Expense Tracking

User Guide

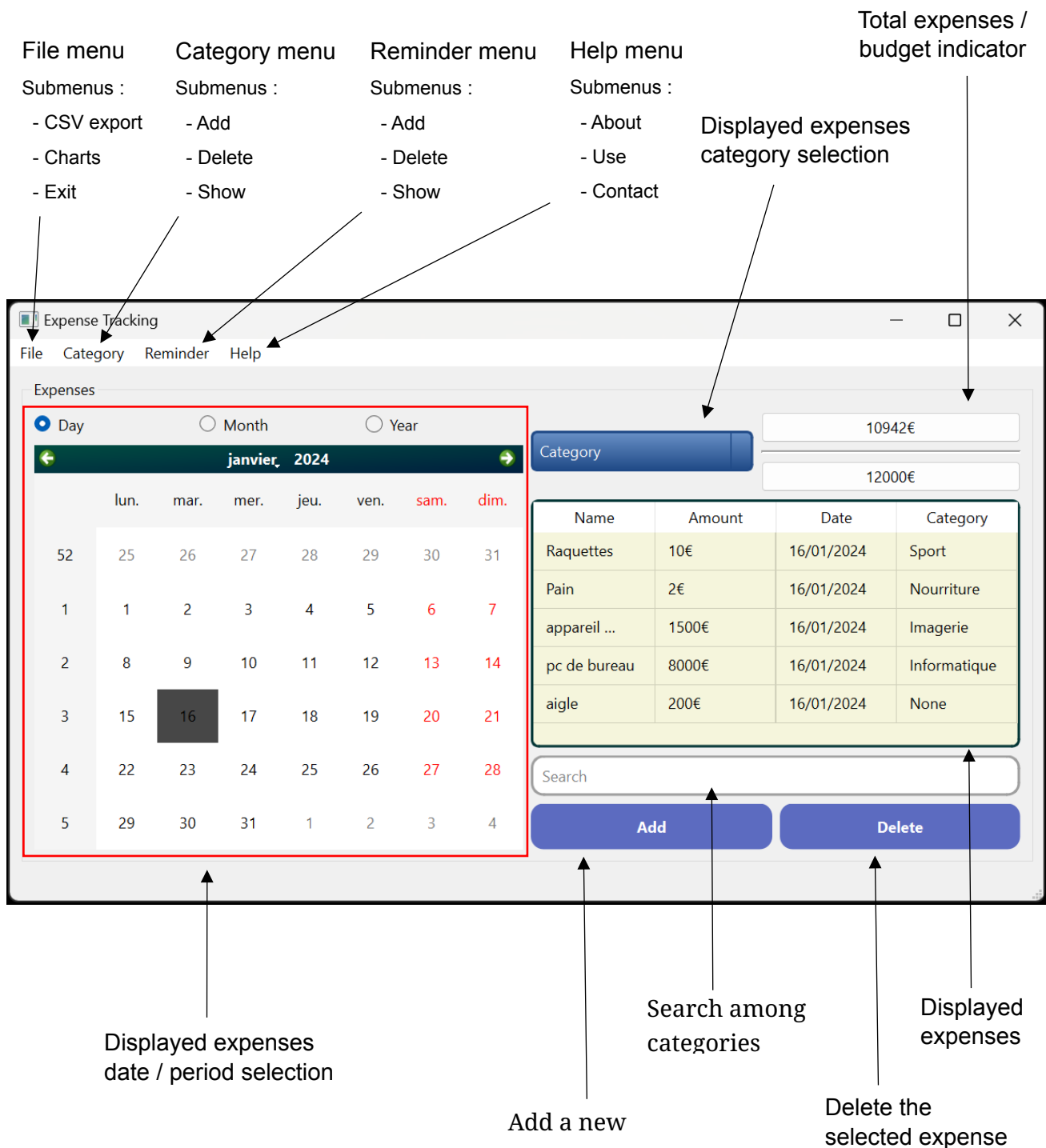# User Guide

Expense tracking application

<u>Summary</u>

Interface overview

File menu

Submenus :
- CSV export
- Charts
- Exit

Category menu

Submenus :
- Add
- Delete
- Show

Reminder menu

Submenus :
- Add
- Delete
- Show

Help menu

Submenus :
- About
- Use
- Contact

Total expenses / budget indicator

Displayed expenses category selection

Displayed expenses date / period selection

Search among categories

Add a new

Delete the selected expense

Displayed expenses
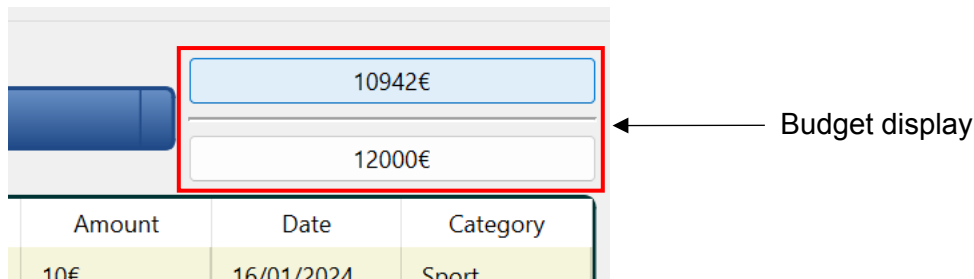
