User Guide ET-HOME

This guide showcases all functionalities and supports you throughout your ET-Home experience.

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1 - Welcome to ET-Home APP

Welcome to our expense tracking application! If you are reading this document, we assume that you have correctly followed all the steps of the **Installation Guide** and you managed to run the app. If it is not the case, we invite you to do it now or you will not be able to use the application correctly.

2 - Create an account & login

Your first steps in the app will guide you in the login screen page. As it is your first time in the app, you can click on the *Register here* link.
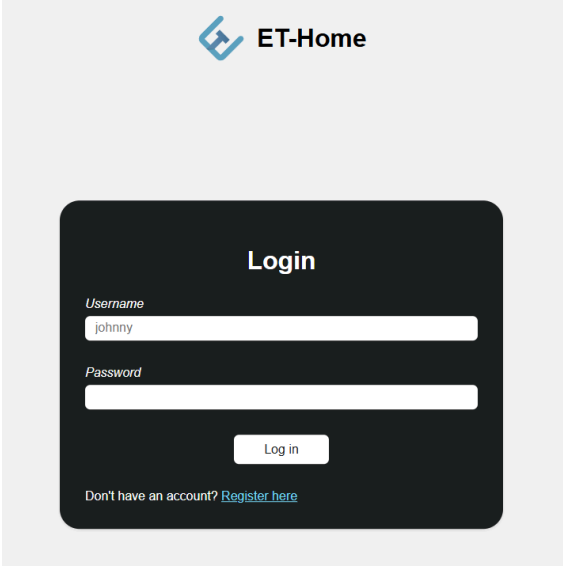

Figure 1 - Login screen

It will send you to the registration page where you have to write down some information such as a username, a password, your first, last name and your e-mail
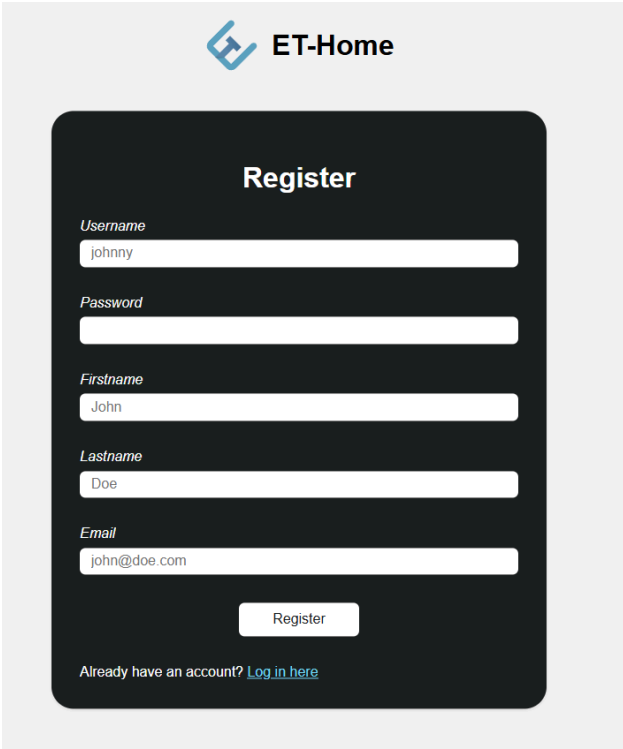

Figure 2 - Register screen

After completing all the register requirements, you will be sent back to the login screen and you can then connect to the application with your username and password.

3 - Dashboard

After creating an account, you now have access to the app and will be taken to the main page. On this page you will find some useful widgets :

- The evolution of your balance during the current month's expense
- The same for the last month
- A list of all your bank accounts (at this point, it should be empty)
- The possibility to add transactions manually
- The possibility to link your app account to a bank account
- The main information about your bank account
- A graphic that shows you visually the evolution of your balance for a period. This parameter can be changed by clicking the top right button of the widget and selecting an other period of the list. You can also filter the data by categories and by account (if you have multiple ones)
- A graphic that shows you the money you have spent based on each categories

You can also find on the left, a sidebar where you can access other pages, which can be helpful to use for your experience

