FINANCIAL PLANNER

Using the Financial Planner Forecast Ledger

ABSTRACT

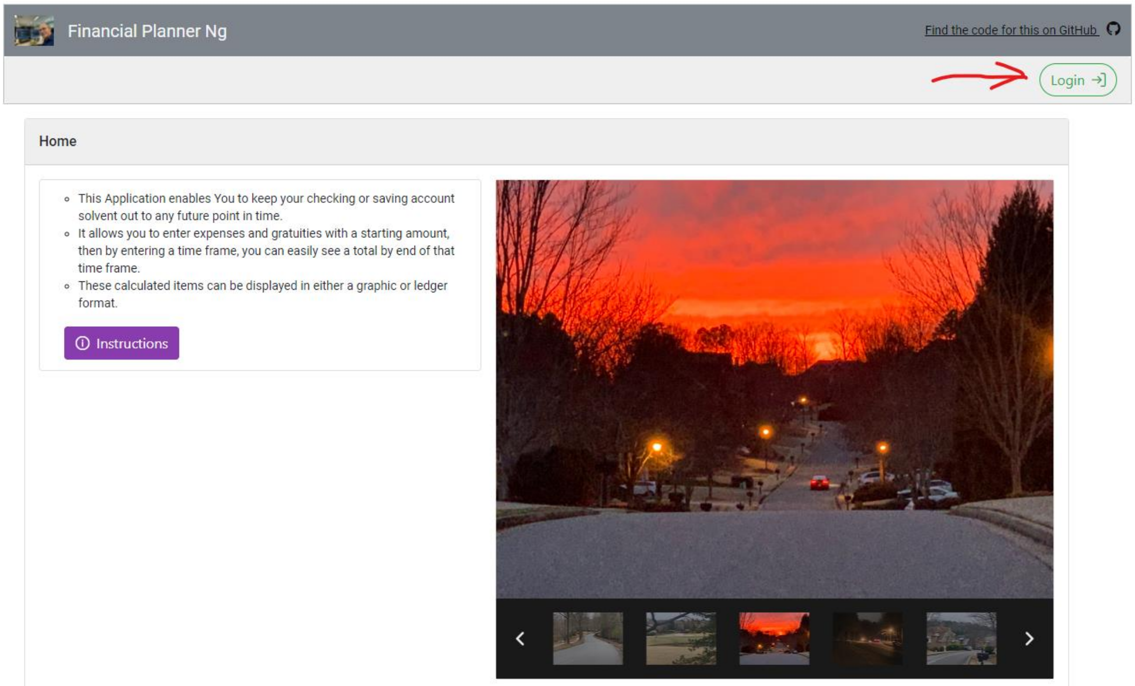
This Application enables You to keep your checking or saving account solvent out to any future point in time. You enter expenses and gratuities with a starting amount, then by entering a time frame, you can easily see a total by end of that time frame. These calculated items can be displayed in either a graphic or ledger format.

Rick Donalson

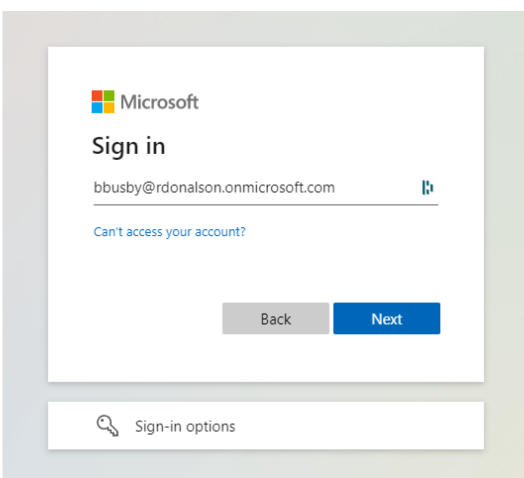
Getting Started

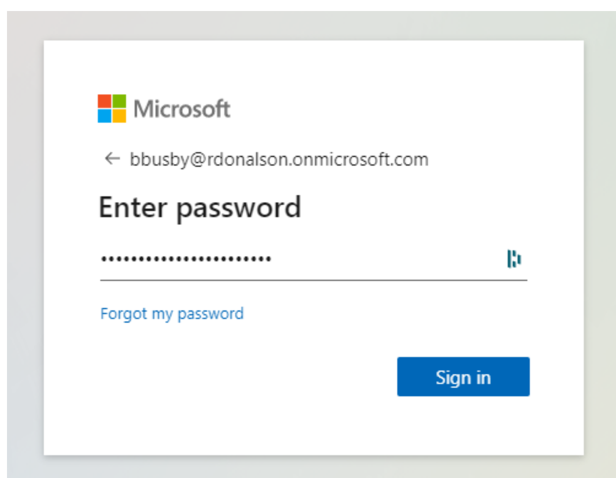
Logging In

- Click the login button in the upper right corner of the splash page.
- Use one of the Pre-Defined Demo logins listed below.



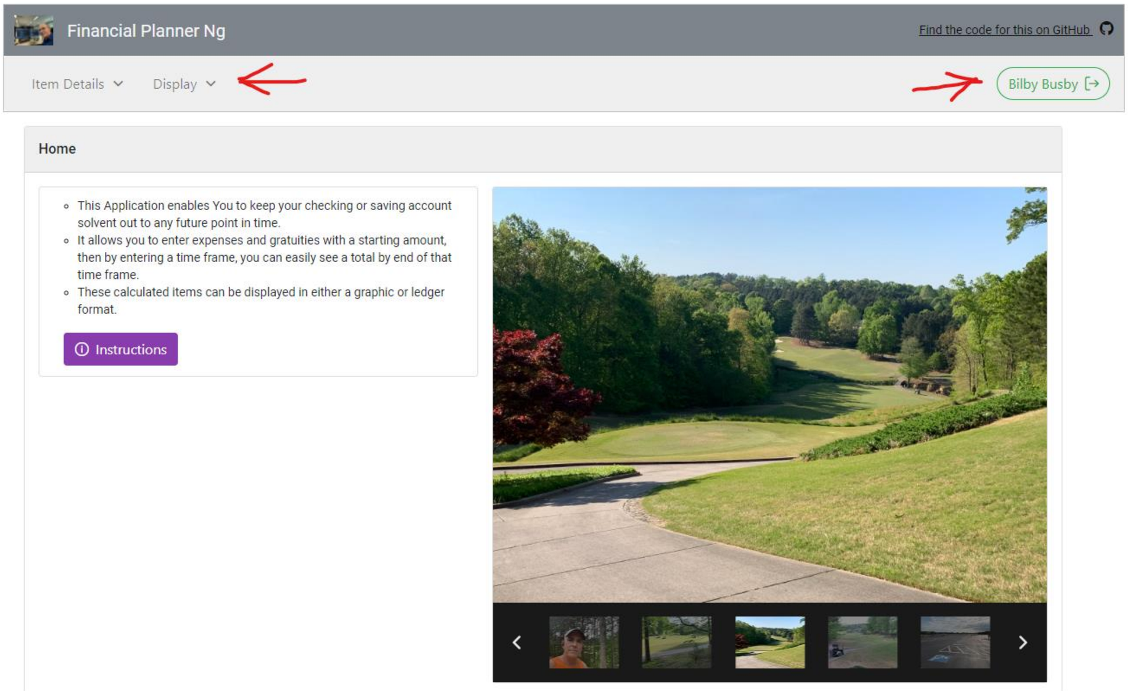
- Enter the Demo Login: bbusby@rdonalson.onmicrosoft.com & Password: I'amAFullStackDevIn2021
- Additional Demo Login: ttutone@rdonalson.onmicrosoft.com & Password: BSM@B4rRyG6qX5ph





- Then Sign In

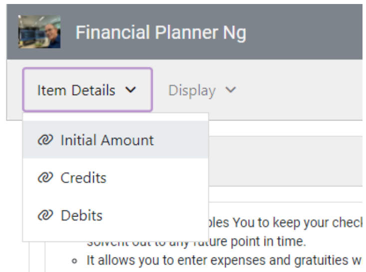
- You'll now see the User's Name, "Bilby Busby" and the Navigation Menu selectors "Item Details" and "Display"



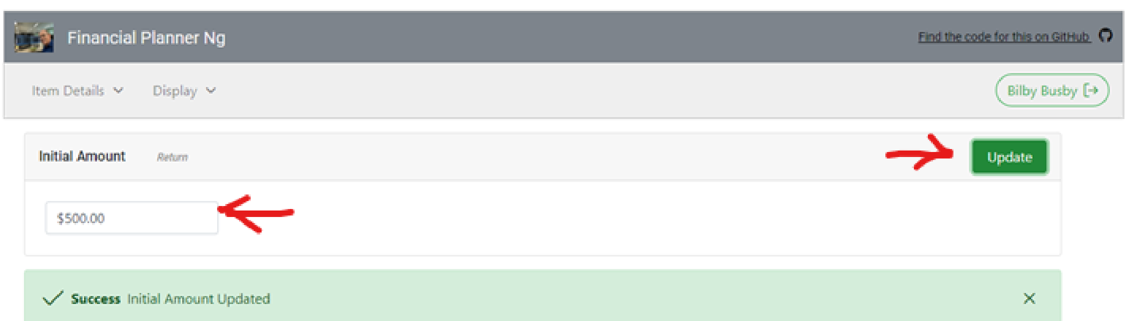
Item Details

Initial Amount

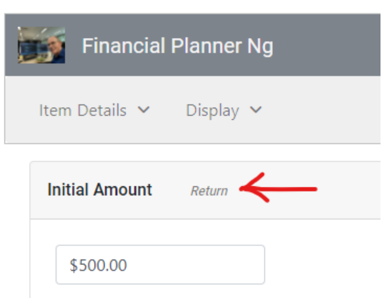
- First task is to enter the current amount you have in your checking or savings account.
- Go to the “Item Details” navigation dropdown and select “Initial Amount”

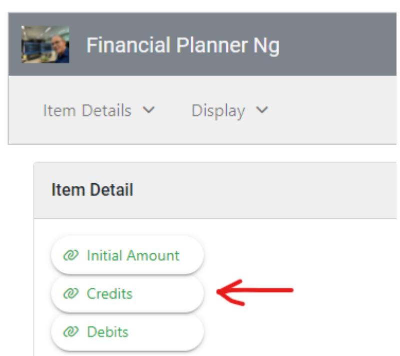


- At the “Initial Amount” page, update the existing value with the new starting amount in the text box
- Click the “Update” button.
- You will get a confirmation message when the value has been updated.



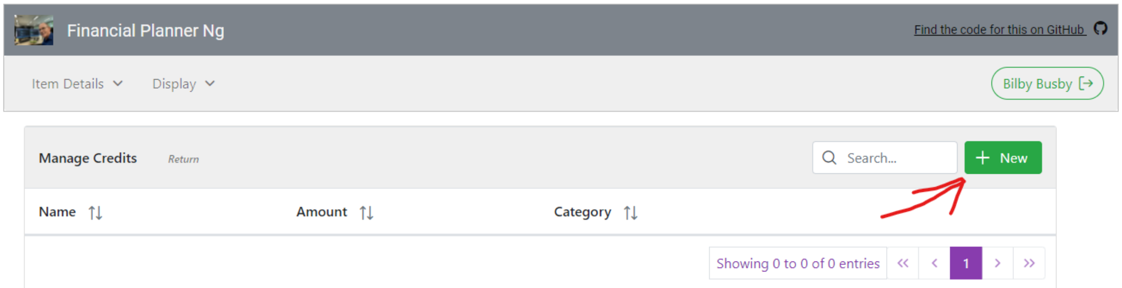
- You will get a confirmation message when the value has been updated.
- Now navigate to Credits by clicking the “Item Details” menu selector as before and selecting “Credits” or click the “Return” link, which will take you to the “Item Details” home page then click the “Credits” button. The latter method is shown below



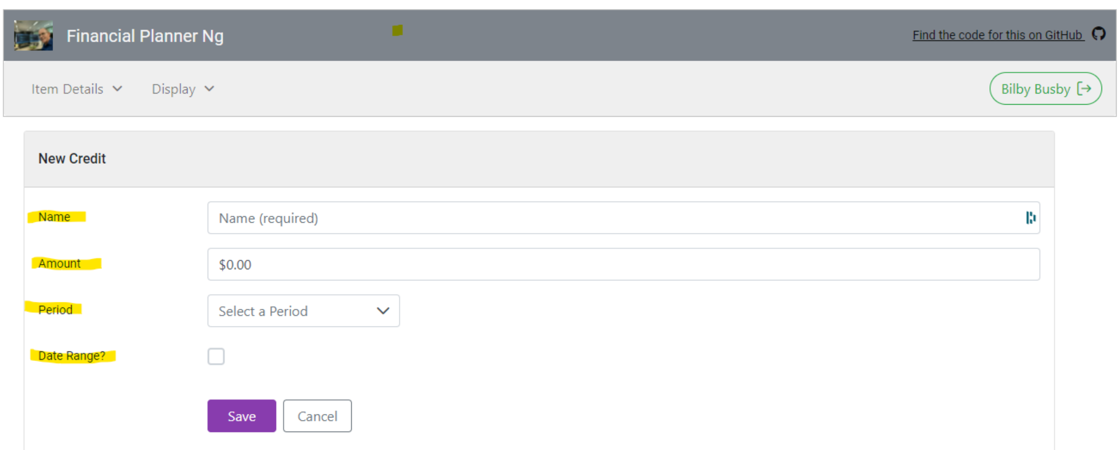


Credits

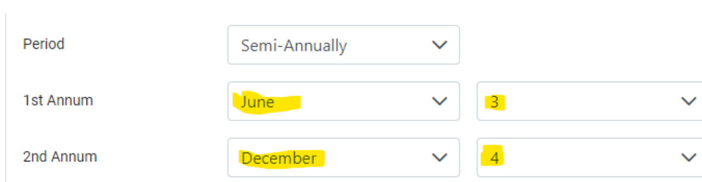
- Now at the Manage Credits screen there are no items.
- Click the New button.



- Now at the New Credit screen, there are four initial fields.
  - Name
    - Enter a representative name for the Credit such as Paycheck or Tax Refund.
  - Amount
    - Enter a positive currency amount in dollars and cents
  - Period
    - There are nine different Periods, each with its own parameter fields.
    - Select a period and enter values in the associated parameter fields

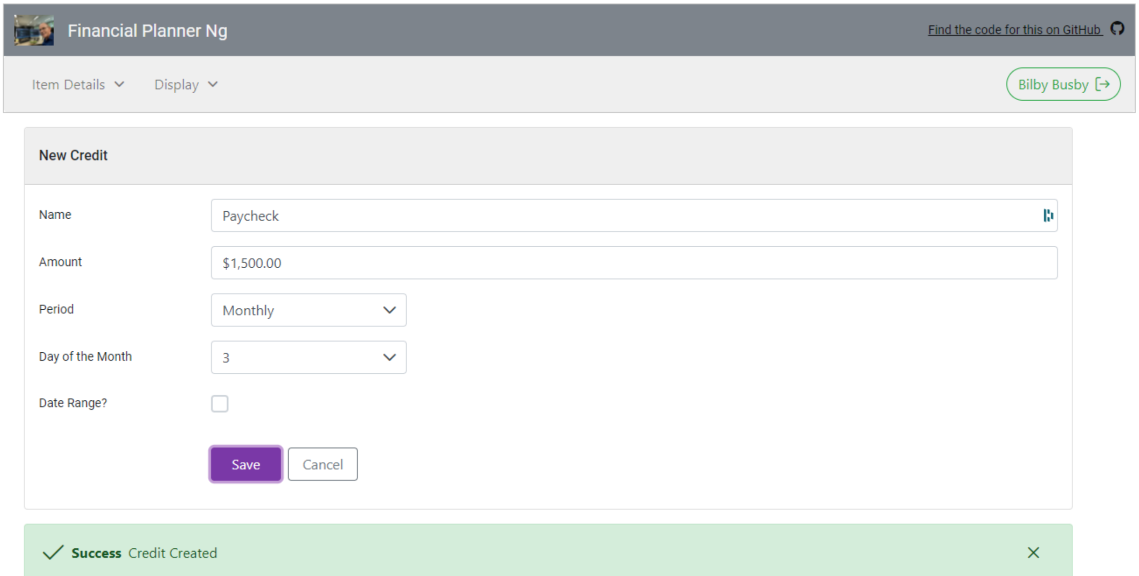


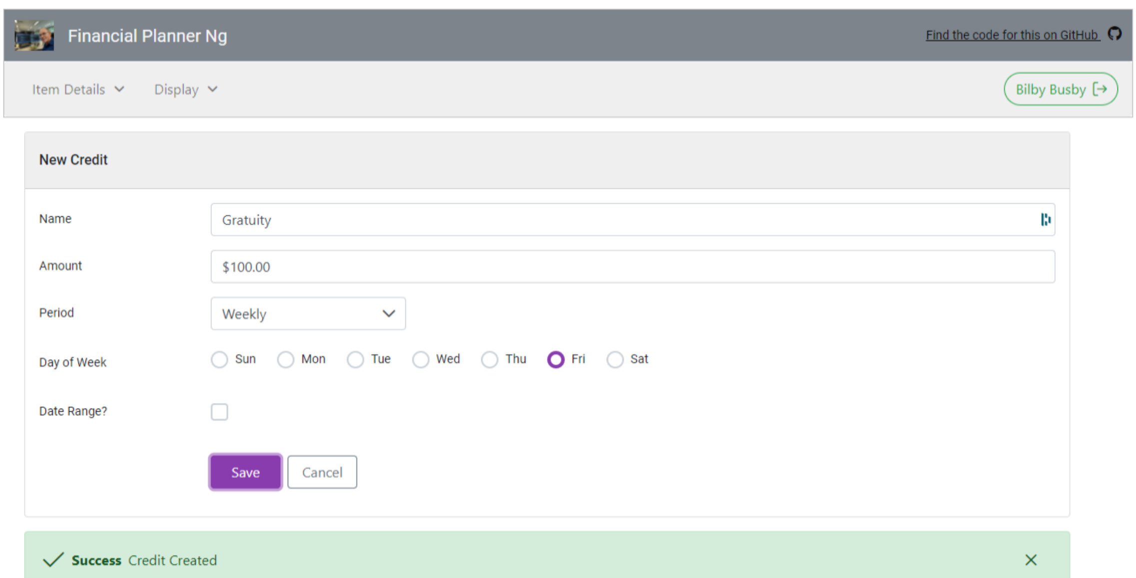
    - For example, select "Semi-Annually", four parameter fields will appear: *first annum month and day* then *second annum month and day*.
    - Then enter the month and day for these two occurrences as shown below



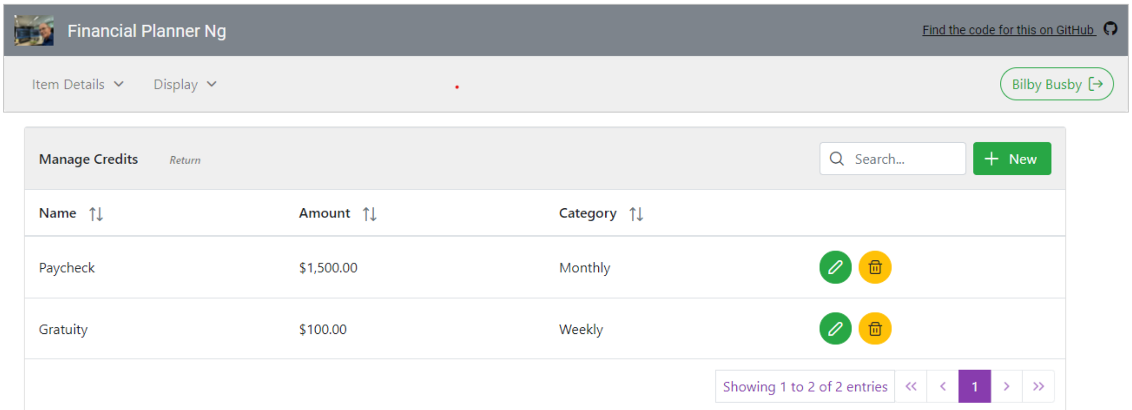
    - This Credit would occur Semi-Annually on June 3rd and December 4th.
    - This is where it would appear in the Display output.

- So, lets add a couple of Credits:
  - Paycheck, $1500 on the 3rd of every Month.
  - Gratuity, $100 on the Friday of every week.





- Here at the Manage Credits screen, you can see the two added items.



Debits

Display

Date Range

Chart

Ledger