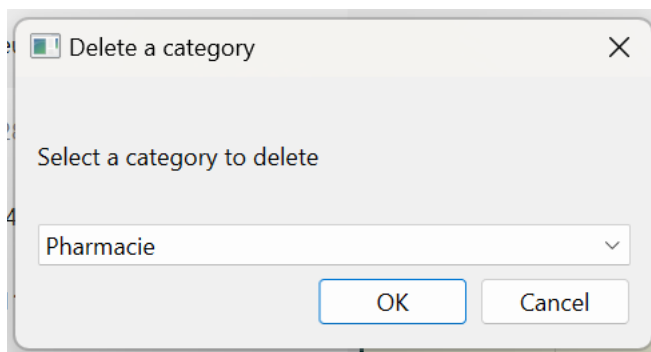


### 3. Delete a category

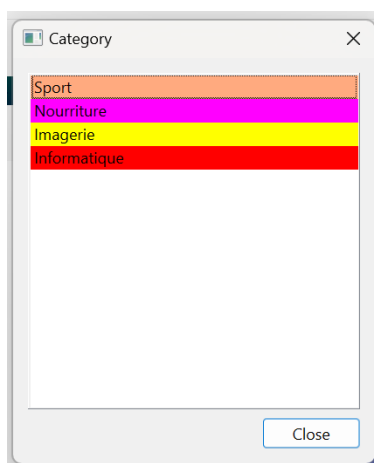
First you will have to choose a category to delete from the list of all existing categories:



Then the selected category will be deleted by clicking on the "OK" button.



### 4. See all categories



All categories will be displayed with their name as well as the chosen category color.

# Expenses management

Name	Amount	Date	Category
Raquettes	10€	16/01/2024	Sport
Pain	2€	16/01/2024	Nourriture
appareil ...	1500€	16/01/2024	Imagerie
pc de bureau	8000€	16/01/2024	Informatique
aigle	200€	16/01/2024	None

Search

Add Delete

Selected expense

Expenses list

Add an expense

Delete an

## 1. Add an expense

By clicking the “Add” button, it will open the expense adding window:

Add expense

Title Fromage

Amount 10,50€

Date 16/01/2024

Description A good french cheese

Nourriture

Save Cancel

In this window you can provide information on the expense to add.

The new expense will be added by clicking the “Save” button.

Adding will be cancelled by clicking the “Cancel” button.

## 2. Delete an expense

The selected expense will be deleted by clicking the “Delete” button.

## 3. Modify an expense

By double clicking on an expense in the list, it will open the expense modification window, which is the same as the adding window:

A screenshot of a 'Modify expense' dialog box. The window has a title bar with a green icon and a close button. It contains several input fields: 'Title' with the value 'Pain', 'Amount' with '2,00€', 'Date' with '16/01/2024', and 'Description' with 'une bonne baguette'. At the bottom, there is a category dropdown menu showing 'Nourriture' and two buttons labeled 'Save' and 'Cancel'.

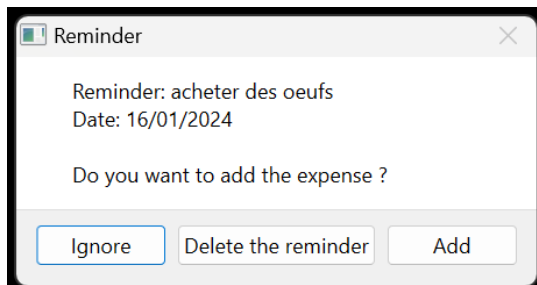
In this window the information about the expense to modify are already provided, and it can be modified.

The modifications will be saved by clicking the “Save” button.

Modifications will be cancelled by clicking the “Cancel” button.

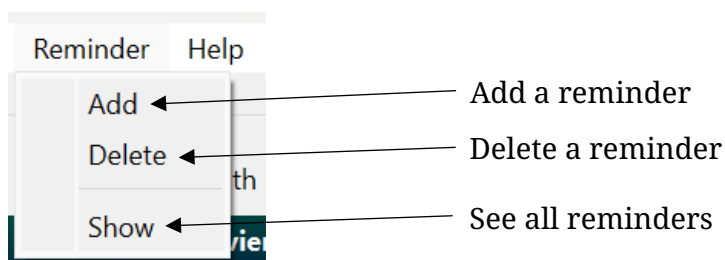


# Reminders



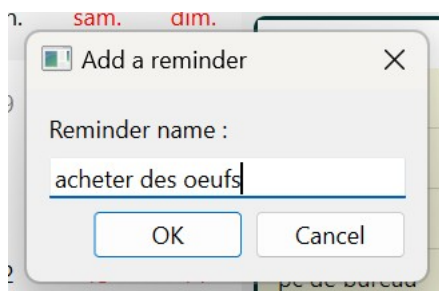
On the chosen reminder date, a window like this one will be shown to the user when the application is launched

