

Prompt:

Create Detailed Instructions for my Personal Finance Tracker. Here are all the details:

Pages Accessible:

Instructions
Dashboard
Transactions
Reports
Student Mastery
MintyAI (Chatbot)

Pages Description and Functionality:

Instructions:

Guide on how to get started with the tracker. Details on how the tracker works. Details on the functionality of each page. Pretend FAQs. Instructions uses headings and subheadings.

Dashboard:

Displays Current Net Balance (income - expenses). Displays total Income. Displays total expenses. Shows a progress bar for the budget (amount of money spent this month divided by budget). Shows progress bar for income goal (total money spent since income goal was set divided by income goal). Displays a line graph of the past 6 months showcasing both income and expenses per month. Expense Radar chart which is categorized by (____, ____ , _____, ___, _____, ____). Recent transactions section which shows the recent six transactions by date.

Transactions:

Displays a table of all the transactions. The columns are [Date, Type (income or expense), Category, Amount, Description (optional), Action (Edit button and delete button)]. Each row displays a transaction and the table is organized by date where the most recent date is at the top.

The user can add a transaction by clicking the add button (card icon) at the top right. The user will be asked to select a date, type (dropdown values: income/expense), category (dropdown depends of whether it's an income or expense), amount, description (optional). Every value must be inputted except description in order to successfully add a transaction.

If the user click the delete button (trash can) for the transaction row it permanently deletes the transaction. If the user clicks the edit button for the transaction row (three dots) it will allow the

user to change any value of the transaction (date, type, category (if type changes, the category must be selected again), amount, description (optional). The user must then click the green save button to save their edits. The user also has the opportunity to completely delete the transaction while on this edit page as well.

Reports:

The Reports page displays charts, graphs, and statistics of the student's financials. At the top right there is a dropdown where the user can select the time frame from which they want to view their financials (last 1 week, last 1 month, last 3 months, last 6 months (default setting), last 1 year, last 5 years).

The charts that are shown are: Activity Line Graph (Income and Expenses), Expense Radar (by expense category), Income Rader (by income category), Expense Bar Chart (by category)

The Statistics that are shown are: Net Income, Savings Rate, Expense-to-Income Ratio, Income-to-Expense Ratio

Student Mastery:

The Student Mastery Page helps the student learn how to effectively manage their money and have proficient financial literacy. It provides the student with the ability to set their monthly budget by clicking the three dots next within the monthly budget card. It provides the student with the ability to set an income goal with a start date and a certain goal they would like to reach. It also provides different courses linked through khan academy such as Financial Goals Course, Budgeting and Saving Course, and Saving and Investing Course. Finally it provides financial resources at the bottom like Yahoo Finance, Investopedia, Nerd Wallet, Next Gen Personal Finance, Practical Money Skills by VISA.

MintyAI Chatbot:

Has access to all the users transactions and can help the user with any questions they have regarding personal finance in general (learning) or about how to use the tracker itself, or about their own transactions.

Instructions for Personal Finance Tracker

Welcome to the Personal Finance Tracker! This guide will help you navigate the tracker's features, understand how to use each page, and make the most of its functionality. Whether you're new to budgeting or a seasoned financial planner, this tracker will help you stay organized and achieve your financial goals.

How the Tracker Works

The Personal Finance Tracker is designed to simplify financial management by providing an intuitive platform to monitor, analyze, and improve your financial habits. Here are the key functionalities:

- **Track Income and Expenses**: Record all financial transactions and categorize them as income or expenses.
- **Visualize Financial Trends**: Use graphs and charts to identify patterns in your financial habits.
- **Set Goals**: Establish budgets and income targets to stay on track.
- **Learn Financial Literacy**: Access resources and courses to improve your financial knowledge.
- **Get Assistance**: Use the MintyAI chatbot for instant help and advice.

Page Overview

Each page has specific features and tools to support your financial journey. Below is a detailed breakdown of all the pages:

1. Instructions

Purpose:

To provide a comprehensive guide on how to use the tracker.

