

Web Budgeting Application

User Guide

Team 3

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Introduction

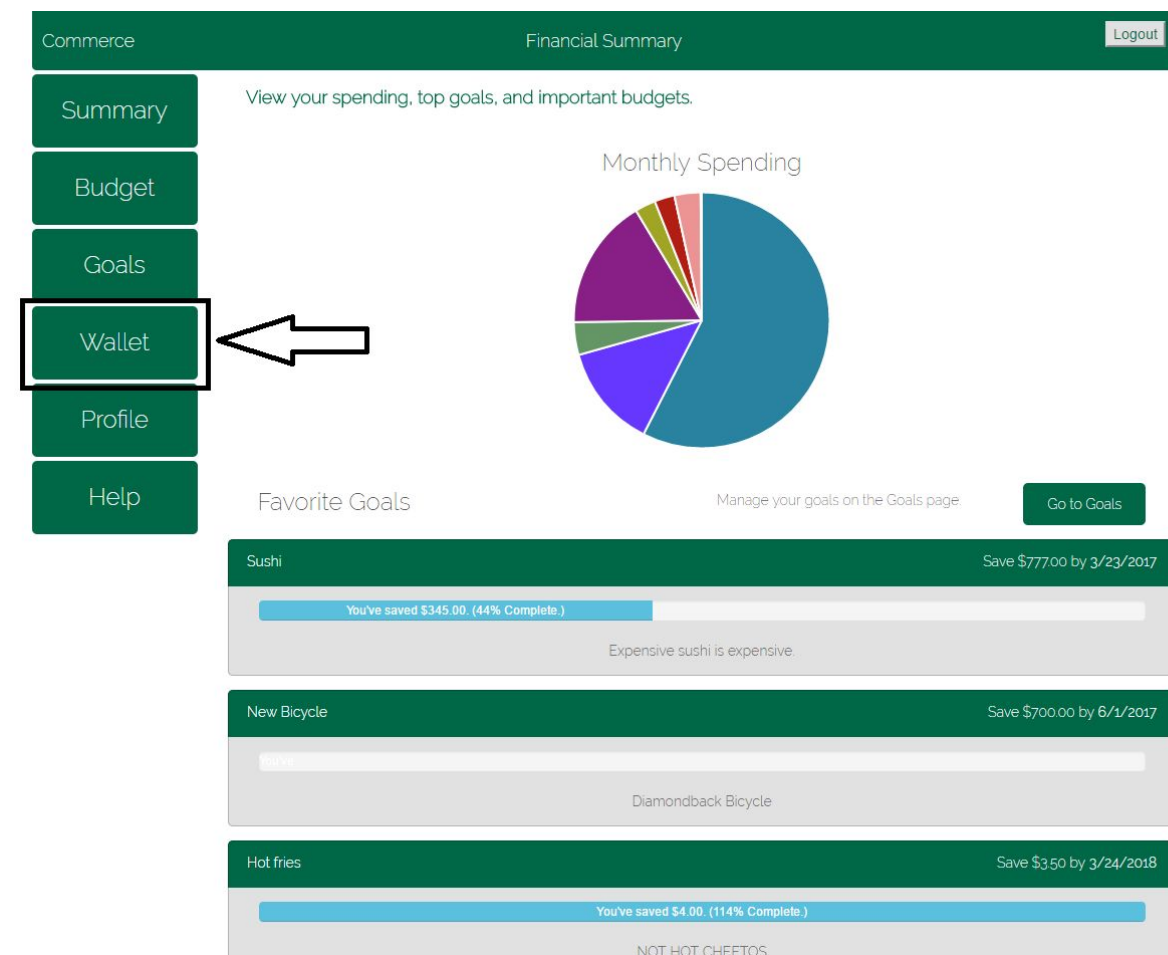
The Web Budgeting application allows users to access a simple interface to access their Commerce Bank accounts. The purpose of this document is to provide a simple walkthrough that explains how to use this application to look at transactions linked to the user's account as well as manage any goals or budgets that are also linked to their account.

Using the Application

Transactions Page

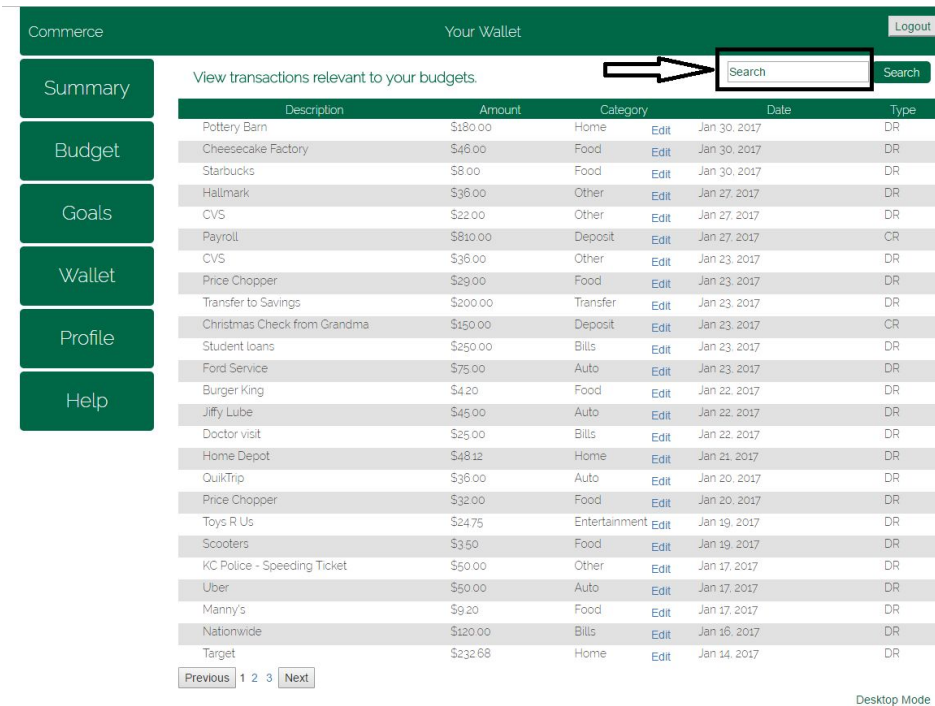
1. Getting to the Transactions page

- a. Once logged into your Commerce Bank account, select the button labeled "Wallet" on the left hand side of the screen



2. Searching for Specific Transactions

- a. On the Wallet page, select the text box labeled “Search”



The screenshot shows the 'Your Wallet' interface. On the left is a sidebar with navigation links: Summary, Budget, Goals, Wallet, Profile, and Help. The main area displays a table of transactions with columns: Description, Amount, Category, Date, and Type. Each row includes an 'Edit' link next to the category. A search bar is located at the top right of the transaction list, with an arrow pointing to it. Below the table are 'Previous' and 'Next' pagination buttons. The text 'Desktop Mode' is visible in the bottom right corner.