Monthly budget management

1. Budget display on the main window

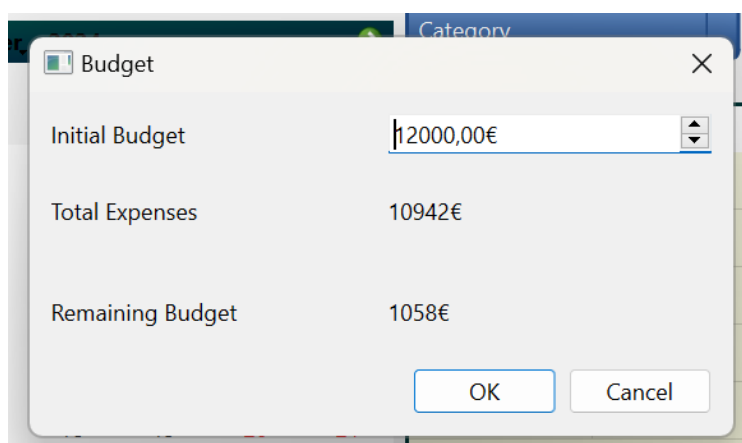This is how the budget is displayed on the main window:

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.
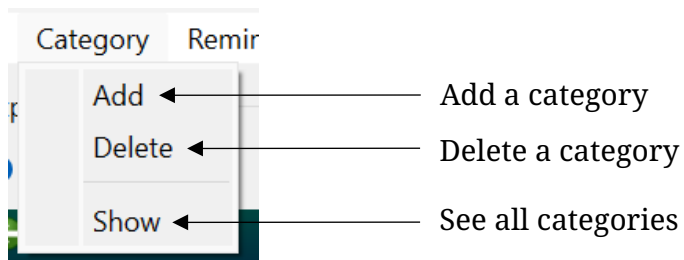
2. Budget management window

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".
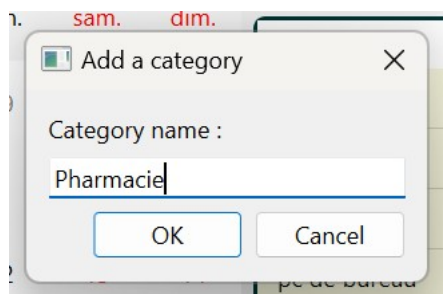
Categories

1. The category menu

Add ← ———————— Add a category

Delete ← ———————— Delete a category
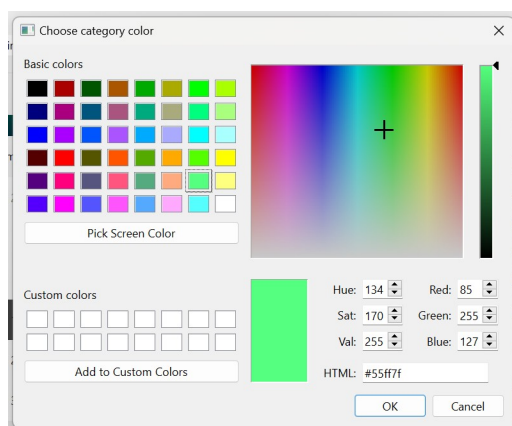
Show ← ———————— See all categories

2. Add a category

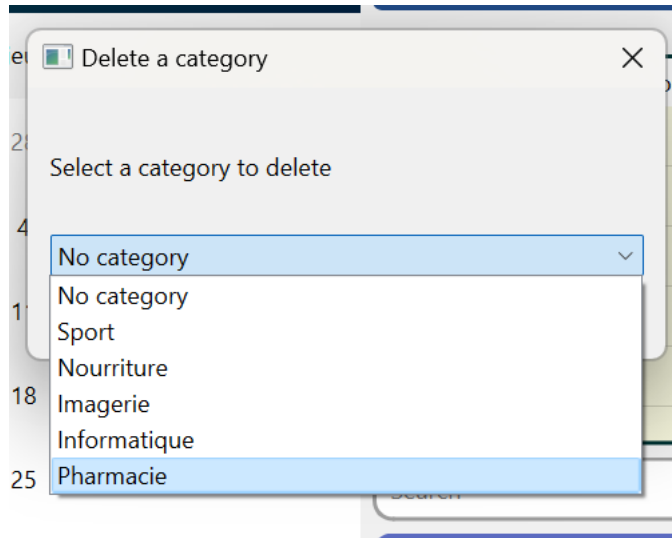First you will have to choose a name for the category:

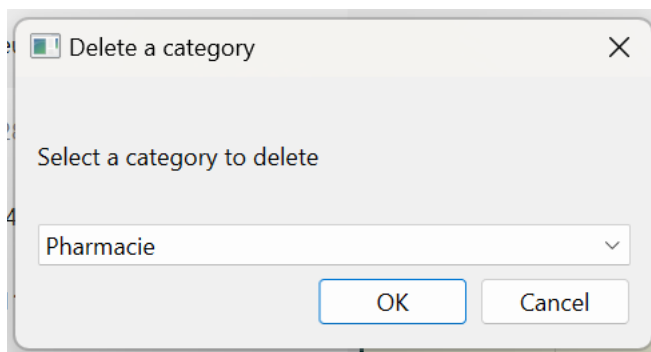
Then you will have to choose a color for the category:
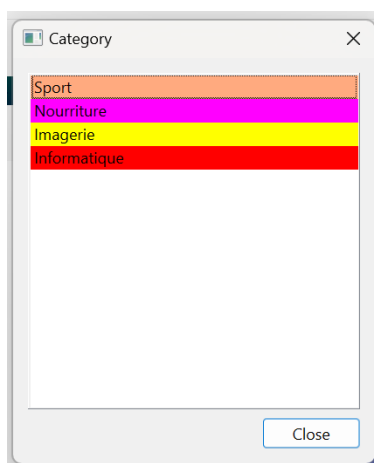
3. Delete a category

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

Selected expense

Expenses list

Add an expense

Search

Add   **Delete**

Delete an

1. Add an expense

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

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:
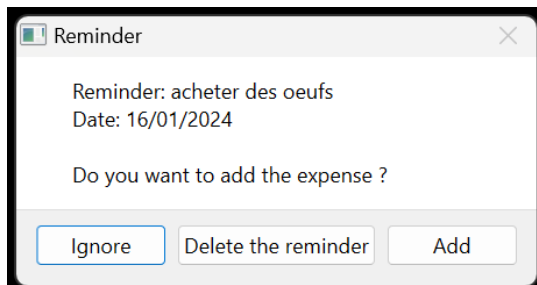

In this window the information about the expense to modify are already provided, and it can be modified.

The modifications will be saved by clicking the "Save" button.

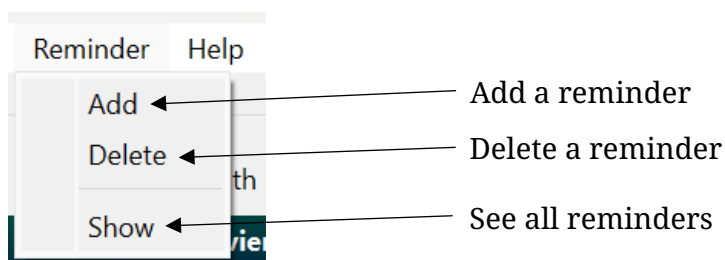Modifications will be cancelled by clicking the "Cancel" button.