## 1. The reminder menu

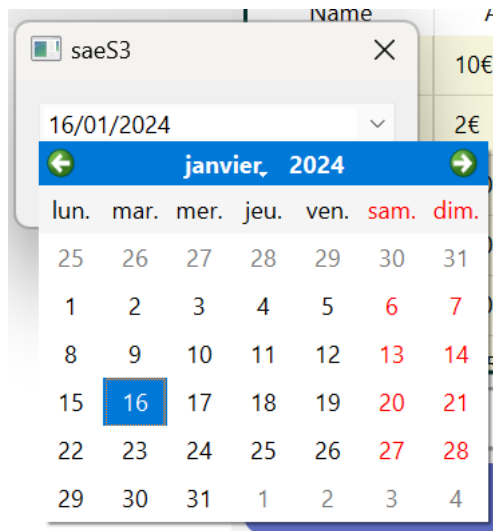


## 2. Add a reminder

First you will have to choose a name for the reminder:

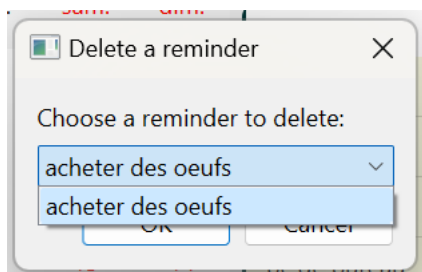


Then you will have to choose a date for the reminder:

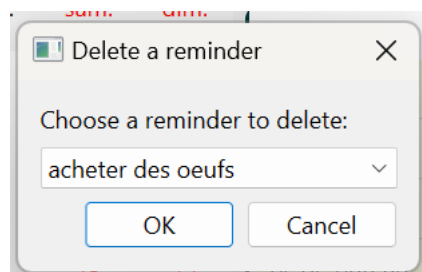


### 3. Delete a reminder

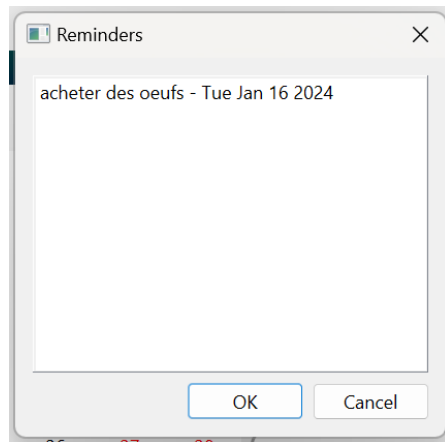
First you will have to choose a reminder to delete from the list of all existing reminders:



Then the selected reminder will be deleted by clicking on the "OK" button.



## 4. See all reminders

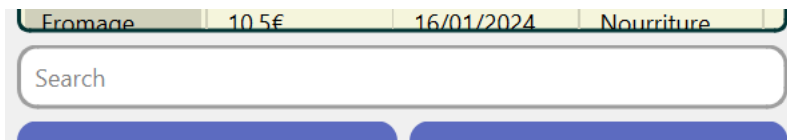


All reminders will be displayed with their name as well as the chosen reminder date.

# Expenses sorting

## 1. Search

It's possible to search for a specific expense in the list with the search bar:



The screenshot shows a table with four columns: 'Fromage', '10.5€', '16/01/2024', and 'Nourriture'. Below the table is a search bar with the placeholder text 'Search'.

By typing an expense name in the search bar, it will keep only corresponding expenses in the list.

For example:

Name	Amount	Date	Category
Pain	2€	16/01/2024	Nourriture
aigle	200€	16/01/2024	None

ai

## 2. Date / period sorting

The displayed expenses in the list are sorted by date. Only the selected date in the side calendar is considered.

There are 3 possible selection period: day, month, and year. The expenses are displayed in the list if it is in the same time period as the selected date.