Description	Amount	Category	Date	Type
Pottery Barn	\$180.00	Home	Jan 30, 2017	DR
Cheesecake Factory	\$46.00	Food	Jan 30, 2017	DR
Starbucks	\$8.00	Food	Jan 30, 2017	DR
Hallmark	\$36.00	Other	Jan 27, 2017	DR
CVS	\$22.00	Other	Jan 27, 2017	DR
Payroll	\$810.00	Deposit	Jan 27, 2017	CR
CVS	\$36.00	Other	Jan 23, 2017	DR
Price Chopper	\$29.00	Food	Jan 23, 2017	DR
Transfer to Savings	\$200.00	Transfer	Jan 23, 2017	DR
Christmas Check from Grandma	\$150.00	Deposit	Jan 23, 2017	CR
Student loans	\$250.00	Bills	Jan 23, 2017	DR
Ford Service	\$75.00	Auto	Jan 23, 2017	DR
Burger King	\$4.20	Food	Jan 22, 2017	DR
Jiffy Lube	\$45.00	Auto	Jan 22, 2017	DR
Doctor visit	\$25.00	Bills	Jan 22, 2017	DR
Home Depot	\$48.12	Home	Jan 21, 2017	DR
QuikTrip	\$36.00	Auto	Jan 20, 2017	DR
Price Chopper	\$32.00	Food	Jan 20, 2017	DR
Toys R Us	\$24.75	Entertainment	Jan 19, 2017	DR
Scooters	\$35.00	Food	Jan 19, 2017	DR
KC Police - Speeding Ticket	\$50.00	Other	Jan 17, 2017	DR
Uber	\$50.00	Auto	Jan 17, 2017	DR
Manny's	\$9.20	Food	Jan 17, 2017	DR
Nationwide	\$120.00	Bills	Jan 16, 2017	DR
Target	\$232.68	Home	Jan 14, 2017	DR

- b. Input the description of the transaction you are looking for



A search input field containing the text 'QuikTrip' and a green 'Search' button to its right.

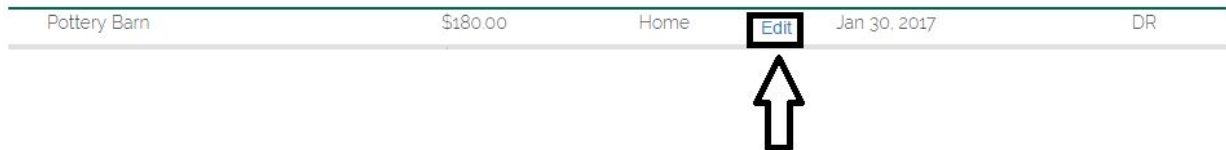
- c. Select the button labeled “Search” to the right of the text box



A search input field containing the text 'QuikTrip' and a green 'Search' button to its right. The 'Search' button is highlighted with a black border, and a large black arrow points upwards towards it.

3. Edit a Transaction

- a. On the Wallet page, find the transaction you wish to edit
b. Select the hyperlink labeled “Edit” in the row of the transaction you wish to edit (this hyperlink can be found to the right of the category of the transaction)

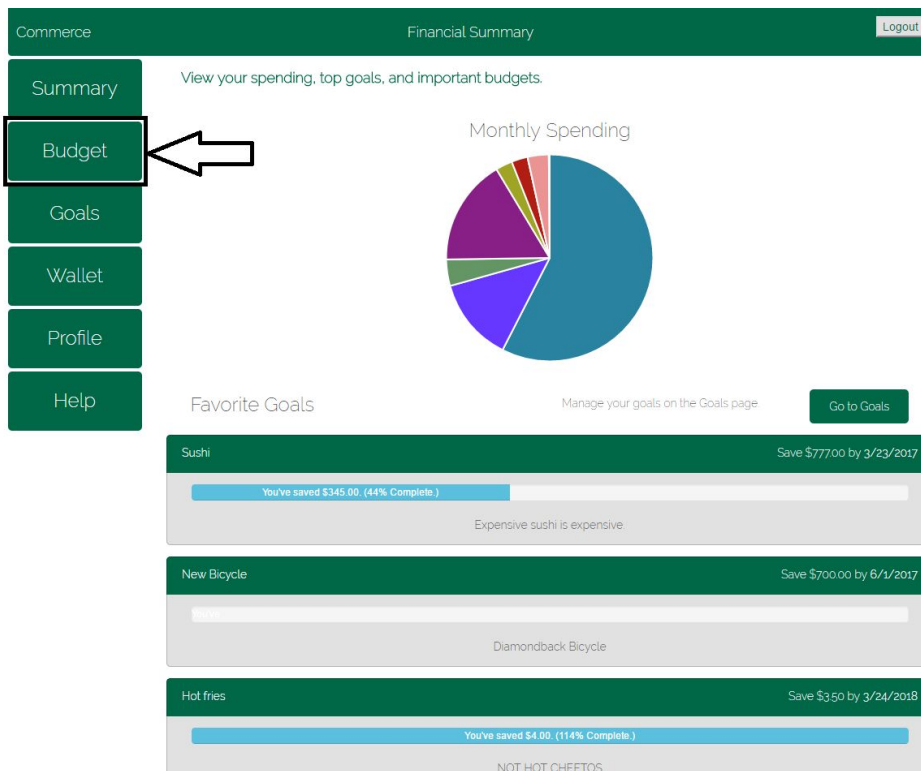


- c. Input information you wish to change
- d. Select the button labeled “Done” in the lower right hand corner of the pop-up

