# Eva-Omabudjetti

**Eva Omabudjetti** is a budgeting application which allows users to:

- Create budget(s)
- Add expenses and incomes to budget
  - Monthly, selected months, one time only
- Edit expenses and incomes
- Delete expenses and incomes
- Change budget name
- Delete the budget
- See current +23 months to the future
- See past months
- See reports made from data

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# Initializing the budget

Every time user creates new budget they go through guided path. Idea is to help users to realize all expenses and incomes what they have. If user opens already created budget, they don't have to take this path. Terms and conditions are asked and approved only first time opening the budget.
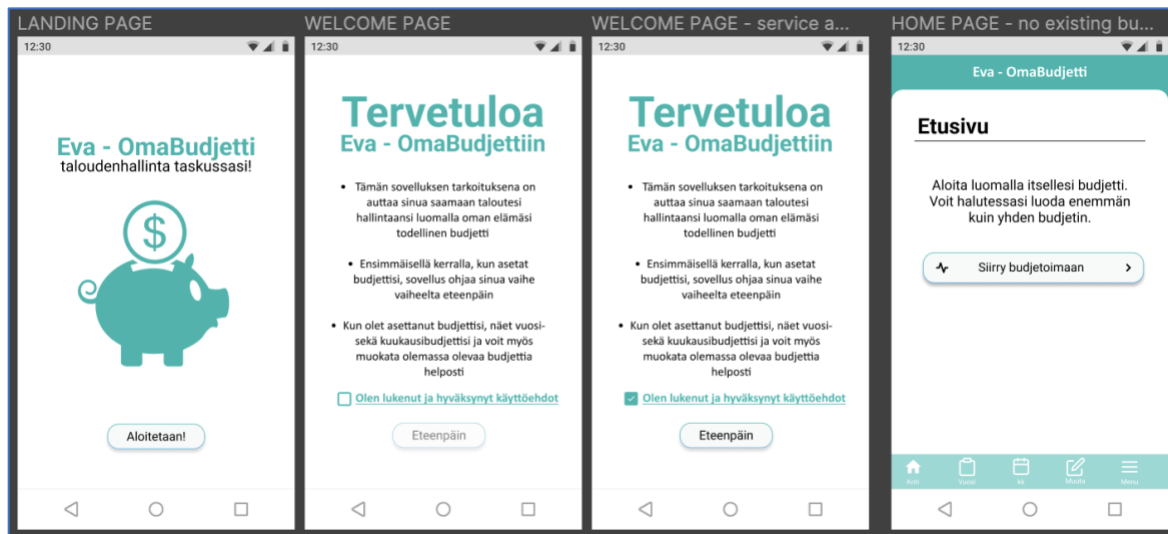


*Figure 1. First views for the customer.*

## Adding expenses

When moving to "siirry budjetoimaan" the application tells user to first add their expenses. Expenses are based on ready-made categories (appendix 1). There is also task flow for adding events (appendix 2).
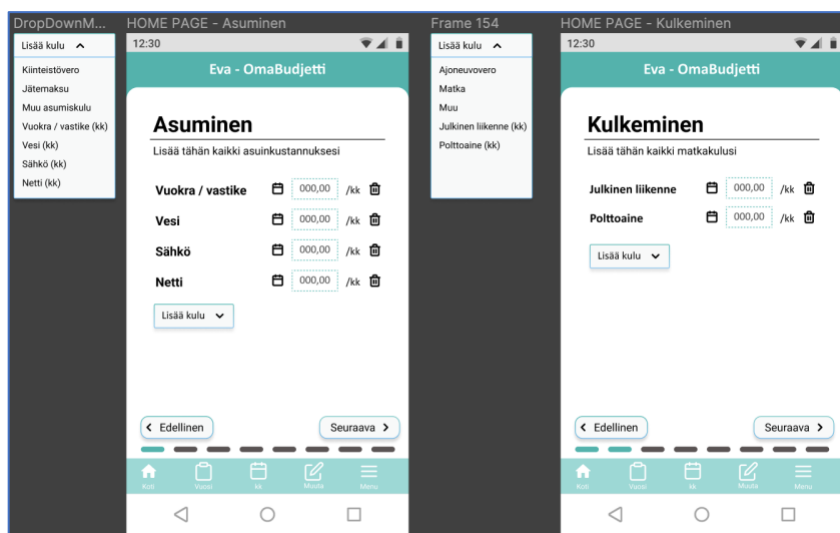


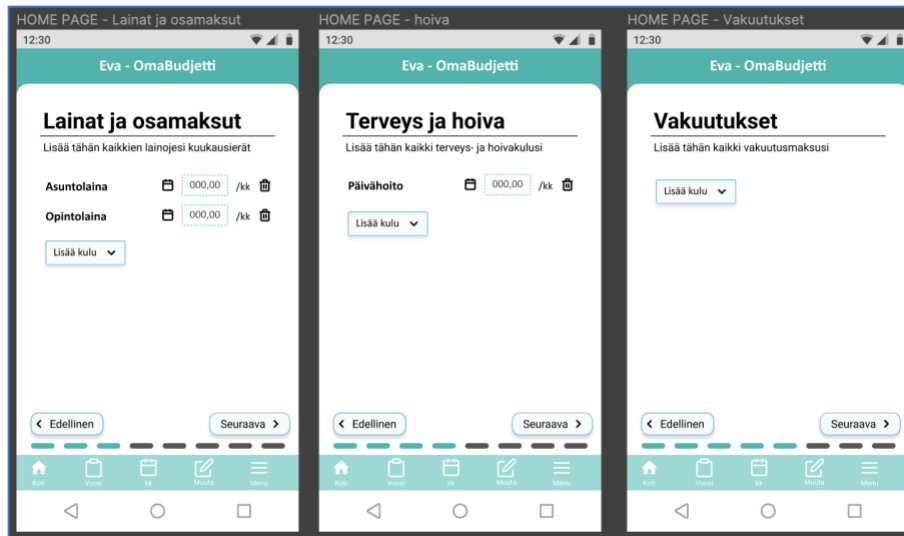*Figure 2. Initialization path: adding expenses 1/3.*
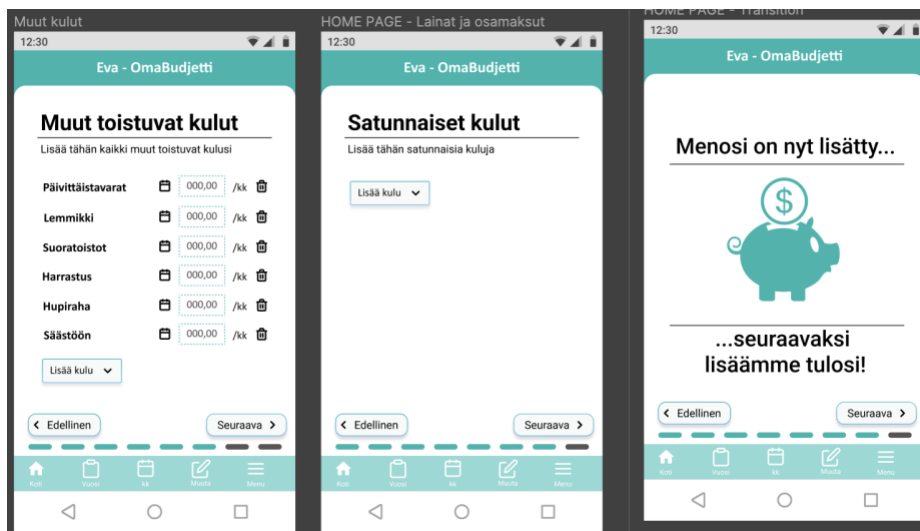
*Figure 3. Initialization path: adding expenses 2/3.*



*Figure 4. Initialization path: adding expenses 3/3.*

## Custom expenses

Some expenses are defined to happen every month, like rent and so on. But as we know, we all have expenses that do not happen every month. Like for example vehicle tax, insurance fees or electricity. User has to be able to add custom appearances for expenses like happens every other month, happens twice a year and so on. There is a task flow about adding custom expenses during the initialization (appendix 2).
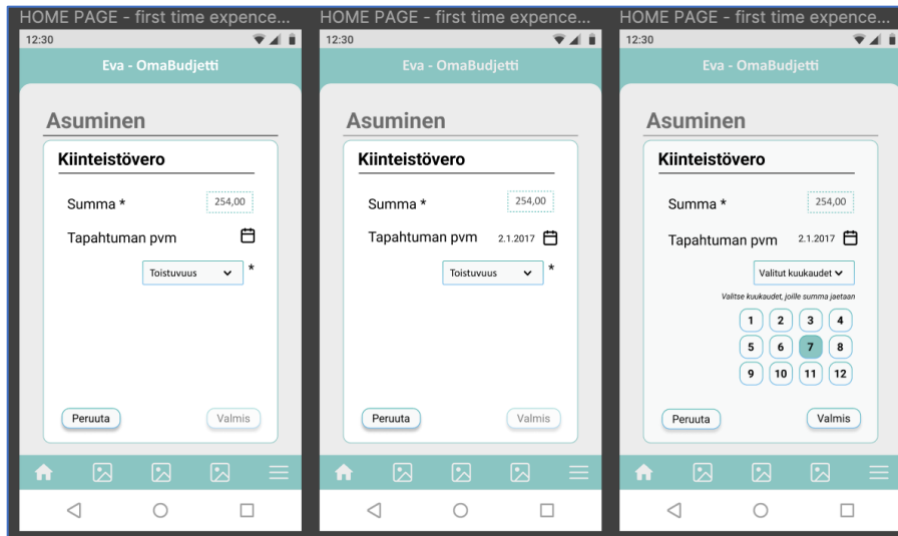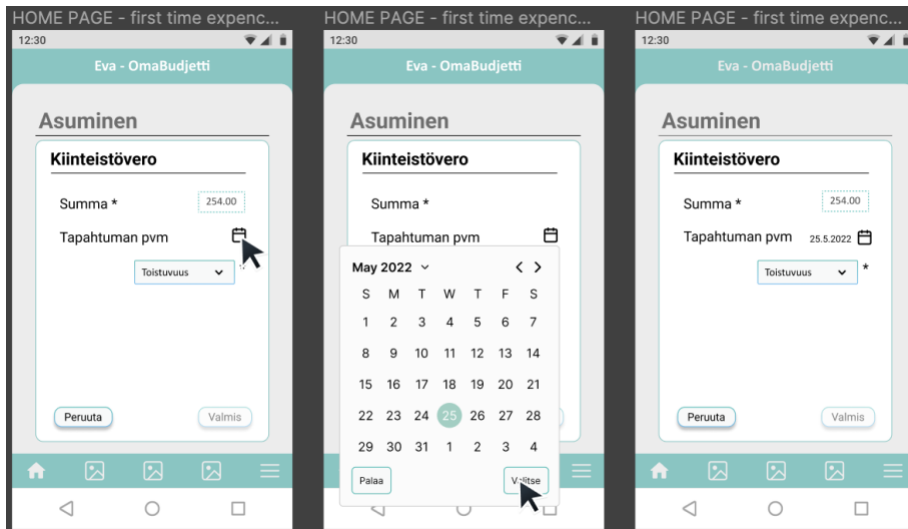
*Figure 5. Adding custom expense.*



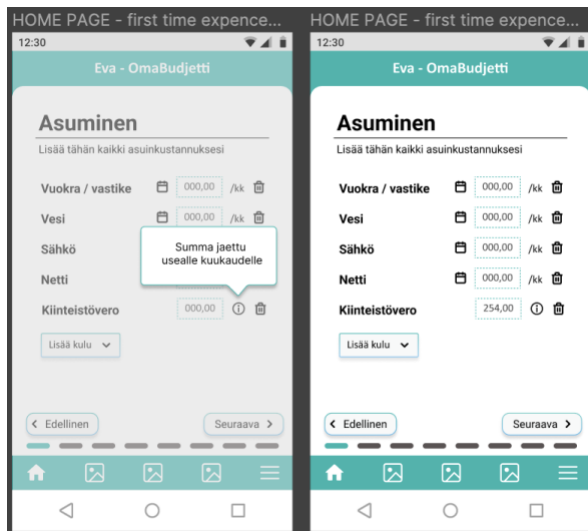*Figure 6. Adding date to custom expense.*

*Figure 7. Showing just added expense.*

There can also be all kinds of expenses what people want to add. We added "muu" event for that purpose. User can give a name to this expense. User can add as many "muu" events as they want.
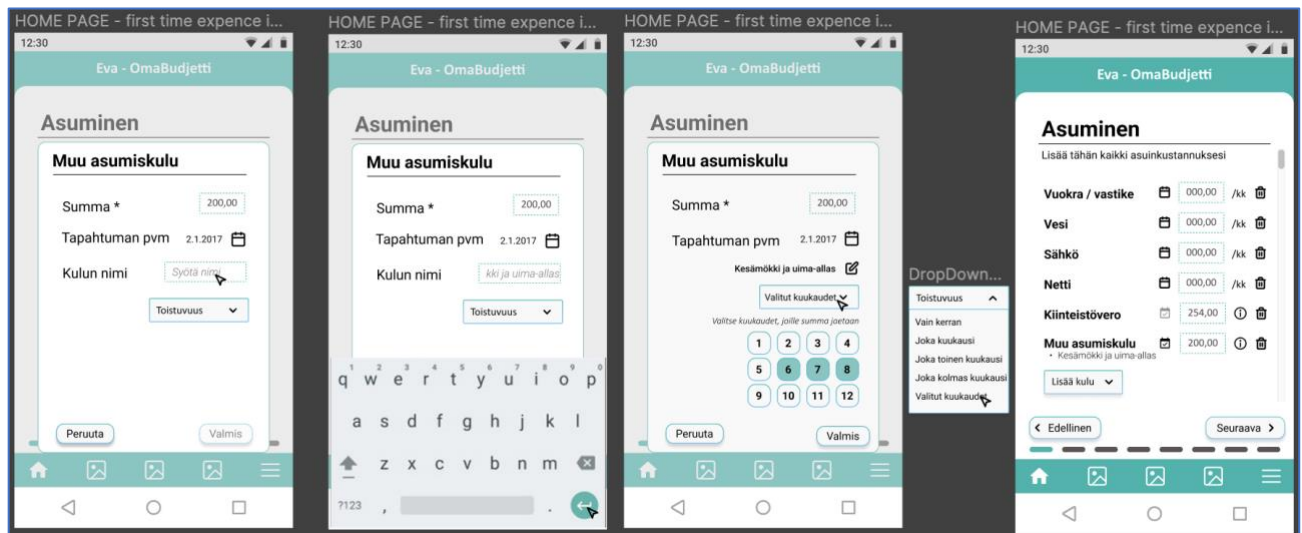


*Figure 8. Adding expense with a name.*
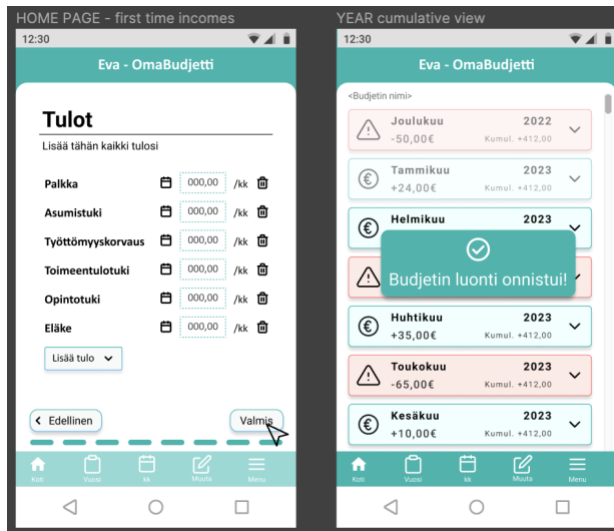
# Adding incomes



*Figure 9. Adding incomes*

# Using the application when the budget is created

When initialization is done, user can start using the actual system. Now they can see different reporting views, edit events (events = expenses or incomes), add events or delete events. They can change the budget name, create new budget or delete budget.

## Cumulative view

Cumulative view shows two past months and current + future months. User can scroll up to see more past months or down to see more future moths. View is a quick look about how finances are going in overall. If month went to minus, the background is read and if it was on the plus side, color is green.
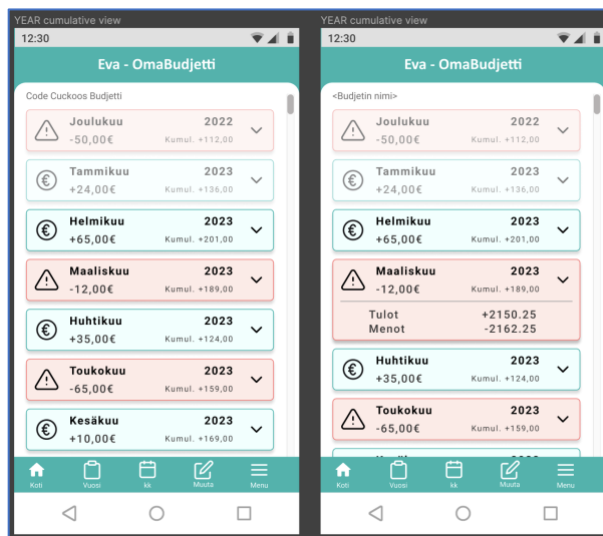


*Figure 10. Cumulative view.*

Month list view

User can also see all events by monthly and tapping the edit icon the monthly events go to "month edit" state where user can edit events.
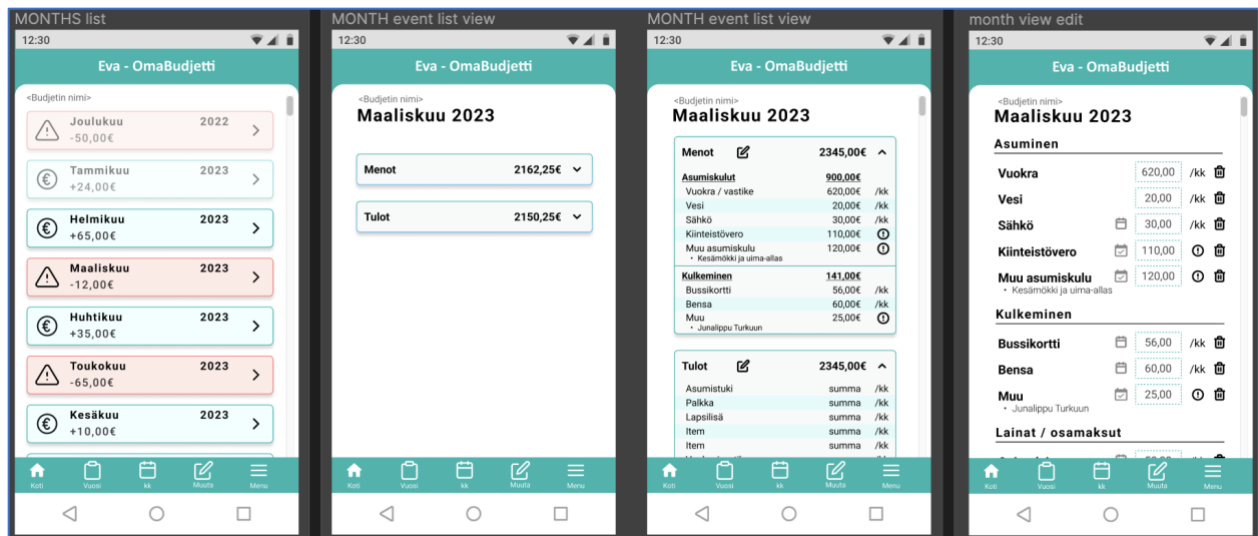
*Figure 11. Month list and last month list edit view.*

## Category edit view

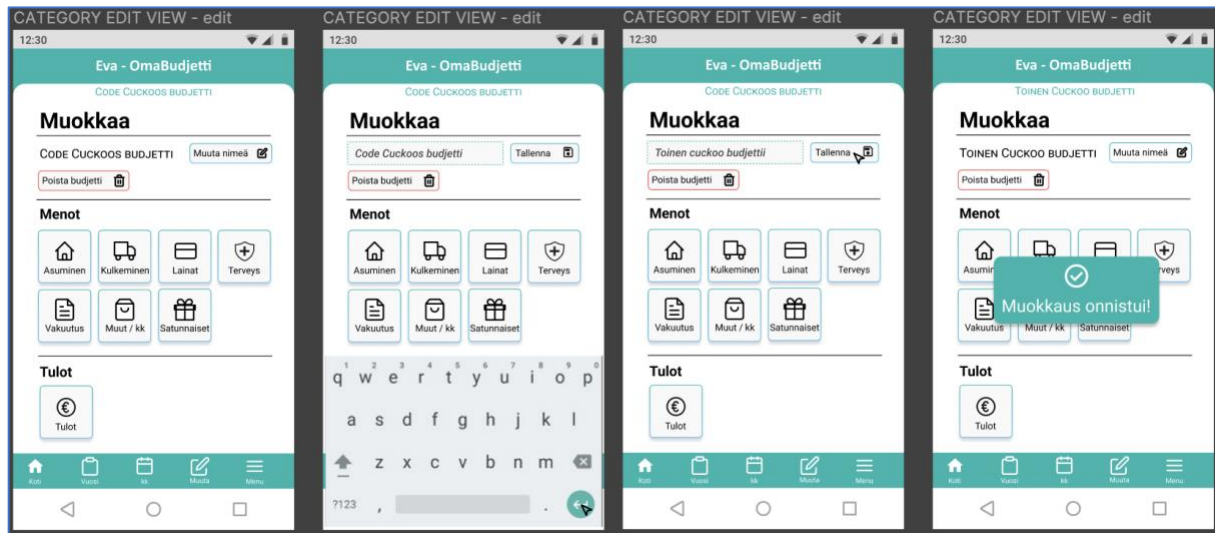In category edit view user can change budget name, delete budget of edit events categorically.



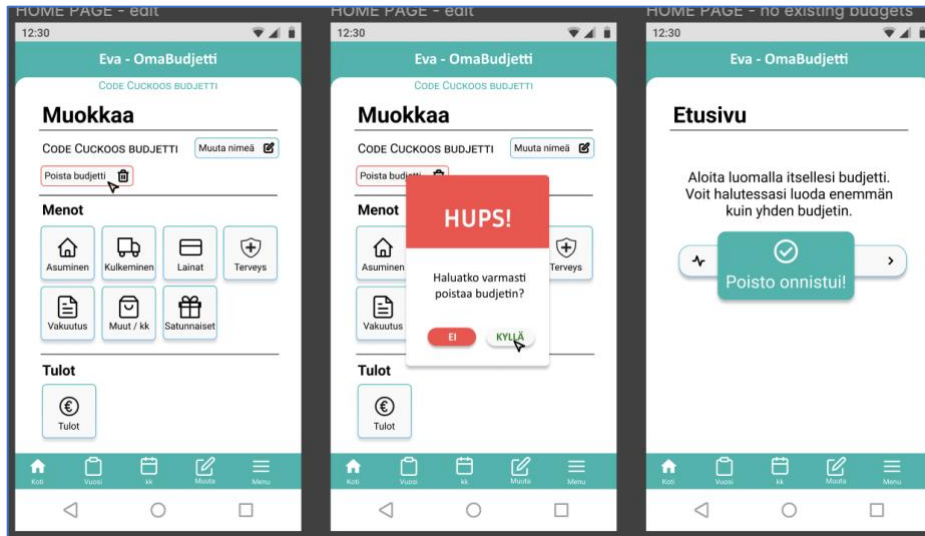*Figure 12. Changing the budget's name in category edit view.*

*Figure 13. Deleting the budget in category edit view.*

## Editing already added events

Editing already added events has to be done bit differently since user has to tell the system does the update infect only one event, all or current and future events.
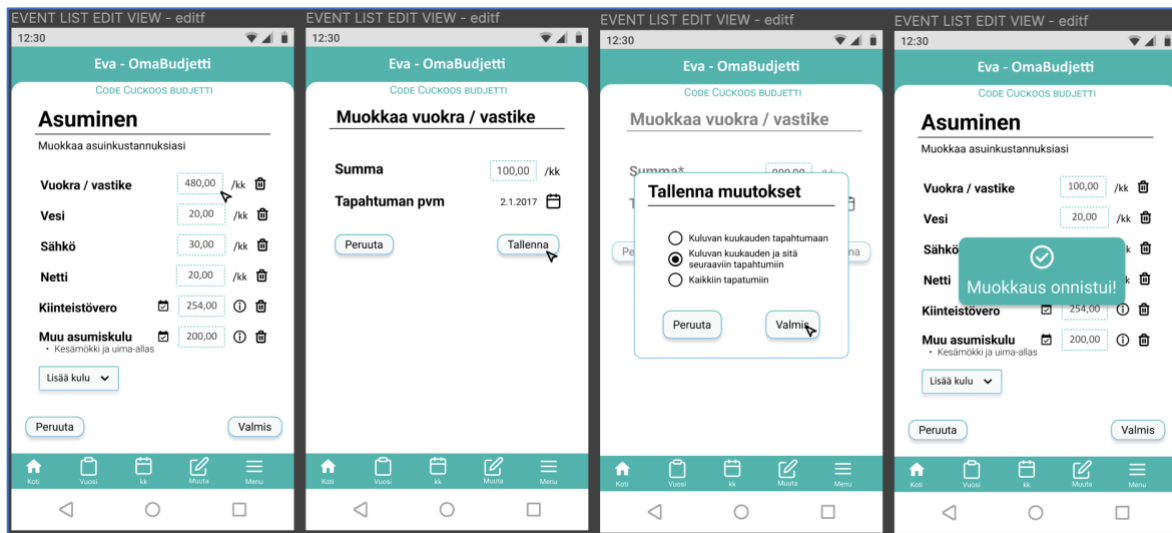


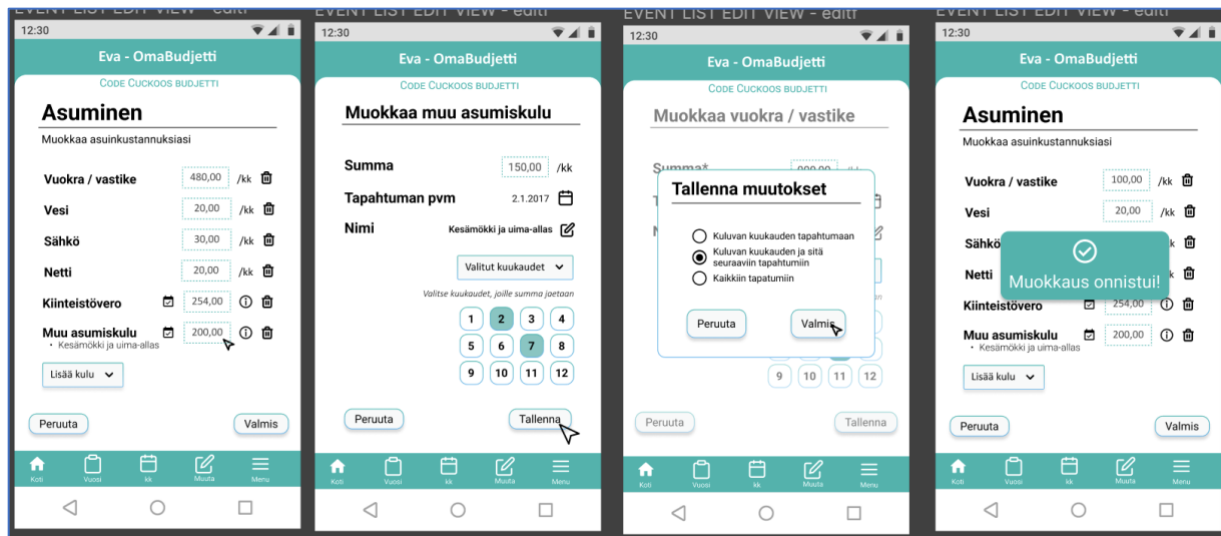*Figure 14. Editing event that happens by default monthly.*
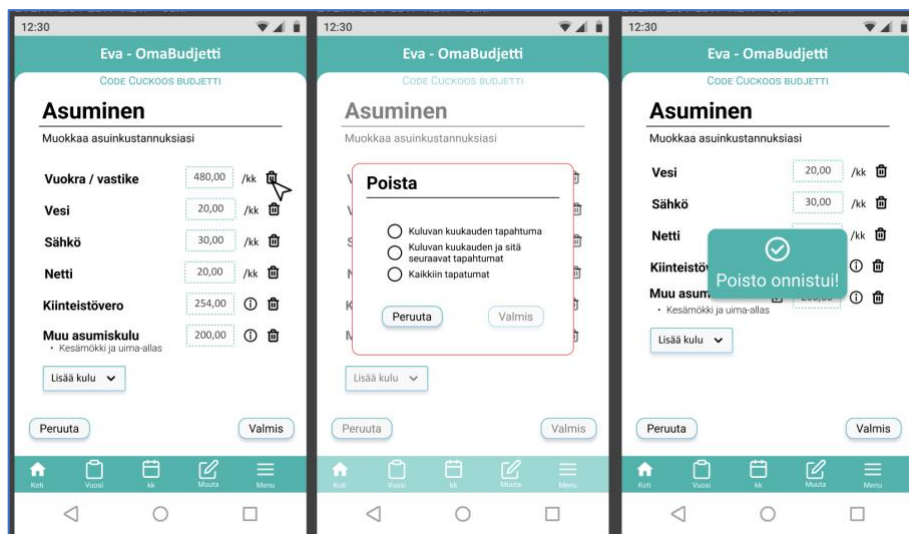
*Figure 15. Editing custom event which has also name.*



*Figure 16. Deleting an event.*

Appendix 1

**Kategorian nimi**

- Tapahtumat, jotka näkyvät ruudussa.
- Tapahtumatyyppi **(kk)** → tapahtuu joka kuukausi
- Tapahtumatyyppi **(cus)** eli custom → käyttäjä määrittelee miten usein tapahtuma toistuu.

- Tapahtumat, jotka ovat listattu alasvetovalikon alla.
- Alasvetovalikossa listattu kaikki kulut. Duplikaatit mahdollisia vain kuluille, joilla on ominaisuus nimi. Muuten ovat disabled valikossa.
- Joillain tapahtumilla on ominaisuus "nimi", jolloin käyttäjä voi asettaa ko. kululle haluamansa nimen.

**Asuminen**

- Vuokra / vastike (kk)
- Vesi (kk)
- Internet (kk)

- Kiinteistövero (cus)
- Vesimaksu (cus)
- Jätemaksu (cus)
- Sähkönsiirto (cus)
- Sähkönkulutus (cus)
- Muu asumiskulu (cus)
  - *Nimi*

**Kulkeminen**

- Julkinen liikenne (kk)
- Polttoaine (kk)

- Ajoneuvovero (cus)
- Muu kulkuvälinemeno (cus)
  - *Nimi*
- Matkakulu (cus)
  - *Nimi*

**Luotot, erämaksut ja maksusopimukset**

- Asuntolaina (kk)
- Opintolaina (kk)

- Luotto / laina (cus)
  - *Nimi*
- Maksusopimus (cus)
  - *Nimi*
- Osamaksu (cus)
  - *Nimi*

*Figure 17. Expense categories 1/2.*

**Terveys ja hoiva**

- Päivähoito (kk)

- Lääkkeet (cus)
  - *Nimi*
- Terveyskulu (cus)
  - *Nimi*
- Muu hoivamaksu (cus)
  - *Nimi*

**Vakuutukset**

- Kotivakuutus (cus)
- Tapaturmavakuutus (cus)
- Sairaskuluvakuutus (cus)
- Matkavakuutus (cus)

- Autovakuutus (cus)
- Liikennevakuutus (cus)
- Lapsivakuutus (cus)
- Lemmikkivakuutus (cus)
- Urheiluvakuutus (cus)
- Muu vakuutus (cus)
  - *Nimi*

**Muut toistuvat kulut**

- Päivittäistavarat (kk)
- Ruoka (kk)
- Lemmikki (kk)
- Suoratoistot (kk)
- Harrastus (kk)
- Hupiraha (kk)
- Säästö (kk)
- Puhelinkulut (kk)

- Muu kk kulu (cus)
  - *Nimi*

**Satunnaiset kulut**

- Vaatteet (cus)
- Juhla-aika (cus)
- Kodin hankinnat (cus)
  - *Nimi*
- Muu kulu (cus)
  - *Nimi*

*Figure 18. Expense categories 2/2.*

Appendix 2.



**WORKFLOW**
Path: Initialisation of budget
Basic view of expense category / income

- Only positive numbers
- Input space reserved for 4 digits and 2 decimals (0000.00).
- If inserted more digits, they will hide
- separators . and , are ok

Messages:
- Voit syöttää vain numeroita
- Summassa voi olla korkeintaan kaksi desimaalia

Input field → Validate input

Not OK → Change input field border & create tool tip. Disable "seuraava button"

OK → All good

Delete icon → Confirmation dialog about deleting → NO btn / YES btn → Delete item & give toast message

**adding date**

Creating new budget → Naming the budget → Adding expenses / incomes → Showing most common monthly fixed (kk) events

Calendar icon → Open calendar in dialog → Chosen date has different background → Select button takes the date chosen → Back to previous window / view, write date to the view

Return button closes the dialog and does not take the date → Back to starting view

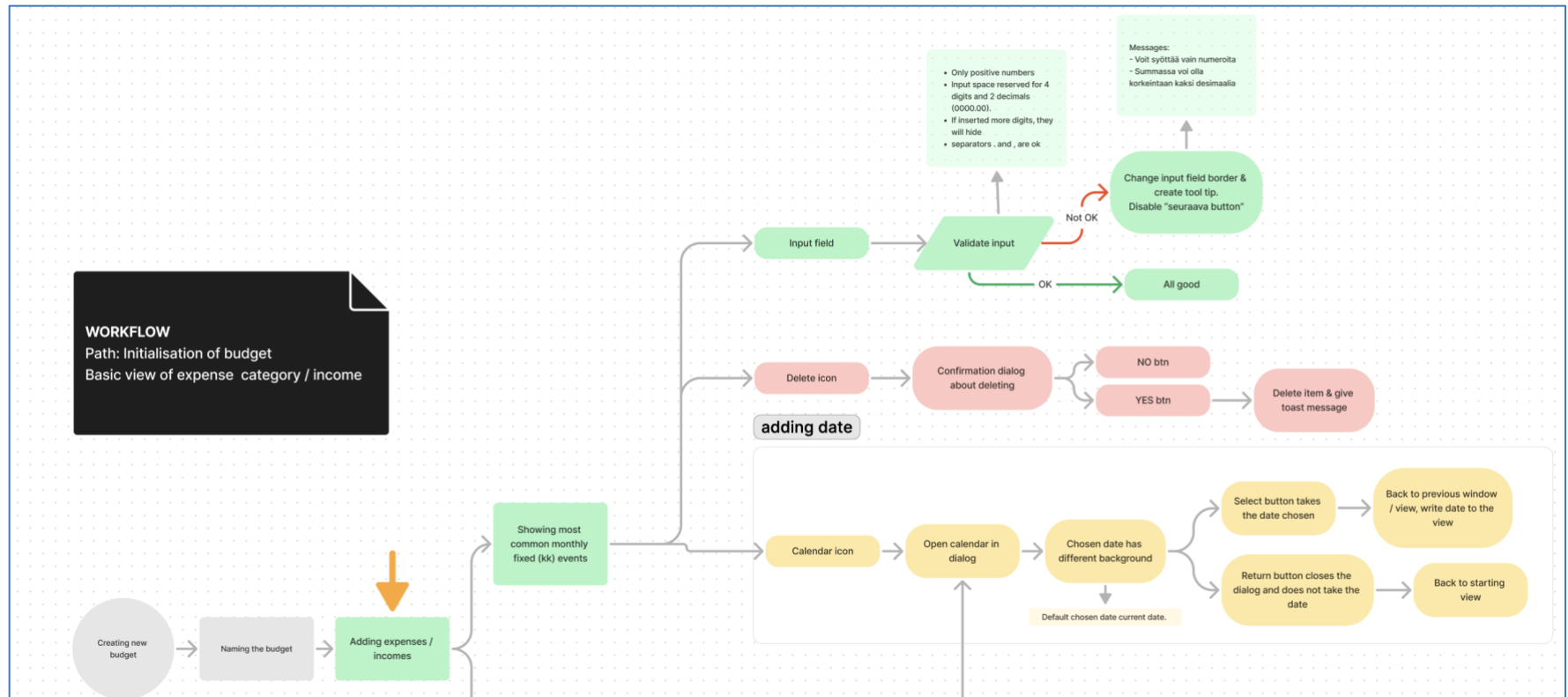Default chosen date current date.

*Figure 19. Task flow of adding a monthly expense during initialization*
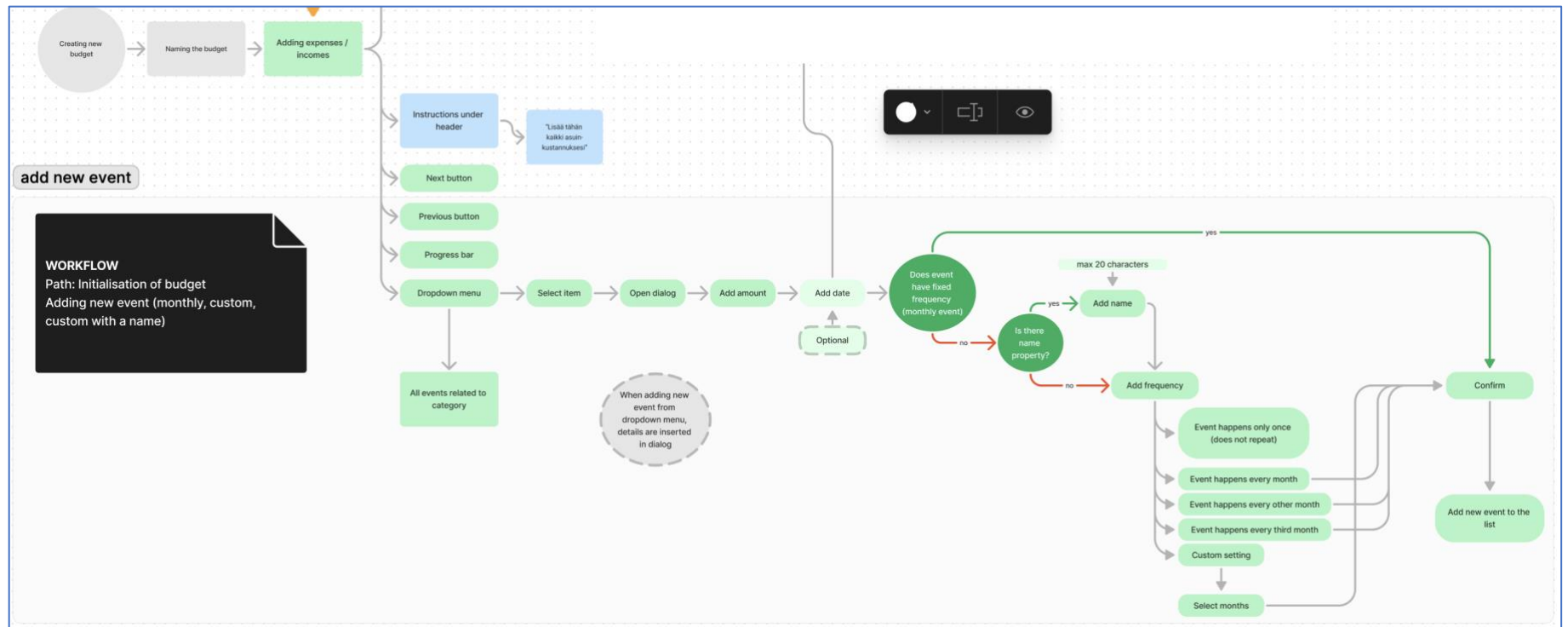
Appendix 3



*Figure 20. Task flow for adding and event during initialization.*
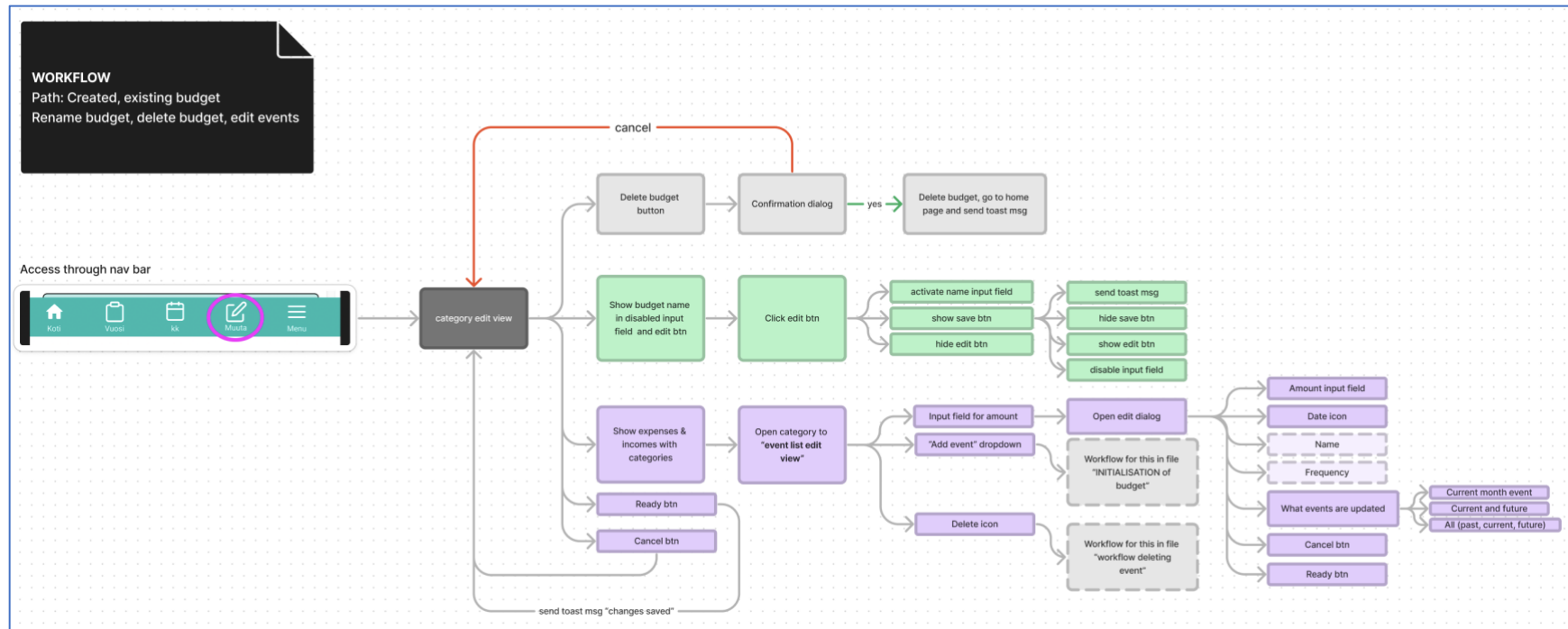
Appendix 4



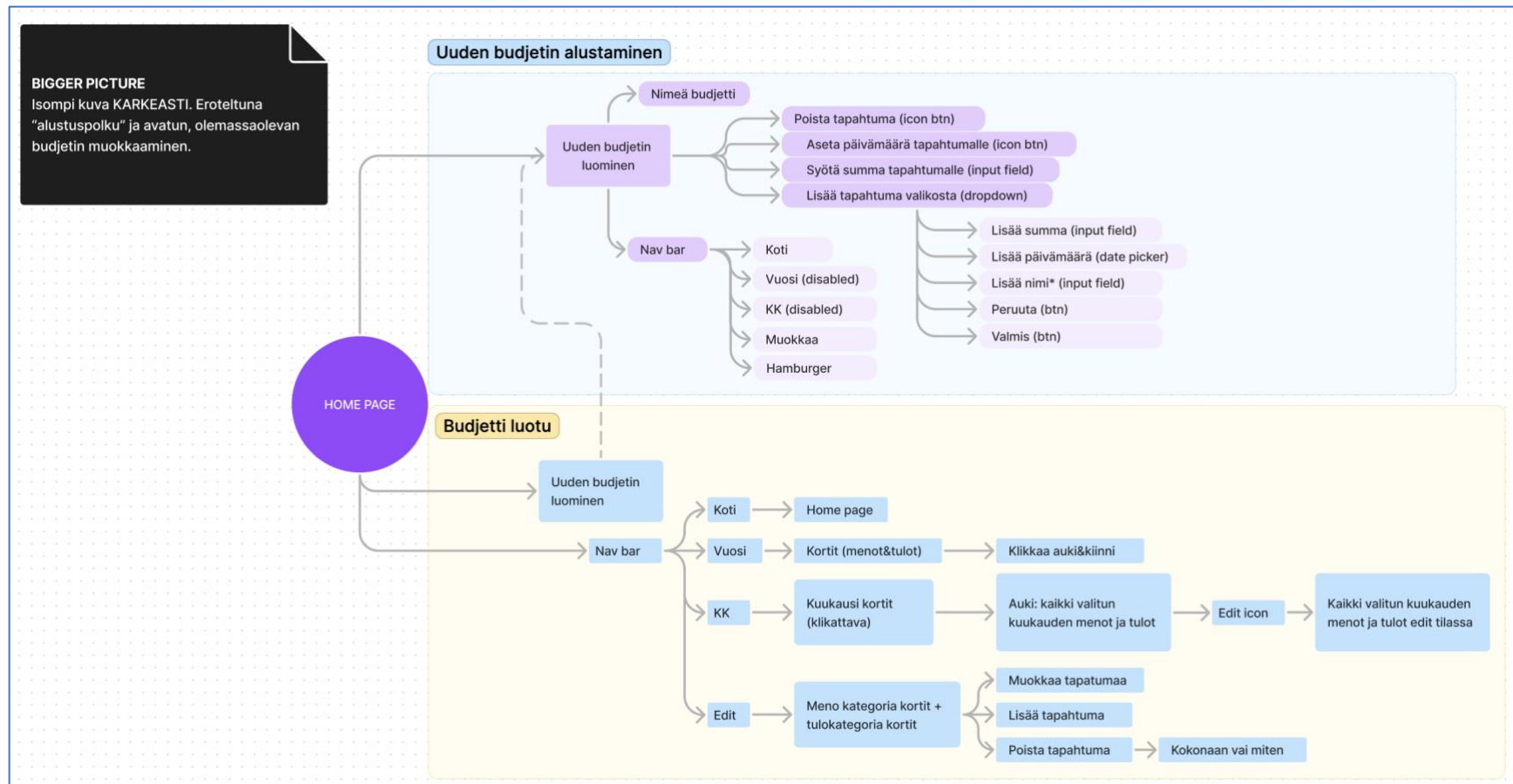*Figure 21. Editing events of already created budget.*

Appendix 5



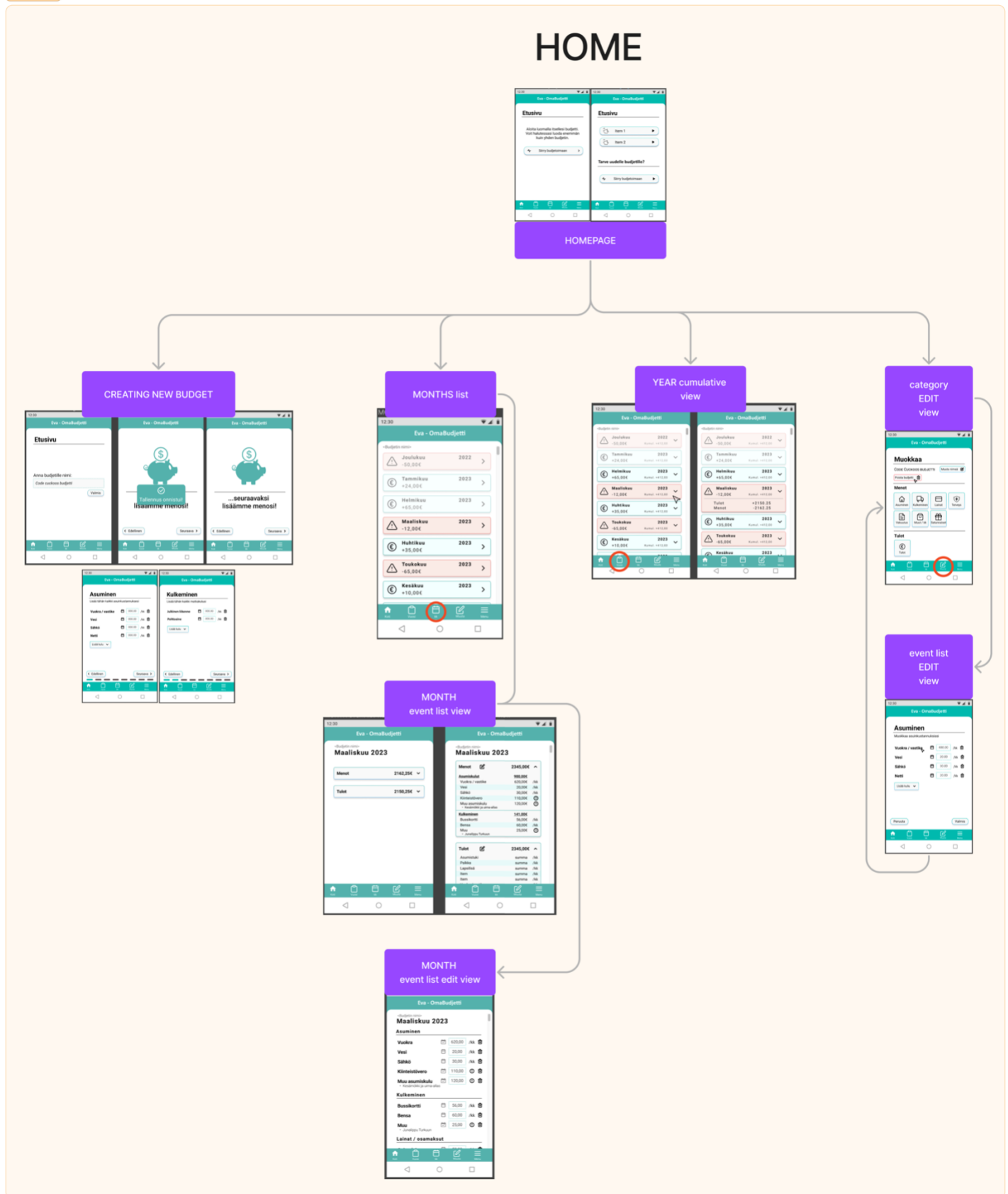*Figure 22. Bigger picture of the whole concept and functionalities.*

Appendix 6

*Figure 23. Sitemap for the application*