- Dashboard (where your are supposed to be at this point)
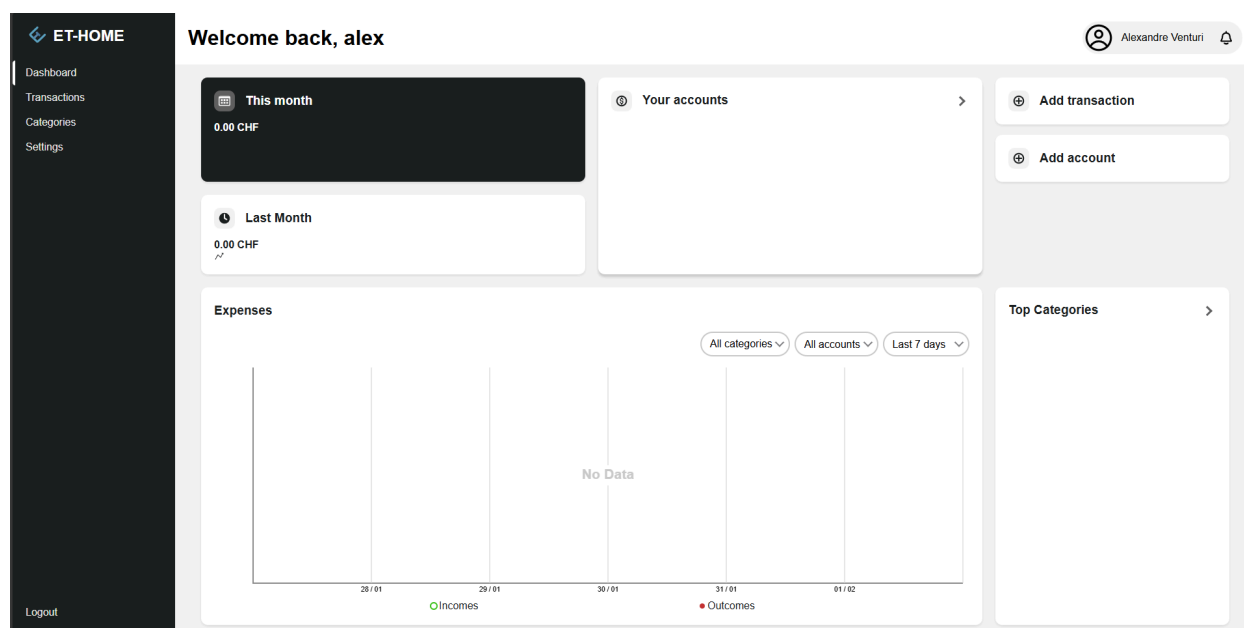- Transactions
- Categories
- Settings
- Logout

Figure 3 - Dashboard

The next step is to link a bank account to your application account. You can access the page where you can link your bank account by clicking on the **Add account** widget or on the top right arrow of the **Your accounts** widget.

3.1 - Add Account

ET-Home itself isn't useful if you don't have a bank account linked, so in this page you have the possibility to link your bank account so that your information and data will be visible on the dashboard. You need to insert some information about your bank account :

- Bank name
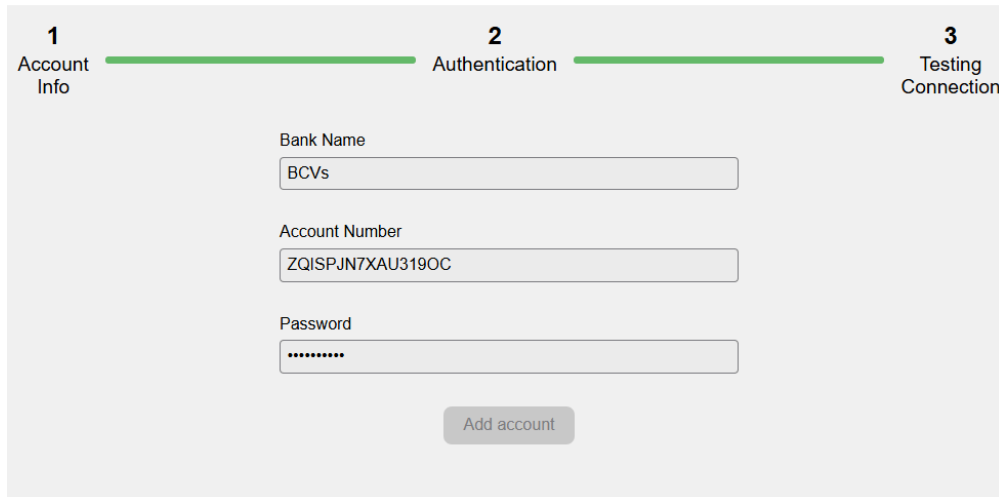- Account number (generated by the bank)
- Your bank password