Budgets Page

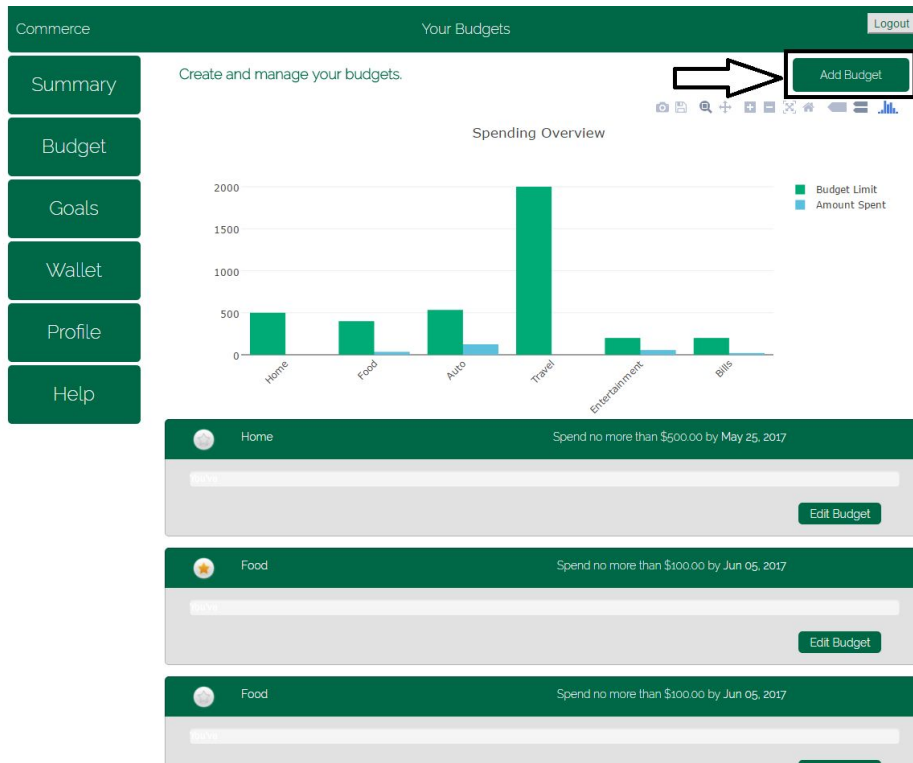
1. Getting to the Budgets page

- a. Once logged into your Commerce Bank account, select the button labeled “Budget” on the left hand side of the screen



2. Adding a Budget

- a. On the Budget page, select the button labeled “Add Budget” located in the top right hand corner of the screen underneath the top bar



- Select a category for the budget
- Select the account you wish the budget to be linked to
- Input the amount you wish the budget to be
- Input the date you wish the budget to start using the format MM/DD/YYYY
- Input the date you wish the budget to end using the format MM/DD/YYYY
- Once you are satisfied with the information you input for the budget, select the button labeled "Add Budget" located at the bottom of the pop-up window

Add a Budget Item

Choose a category: Home

Choose an account: Select Account

Amount: 50.00

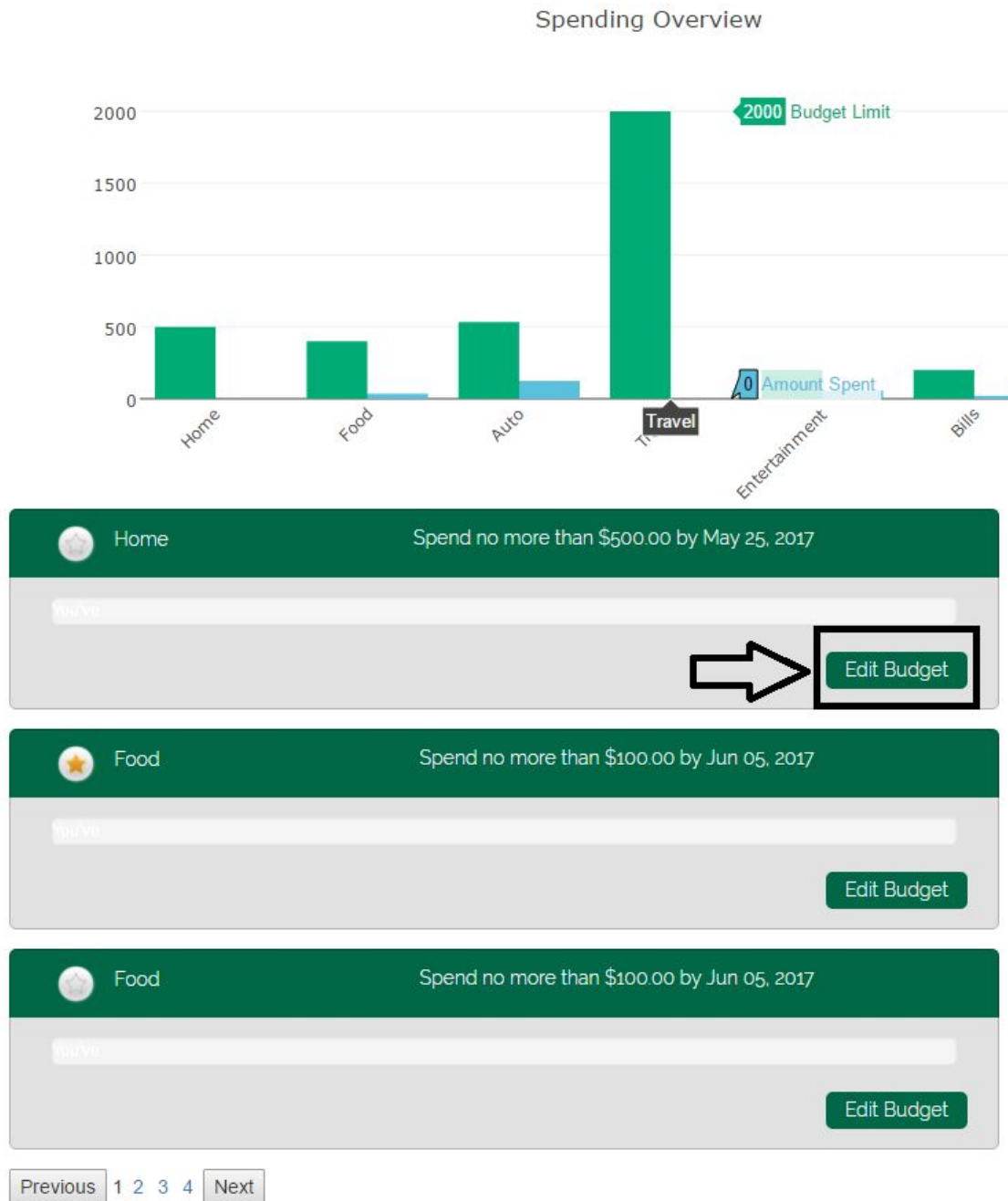
Start Date: 4/30/2017

End Date: 5/15/2017

Add Budget

3. Editing a Budget

- On the Budget page, find the budget you wish to edit
- Select the button labeled “Edit Budget” located in the lower right hand corner of the budget box you wish to edit



