

Commerce Bank Project User Guide

Corner Club

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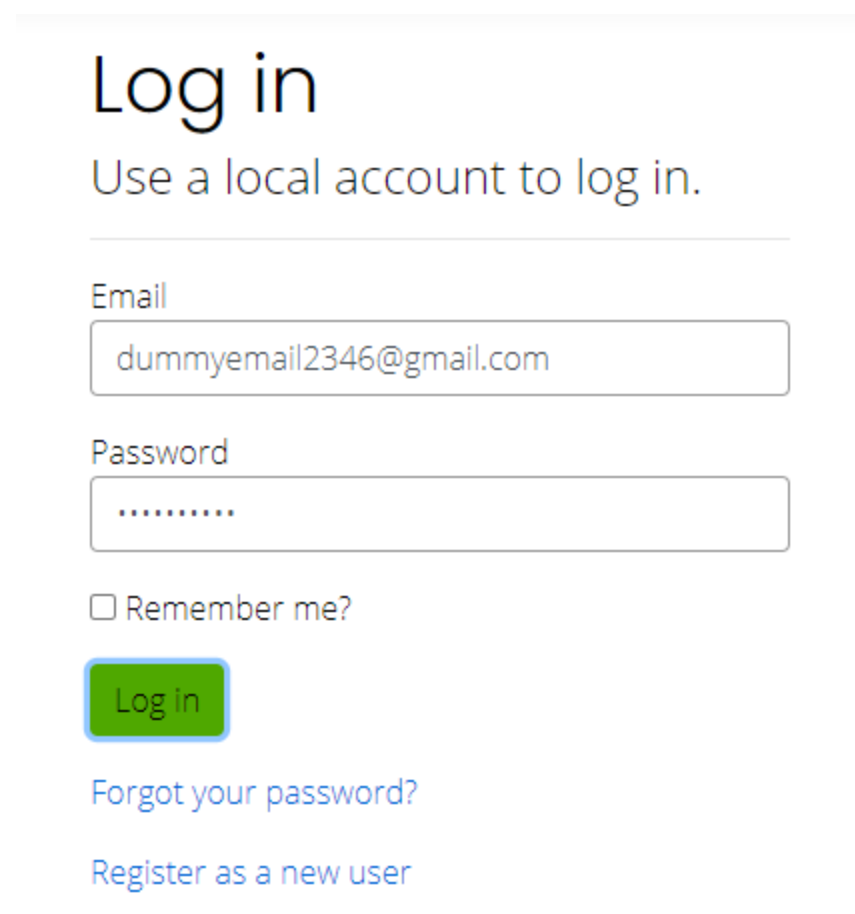
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1 Introduction

The Commerce Bank application allows users to login to their account through the web portal to be able to see their transactions, notifications, and more. This document will provide instructions on how to use the app to view transactions, generate notifications, activate dark mode, etc.

2 Logging In

In order to be able to access the rest of the features of the website, the user must login with their credentials



The screenshot shows a login page with a light gray background. At the top, the text "Log in" is displayed in a large, dark font, followed by "Use a local account to log in." in a smaller, blue font. Below this is a horizontal line. The "Email" label is positioned above a text input field containing "dummyemail2346@gmail.com". The "Password" label is above a text input field filled with dots. Below the password field is a checkbox labeled "Remember me?". A green "Log in" button is located below the checkbox. At the bottom, there are two blue links: "Forgot your password?" and "Register as a new user".

Log in

Use a local account to log in.

Email

dummyemail2346@gmail.com

Password

.....

☐ Remember me?

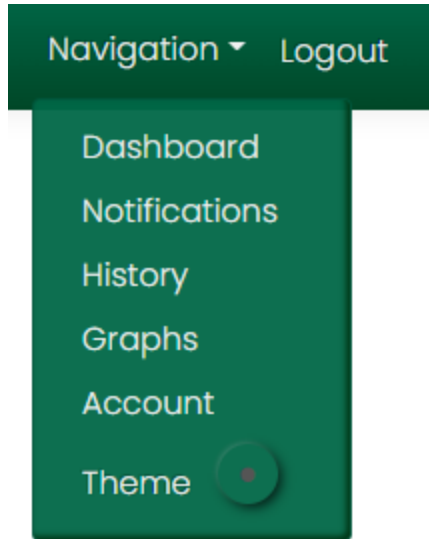
Log in

[Forgot your password?](#)

[Register as a new user](#)

2.1 Dark Mode

Dark Mode is an option for the user if they would like the experience to be more gentle on the eyes.



By clicking the little button next to Theme, this will activate Dark Mode

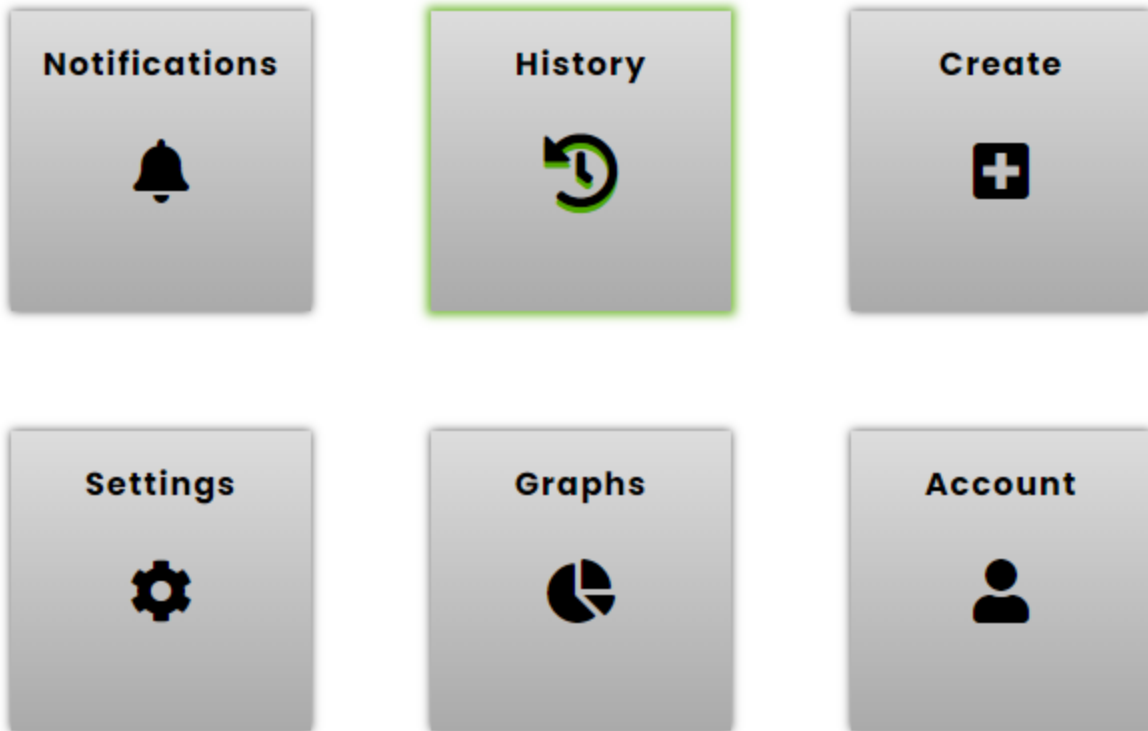
3 Transactions

As this is a banking app, Transactions are one of the main features of the app, this section will discuss how to View, Filter, and Add your own Transactions.

3.1 Viewing Transactions

In order to View a list Transactions related to your accounts, click the 'History' button

Dashboard



This will take you to a page that has all of your transactions.

View Transactions

Filter >

Back

Page 1

Next

Account	Date	Amount	Description	
Savings	1/27/2017	+\$100.00	Transfer from savings	Details
Savings	1/27/2017	+\$0.02	Interest	Details
Savings	1/27/2017	+\$150.00	Transfer from savings	Details
Checking	1/27/2017	-\$150.00	Nebraska Furniture Mart	Details
Checking	1/27/2017	+\$100.00	Transfer to Savings	Details
Checking	1/27/2017	-\$29.10	QuikTrip	Details

3.2 Filtering Transactions

In order to Filter your list of Transactions, click the drop-down arrow next to Filter and specify your criteria

View Transactions

Filter ▼

Select Account

All ▼

Search

starbucks

From: 11/01/2016



To: 01/27/2017




Go

Back

Page 1

Next

View Transactions

Filter 
Select Account All Search starbucks
From: 11/01/2016 To: 01/27/2017 Go

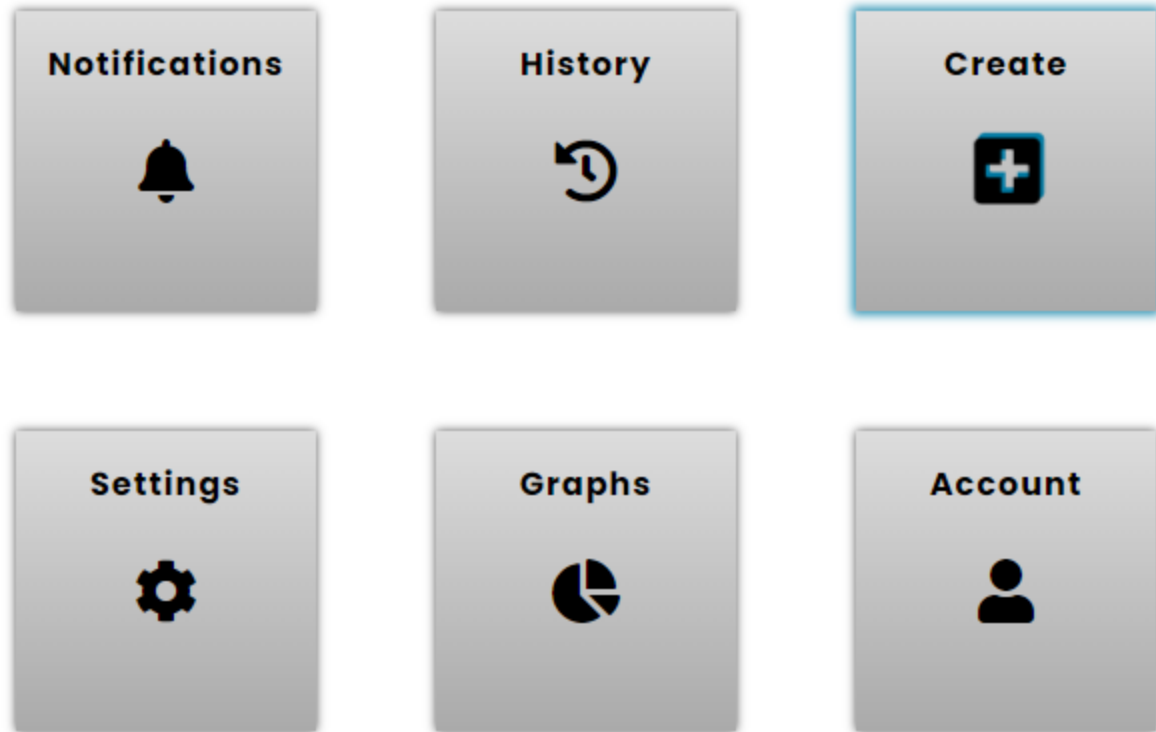
Back Page 1 Next

Account	Date	Amount	Description	
Checking	1/17/2017	-\$25.00	Starbucks gift card	Details
Checking	12/9/2016	-\$13.90	Starbucks	Details
Checking	11/30/2016	-\$4.00	Starbucks	Details
Checking	11/14/2016	-\$10.65	Starbucks	Details

3.3 Adding Transactions

In order to Add more Transactions to your account from the web app, click the 'Create' button on the Dashboard

Dashboard



Choose your account, the type of transactions, your category, the amount, a description and then hit 'Create'

Create Transaction

Account

Checking 411111111 ▼

Type

Withdrawal ▼

Category

Other ▼

Amount

20

Description

CSV

Create

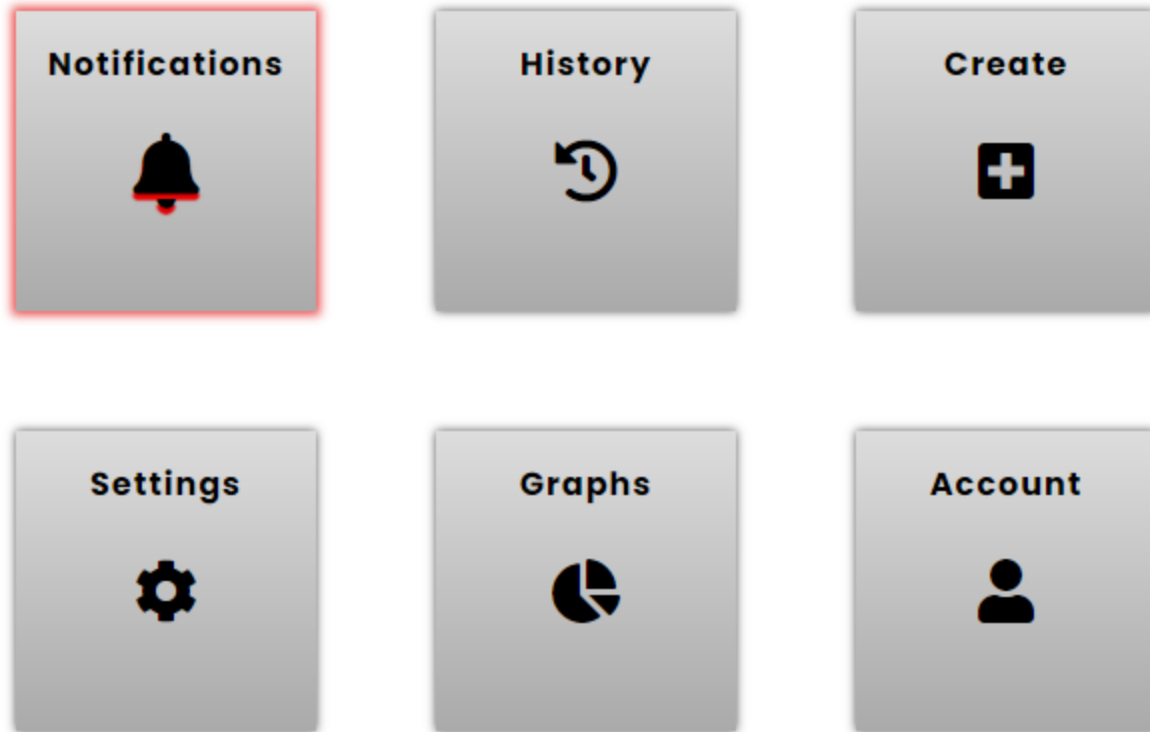
Back to List

4 Notifications

As a user you have the ability to generate notifications to trigger related to your transactions. You have the flexibility to be able to customize these related to your budget and other specifications.

To access Notifications, click the 'Notifications' button on the Dashboard

Dashboard



4.1 Customizing Notifications

In order to be able to customize your Notifications, click the 'Settings' button of the Notification Center



There are many ways you can customize your notifications utilizing our settings.

Notification Settings

Adjust notification rules below. Changes to settings must be saved before they take effect.

Save Changes

Monthly Budget ▼

Receive notifications when your monthly budget is exceeded

 1000.00

☒ Enable

Balance ▼

Receive notifications when a withdrawal reduces your balance below a specified amount

 1000.00

☒ Enable

Timeframe ▼

Receive notifications when a transaction takes place between the specified times

Start Time: End Time:

☐ Enable

Budget By Category ▼

Receive notifications when spending for any of your chosen categories exceeds a specified amount

Chores ▼

 50.00

☐ Enable

Clothing >

Eating Out >

Essentials >

Food >

Fun >

Gas >


Phone >


Other >


4.2 Generating Notifications




In order to be able to generate Notifications, click the 'Generate Notifications' on the Notification Center

Notification Center

[Settings](#) 

[Generate Notifications](#) 

[Delete All](#) 

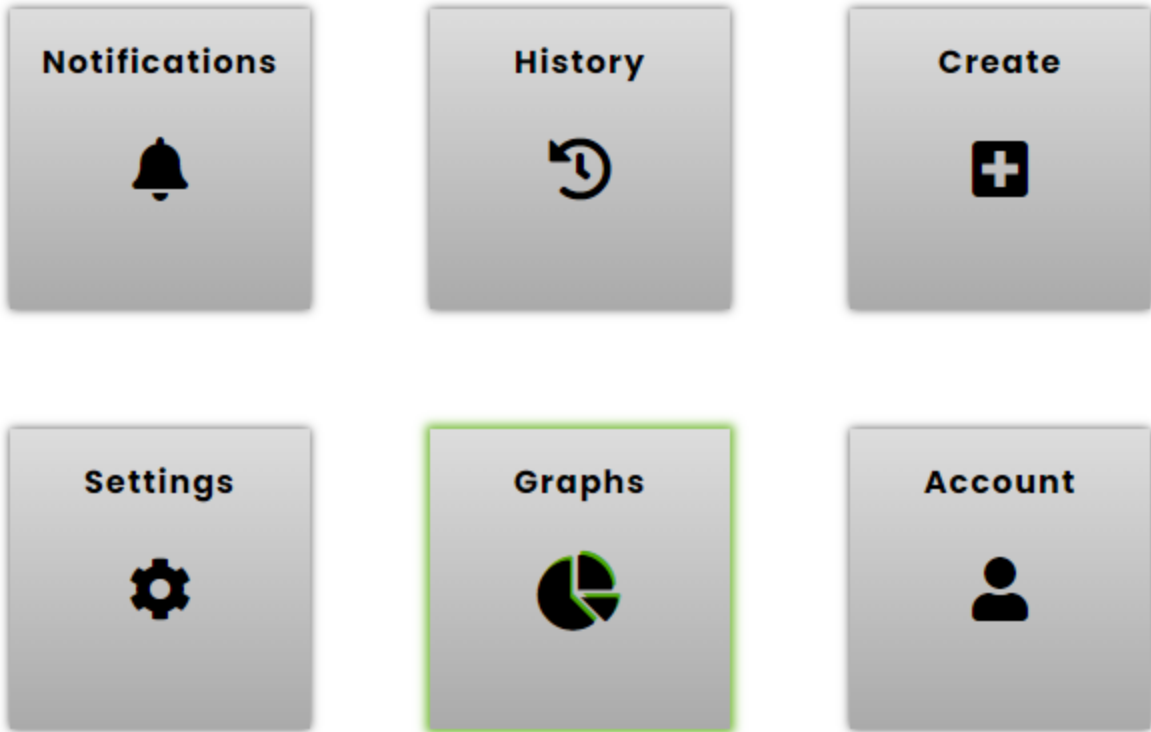
Type	Description	Date	
Monthly Budget	You have exceeded your monthly budget of \$1000.00	2/1/2017 12:00:00 AM	
Monthly Budget	You have exceeded your monthly budget of \$1000.00	1/1/2017 12:00:00 AM	
Monthly Budget	You have exceeded your monthly budget of \$1000.00	12/1/2016 12:00:00 AM	

5 Graphs

A summarized Data Dashboard Graph view is an option for any user who would like to see a summary of their transactions. This includes being able to see a current balance of your accounts, a list of your most recent transactions and visuals summarizing information.

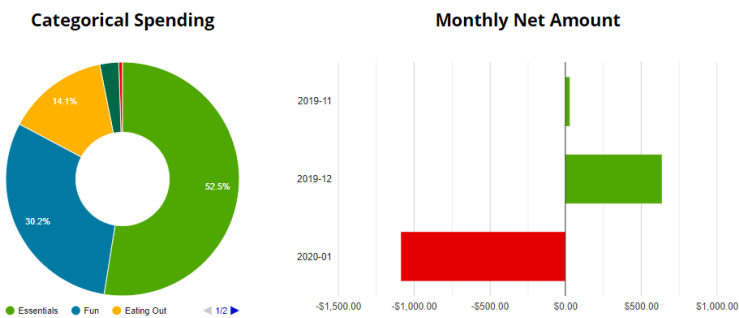
In order to access the Graph View, hit the 'Graphs' button on the Dashboard

Dashboard



Data

Account	Balance
Checking	\$4571.08



Last 5 Transactions

Account	Date	Amount	Description	
Checking	1/30/2020	-\$8.00	Starbucks	
Checking	1/30/2020	-\$46.00	Cheesecake Factory	
Checking	1/29/2020	-\$180.00	Pottery Barn	
Checking	1/28/2020	+\$810.00	Payroll	
Checking	1/27/2020	-\$22.00	CVS	