Figure 4 - Link between bank account and app account

After you link a bank account to your profile, you can see a notification on the top right notification bell that tells you that the link is done.
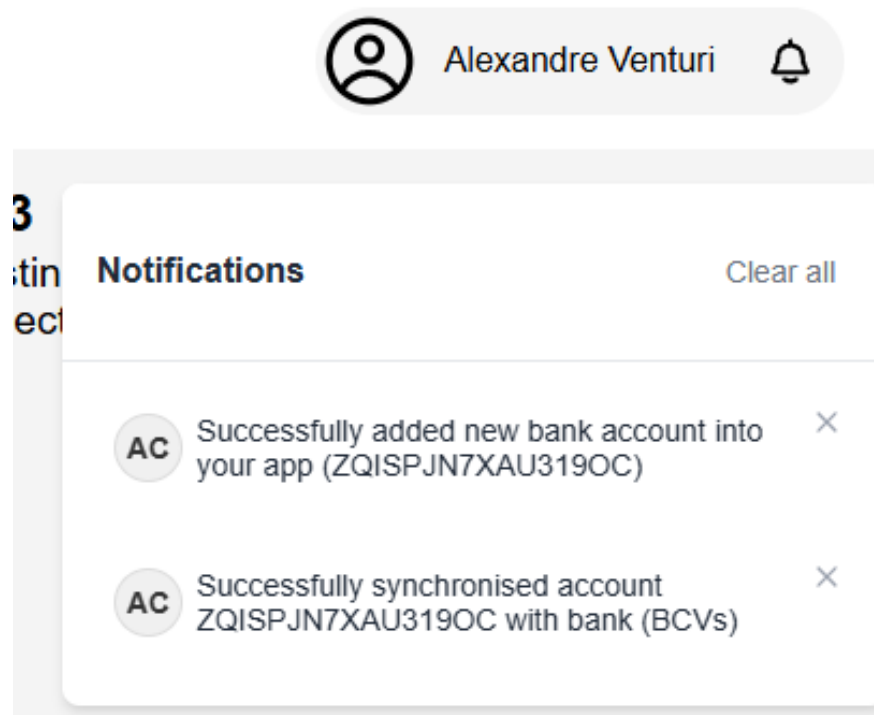

Figure 5 - Account successfully added and linked notification

You can hide the notification window by clicking on the bell !

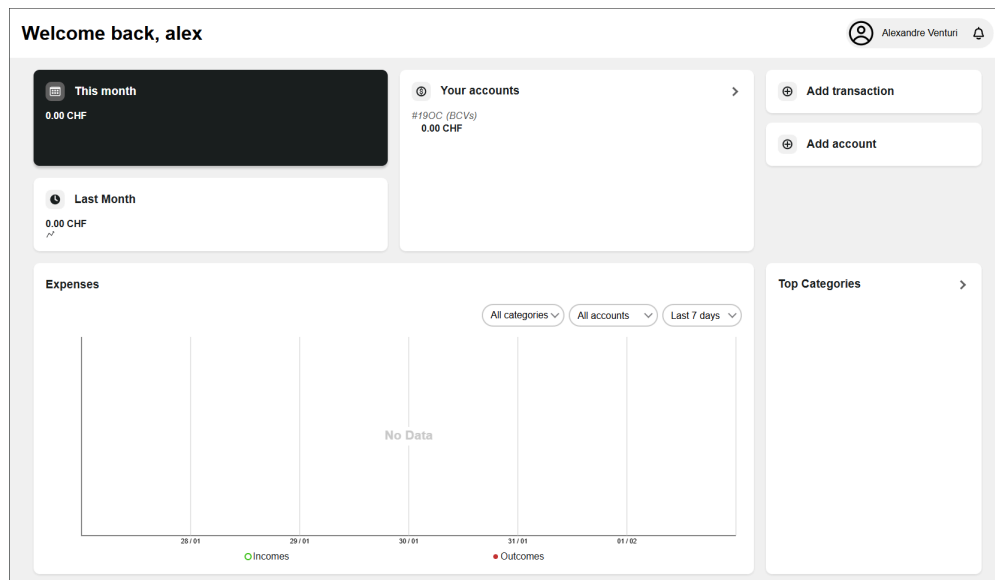Now, if you go back to the dashboard you can see that something changed :

Figure 6 - Dashboard with account linked

You can see that you have an account on the **Your accounts** widget (you can compare with the figure 3). This is the one your just added in the previous steps.