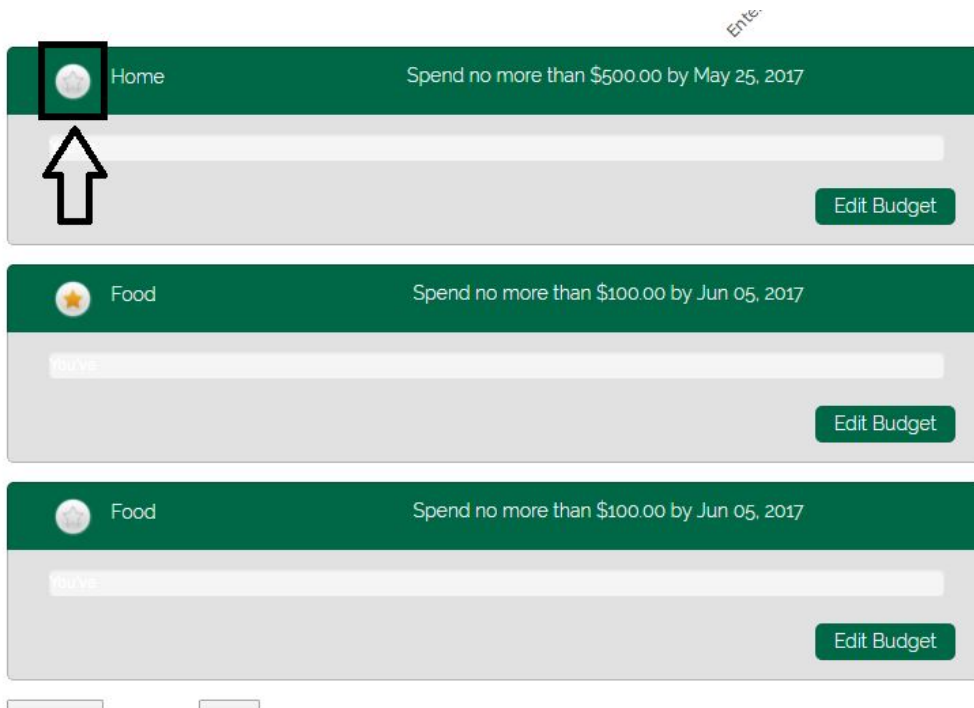
- Input the information you wish to change about the budget
- Select the button labeled “Done” in the lower part of the pop-up window

4. Removing a Budget

- On the budget page, find the budget you wish to remove
- Select the button labeled “Edit Budget” located in the lower right hand corner of the budget box you wish to remove
- Select the button labeled “Remove Budget”

5. Marking a Budget as a “Favorite Budget”

- On the budget page, find the budget you wish to mark as a “Favorite”
- Select the round button in the upper left hand corner of the budget box you wish to mark as a “Favorite”

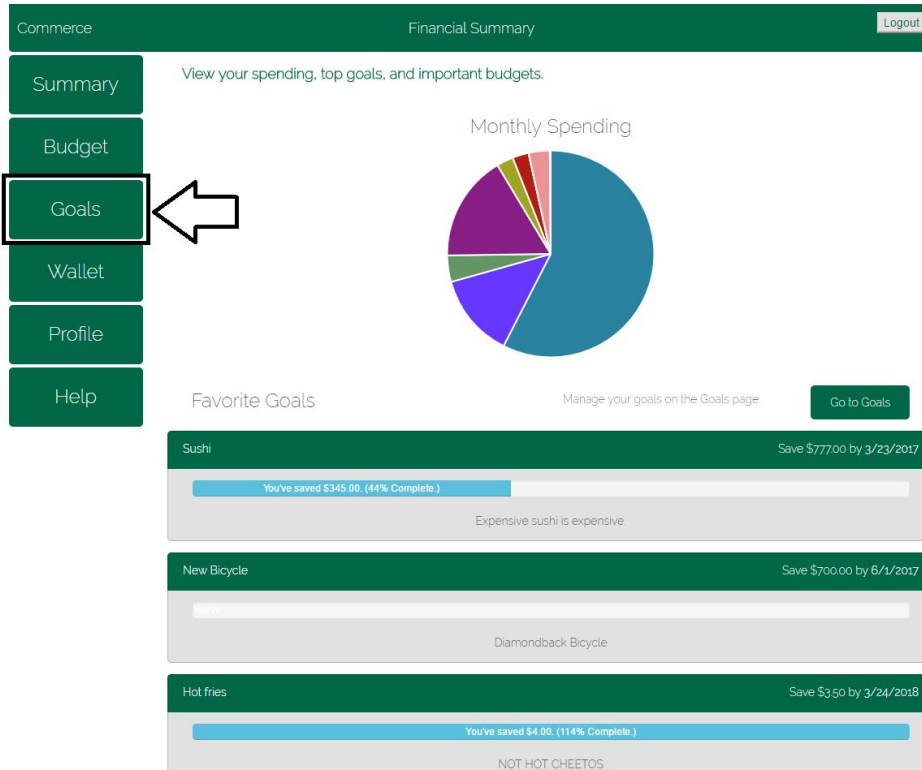


- Once selected, the a star will appear in the middle of the button showing that the budget has been made into a “Favorite Budget”
- Budgets marked as “Favorite” will appear on the Summary page

Goals Page

1. Getting to the Goals page

- Once logged into your Commerce Bank account, select the button labeled “Goals” on the left hand side of the screen



2. Adding a Goal

- On the Goals page, select the button labeled “Add a Goal” in the upper right hand portion of the screen

Commerce
Your Goals
Logout

Summary
Budget
Goals
Wallet
Profile
Help

Create and manage financial goals.

Add a Goal

Active Goals
Inactive Goals

Tester
Save \$150.00 by May 05, 2017

Add Funds
Edit Goal

Angry Birds
Save \$10.00 by Mar 03, 2017

Mobile addiction

Add Funds
Edit Goal

Chocolate
Save \$3.14 by May 05, 2019

You've saved \$16.00. (509% Complete.)

Yum

Add Funds
Edit Goal

Previous
1
2
3
4
Next

Desktop Mode

- Input a name for your goal
- Input the amount of money the goal requires to be saved in order to be completed
- Input the date which you wish the goal to be accomplished in the format MM/DD/YYYY
- (Optional) Input a description of the goal
- Select how you wish money to be allocated towards your goal
 - First option: "A specified amount each deposit."
 - The value entered in the text box to the left will be considered a dollar amount. This dollar amount will be taken out of each deposit into the account linked with this goal.

The screenshot shows a modal window titled "Add a Goal" with a close button (X) in the top right corner. The form contains the following fields and options:

- "Create a name for your goal": A text box containing the word "Goal".
- "How much would you like to save?": A text box containing "150.00".
- "By what date should this goal be reached? (mm/dd/yyyy)": A text box containing "05/20/2017".
- "Describe this goal (Optional)": A text box containing "Goal to be reached."
- "How would you like to save money?": A section with three radio button options:
 - ☒ **A specified amount each deposit.**
 - ☐ A percentage of each deposit.
 - ☐ Manually add funds as desired.
- Below the radio buttons is a text box labeled "Amount:" which is highlighted with a black border and a large black arrow pointing to it from the right.
- At the bottom left is a green button labeled "Add Goal".

- ii. Second option: "A percentage of each deposit."
1. The value entered in the text box to the left will be considered a percentage. This percentage will be deducted from every deposit you make into an account that is linked to this goal.

This screenshot is identical to the one above, but with the following differences:

- The radio button for "A percentage of each deposit." is now selected (indicated by a filled circle).
- The text box below the radio buttons is now labeled "Percentage:" and is highlighted with a black border and a large black arrow pointing to it from the right.

- iii. Third option: "Manually add funds as desired."
1. No text box will appear if this option is selected. We will go over how to manually add funds to a goal in the next section.

Add a Goal ✕

Create a name for your goal:

How much would you like to save?:

By what date should this goal be reached? (mm/dd/yyyy):

Describe this goal (Optional):

How would you like to save money?