Features:

- **Getting Started**: Learn how to set up your tracker.
- **Page Descriptions**: Understand the functionality of each page.
- **FAQs**: Common questions and solutions for troubleshooting.

FAQs

- **How do I add a transaction?** Go to the **Transactions** page, click the add button, and fill in the required fields.
- **How do I set a budget?** Navigate to the **Student Mastery** page and edit the budget card.
- **What is the purpose of the MintyAI chatbot?** MintyAI can assist with financial queries and usage tips.

2. Dashboard

Purpose:

Provides a summary of your current financial standing.

Features:

- **Net Balance**: Displays income minus expenses.
- **Total Income and Expenses**: Shows cumulative amounts.
- **Budget Progress Bar**: Tracks monthly spending against your budget.
- **Income Goal Progress Bar**: Tracks progress toward your income goal.
- **Line Graph**: Visualizes income and expenses over the past 6 months.
- **Expense Radar Chart**: Categorizes spending into predefined segments.
- **Recent Transactions**: Displays the latest six transactions by date.

3. Transactions

Purpose:

Allows you to log, edit, and delete financial transactions.

Features:

- **Transaction Table**: Displays all transactions with columns:

- Date
- Type (income/expense)
- Category
- Amount
- Description (optional)
- Action (Edit/Delete buttons)

- **Adding Transactions**:

1. Click the add button (card icon) in the top-right corner.
2. Fill in the required fields:

- Date
- Type (income/expense)
- Category
- Amount
- Description (optional)

3. Click "Save" to add the transaction.

- **Editing Transactions**:

1. Click the Edit button (three dots) in the transaction row.
2. Update the desired fields.
3. Click "Save" to confirm changes.
4. Optionally, delete the transaction while editing.

- **Deleting Transactions**:

- Click the Delete button (trash can) in the transaction row to permanently remove it.

4. Reports

Purpose:

Analyze your financial data through charts, graphs, and statistics.

Features:

- **Timeframe Selection**: Use the dropdown menu to filter reports by:

- Last 1 week
- Last 1 month
- Last 3 months
- Last 6 months (default)
- Last 1 year
- Last 5 years

- **Charts and Graphs**:

- Activity Line Graph (Income and Expenses)
- Expense Radar Chart (categorized spending)
- Income Radar Chart (categorized income)
- Expense Bar Chart (spending by category)

- **Statistics**:

- Net Income
- Savings Rate
- Expense-to-Income Ratio
- Income-to-Expense Ratio

5. Student Mastery

Purpose:

Improve financial literacy and set personal financial goals.

Features:

- **Budget Setting**:

1. Click the three dots on the Monthly Budget card.
2. Enter your desired budget.

- **Income Goal Setting**:

1. Click the "Set Goal" button on the Income Goal card.
2. Specify the start date and income target.

- **Learning Resources**:

- Access linked courses on Khan Academy:

- Financial Goals Course
- Budgeting and Saving Course
- Saving and Investing Course

- Explore additional resources:

- Yahoo Finance
- Investopedia
- Nerd Wallet
- Next Gen Personal Finance

- Practical Money Skills by VISA

6. MintyAI Chatbot

Purpose:

Provides instant assistance for learning personal finance or using the tracker.

Features:

- **General Financial Learning**: Ask MintyAI questions about budgeting, saving, or investing.
- **Tracker Guidance**: Get help navigating the tracker's features.
- **Transaction Insights**: Query specific transactions or patterns in your financial data.

Example Questions:

- "How much did I spend on groceries last month?"
- "What is the best way to save for an emergency fund?"
- "How do I edit a transaction?"

Getting Started

1. Familiarize yourself with the **Instructions** page.
2. Begin adding your income and expenses on the **Transactions** page.
3. Review your financial summary on the **Dashboard**.
4. Analyze trends and statistics on the **Reports** page.
5. Set goals and explore resources on the **Student Mastery** page.
6. Use **MintyAI** for any questions or assistance.

By following these steps, you'll be well on your way to achieving financial mastery!