**Family Expense Tracker Web User Instructions**

**Course:** CST8285 Web Programming

**Section:** 313

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**Assignment:** Group Lab Assignment 2

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The Family Expense Tracker web application is designed to assist families in managing their expenses effectively. It provides a comprehensive platform for managing household expenses efficiently. Below is a guide outlining the key functionalities offered by the website:

1. **User Registration:**
   * New users can register for an account by providing their email address, username, and password on the "Sign-Up" page.
   * Users must agree to the terms and conditions before signing up.
2. **User Authentication:**
   * Registered users can log in to their accounts using their username and password on the "Login" page.
   * Once logged in, users gain access to the full functionality of the Family Expense Tracker website.
3. **Dashboard Navigation:**
   * Upon successful login, users are directed to the dashboard, which serves as the main navigation hub.
   * The dashboard provides quick access to various sections of the application, including invoice input, invoice search, and other features.
4. **Invoice Input:**
   * Users can record household expenses by accessing the "Invoice Input" page.
   * The "Invoice Input" page allows users to enter detailed information about each transaction, including vendor details, transaction date and time, product details, and total cost.
   * Users can add multiple transaction items in a single invoice.
5. **Invoice Search:**
   * The "Invoice Search" page enables users to search and retrieve historical transaction data based on specific criteria such as vendor, date range, and transaction details.
   * Users can filter transactions and view detailed information about each transaction, including vendor name, invoice number, transaction date and time, subtotal, tax, total, and description.
6. **User Profile Management:**
   * Users can manage their profile information, including first name, last name, nickname, relationship, and gender, on the registration page.
   * The "Login" page provides users with the option to remember their login credentials for future access.
   * Users can also reset their passwords if forgotten.
7. **Navigation and Accessibility:**
   * The website includes a navigation bar at the top of each page, allowing users to navigate between different sections of the application easily.
   * A "Top of Page" link in the footer allows users to quickly navigate back to the top of the current page.

By leveraging these functionalities, users can effectively track and manage their family's expenses, analyze spending patterns, and make informed financial decisions with the Family Expense Tracker website.

**Login Page Usage Instructions**

The "Login" page allows users to log in to the Family Expense Tracker application.

**Steps to Use:**

1. **Enter Credentials:**
   * Input your username and password in the respective fields.
2. **Remember Me:**
   * You can choose to check the "Remember me" checkbox to save your login credentials for future use.
3. **Login or Cancel:**
   * Click the "Login" button to log in to your account.
   * If you want to cancel and clear the input fields, click the "Cancel" button.
4. **Forgot Password:**
   * If you forgot your password, you can click on the "Forgot password?" link to reset it.
5. **New User Signup:**
   * If you are a new user, you can click on the "New User Signup" link to create a new account.

**Additional Notes:**

* You can navigate back to the top of the page by clicking the "Top of Page" link in the footer.
* Ensure that you enter the correct username and password to access your account.

**Registration Page Usage Instructions**

The "Registration" page allows users to create a new account for the Family Expense Tracker application.

**Steps to Use:**

1. **Enter Personal Information:**
   * Fill in your first name, last name, nickname, and select your relationship from the dropdown menu.
2. **Select Gender:**
   * Choose your gender by selecting the appropriate radio button (Male or Female).
3. **Create Password:**
   * Enter a password in the "Password" field and re-enter it in the "Re-type Password" field to confirm.
4. **Register or Reset:**
   * Click the "Register" button to submit your registration information and create your account.
   * If you want to clear all input fields, click the "Reset" button.

**Additional Notes:**

* All fields marked with (\*) are required, ensure you fill them out correctly.
* Passwords entered in the "Password" and "Re-type Password" fields must match for successful registration.
* After registering, you can log in to the application using your username and password on the login page.

**Invoice Input Page Usage Instructions**

The page is designed for users to input invoice information for recording transaction details.

**Steps to Use:**

1. **Select or Create Vendor Information:**
   * Choose an existing vendor from the "Existing Vendors" dropdown menu or select "New Vendor" to input new vendor information.
   * If selecting "New Vendor", an input field will appear where you can enter the new vendor's name.
   * Click "New Vendor" button to confirm adding a new vendor or click "Edit Vendor" button to edit existing vendor information.
   * If editing vendor information needs to be canceled, click "Cancel" button.
2. **Enter Vendor Address and Contact Information:**
   * Address, city, province, ZIP, email, phone, GST number, and membership information will be automatically filled based on the selected vendor. These fields are not editable.
3. **Fill in Invoice Details:**
   * Input invoice number, transaction date, and transaction time.
4. **Add Transaction Items:**
   * Each transaction item requires information such as product name, quantity, unit, price, and tax type.
   * Click "Add Transaction Item" button to add a new transaction item.
   * If any added transaction item needs to be deleted, click the "Delete" button next to the respective item.
5. **View Transaction Totals:**
   * The subtotal, tax, and total amounts will be automatically calculated and displayed in the "SUBTOTAL", "TAX", and "TOTAL" fields respectively.
6. **Provide Invoice Description:**
   * Fill in the description of the invoice in the "Invoice Description" textarea.
7. **Submit or Reset:**
   * Click "Submit" button to submit the entered invoice information, or click "Reset" button to clear all input fields.

**Additional Actions:**

* In the navigation bar at the top of the page, you can easily switch to other pages including the home page, invoice input page, and invoice search page.
* In the navigation bar at the bottom of the page, you can quickly return to the top of the page.

**Invoice Search Page Usage Instructions**

The "Invoice Search" page allows users to search for specific invoice information based on various filters.

**Steps to Use:**

1. **Apply Filters:**
   * Choose a vendor from the "Select The Vendor" dropdown menu to filter transactions by vendor. You can select "All Vendor" to search transactions from all vendors.
   * Specify the start date and end date to filter transactions within a specific date range.
   * Click the "Search" button to apply the filters or click "Reset" to clear all filters.
2. **View Transactions List:**
   * After applying filters, the transactions list will be displayed showing details such as vendor name, invoice number, transaction date, transaction time, subtotal, tax, total, and description.
3. **View Transaction Details:**
   * Transaction details such as vendor product ID, product name, quantity, unit, price, and tax type will be shown in the "Transactions Detail" section.

**Additional Notes:**

* You can navigate back to the top of the page by clicking the "Top of Page" link in the footer.
* The page is designed to help users easily search for and view invoice information based on their specified criteria.

**Profile Edit Page Usage Instructions:**

1. **Logging In**:
   * Ensure you are logged in with your username.
   * If not logged in, you will be redirected to the login page.
2. **Navigation**:
   * Use the navigation bar at the top to access different sections like Home, Invoice Input, and Invoice Search.
   * Click on your username on the top right to access "My Profile" and "Logout" options.
3. **Profile Editing**:
   * On the "My Profile" page, you can edit your email address, username, and reset your password.
   * Enter your new email address or username in the respective fields.
   * For resetting the password, input the new password and retype it for confirmation.
   * You can also choose to display the password by checking the "Show Password" box.
   * Click "Edit email/username" to save changes, "Reset Password" to change the password, or "Cancel" to discard changes.

This page facilitates easy navigation and management of your profile information and password.