User Manual for Personal Finance Tracker

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1 Introduction

This website is intended as a personal finance tracker that lets users visualise and track their spending habits, giving them information to better their finacial wellbeing. It is intended for users on an individual level, wether you are a student or a CEO, this website can help you with your personal financial affairs!

2 Getting Started

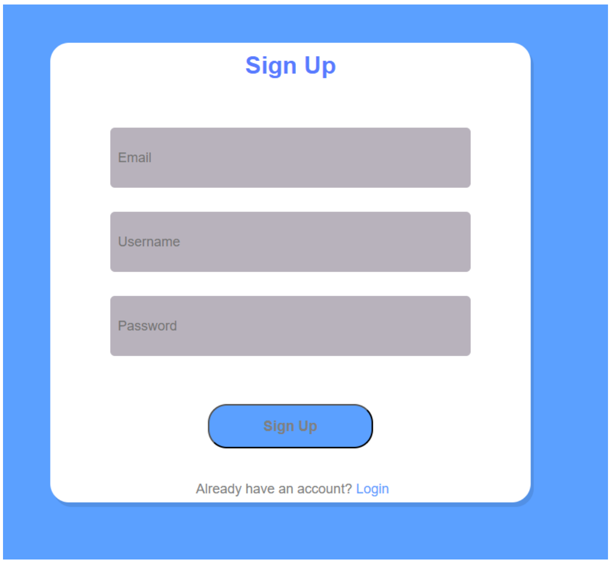
2.1 System Requirements

Personal finance tracker works best in Google Chrome, Mozilla Firefox, and Microsoft Edge (latest versions).

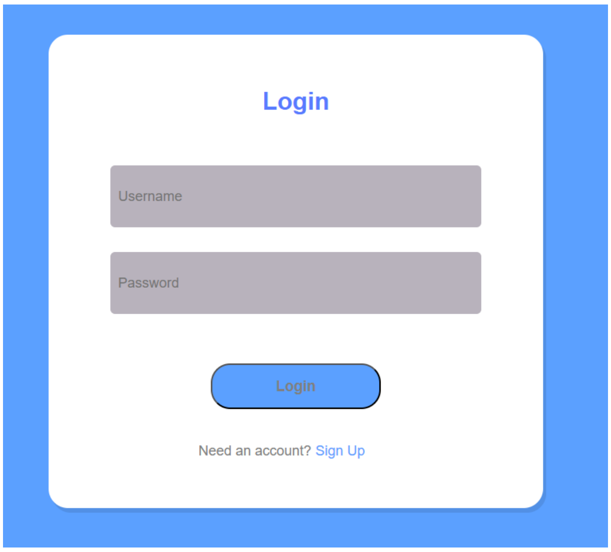
2.2 Account Setup

Upon loading the application you will be directed to the Signup Tab. Simply enter:

- An Email
- A Username
- A Password



If you already have an account, select the login link and login with your details.

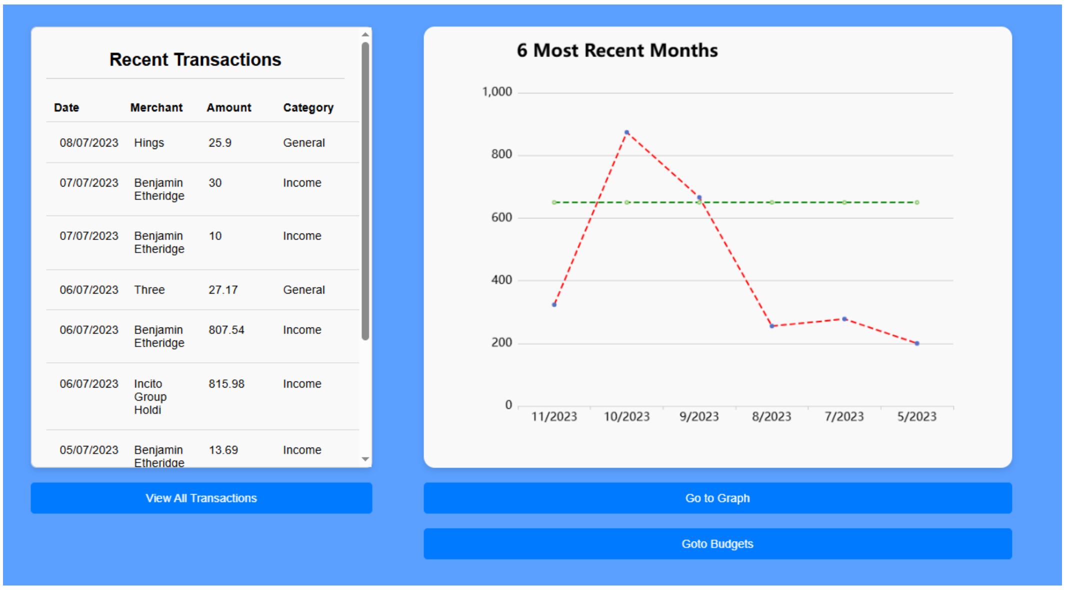


3 Navigating the Website

3.1 Homepage Overview

Upon signing up or logging in, you will be directed to the Mainpage, this contains:

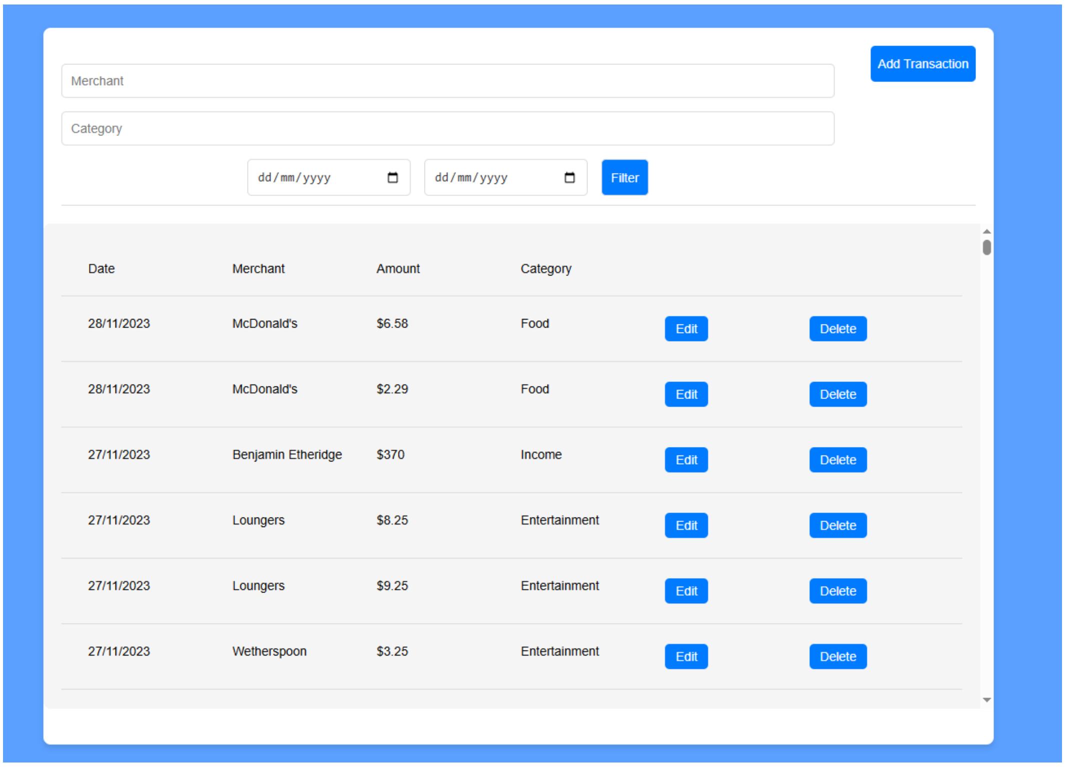
- Your recent transactions
- A recent transaction overview graph
- Button links to other pages



3.2 Transaction Page Overview

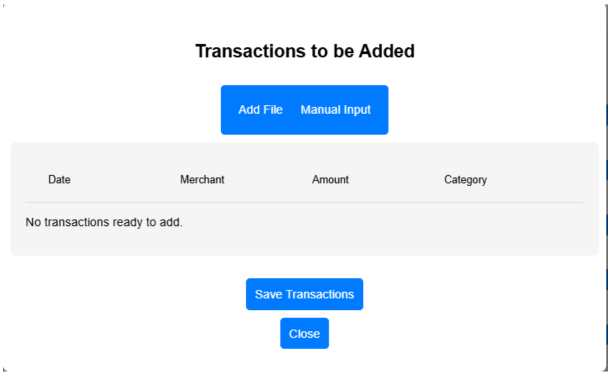
The Transaction Page lets the user:

- View all transactions
- Filter transactions based on Merchant name, category and a date range.
- Add new transactions
- Edit or delete current transactions

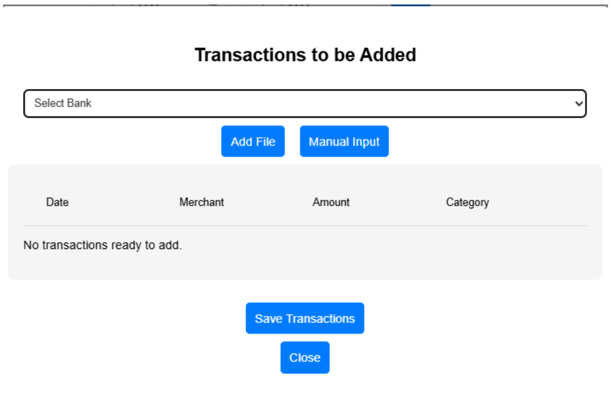


3.2.1 Adding a Transaction

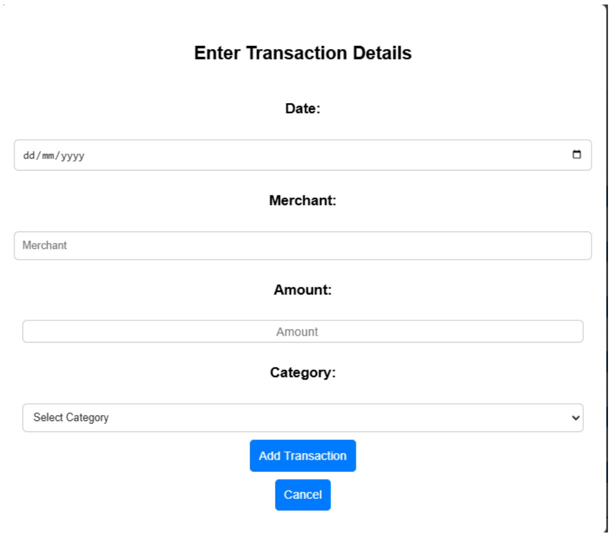
Upon clicking add transactions, a pop up modal will appear. Here Users can add a CSV file type bank statement or manually add a transaction.



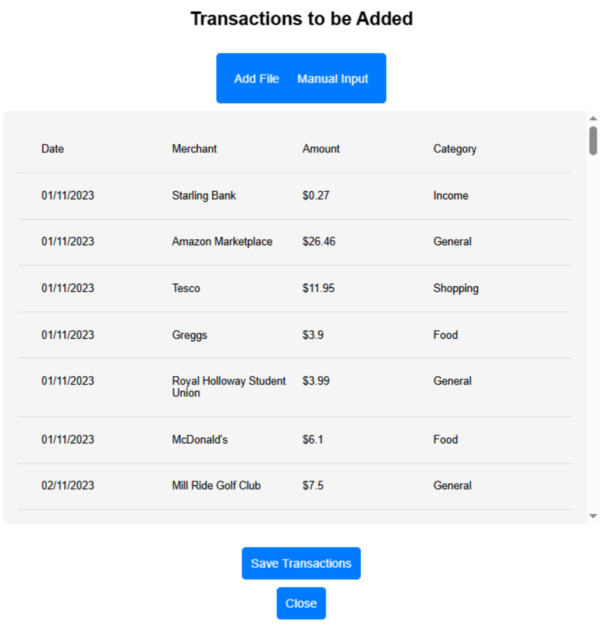
Select the correct bank from the drop down box of supported banks.



Enter details of your transaction



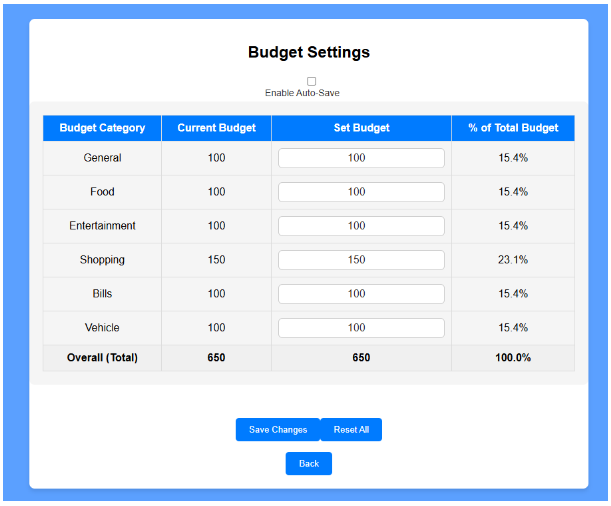
You can then view your transactions to be added before commiting to saving them onto your account.



Date	Merchant	Amount	Category
01/11/2023	Starling Bank	$0.27	Income
01/11/2023	Amazon Marketplace	$26.46	General
01/11/2023	Tesco	$11.95	Shopping
01/11/2023	Greggs	$3.9	Food
01/11/2023	Royal Holloway Student Union	$3.99	General
01/11/2023	McDonald's	$6.1	Food
02/11/2023	Mill Ride Golf Club	$7.5	General

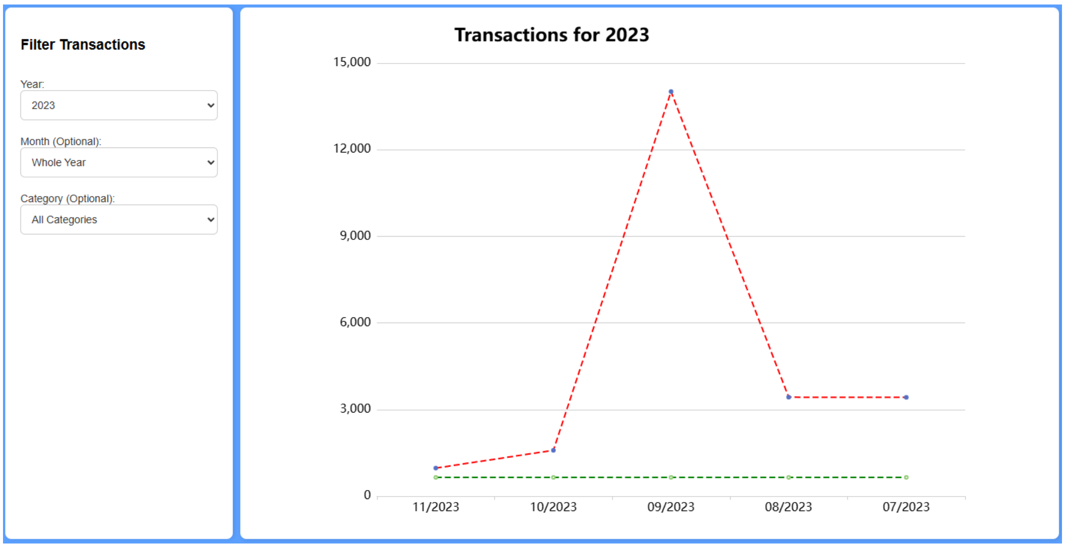
3.3 Budget Page Overview

Here users can set monthly budgets for each category option. A total monthly budget will then be calculated and applied to graphs.



3.4 Graph Page Overview

Here the user can see a detailed graph that can adapt based on selected user filters. Users can adjust the drop down boxes in the filter bar to change what they see on the graph.



4 Troubleshooting

4.1 Common Issues

4.1.1 No graph showing with new account

For the overview graph to show and for the main graphs to show anything meaningful, it is recommended that users enter at least a years worth of transaction history.

4.1.2 Sign Up Not Allowed

If an account with a matching Username or Email is found, it will not allow signup. Please use a different Username or Email.