3.2 - Categories

The first element we will show you is the category system. In our application, you have the possibility to order your transactions by categories and add some budget limit to them. Everything takes place on the **Categories** page. You can access the page by clicking on **Categories** on the sidebar or on the top right arrow of the **Top Categories** widget.
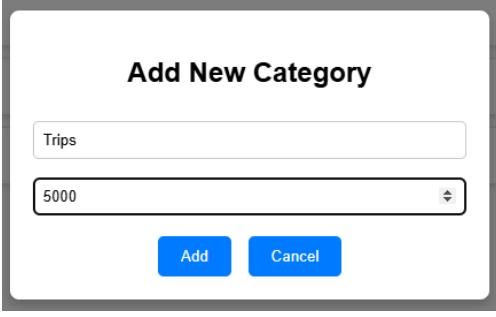

Figure 7 - Categories management page

You can see that you already have some pre-generated categories that are common to every account. You can't remove them but you can choose wether you want to be notified, if your category budget runs low, by clicking on the check box. You can also modify the number on the right of every category, this number is the budget limit of the expense you can have for each category. Next to the name of the category, you have the information of the amount of money spent for each category during the current month.

Now let's create a new category, you can do it by clicking on the blue **Add Category** button.

A small pop-up will appear and you can write the category's name and the budget limit you want to have on this category.

Figure 8 - Add new category

You can cancel this process by clicking on the **Cancel** button or validate your choice by clicking on the **Add** button.

Figure 9 - List of categories with a new one created

You see now your newly added category on the list. Notice that you can remove categories you create yourself !

The last information you need to know is that if you make a modification of any budget limit or any check box, you need to click on the blue **Update Categories** button to save the modifications you have done.

You now know everything you need to know about categories management, let's move on to the transactions.

3.3 - Transactions

The next step could be to add some new transactions to your account. You can do it by clicking on the **Add transaction** widget. You now see this page.

Figure 10 - Adding a transaction

Here, you can add a transaction with specific parameters

- A category
- An amount
- The date of that transaction
- A description of the transaction (optional)

We previously added a category and you can see that it appears in the categories choice.

Figure 11 - Category list with new one added

When you have fully completed all the required fields, you can click on the **Create** button to add it on your transactions list.
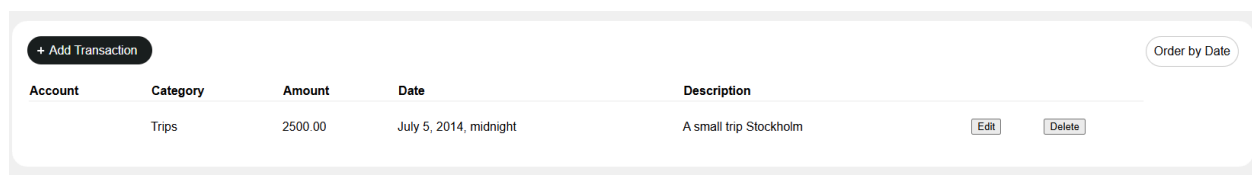

Figure 12 - Transaction history

You can notice that after you create a transaction, you automatically move to an other page. This is the **Transaction history** page that you can access directly by clicking on the **Transaction** link on the left *from the dashboard*.

If you have many transactions, you can order them by different parameters, here you have
- By date
- By categories
- By amount

You can change that by clicking on the **Order by Date** which is the default order. By doing that you open a drop-down menu with all 3 choices.

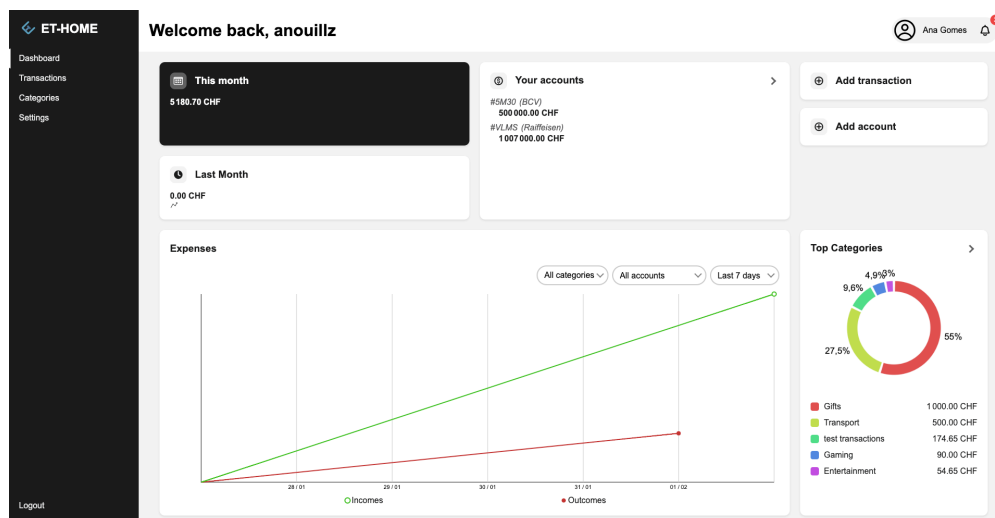### 3.3.1 - Example of dashboard with data