☐ A specified amount each deposit.
☐ A percentage of each deposit.
☒ Manually add funds as desired.

Add Goal

- g. If either the first or second options are selected, input the desired amount in the text box that appears to the left of these options (labeled Amount if first option is selected or labeled Percentage if the second option is selected)
 - i. If the third option is selected, skip this step
- h. Once you are satisfied with the information you have given, select the “Add Goal” button located in the lower right hand section of the pop-up menu

Add a Goal ✕

Create a name for your goal:

How much would you like to save?:

By what date should this goal be reached? (mm/dd/yyyy):

Describe this goal (Optional):

How would you like to save money?

☐ A specified amount each deposit.
☐ A percentage of each deposit.
☒ Manually add funds as desired.

Add Goal

3. Manually Adding Funds to a Goal

- a. On the Goals page, find the goal you wish to add funds to

- b. In the text box located in the lower right hand section of the goal you wish to add funds to, input the dollar amount you wish to add to the goal

Commerce

Your Goals

Logout

Summary

Budget

Goals

Wallet

Profile

Help

Create and manage financial goals.

Add a Goal

Active Goals

Inactive Goals

Tester

Save \$150.00 by May 05, 2017

Save

Add Funds

Edit Goal

Angry Birds

Save \$10.00 by Mar 03, 2017

Save

Mobile addiction

Add Funds

Edit Goal

Chocolate

Save \$3.14 by May 05, 2019

You've saved \$16.00. (509% Complete.)

Yum

Add Funds

Edit Goal

Previous 1 2 3 4 Next

Desktop Mode

- c. Select the Add funds button that is located directly to the right of the text box

Commerce

Your Goals

Logout

Summary

Budget

Goals

Wallet

Profile

Help

Create and manage financial goals.

Add a Goal

Active Goals

Inactive Goals

Tester

Save \$150.00 by May 05, 2017

Add Funds

Edit Goal

Angry Birds

Save \$10.00 by Mar 03, 2017

Mobile addiction

Add Funds

Edit Goal

Chocolate

Save \$3.14 by May 05, 2019

You've saved \$16.00. (509% Complete.)

Yum

Add Funds

Edit Goal

Previous1234Next

Desktop Mode

4. Editing a Goal

- On the Goals page, find the goal you wish to edit
- In the lower right hand corner of the goal you wish to edit, select the “Edit Goal” button

Commerce
Your Goals
Logout

Summary
Create and manage financial goals.
Add a Goal

Active Goals
Inactive Goals

Tester
Save \$150.00 by May 05, 2017

Add Funds

Angry Birds
Save \$10.00 by Mar 03, 2017

Add Funds

Chocolate
Save \$3.14 by May 05, 2019

You've saved \$16.00. (509% Complete.)

Add Funds

Previous
1
2
3
4
Next

Desktop Mode

c. The goal box will change into this:

Goal Name:

Goal Amount:

Goal Date (mm/dd/yyyy):

Delete Goal
Description:
Save Changes

d. Input the information you wish to change into the text boxes that appear


Goal Name:

Goal Amount:

Goal Date (mm/dd/yyyy):

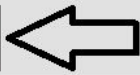
Delete Goal
Description:
Save Changes

e. Once you are satisfied with what you have changed, select the button in the lower right hand corner of the goal box labeled "Save Changes"

Goal Name: Tester	Goal Amount: \$150.00	Goal Date (mm/dd/yyyy): 5/5/2017
Delete Goal		Description: <input type="text"/>  Save Changes

5. Deleting a Goal

- On the Goals page, find the goal you wish to delete
- In the lower right hand corner of the goal you wish to edit, select the “Edit Goal” button
- Select the “Delete Goal” button located in the lower left hand corner of the goal box

Goal Name: Tester	Goal Amount: \$150.00	Goal Date (mm/dd/yyyy): 5/5/2017
 Delete Goal	Description: <input type="text"/>	Save Changes

- If you wish to continue to delete the goal select the “OK” button, if you do not wish to delete the goal select the “Cancel” button

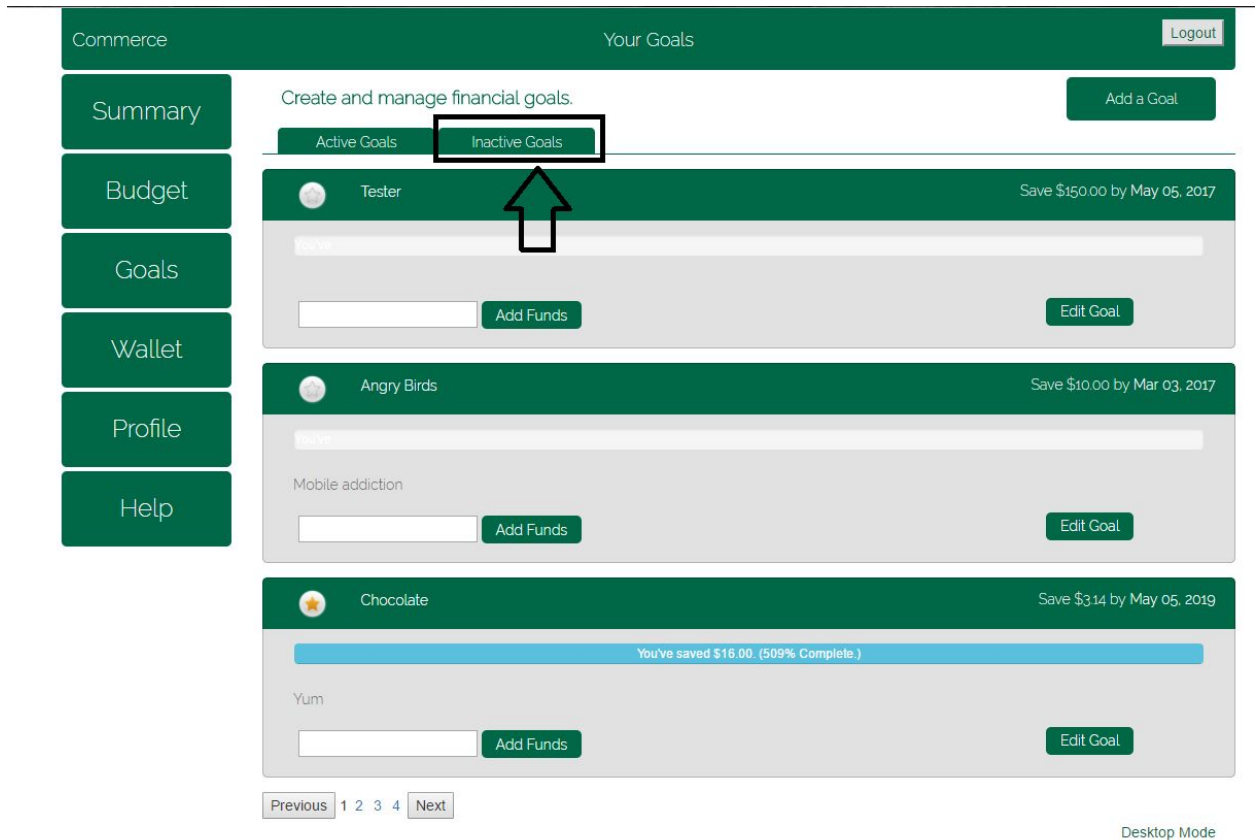
localhost:50692 says:

Are you sure you want to delete this goal?

OK Cancel

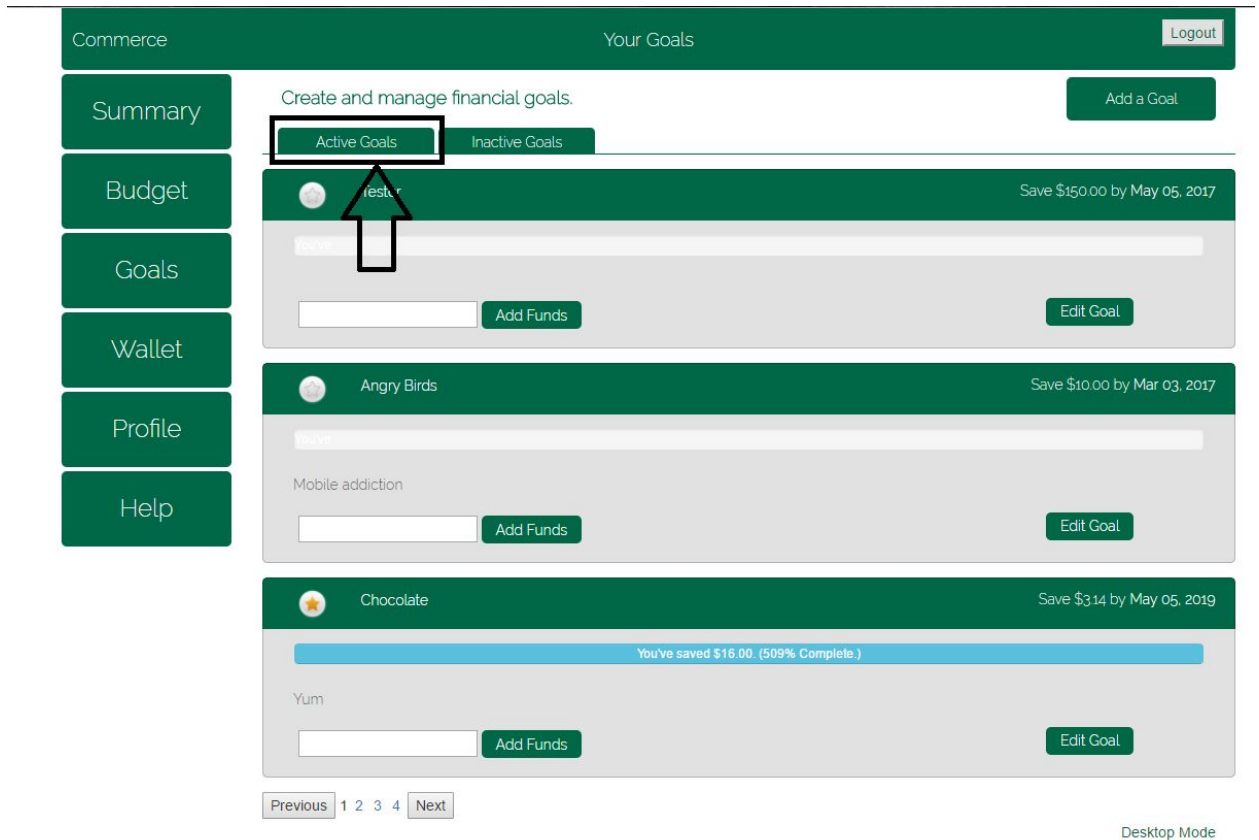
6. Finding Inactive Goals

- Goals that have either been completed or deleted will show up under the “Inactive Goals” tab
- On the Goals page, select the “Inactive Goals” tab located under the text line, “Create and manage financial goals.”



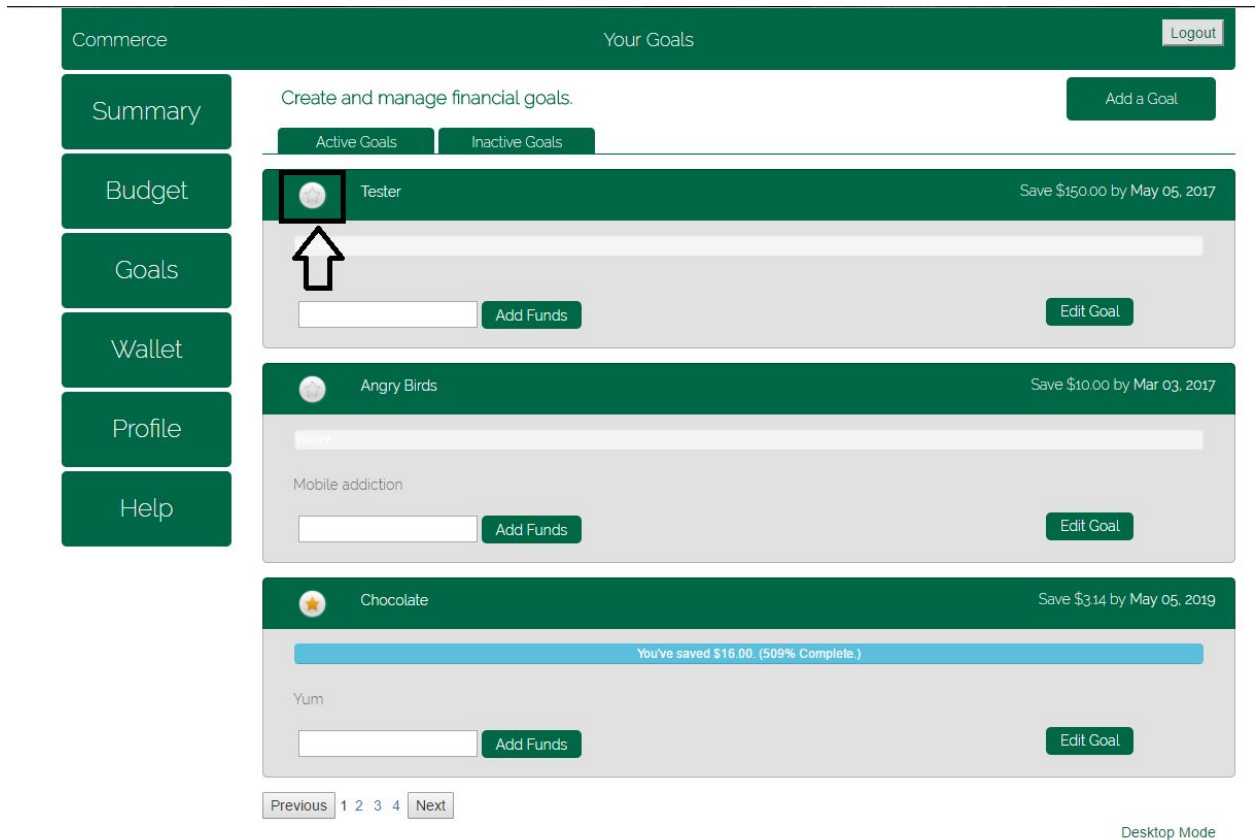
7. Finding Active Goals

- By default, when you select the “Goals” button on the left hand side of the screen, you will be taken to this tab
- On the Goals page, select the “Active Goals” tab located under the text line, “Create and manage financial goals.”



8. Making a Goal a “Favorite Goal”

- On the Goals page, find the goal you wish to “Favorite”
- In the upper left hand corner of the goal box you wish to “Favorite” select the round button

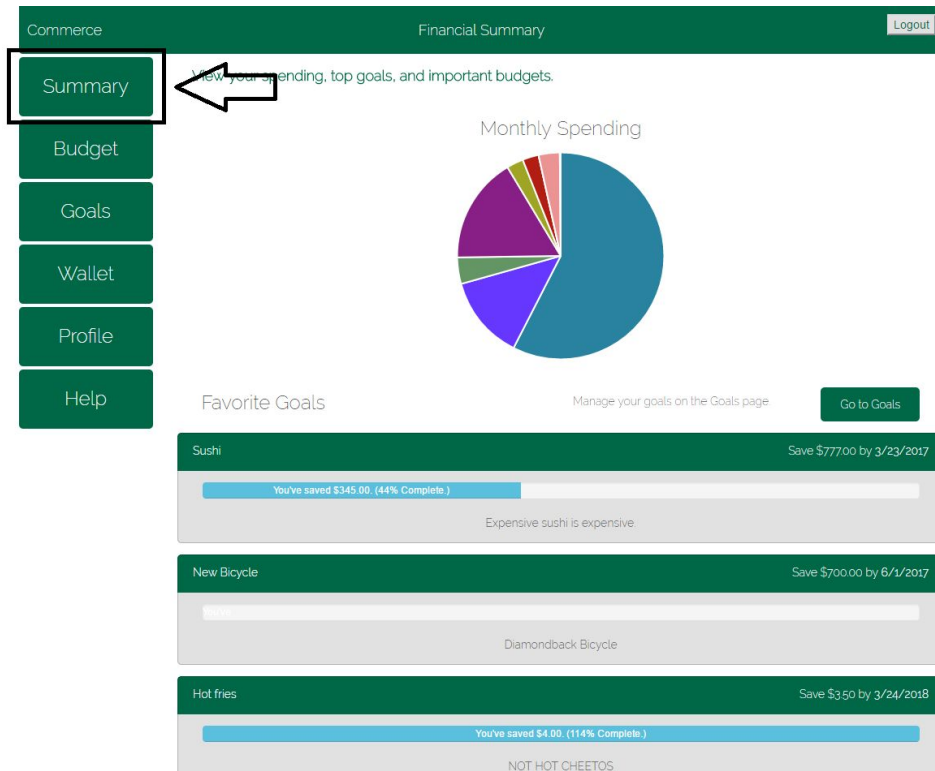


- c. A star will appear in the middle of the button showing that the goal has been “Favorited”
- d. Goals marked as “Favorite” will appear on the Summary page

Summary Page

1. Getting to the Summary Page

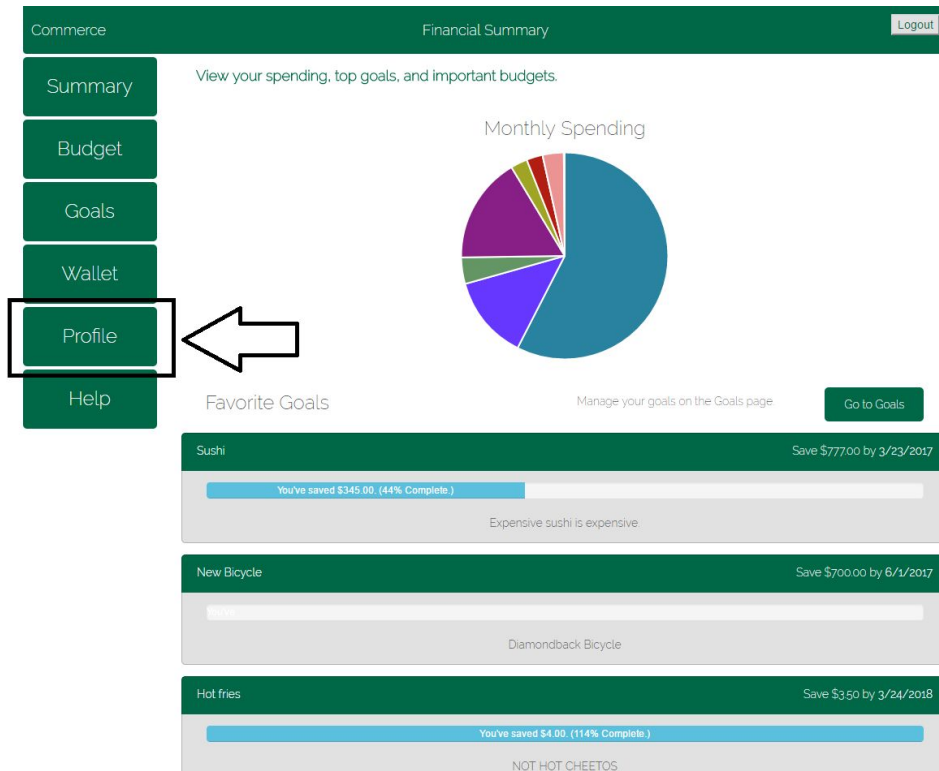
- a. By default, after you have logged in you will be redirected to the Summary page
- b. On the left hand side of the screen, select the button labeled “Summary”



Profile Page

1. Getting to the Profile Page

- On the left hand side of the screen, select the button labeled "Profile"



2. View Your User Profile

- On the Profile page, select the tab labeled "Profile" located under the text line, "View your profile and achievements."

Commerce Your Profile Logout

View your profile and achievements.

Profile Achievements Settings

Receive Goal Notifications: ☒


Receive Budget Notifications: ☐

Receive Notifications via Email: ☒

Receive Notifications via Text: ☐

Update

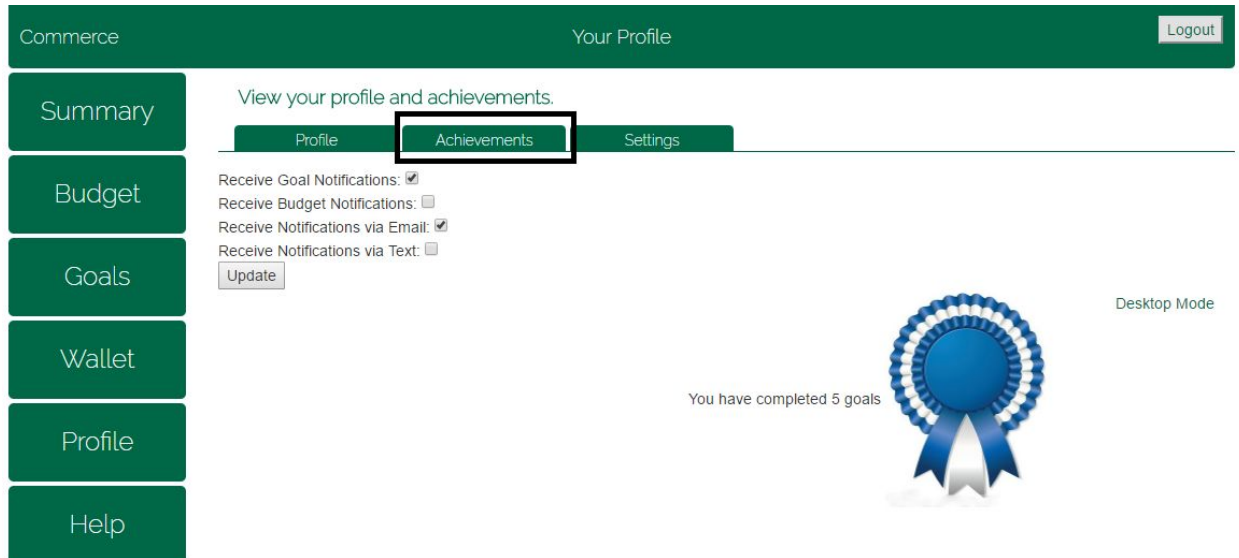
You have completed 5 goals



Desktop Mode

3. View Your Achievements

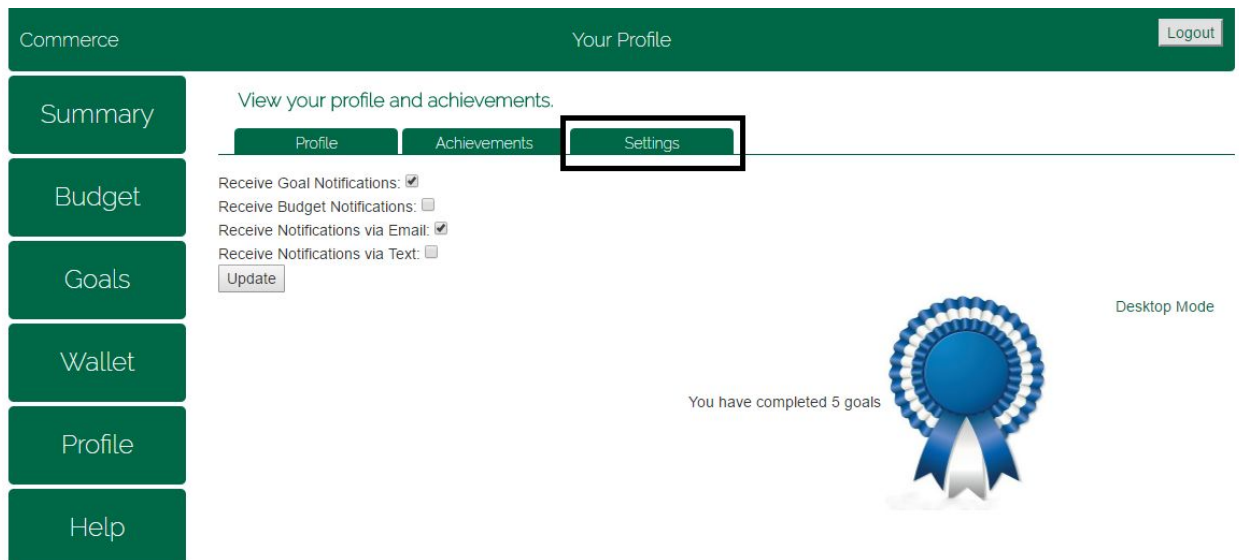
- a. On the Profile page, select the tab labeled “Achievements” located under the text line, “View your profile and achievements.”



The screenshot shows the 'Your Profile' page in a green-themed interface. The top navigation bar includes 'Commerce' and 'Your Profile' with a 'Logout' button. A sidebar on the left contains buttons for 'Summary', 'Budget', 'Goals', 'Wallet', 'Profile', and 'Help'. The main content area is titled 'View your profile and achievements.' and features three tabs: 'Profile', 'Achievements' (which is highlighted with a black border), and 'Settings'. Below the tabs, there are four notification settings: 'Receive Goal Notifications' (checked), 'Receive Budget Notifications' (unchecked), 'Receive Notifications via Email' (checked), and 'Receive Notifications via Text' (unchecked). An 'Update' button is located below these settings. On the right side of the main content area, there is a blue ribbon award icon and the text 'You have completed 5 goals'. The text 'Desktop Mode' is visible in the bottom right corner.

4. Opt-in or Opt-out of Notifications

- a. On the Profile page, select the tab labeled “Settings” located under the text line, “View your profile and achievements.”



This screenshot is identical to the one above, showing the 'Your Profile' page. However, the 'Settings' tab is now highlighted with a black border. The notification settings and the 'Update' button remain visible. The blue ribbon award icon and the text 'You have completed 5 goals' are also present. The text 'Desktop Mode' is visible in the bottom right corner.

- b. If you wish to receive notifications about goals, check the box to the right of the text that says “Receive Goal Notifications”
- c. If you wish to receive notifications about budgets, check the box to the right of the text that says “Receive Budget Notifications”

- d. If you wish to receive notifications via email, check the box to the right of the text that says “Receive Notifications via Email”
- e. If you wish to receive notifications via text, check the box to the right of the text that says “Receive Notifications via Text”

Commerce

Your Profile

Logout

Summary

Budget

Goals

Wallet

Profile

Help

View your profile and achievements.

Profile

Achievements

Settings

Receive Goal Notifications: ☒


Receive Budget Notifications: ☐

Receive Notifications via Email: ☒

Receive Notifications via Text: ☐

Update

You have completed 5 goals



Desktop Mode

- f. If you have checked or unchecked any of the above boxes, be sure to select the button labeled “Update” located below these checkboxes before you navigate away from this page

Commerce

Your Profile

Logout

Summary

Budget

Goals

Wallet

Profile

Help

View your profile and achievements.

Profile

Achievements

Settings

Receive Goal Notifications: ☒


Receive Budget Notifications: ☐

Receive Notifications via Email: ☒

Receive Notifications via Text: ☐

Update

You have completed 5 goals



Desktop Mode

Help Page

1. Getting to the Help Page

- On the left hand side of the screen, select the button labeled “Help”