For example:

With the day period:

Expenses

Day

Month

Year

janvier, 2024

Category

12952.5€

12000€

	lun.	mar.	mer.	jeu.	ven.	sam.	dim.
52	25	26	27	28	29	30	31
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31	1	2	3	4

Name	Amount	Date	Category
rain	2€	16/01/2024	Nourriture
appareil ...	1500€	16/01/2024	Imagerie
pc de bureau	8000€	16/01/2024	Informatique
aigle	200€	16/01/2024	None
Fromage	10.5€	16/01/2024	Nourriture
	2000€	16/01/2024	None

Search

AddDelete

With the month period:

Expenses

Day

Month

Year

janvier, 2024

Category

12952.5€

12000€

	lun.	mar.	mer.	jeu.	ven.	sam.	dim.
52	25	26	27	28	29	30	31
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31	1	2	3	4

Name	Amount	Date	Category
pc de bureau	8000€	16/01/2024	Informatique
aigle	200€	16/01/2024	None
Fromage	10.5€	16/01/2024	Nourriture
	2000€	16/01/2024	None
vaccin	1200€	19/01/2024	None
Raquettes	30€	25/01/2024	Sport

Search

AddDelete

With the year period:

Expenses

Day

Month

Year

janvier, 2024

Category

12952.5€

12000€

	lun.	mar.	mer.	jeu.	ven.	sam.	dim.
52	25	26	27	28	29	30	31
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31	1	2	3	4

Name	Amount	Date	Category
aigle	200€	16/01/2024	None
Fromage	10.5€	16/01/2024	Nourriture
	2000€	16/01/2024	None
vaccin	1200€	19/01/2024	None
Raquettes	30€	25/01/2024	Sport
Raquettes	120€	22/02/2024	Sport

Search

AddDelete

### 3. Category sorting

By selecting a category in the categories list above the expenses list, you'll only get the expenses that belong to the selected category.

For example:

Without any selected category:

The interface shows a 'Category' dropdown menu with the text 'Category' inside. To the right of the dropdown are two input fields: the top one contains '12952.5€' and the bottom one contains '12000€'. Below these is a table with 4 columns: 'Name', 'Amount', 'Date', and 'Category'. The table contains 6 rows of data. At the bottom of the interface is a 'Search' input field and two buttons labeled 'Add' and 'Delete'.

Name	Amount	Date	Category
Raquettes	10€	16/01/2024	Sport
Pain	2€	16/01/2024	Nourriture
appareil ...	1500€	16/01/2024	Imagerie
pc de bureau	8000€	16/01/2024	Informatique
aigle	200€	16/01/2024	None
Fromage	10.5€	16/01/2024	Nourriture

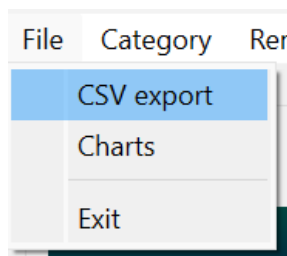
With a selected category:

The interface is identical to the previous one, but the 'Category' dropdown menu now displays 'Nourriture'. Consequently, the table only shows 2 rows of data, both with the category 'Nourriture'. The total amounts in the input fields remain '12.5€' and '12000€'.

Name	Amount	Date	Category
Pain	2€	16/01/2024	Nourriture
Fromage	10.5€	16/01/2024	Nourriture

# CSV files

A csv export which contains all expenses data is possible in the “File” menu:



The data are exported with the following format:

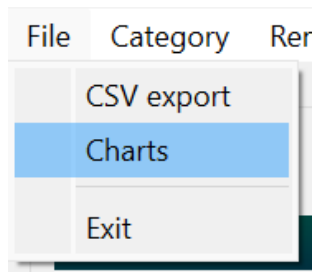
"Date";"Name";"Description";"Amount";"Category"

For example: Data.csv file

```
"Date";"Name";"Description";"Amount";"Category"
"16/01/2024";"Raquettes";"Raquettes de tennis";"10";"Sport"
"16/01/2024";"Pain";"une bonne baguette";"2";"Nourriture"
"16/01/2024";"appareil photo";"un bon appareil photo de qualité pour de belles photos de voyages";"1500";"Imagerie"
"16/01/2024";"pc de bureau";"le montage ça demande un bon pc quand même";"8000";"Informatique"
"16/01/2024";"aigle";"ça coute cher cette bete";"200";""
"16/01/2024";"Fromage";"A good french cheese";"10.5";"Nourriture"
"16/01/2024";"";"";"2000";""
"19/01/2024";"vaccin";"pour le coronavirus";"1200";""
"25/01/2024";"Raquettes";"encore pour le tennis";"30";"Sport"
"22/02/2024";"Raquettes";"Pour le badmington";"120";"Sport"
```

# Charts

Charts visualizations which contain displayed expenses data is possible in the “File” menu:



There is currently only one chart which shows the distribution of categories among expenses, but this feature is still being improved.

For example:

With these expenses:

Name	Amount	Date	Category
Raquettes	10€	16/01/2024	Sport
Pain	2€	16/01/2024	Nourriture
appareil ...	1500€	16/01/2024	Imagerie
pc de bureau	8000€	16/01/2024	Informatique
aigle	200€	16/01/2024	None
Fromage	10.5€	16/01/2024	Nourriture
	2000€	16/01/2024	None

We get this chart:

