Web Budgeting Application

User Guide

Team 3

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Contents

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.
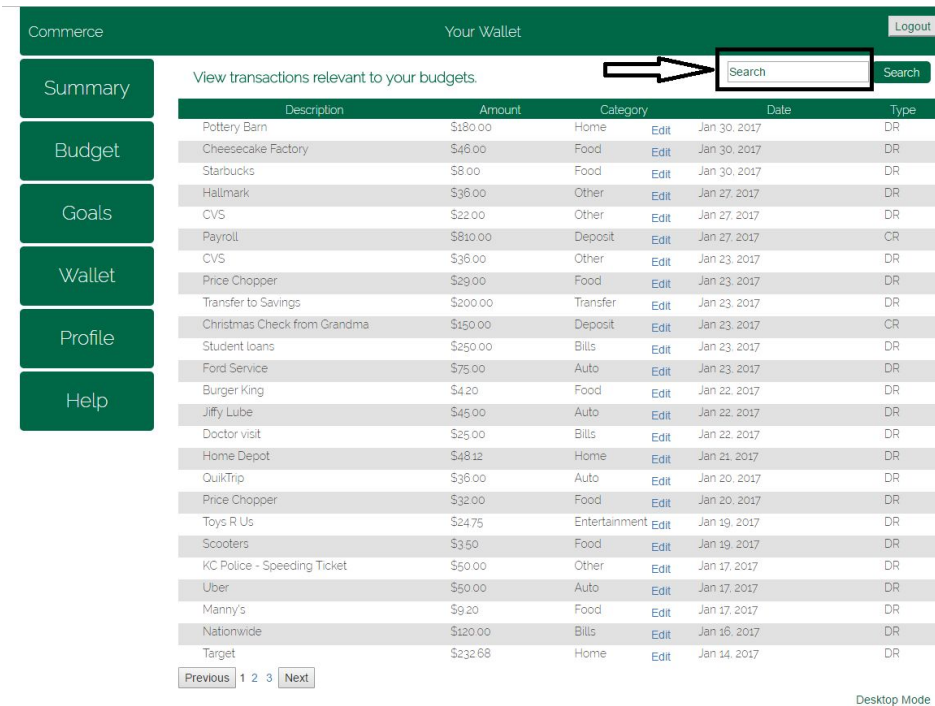
Using the Application

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
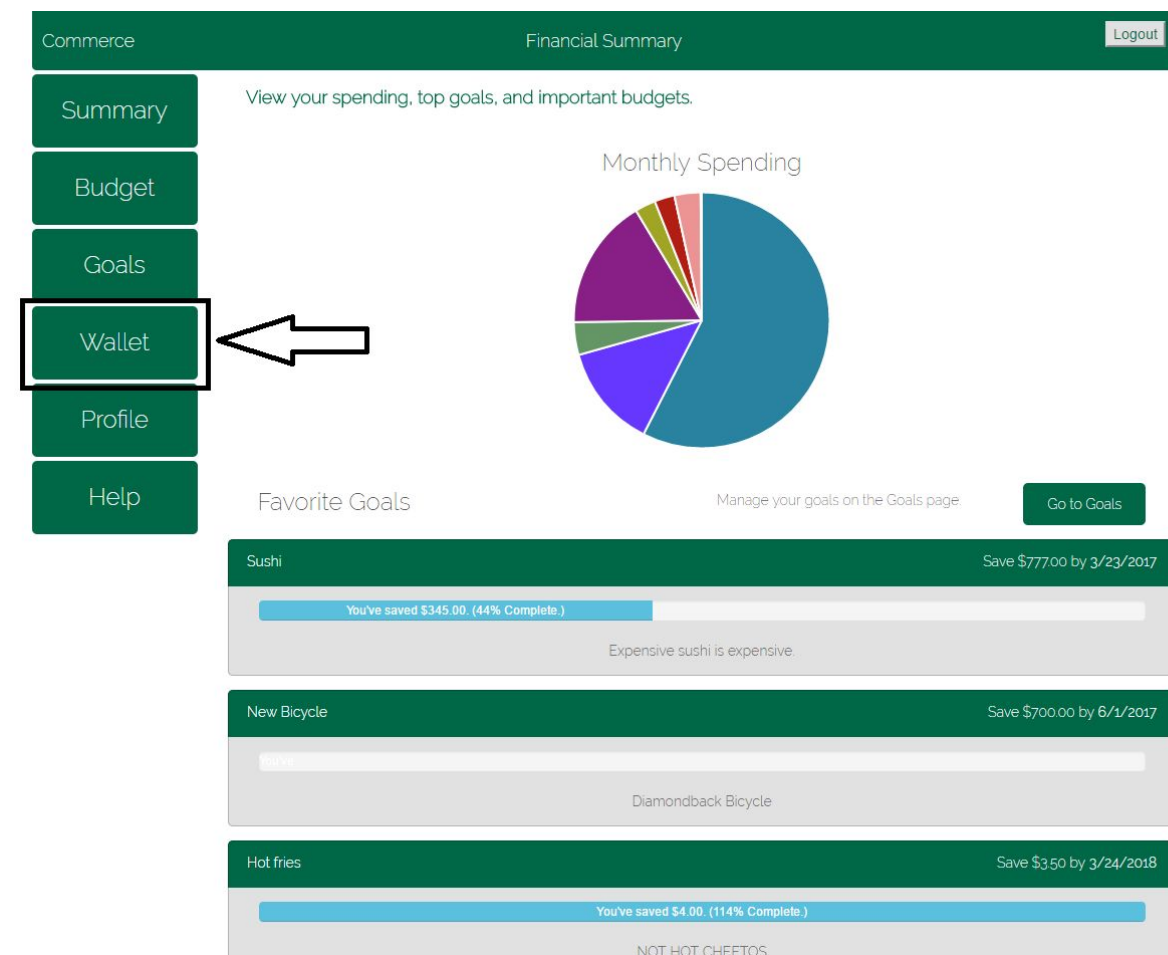
2. Searching for Specific Transactions

    a. On the Wallet page, select the text box labeled "Search"

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

    c. Select the button labeled "Search" to the right of the text box

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)

Pottery Barn	$180.00	Home	**Edit**	Jan 30, 2017	DR
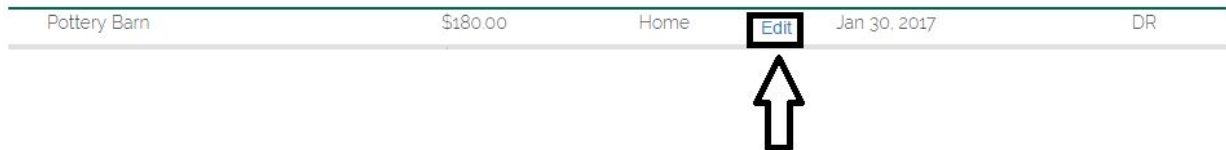
c. Input information you wish to change
d. Select the button labeled "Done" in the lower right hand corner of the pop-up

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
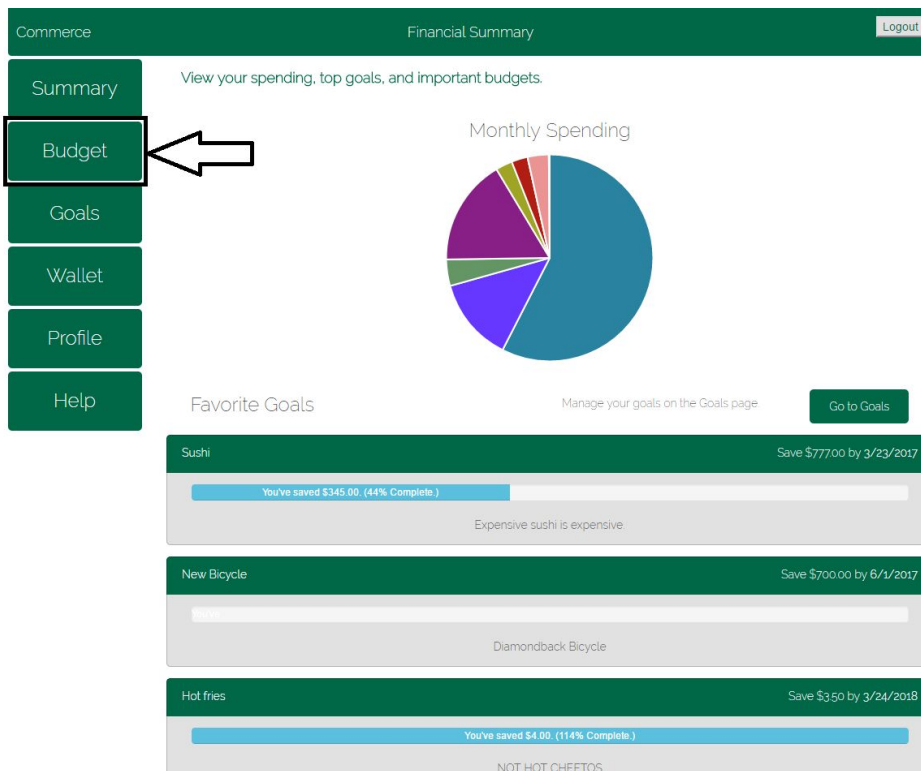
2. Adding a Budget
   a. On the Budget page, select the button labeled "Add Budget" located in the top right hand corner of the screen underneath the top bar
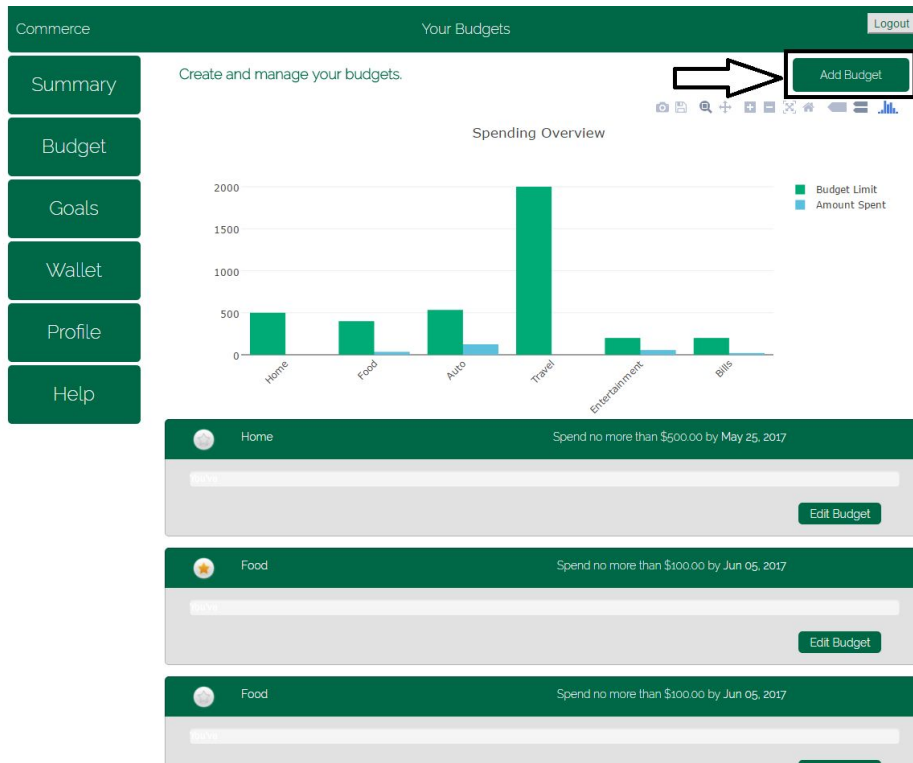
b. Select a category for the budget
c. Select the account you wish the budget to be linked to
d. Input the amount you wish the budget to be
e. Input the date you wish the budget to start using the format MM/DD/YYYY
f. Input the date you wish the budget to end using the format MM/DD/YYYY
g. Once you are satisfied with the information you input for the budget, select the button labeled "Add Budget" located at the bottom of the pop-up window

3. Editing a Budget

    a. On the Budget page, find the budget you wish to edit

    b. Select the button labeled "Edit Budget" located in the lower right hand corner of the budget box you wish to edit
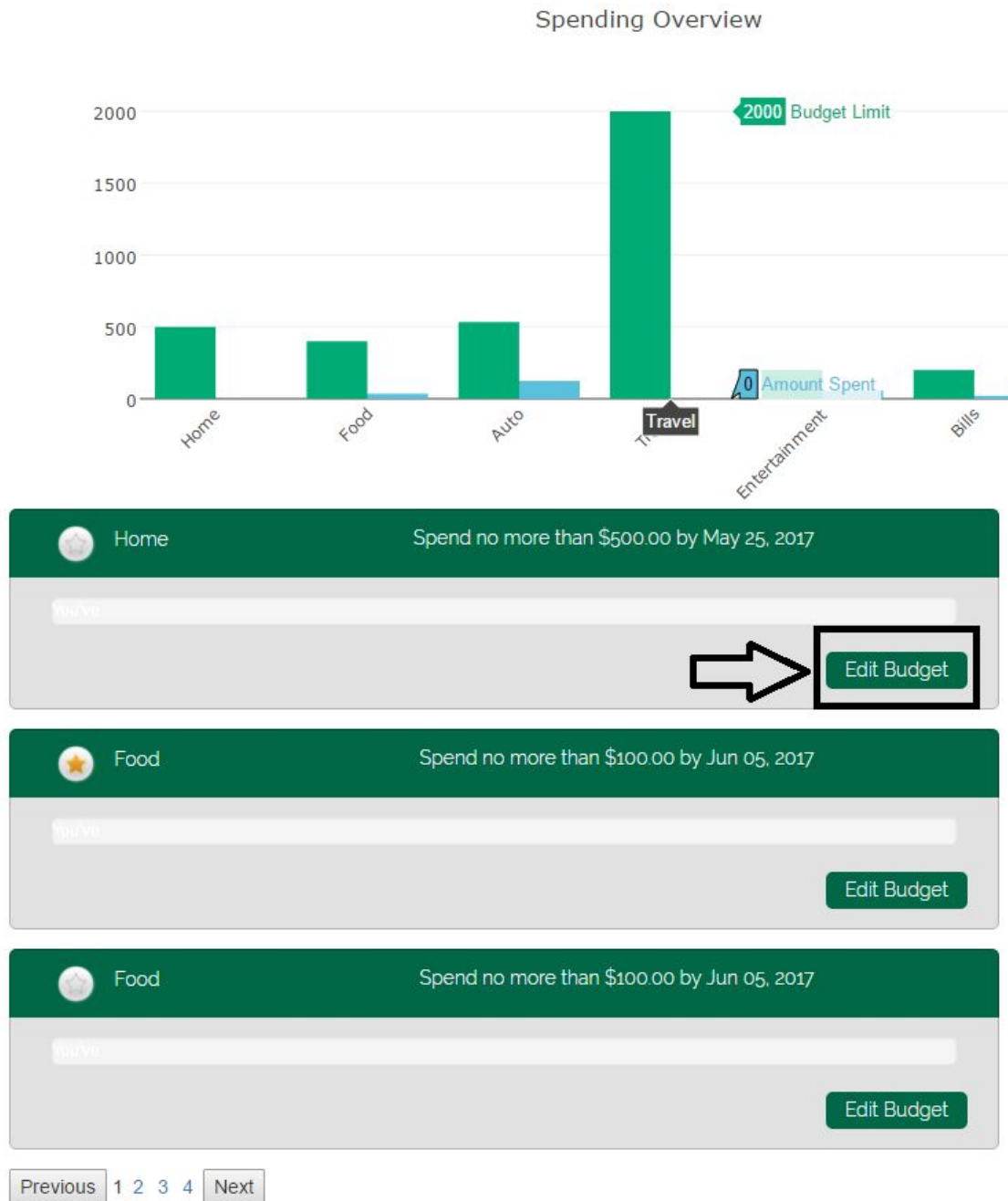

    c. Input the information you wish to change about the budget

    d. Select the button labeled "Done" in the lower part of the pop-up window

4. Removing a Budget
    a. On the budget page, find the budget you wish to remove
    b. Select the button labeled "Edit Budget" located in the lower right hand corner of the budget box you wish to remove
    c. Select the button labeled "Remove Budget"

5. Marking a Budget as a "Favorite Budget"
    a. On the budget page, find the budget you wish to mark as a "Favorite"
    b. Select the round button in the upper left hand corner of the budget box you wish to mark as a "Favorite"
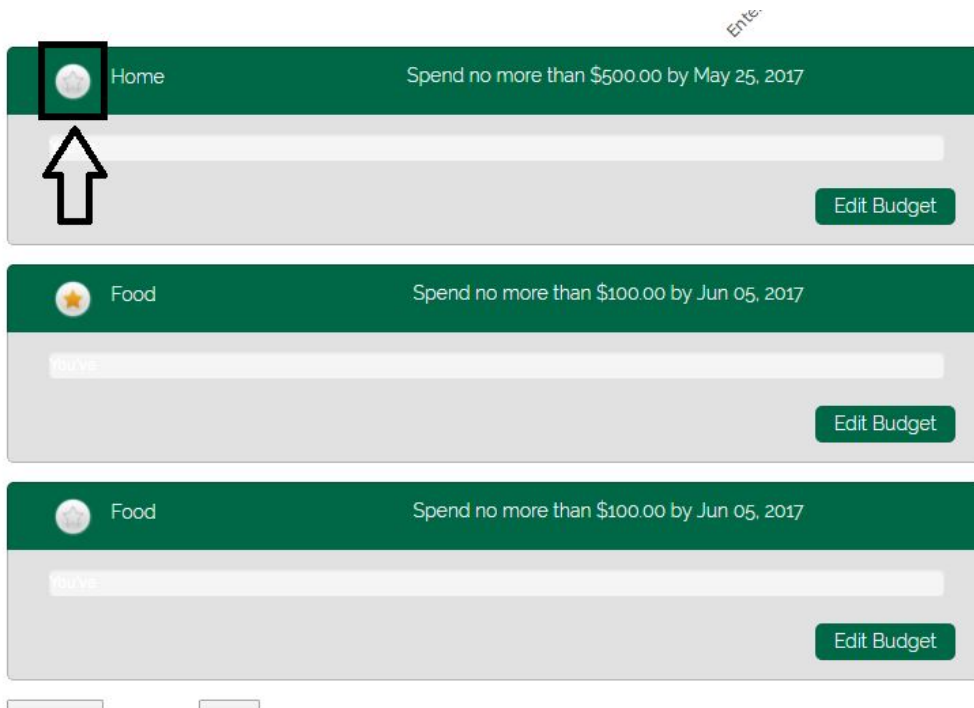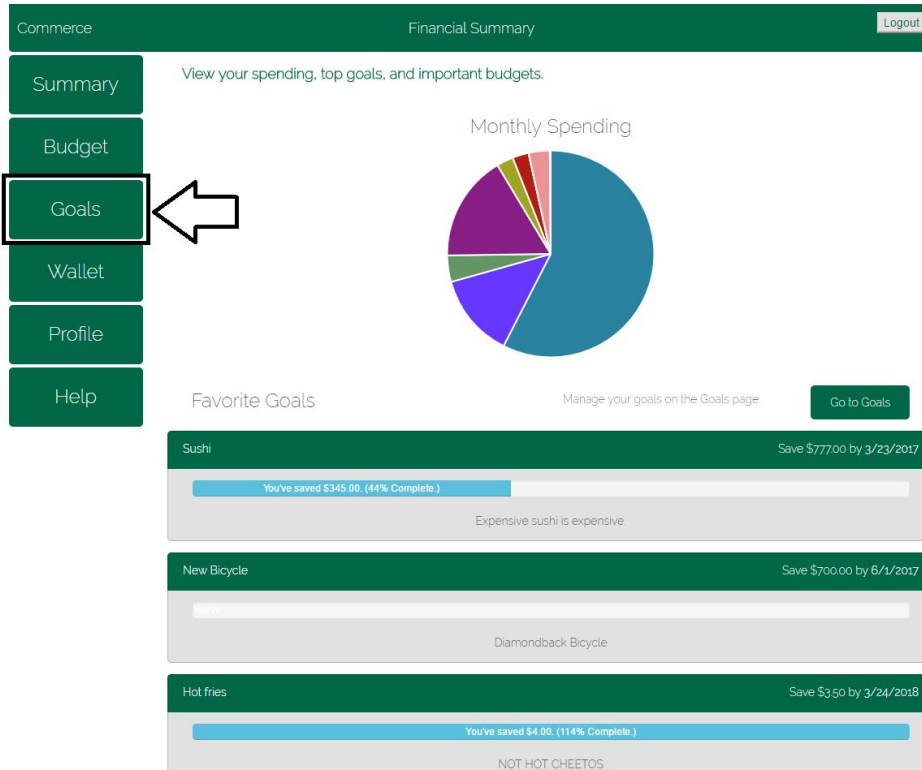

    c. Once selected, the a star will appear in the middle of the button showing that the budget has been made into a "Favorite Budget"
    d. Budgets marked as "Favorite" will appear on the Summary page

Goals Page

1. ## Getting to the Goals page
   a. Once logged into your Commerce Bank account, select the button labeled "Goals" on the left hand side of the screen

2. ## Adding a Goal
   a. On the Goals page, select the button labeled "Add a Goal" in the upper right hand portion of the screen

b. Input a name for your goal

c. Input the amount of money the goal requires to be saved in order to be completed

d. Input the date which you wish the goal to be accomplished in the format MM/DD/YYYY

e. (Optional) Input a description of the goal

f. Select how you wish money to be allocated towards your goal

   i. First option: "A specified amount each deposit."

      1. 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.

  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.

  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.

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

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

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

| Commerce | Your Goals | Logout |

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

4. Editing a Goal
   a. On the Goals page, find the goal you wish to edit
   b. In the lower right hand corner of the goal you wish to edit, select the "Edit Goal" button

c. The goal box will change into this:

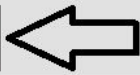d. Input the information you wish to change into the text boxes that appear

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"

5. Deleting a Goal
   a. On the Goals page, find the goal you wish to delete
   b. In the lower right hand corner of the goal you wish to edit, select the "Edit Goal" button
   c. Select the "Delete Goal" button located in the lower left hand corner of the goal box

   d. 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
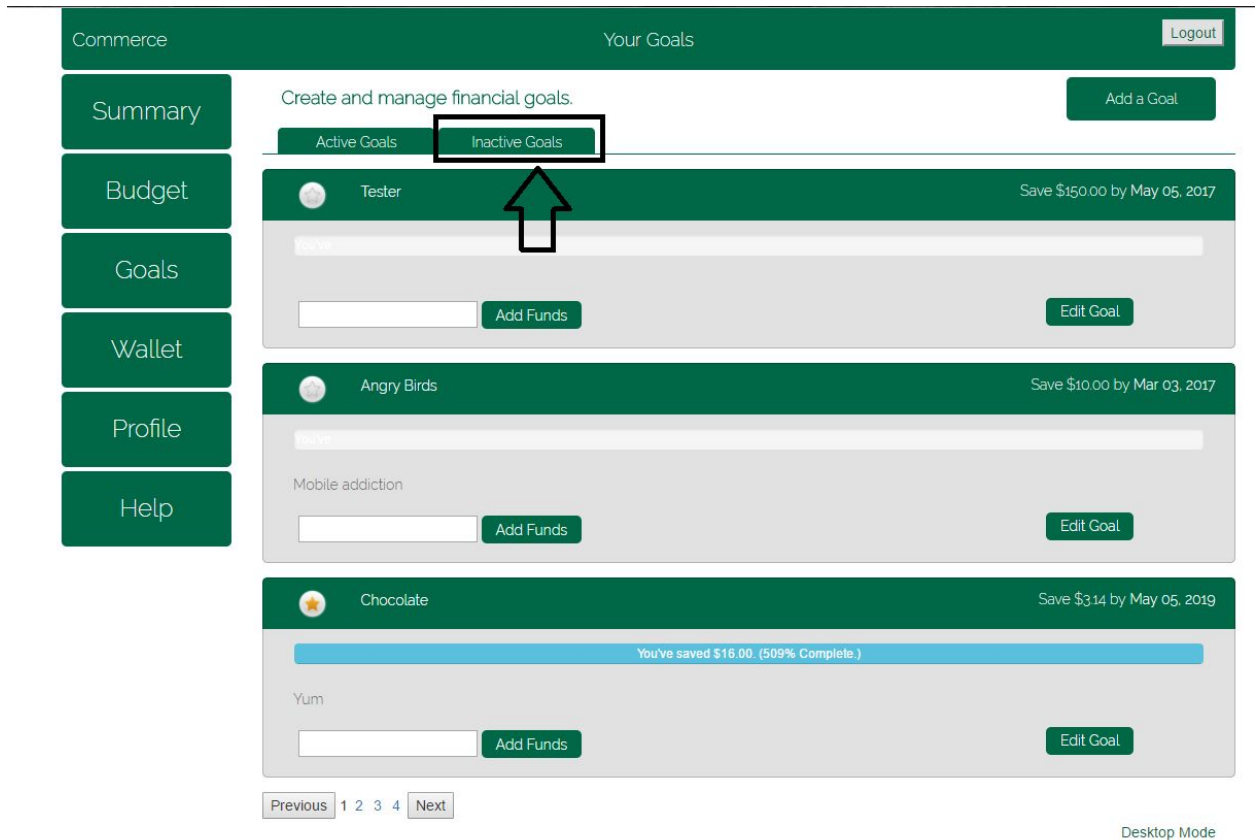

6. Finding Inactive Goals
   a. Goals that have either been completed or deleted will show up under the "Inactive Goals" tab
   b. On the Goals page, select the "Inactive Goals" tab located under the text line, "Create and manage financial goals."

7. Finding Active Goals

a. By default, when you select the "Goals" button on the left hand side of the screen, you will be taken to this tab

b. On the Goals page, select the "Active Goals" tab located under the text line, "Create and manage financial goals."
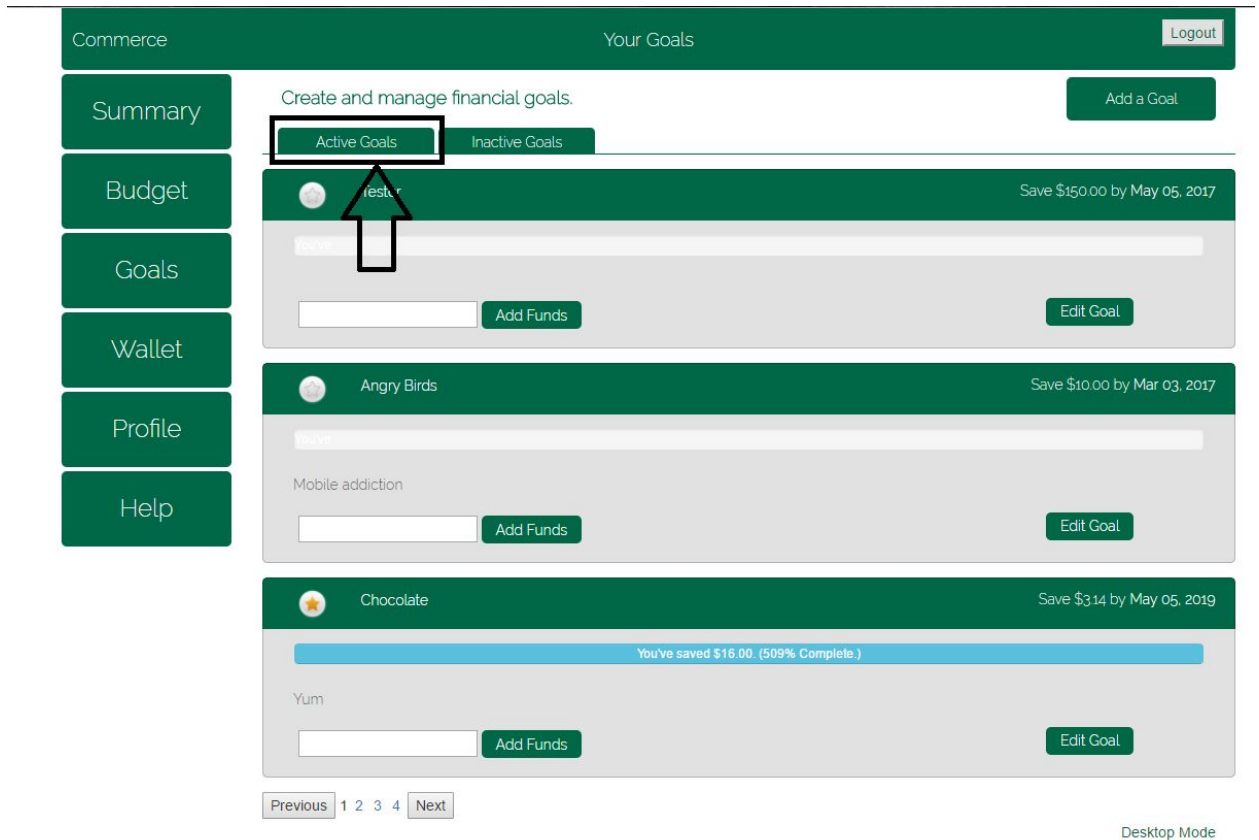
8. Making a Goal a "Favorite Goal"

    a. On the Goals page, find the goal you wish to "Favorite"

   b. In the upper left hand corner of the goal box you wish to "Favorite" select the round button
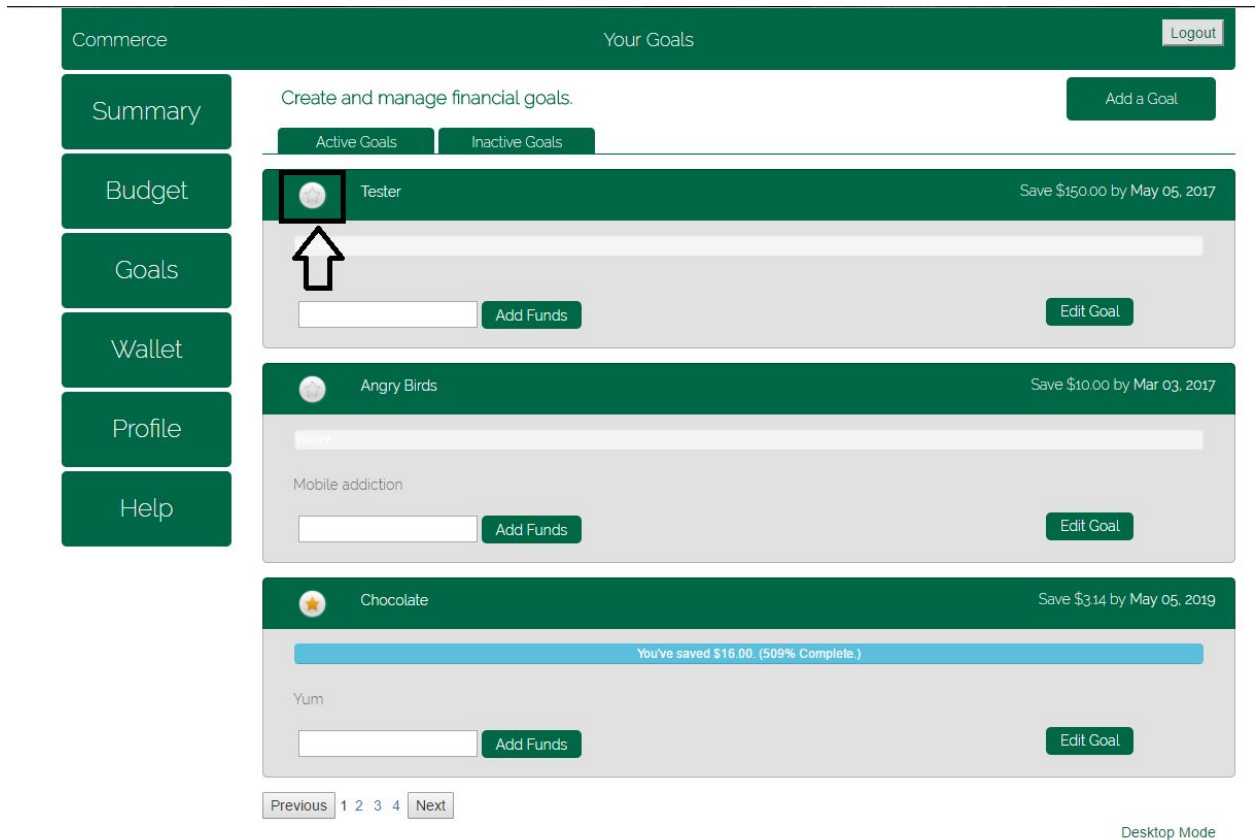
    c. A star will appear in the middle of the button showing that the goal has been "Favorited"

    d. Goals marked as "Favorite" will appear on the Summary page

Summary Page
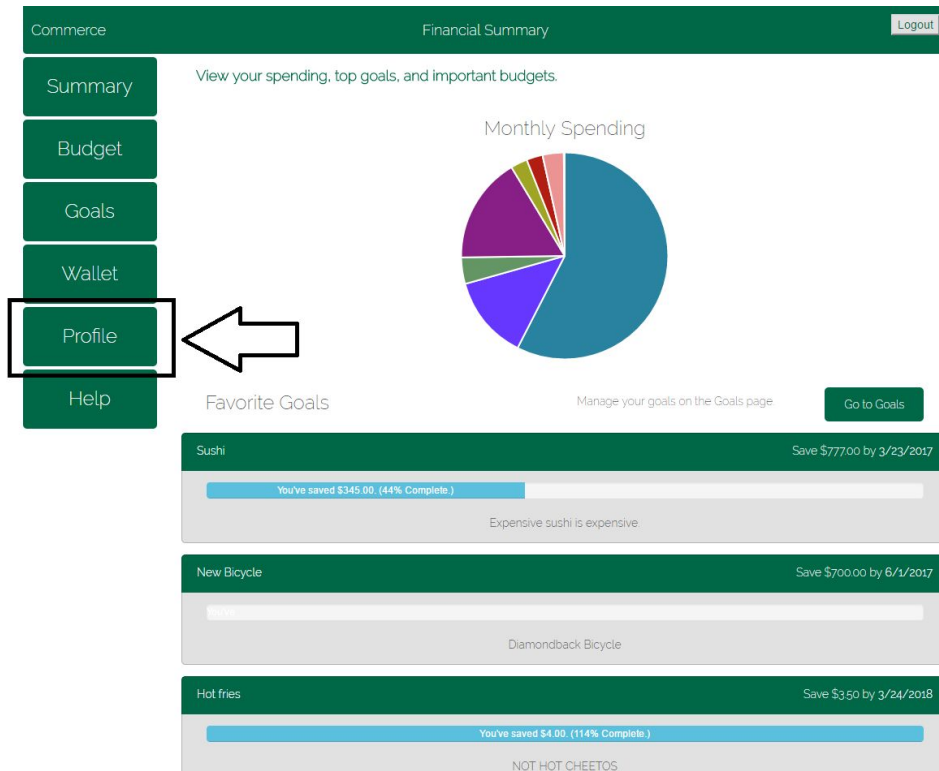
1. Getting to the Summary Page
   a. By default, after you have logged in you will be redirected to the Summary page
   b. On the left hand side of the screen, select the button labeled "Summary"
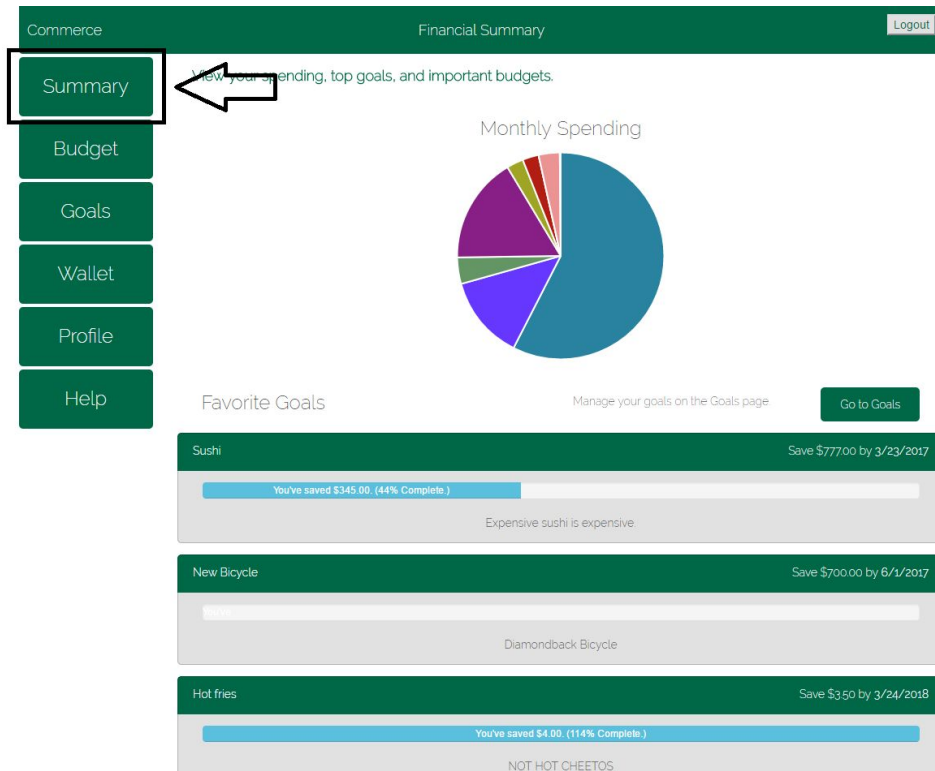
Profile Page

1. Getting to the Profile Page
   a. On the left hand side of the screen, select the button labeled "Profile"

2. View Your User Profile

    a. On the Profile page, select the tab labeled "Profile" located under the text line, "View your profile and achievements."
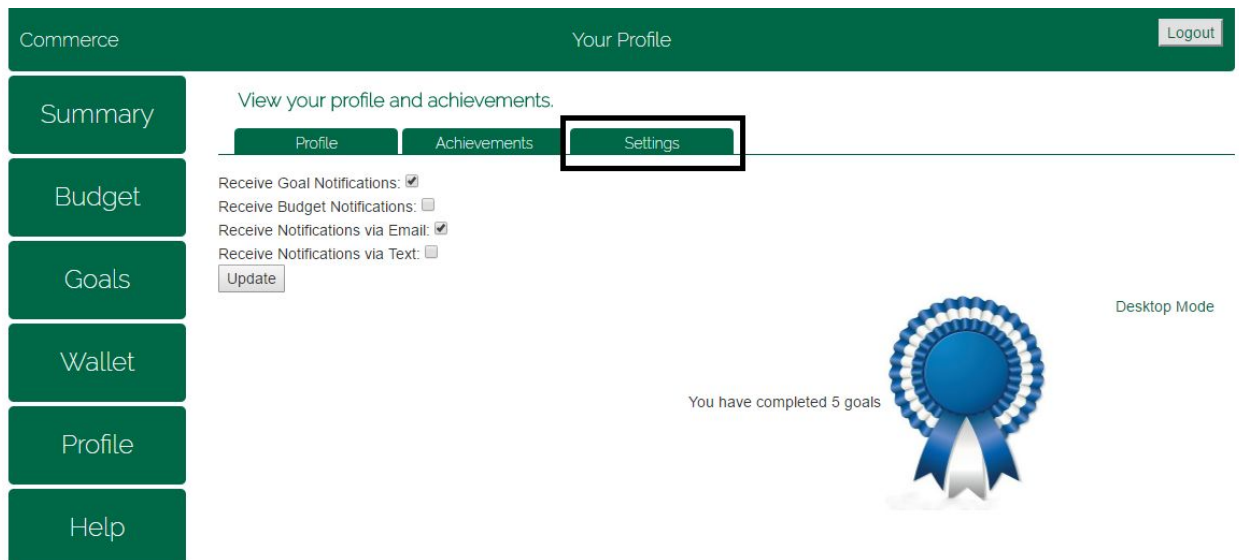
3. View Your Achievements

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

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."

  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"

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

Help Page

1. Getting to the Help Page
    a. On the left hand side of the screen, select the button labeled "Help"