Reminders
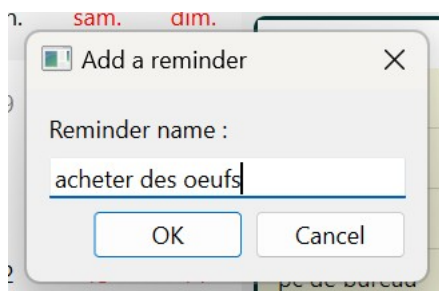

On the chosen reminder date, a window like this one will be shown to the user when the application is launched.

1. The reminder menu

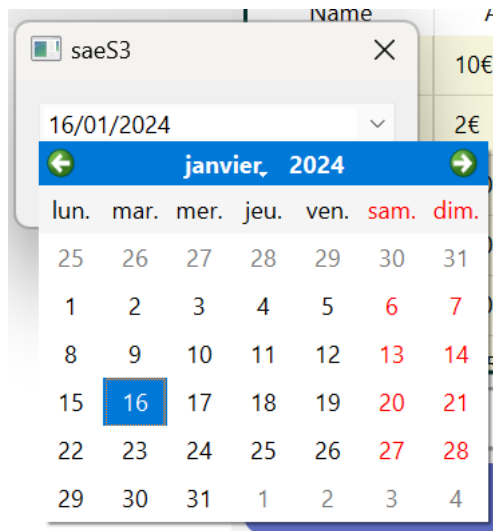
Add a reminder

Delete a reminder

See all reminders

2. Add a reminder

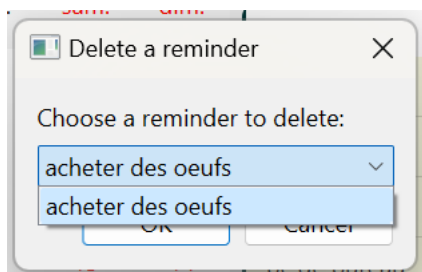First you will have to choose a name for the reminder:

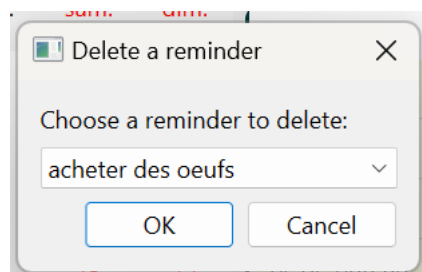Then you will have to choose a date for the reminder:
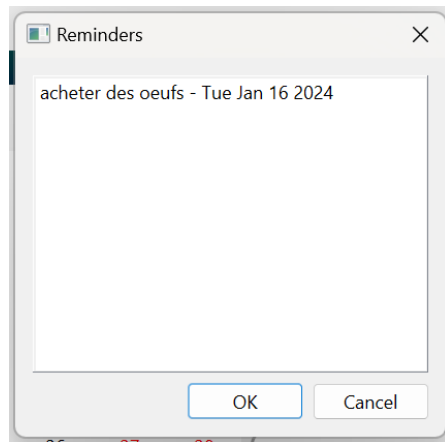

3. Delete a reminder

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.
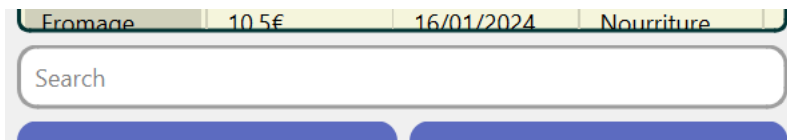
4. See all reminders

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:

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

<u>For example:</u>

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:

With the month period:

With the year period:

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.

<u>For example:</u>

Without any selected category:

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

Category — 12952.5€ / 12000€

Search · Add · Delete

With a selected category:

Nourriture — 12.5€ / 12000€

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

Search · Add · Delete

CSV files

A csv export which contains all expenses data is possible in the "File" menu:
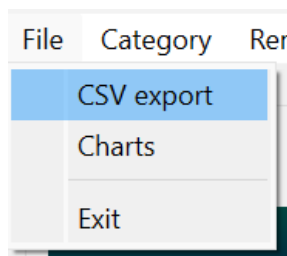
The data are exported with the following format:

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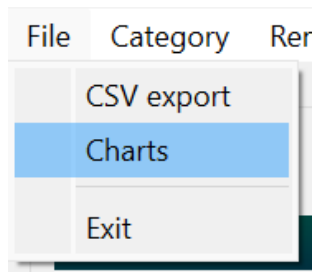
There is currently only one chart which shows the distribution of categories among expenses, but this feature is still being improved.

For example:

With these expenses:

We get this chart: