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Budget Buddy Documentation

INTRODUCTION

This application assist in tracking one's budget through tracking daily transactions. We live in a generation where people, especially youth, spend large amounts of their time on smartphone and cellular devices. Therefore, akin to the recent trend that is occurring in the market, the smartphone is beginning to do everything for the consumer and has a vital purpose beyond sole communication.

There is currently an epidemic in this country of monetary irresponsibility. Our economy has evolved into a fast, quick-transfer economy in which people make charges on their credit cards, and thereby lose a perception and fail to grasp their aggregate spending until they view the bill at the end of month. This phenomena may be used to describe the overabundance and specter of debt currently encasing the nation and spreading to other countries as well. Our application seeks to combat this problem. Users are able to easily log each transaction, inflows and outflows, thereby always being able to track his/her spending at any given moment in time. In addition, our graphs/analytics allows the users to quickly see in what category (i.e. entertainment, food, etc.) he may be spending too large of a portion of his budget and therefore readjust. In addition, Budget Buddy allows one to take a picture of the receipt for each purchase logged, therefore allowing a user to review the exact items purchased if necessary. Hence, Budget Buddy seeks to develop greater individual financial responsibility.

COMPATABILITY

This application is an iOS app that is compatible with any edition of the iPhone from the iPhone 4s to the iPhone 6 Plus. Note that it is not compatible with the iPad nor any non-Apple media device, such as, but not limited to, Android devices, Blackberry devices. Windows Phone, HTC devices, Samsung devices, and Motorola devices.

INSTALLATION

Note that the said application is an iPhone app. Since this application is not yet on the iTunes store, to use this application one requires a Mac to compile and build the program and source files (via Xcode). To run the application, one may utilize the iOS Simulator or deploying it directly on a device by plugging in an iPhone device of any generation from the iPhone 4s to the iPhone 6 Plus. [Note then, on the device, after all the necessary files have been downloaded, the application may be run on the iPhone without any external connections to the computer].

USER MANUAL

Note use of the device consists of essentially two features, a log and a summary. The log essentially serves to record and edit all transactions made, whether they be inflows or outflows. The summary allows one to select a particular month and view summary data, such as total inflows and outflows, net inflow, and a pie chart depicting the percentage of spending in each of the spending categories (Entertainment, Food, Clothing, Pharmacy, Household, Travel, and Miscellaneous). We give more detailed information on features and usage.

1. *Initialization*
   Upon opening the app, there is a blue splash screen with the words "Budget Buddy" that appears while the application is loading. The user will initially find themselves on the "log" screen, recording all purchases. Note on the bottom of the screen, there are icons for "Log" and "Summary." Pressing between these two allows the user to toggle between the "Log and Summary" views.

2. *Log Screen – Adding New Log*
   On the log screen/page, press the plus sign in the upper right hand corner. This will take the user to an "Add Receipt" page. First, the user should toggle the bar (blue indicates chosen) to indicate whether the transaction was an inflow our outflow. If the user clicks "Add New Image" they may take a picture via the camera (and crop) or choose to extract an image from the photo library. Note that the application automatically attempts to extract the total amount from the receipt (i.e. requires a receipt with a dollar sign preceding the total amount) and populate the field. If it is not able to extract a valid total, then the "Amount" field will be left blank. Anyway, the amount field is modifiable by the user. For the "Payee" field, the user types in the merchant or patron. Note that the "Payee" automatically tries to autocomplete with existing payees in the log. In addition, the user may select spending category, payment methods, and date of purchase via pickers. Also, if the user uses an autocompleted Payee, then the picker automatically moves to the category most related to the store, i.e. based on previous purchases. Press "Done" in the top right to save the purchase and include it in the log. To cancel the entry, press "Cancel" in the top left corner.

3. *Log Screen – Modifying and View Existing Logs*
   To delete a log entry, press "Edit" in the top left of the screen. Press the red icon next to an entry to delete it from the log. Press "Done" when you are done deleting. To actually edit an existing entry, click on an entry in the log. You will be directed to a "View Detail" page that has all the stored information about the log entry. To modify this information, press "Edit" in the top right corner to be redirected to an "Edit Receipt" page identical to the "Add Receipt" page in the previous page. Press "Done" to save the edited information. To cancel, press "Cancel."

4. *Summary Screen*
   This allows the user to view summary analytics about their spending over periods of time. The initial screen will show a list of months. Select (click) one of these and you will be redirected to a page titled with the month name and year selected. In it is aggregate spending data: total inflow, total outflow, and net. If the net is positive, it will in green text, indicating a profit and good fiscal judgment. Otherwise, if it is negative, it will be in red text. In addition, there is a pie chart depicting the portion of

spending in each of categories. As always, press "Back" to go back to the original summary page.

CONCLUSION

This concludes the documentation for our Application Budget Buddy. Any further questions may be sent via e-mail to the creators of the application, whose contact information is below.

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