

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 financial wellbeing. It is intended for users on an individual level, whether 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



Sign Up

Email

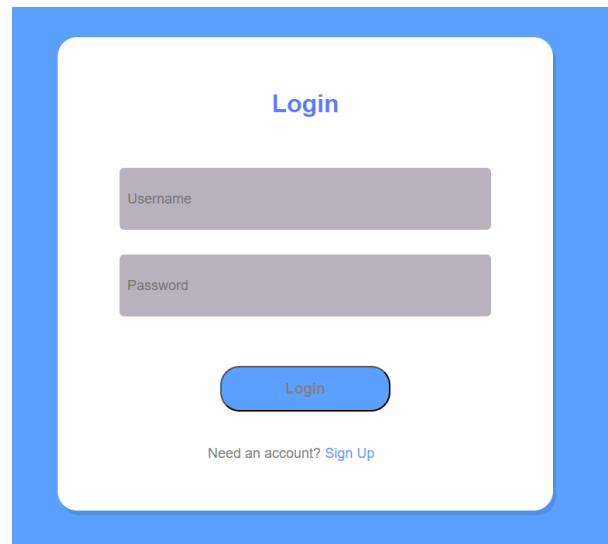
Username

Password

Sign Up

Already have an account? [Login](#)

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



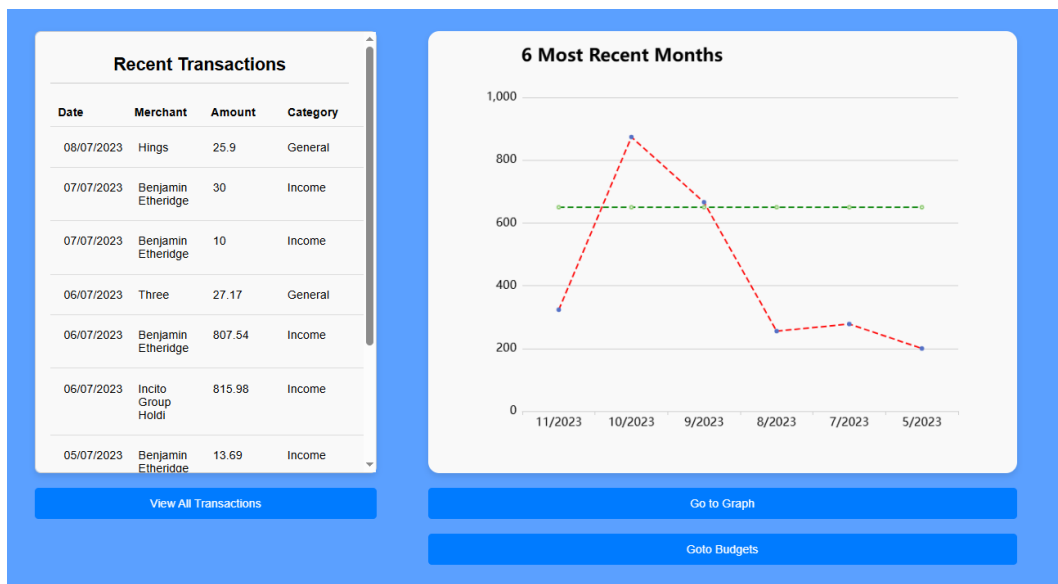
The image shows a login form centered on a white background, enclosed within a blue rectangular border. At the top of the form, the word "Login" is displayed in blue text. Below this, there are two input fields: the first is labeled "Username" and the second is labeled "Password". Both fields are represented by light gray rectangular boxes. Underneath the password field is a blue button with rounded corners and a black outline, containing the word "Login" in white text. At the bottom of the form, the text "Need an account? [Sign Up](#)" is displayed, where "Sign Up" is a blue hyperlink.

3 Navigating the Website

3.1 Homepage Overview

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

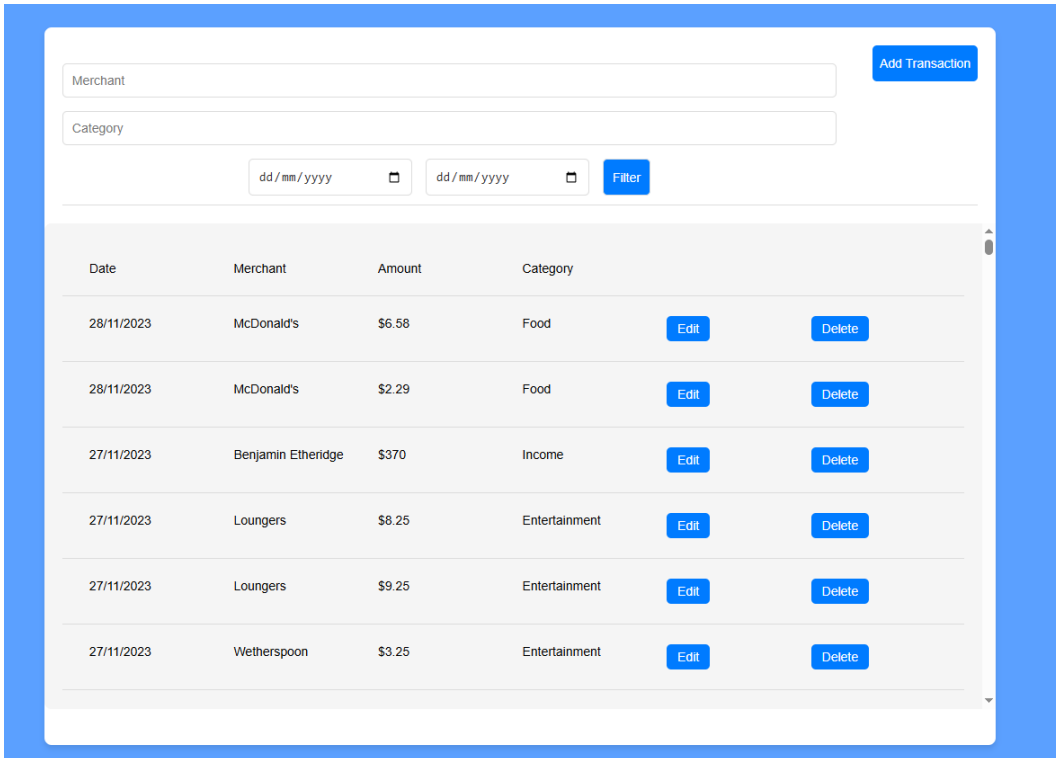
- Your recent transactions
- A recent transaction overview graph
- Button links to other pages



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



The screenshot displays the Transaction Page interface. At the top, there is a form with two input fields: "Merchant" and "Category". To the right of the "Merchant" field is a blue button labeled "Add Transaction". Below the "Category" field, there are two date pickers showing "dd/mm/yyyy" and a blue button labeled "Filter". Below the form is a table with the following columns: "Date", "Merchant", "Amount", "Category", "Edit", and "Delete". The table contains six rows of transaction data.

Date	Merchant	Amount	Category	Edit	Delete
28/11/2023	McDonald's	\$6.58	Food	Edit	Delete
28/11/2023	McDonald's	\$2.29	Food	Edit	Delete
27/11/2023	Benjamin Etheridge	\$370	Income	Edit	Delete
27/11/2023	Loungers	\$8.25	Entertainment	Edit	Delete
27/11/2023	Loungers	\$9.25	Entertainment	Edit	Delete
27/11/2023	Wetherspoon	\$3.25	Entertainment	Edit	Delete

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.

Transactions to be Added

Add File

Manual Input

Date	Merchant	Amount	Category
No transactions ready to add.			

Save Transactions

Close

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

Transactions to be Added

Select Bank

Add File

Manual Input

Date	Merchant	Amount	Category
No transactions ready to add.			

Save Transactions

Close

Enter details of your transaction

Enter Transaction Details

Date:

dd/mm/yyyy

Merchant:

Merchant

Amount:

Amount

Category:

Select Category

Add Transaction

Cancel

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

Transactions to be Added

Add FileManual Input

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

Save Transactions

Close

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.

Budget Settings

☐ Enable Auto-Save

Budget Category	Current Budget	Set Budget	% of Total Budget
General	100	<input type="text" value="100"/>	15.4%
Food	100	<input type="text" value="100"/>	15.4%
Entertainment	100	<input type="text" value="100"/>	15.4%
Shopping	150	<input type="text" value="150"/>	23.1%
Bills	100	<input type="text" value="100"/>	15.4%
Vehicle	100	<input type="text" value="100"/>	15.4%
Overall (Total)	650	650	100.0%

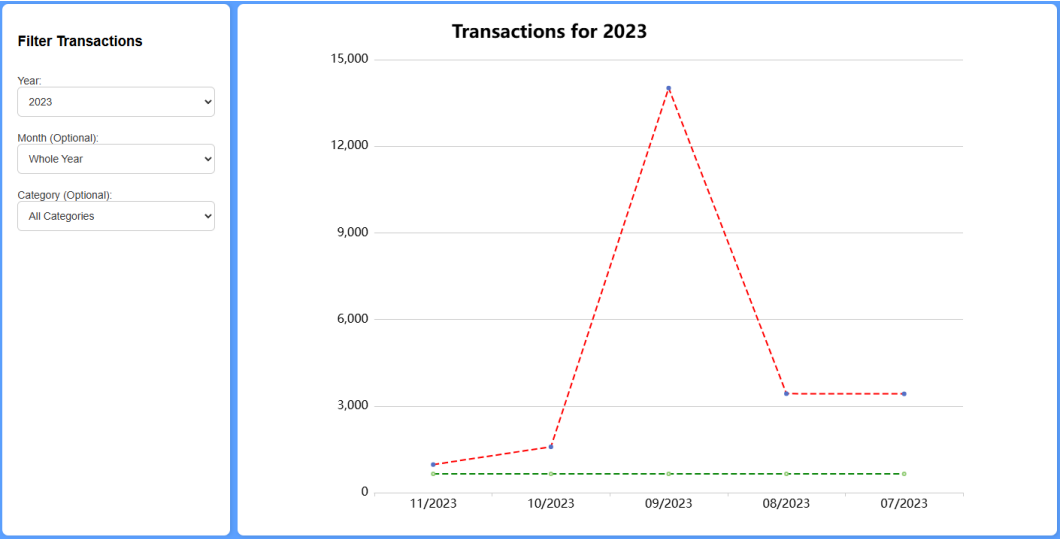
Save Changes

Reset All

Back

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.