

# SmartWallet - Full Documentation

# Table of Contents

<b>Project State</b>	<b>3</b>
Scope	3
<b>Servers</b>	<b>4</b>
Installation	4
Configuration	6
<b>User Features</b>	<b>9</b>
Creating an Account	9
Logging In	11
Money Management	13
Overall View	13
Adding Expenses	14
Deleting Expenses	15
Updating Expenses	15
Month View	16
Everyday View	16
Filtered View	17
Statistics	18
Profile	18
<b>Upcoming Features</b>	<b>20</b>

# Project State

## Scope

1. The scope of this finance webapp covers:
  - a. Login
    - i. User Sign-in
    - ii. Social Media Sign-in
  - b. Registration
  - c. User Features
    - i. Overall View
    - ii. Month View
    - iii. Everyday View
    - iv. Filtered View
    - v. Statistics
    - vi. Profile

# Servers

## Installation

1. Install Yarn package manager by going to:

<https://yarnpkg.com/lang/en/docs/install/#windows-stable>

Installation

Stable: **v1.9.2**  
Node: ^4.8.0 || ^5.7.0 || ^6.2.2 || >=8.0.0

Before you start using Yarn, you'll first need to install it on your system. There are a growing number of different ways to install Yarn:

Operating system: Windows  
Version: Stable (1.9.2)

Getting Started  
Installation  
Usage

### Windows

There are three options for installing Yarn on Windows.

#### Download the installer

This will give you a `.msi` file that when run will walk you through installing Yarn on Windows.

If you use the installer you will first need to install [Node.js](#).

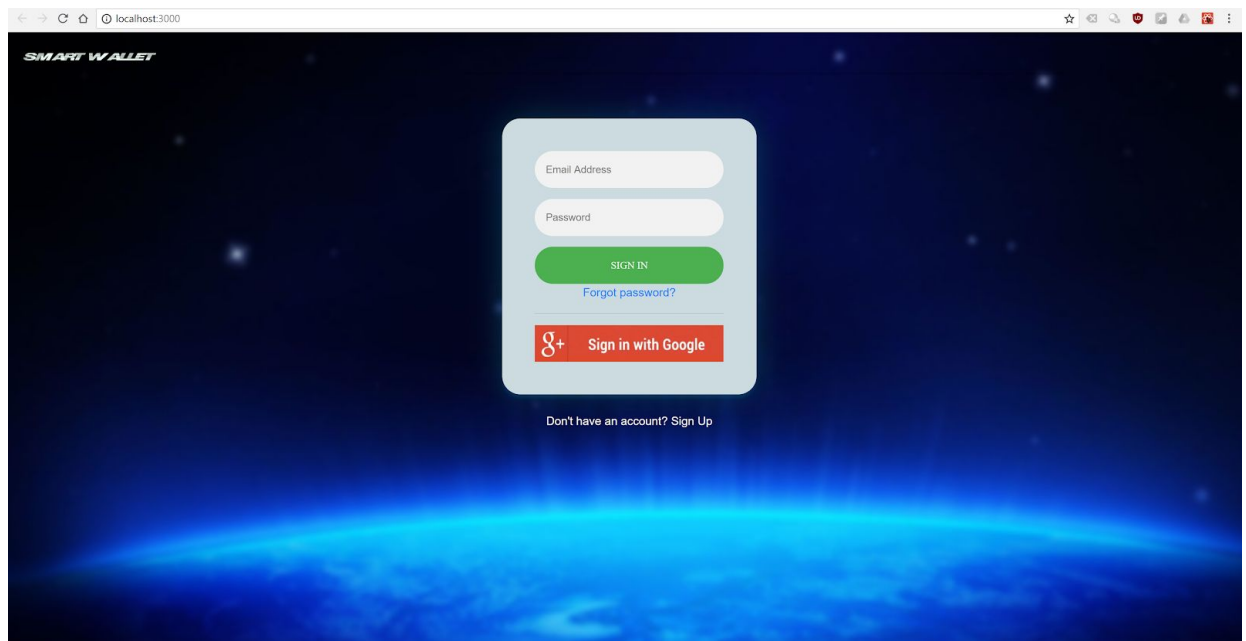
Download Installer

- Select the appropriate operating system, and download the most recent stable version.
2. After Yarn package manager is installed, download SmartWallet from the GitHub repository at: <https://github.com/smshinn/SmartWallet>
  3. Install the dependencies for SmartWallet by opening Node.js command prompt and navigating to the SmartWallet directory. Then input "yarn install" into the console.
  4. To run the SmartWallet Application, input "yarn start" into the console.

**IMPORTANT: Make sure Firebase has been configured properly in `\SmartWallet\src\firebase\firebase.js` (Look up Configuration in the table of contents for further details on how to configure firebase)**

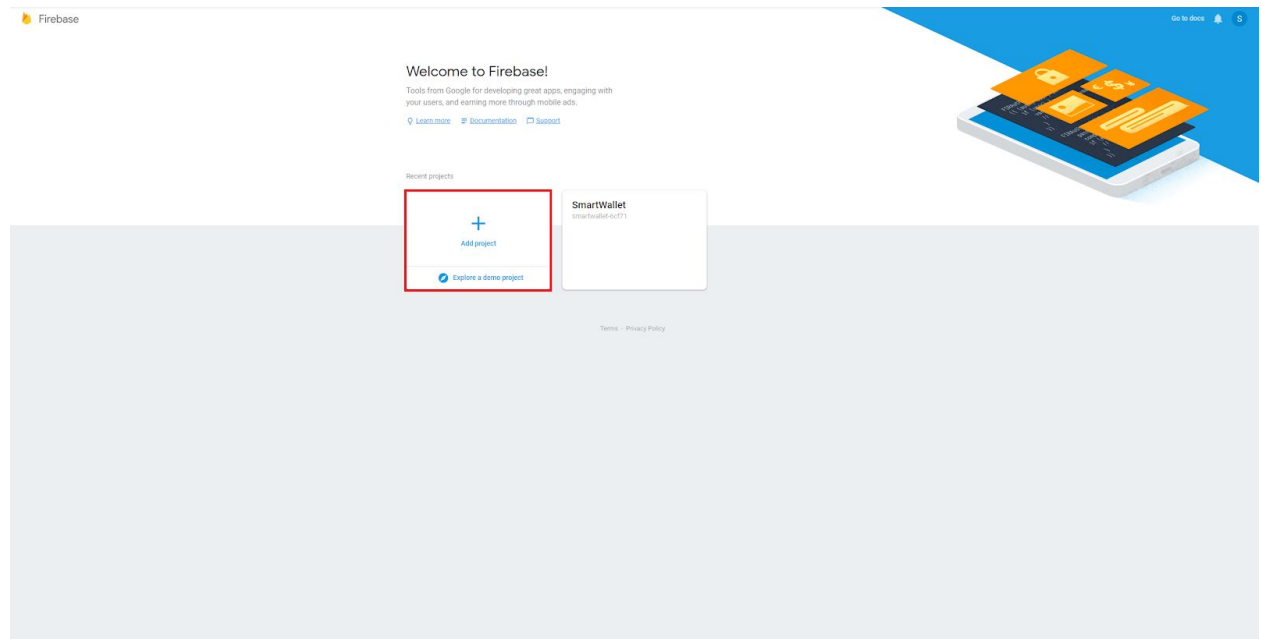
```
C:\SmartWallet>yarn start
yarn run v1.9.2
$ react-scripts start
```

5. The default browser should open and SmartWallet should now be accessible at localhost:3000

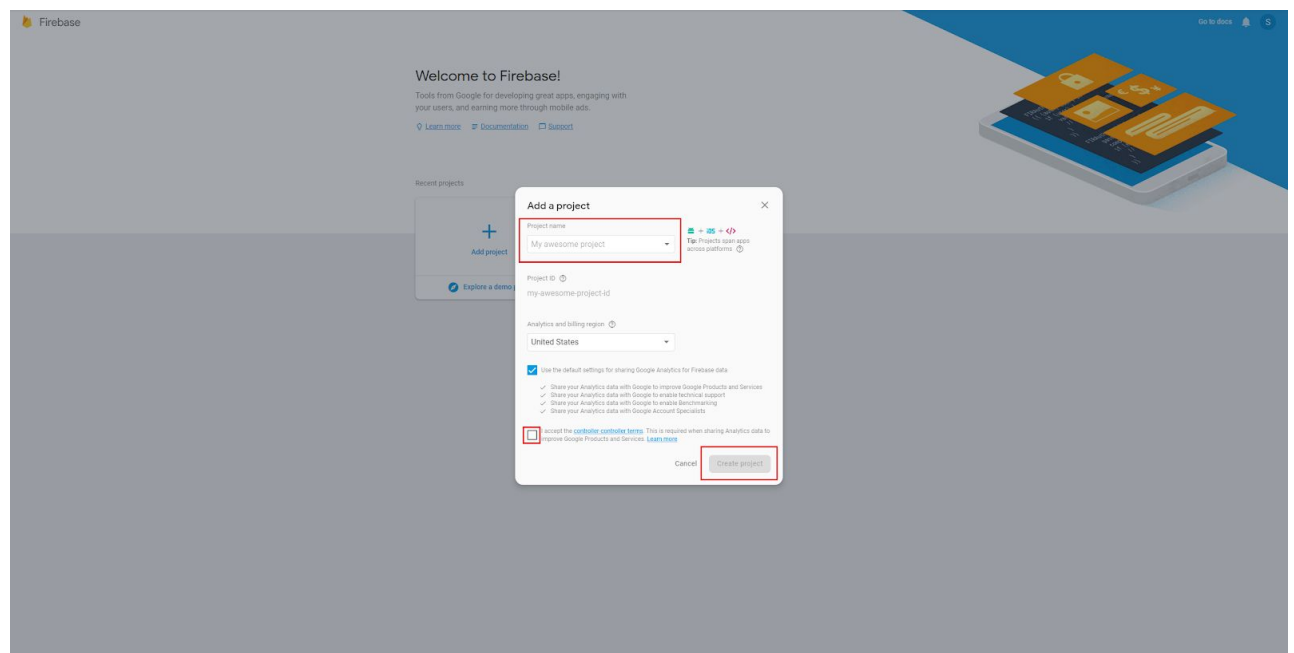


## Configuration

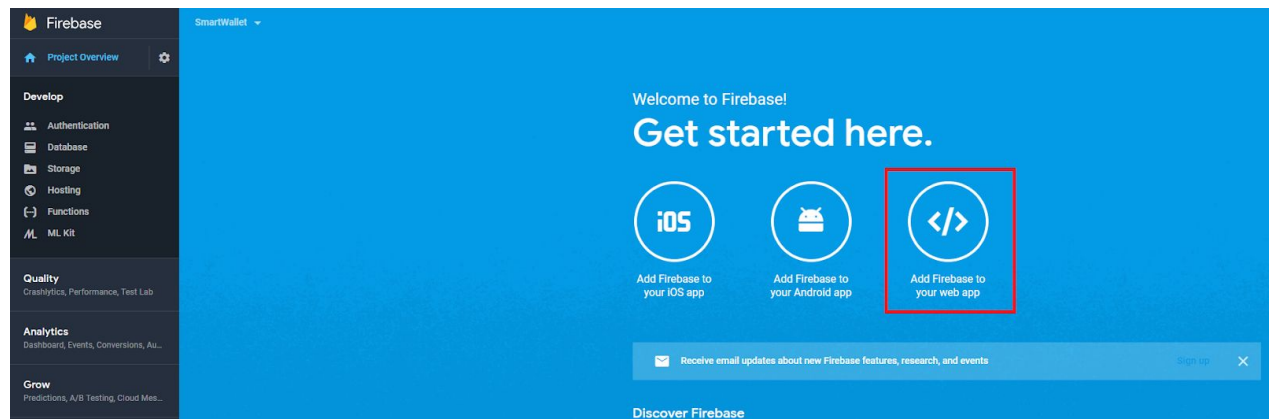
1. Create a firebase project at the link provided: <https://console.firebase.google.com>



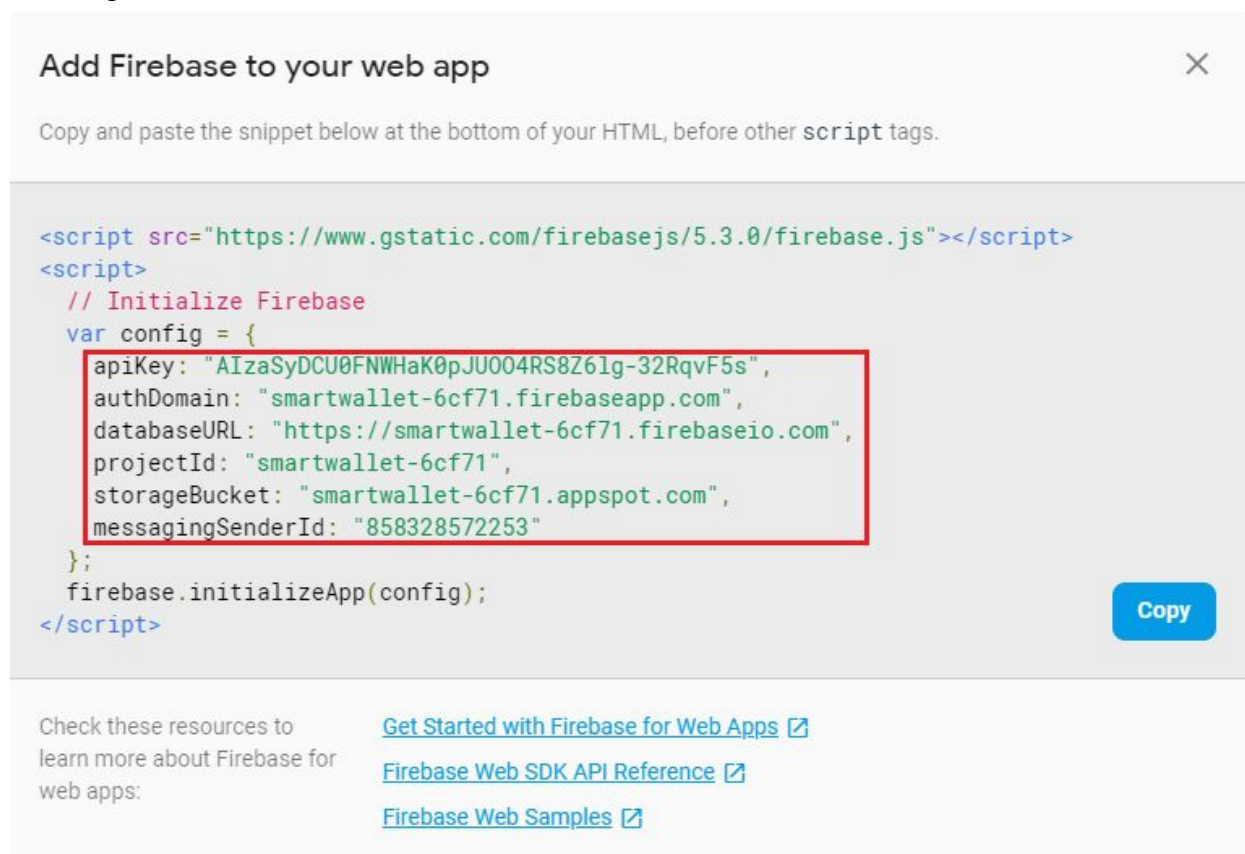
2. Enter the project name, accept the terms and conditions, and click the “Create Project” button.



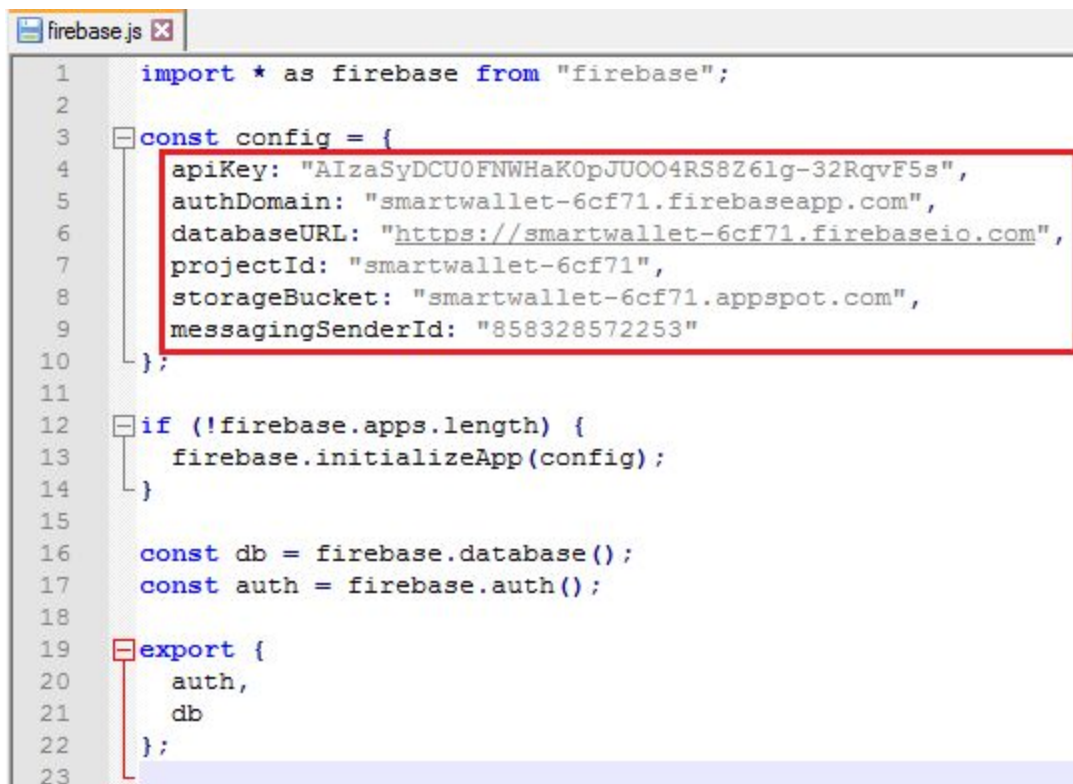
3. Once you have created your firebase project, click on “Add Firebase to your web app”.



4. A dialogue box similar to this should be shown:



5. Replace the firebase configuration code in `\SmartWallet\src\firebase\firebase.js` with the code that is shown in the dialogue box.



```
1  import * as firebase from "firebase";
2
3  const config = {
4    apiKey: "AIzaSyDCU0FNWHaK0pJUOO4RS8Z6lg-32RqvF5s",
5    authDomain: "smartwallet-6cf71.firebaseio.com",
6    databaseURL: "https://smartwallet-6cf71.firebaseio.com",
7    projectId: "smartwallet-6cf71",
8    storageBucket: "smartwallet-6cf71.appspot.com",
9    messagingSenderId: "858328572253"
10 };
11
12 if (!firebase.apps.length) {
13   firebase.initializeApp(config);
14 }
15
16 const db = firebase.database();
17 const auth = firebase.auth();
18
19 export {
20   auth,
21   db
22 };
23
```

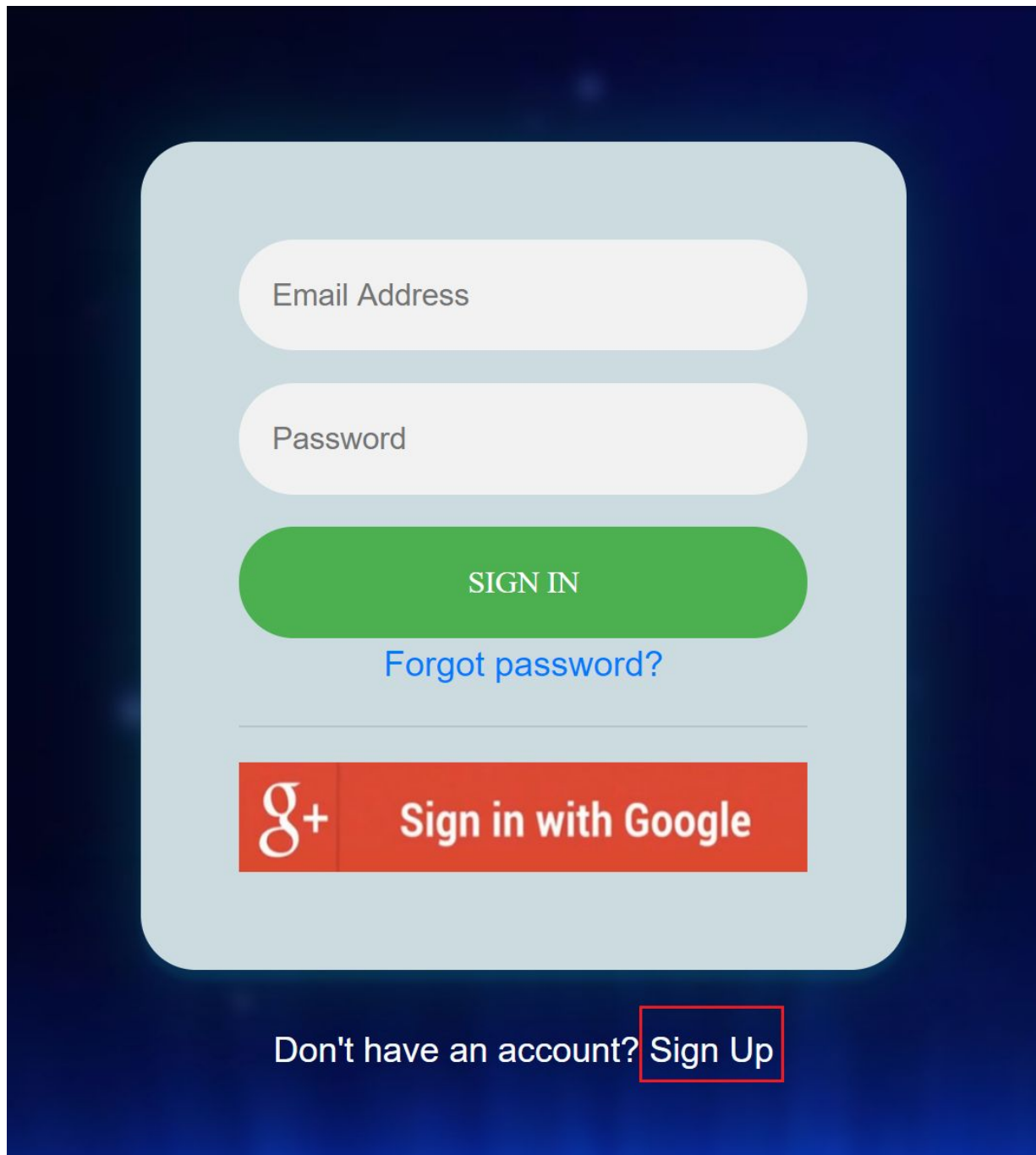
6. Firebase is now configured to run with the SmartWallet webapp.



# User Features

## Creating an Account

1. Under the sign-in box, click on the “Sign Up” link.



The image shows a user authentication interface on a dark blue background. A light blue rounded rectangle contains the sign-in fields. At the bottom of the interface, the text "Don't have an account?" is followed by a "Sign Up" link, which is highlighted with a red rectangular box.


Email Address

Password

SIGN IN

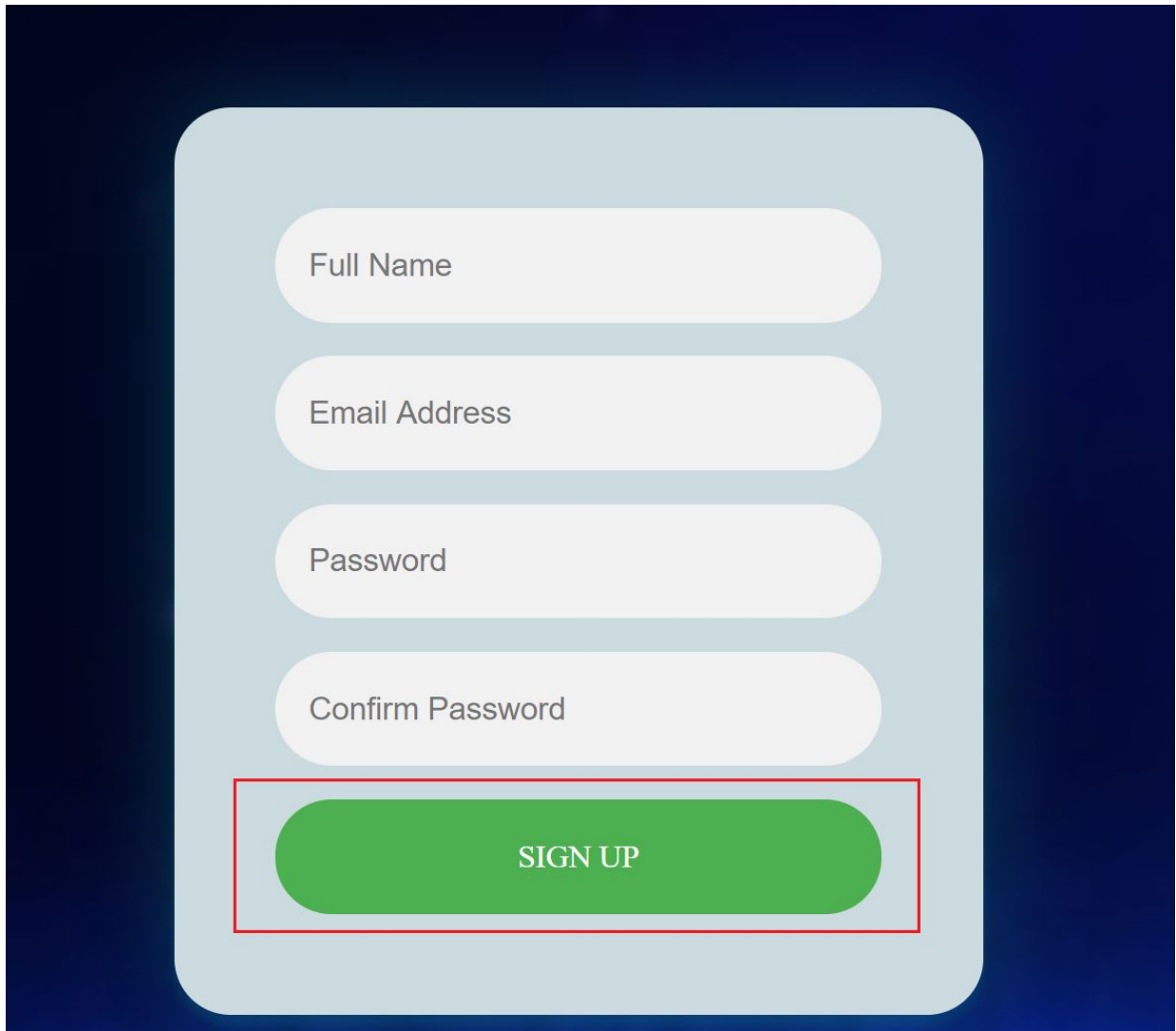
[Forgot password?](#)

---

 Sign in with Google

Don't have an account? [Sign Up](#)

2. Fill out the appropriate fields, then click on the “Sign Up” button.

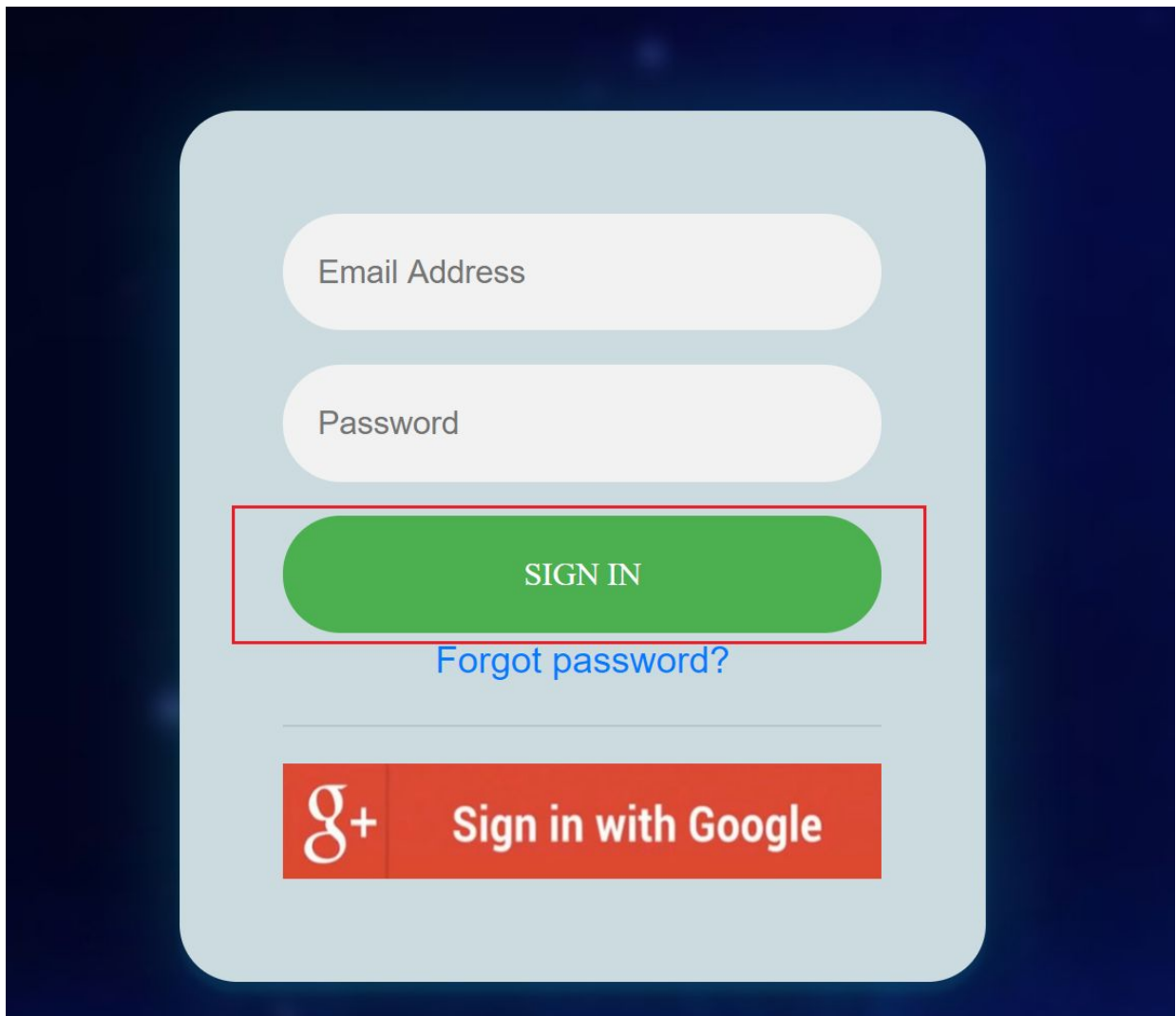


A sign-up form is displayed on a dark blue background. The form is contained within a light blue rounded rectangle. It features four white rounded input fields stacked vertically, labeled "Full Name", "Email Address", "Password", and "Confirm Password". Below these fields is a green rounded button with the text "SIGN UP" in white. A red rectangular box highlights the "SIGN UP" button.

3. Your email address and password combination has now been created.

## Logging In

1. Fill out the appropriate fields, and click the “Sign In” button.



A login form interface on a dark blue background. The form is a light blue rounded rectangle containing two white input fields labeled "Email Address" and "Password". Below these is a green "SIGN IN" button, which is highlighted by a red rectangular border. Underneath the button is a blue link that says "Forgot password?". At the bottom of the form is a red button with the Google+ logo and the text "Sign in with Google".

2. Additionally, users can sign in using Google accounts.

The image shows a login interface on a dark blue background. It features a light blue rounded rectangle containing the following elements:

- An input field labeled "Email Address".
- An input field labeled "Password".
- A green rounded button labeled "SIGN IN".
- A blue link labeled "Forgot password?".
- A red button labeled "Sign in with Google" which includes the Google+ logo (a white "g" with a "+" sign) on its left side.

The "Sign in with Google" button is highlighted with a red rectangular border.

# Money Management

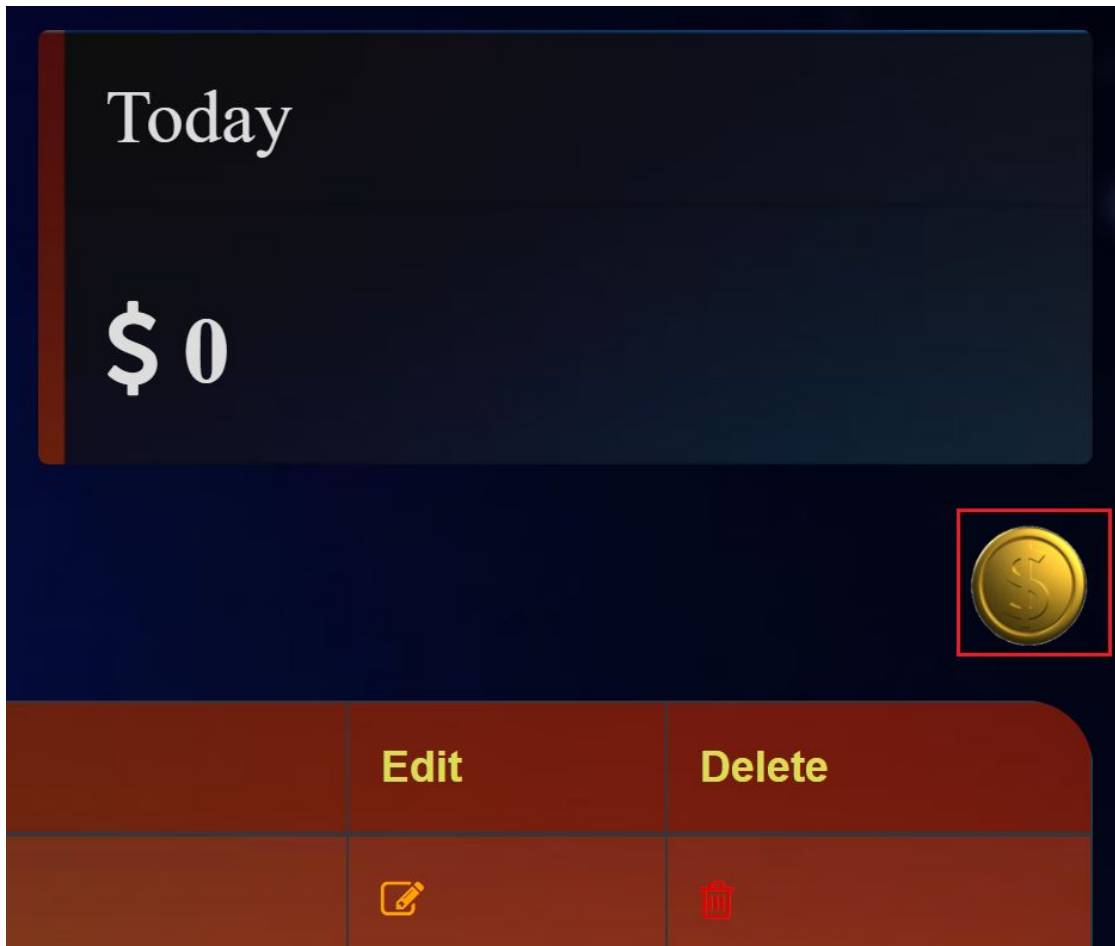
## Overall View

1. After logging into an account, the home page should default to the overall view.



## Adding Expenses

1. Click on the spinning golden coin just above the chart to add an expense.



2. Choose a date, input expense, choose a category, and enter a comment/description.

Add an expense

X

Date

08/02/2018

Expense

category

Food

▼

Comments

save

## Deleting Expenses

1. Under the delete column for the expenses table, select the trash icon that corresponds to the specific expense to be deleted.

Sr.No.	Date	Expense	Category	Comments	Edit	Delete
1	08/01/2018 Wednesday	\$ 150	Food	Restaurant		
2	08/01/2018 Wednesday	\$ 200	Clothing	Mall		
3	07/20/2018 Friday	\$ 500	Healthcare	Insurance		
4	07/01/2018 Sunday	\$ 1500	Bills & Utilities	Rent		
5	04/23/2018 Monday	\$ 1000	Investment	Stock		
6	04/13/2018 Friday	\$ 50	Entertainment	Movies		
7	01/16/2018 Tuesday	\$ 100	Gifts & Donations	Birthday		

## Updating Expenses

1. Under the edit column for the expenses table, select the notepad/pencil icon that corresponds to the specific expense to be edited.

Sr.No.	Date	Expense	Category	Comments	Edit	Delete
1	08/01/2018 Wednesday	\$ 150	Food	Restaurant		
2	08/01/2018 Wednesday	\$ 200	Clothing	Mall		
3	07/20/2018 Friday	\$ 500	Healthcare	Insurance		
4	07/01/2018 Sunday	\$ 1500	Bills & Utilities	Rent		
5	04/23/2018 Monday	\$ 1000	Investment	Stock		
6	04/13/2018 Friday	\$ 50	Entertainment	Movies		
7	01/16/2018 Tuesday	\$ 100	Gifts & Donations	Birthday		

2. In the popup window, edit the relevant fields and click the “Save” button.

Edit expense

Date

08/01/2018

Expense

200

category

Clothing

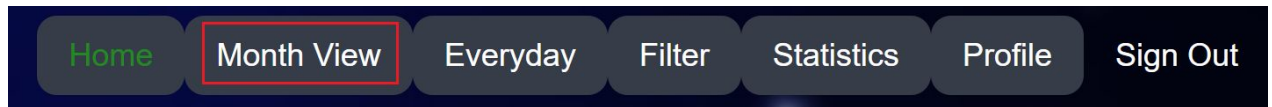
Comments

Mall

save

## Month View

1. In the top right corner of the page, click on the “Month View” tab.

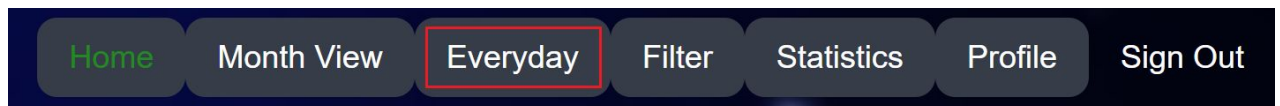


2. Choose the month to view the expenses and details in a pie chart representation.



## Everyday View

1. In the top right corner of the page, click on the “Everyday” tab.



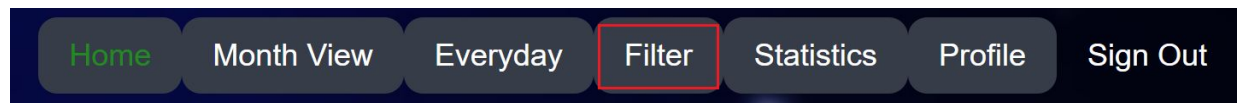


2. Select a date to view the expenses and details in a pie chart representation.



## Filtered View

1. In the top right corner of the page, click on the “Filter” tab.



2. Filter expenses by a combination of date, expenses, and category.

SMART WALLET

Home Month View Everyday Filter Statistics Profile Sign Out

Filter out your expenses

From Date: 01/01/2018 To Date: 08/02/2018

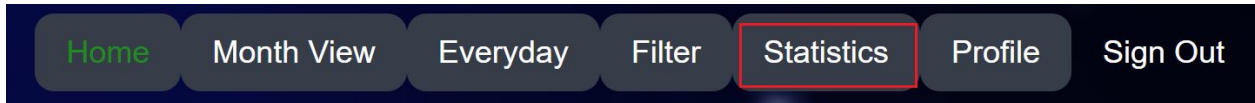
From Expense: 00 To Expense: 10000

category: Entertainment

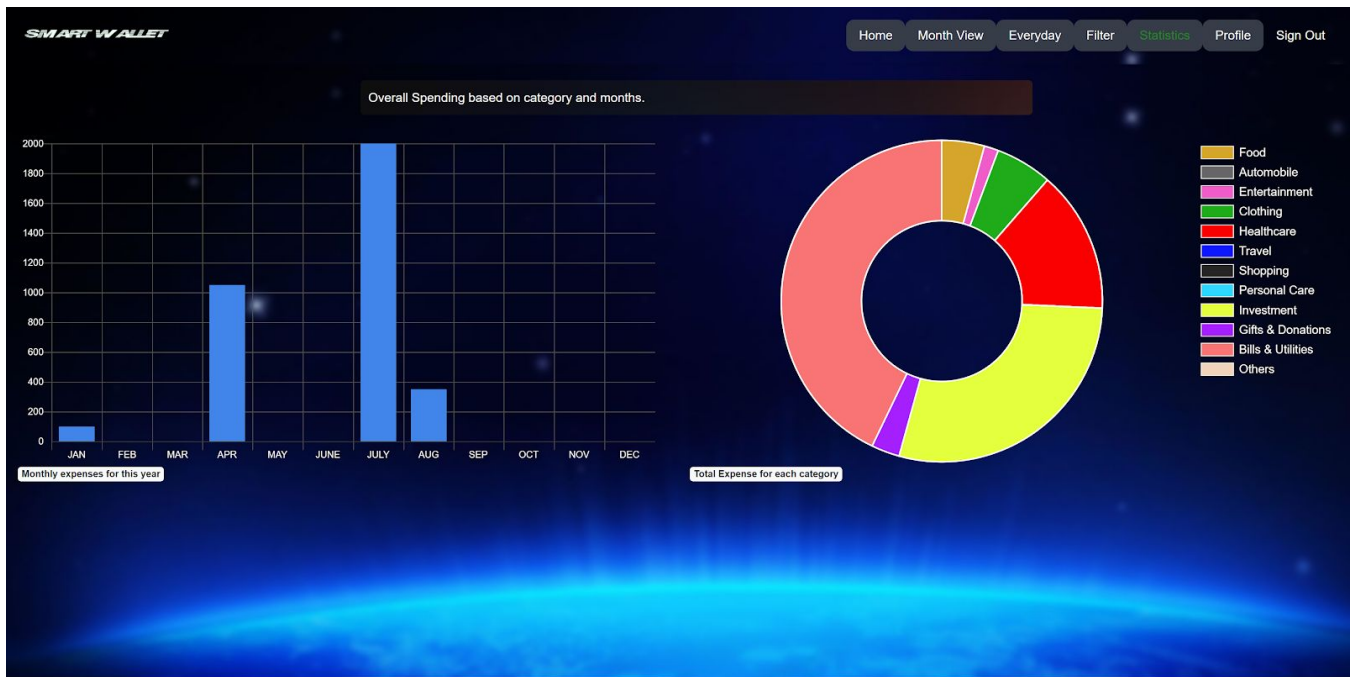
Sr.No.	Date	Expense	Category	Comments	Edit	Delete
1	04/13/2018 Friday	\$ 50	Entertainment	Movies		

## Statistics

1. In the top right corner of the page, click on the “Statistics” tab.

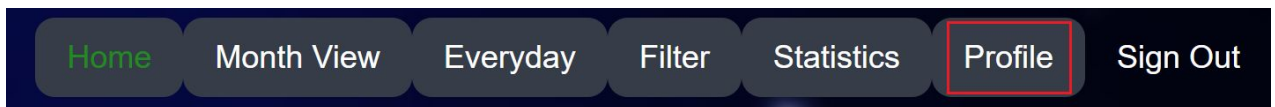


2. A bar graph detailing the total monthly expenses for the year and a pie graph detailing the total expenses for each category will be shown.

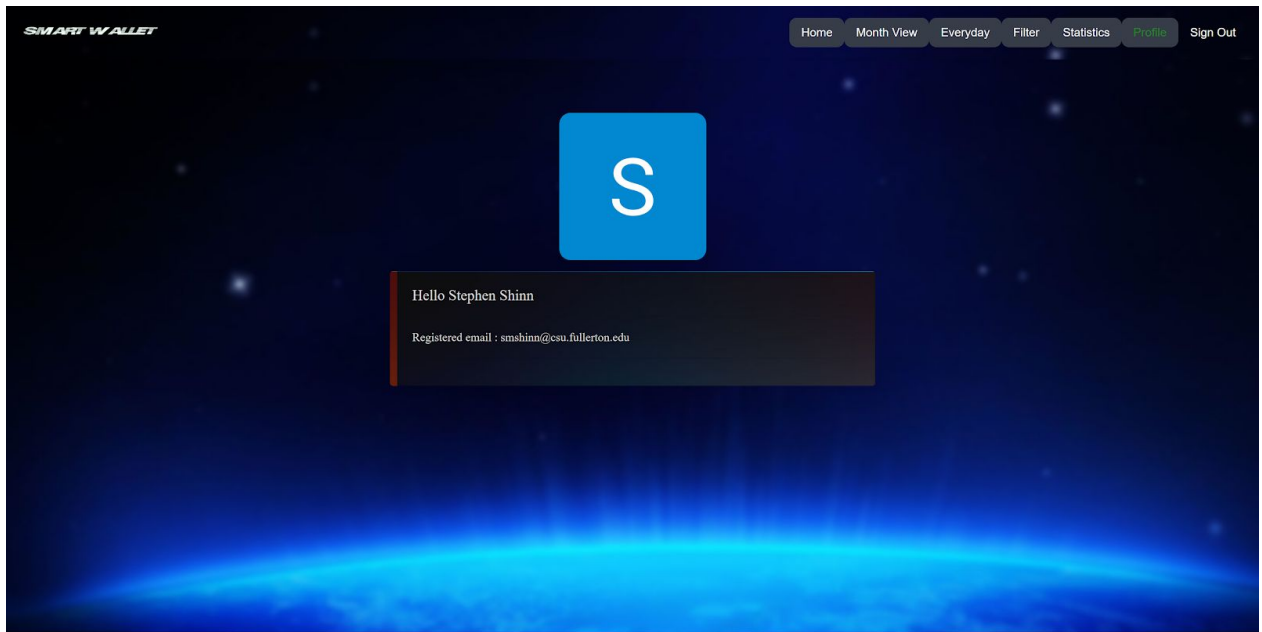


## Profile

1. In the top right corner of the page, click on the “Profile” tab.



2. The user's profile picture along with their registered name and email will be shown.



# Upcoming Features

1. Budget
2. Credit Card / Bank Account Sync
3. Theme Changing (Day/Night Mode)
4. Export excel
5. Predictive cost analysis