Figure 13 - Dashboard with data

3.4 - Settings

The settings page is there to help you modify your information and export them easily. This page is divided in three different pages **My User Account**, **Bank Accounts** and **Data Export**.
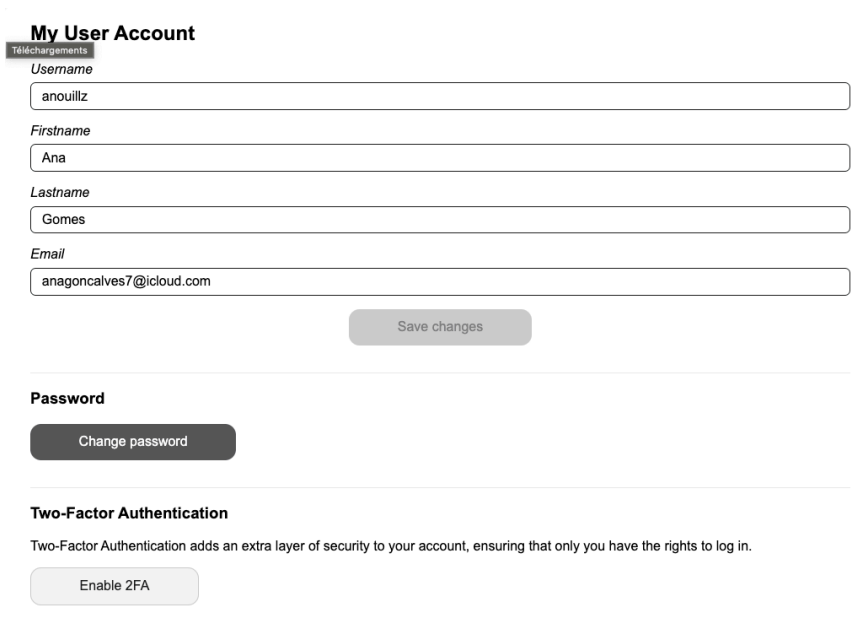
3.4.1 - My User Account

In the **My User Account** window you can change your Username, Firstname, Lastname, and Email. To do so, enter you new information and then click on the **Saves changes** button.

Figure 14 - My User Account window

You can also modify your password by clicking on the **Change password** button. When pressed, a new page appears which allows you to change your password.

Figure 15 - Changing password window

You can also enable a two-factor authentication by clicking on the **Enable 2FA** button. You will need an authenticator app, such as "Microsoft Authenticator" to enable this feature.

Figure 16 - Enable 2FA

You will be brought to the **Setup TOTP** page where you will need to scan the QRcode using your authenticator app. You can also use the Key if needed. You can then enter the code your authenticator will give you and confirm with the button.

Figure 17 - Enable 2FA, using authenticator

You will then recieve a notification confirming your two factor authentication. If you return to **My user account**, you will se that the **Enable 2FA** is now **2FA enabled**.

Figure 18 - 2FA enabled

3.4.2 - Bank Accounts

In the **Bank Account** window you can see all the bank accounts that are linked to your application. You can easily see some information such as you current balance on each account, the bank account name and number.
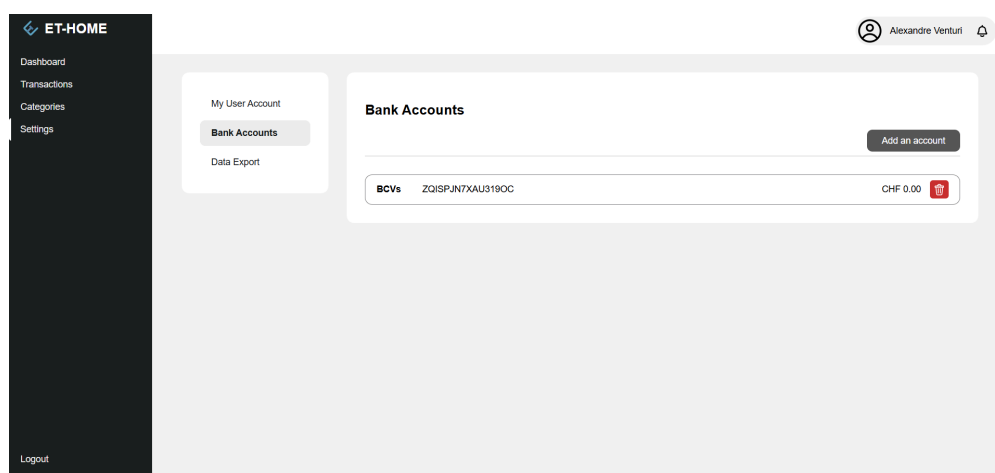

Figure 19 - Bank Account window

You can also press the red button with the bin icon to delete the selected bank account. When clicked, a new window will appear with a warning message.
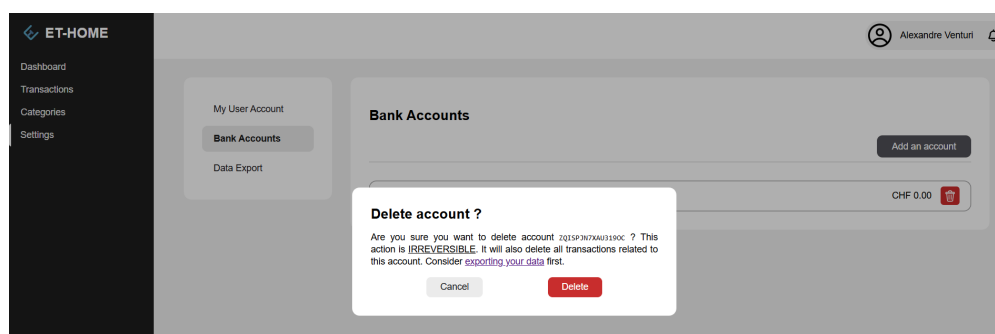

Figure 20 - Bank Account delete window

When you delete your bank account, it will be irreversible and will delete all the transactions related to this account. At this point it is possible to export your data by clicking on the *exporting your data* link.

The **Add an account** button will redirect you to the add bank account page like explained before.

3.4.3 - Data Export

In the **Data Export** page you can export all your information in a JSON file format. You will need to enter your password and then click on the **Export** button. Your web browser will then directly download the file.
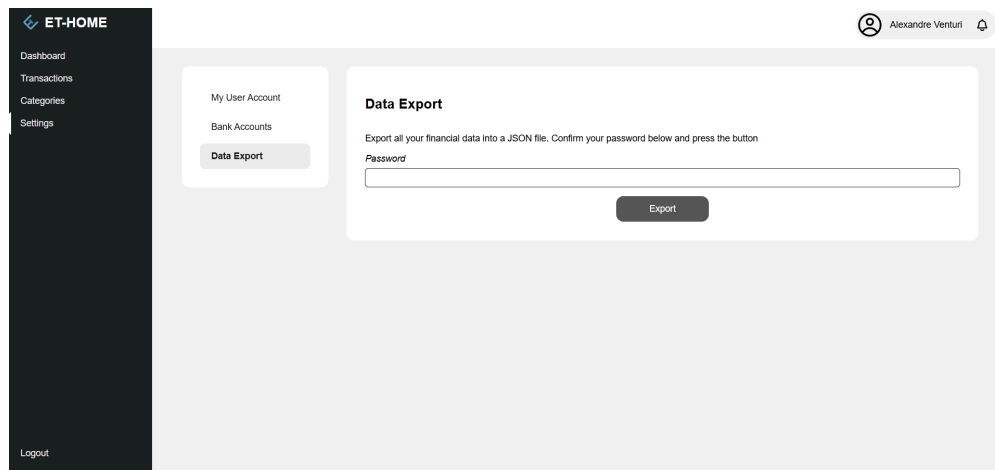

Figure 21 - Data Export window

This file contains all your information such as you different accounts, transactions (added by the application), categories and personal information.

Figure 22 - Exported Data

4 - Conclusion

Thank you for exploring the features of our application. We hope you find it intuitive and powerful, enhancing your experience in every way possible.