**DOCUMENTATION**

* **INTRODUCTION:**
* Budget Advisor provides an easy way to keep track of your daily budget.
* Budget Advisor allows you to create a budget for the entire year to cover regular monthly expenses as well as items which are only applicable to particular months. You can also enter your income each month.
* The budget is split into categories. A budget category can be either an income category or an expense category. Each category is made up of budget items. You can create your own categories and items.
* You can then enter your estimated budget, as well as your actual costs for each month as they occur. This allows you to track how your budgeted costs compare to the actual costs. You can compare in total, by Category, or by budget item.
* There is extensive graphical and reporting analysis of your budget data to help you analyse how effective your budgeting is, and to help you adjust your budgets for the future accordingly.
* **GETTING STARTED:**
* **CREATING NEW ACCOUNT-**
* The first step when running Budget Advisor is to create a new budget. When you first run Budget Advisor you will see a Login screen for Login into account.If you are new user then click on 'new user' and enter the required details.If you are current user then simply enter your username and password and submit it.
* If you are new user then Bankinformation screen will open. Enter required details and then click on submit. This screen can be skipped but the cash information is mandatory.
* **MAIN WINDOW-**
* On the main program windows you will see buttons for each month at the top of the screen. You can choose which month you're working on by selecting the appropriate button. In the example below May is the selected Month.
* On the left hand side of the screen you will see a list of budget categories. A budget category contains various budget items. Each category has a name, and a total next to it for budgeted and actual. The total is the sum of all items in that category. A category can be either an income or an expense. Income categories have a black plus next to them. Expense are shown by a red minus.
* On the right hand of the screen there is a list of budget items. When you select a budget category the item in that category are displayed. Try clicking on different categories to see the items in each.
* At the bottom of the screen are buttons for working with categories and items. You can add, edit or delete both categories and items.
* **CUSTOMIZING YOUR BUDGET-**
* Your budget now contains a set of common budget categories and items. You might want to add some of your own categories/items and get rid of any that you will never use.
* First we will delete a budget item. In this tutorial we will delete "Magazines" which is in the "Entertainment" category.

1. First select "Entertainment" in the list of Categories by clicking on it.
2. On the right-hand side of the screen you will see a list if budget items within the Entertainment category. Select "Magazines" by clicking on it.
3. Click the "Delete" button at the bottom of the screen. Click yes and the item will be deleted.

* You follow almost the same process to delete an entire budget category. When you delete a category all items in the category will be removed.
* Look through the categories and items and delete any you won't use. Don't worry, you can always add them again later if you need to.
* Adding New Categories/Items:
* You might also have some income or expenses that aren't in the common budget. First we'll add a new item to a category.

1. Select the category you want to add the item to. In this example we will add an item to "Food and Groceries".
2. Once the category is selected click the "Add" button below the list of budget items.
3. Enter the name of the item. For example, "Junk Food". When you click OK the item will appear in the list.

* Next we we add a new category.

1. Click the "Add" button below the categories list.
2. You can then enter the category name and specify whether this is an income or an expense category.
3. When you are ready click "Add" and the new category will appear in the list.

* When you click on the category you've just added you will see that it contains no budget items. You can add items to the category by following the process explained above.
* Once your categories and items are setup you shouldn't need to change them often.
* **ENTERING BUDGET-**
* When you look at a budget item you will see that there are three columns next to it. The most important are "Budget" and "Actual". The budget column shows how much money you have budgeted for this item in the current month. You should try and estimate how much you will spend on this item for the month and enter it in advance. At the end of the month you should know how much you actually spent and you can fill this in the actual column. If you're budgeting well then the budgeted amount and the actual amount should be almost the same. You can use the reports and graphs to see how well you're budgeting.
* Try entering some values into the budgeted and actual column for some of the budget items. You will see that the total budgeted and actual amounts of all items in a category is shown next to the category name. The total of all categories is shown below the list of categories.
* You will see Up-Down Arrows next to the Category column. It shows your budget-actual status.
* **BUDGET CATEGORIES:**
* **ADDING NEW CATEGORY-**
* Budget Advisor allows you to add Budget Categories, each with their own unique Budget items. Each budget category can be either an income category or an expense category.
* Adding a new category involves two steps:

1. First click “Add” underneath the Categories Display.
2. Enter the name for the new category and select whether it will be an income or an expense category. Clicking "Add" will add the category and return you to the main screen.

* Once added, the category won't contain any budget items. You will have to add items to the category.
* **DELETING BUDGET CATEGORY-**
* Deleting a Category involves two steps:

1. You can press “Delete” under the Categories display to delete the Category.
2. Select Item to be deleted, and press “OK”.

* Warning: Deleting a Category will delete all Budget items under that category.
* **MODIFYING CATEGORY-**
* Modifying a category involves three steps:

1. You can press “Rename” under the Categories Display.
2. Select Item to be modified and then write new name. Make sure the new name must not match with the existing Category Item name.
3. Press “Update”.

* **BUDGET ITEMS:**
* **ADDING, DELETING AND MODIFYING ITEMS-**
* First select the category to which you want to add, delete or update a new item. This can be done by clicking on the category's name on the left of the screen. Items will be added to the category that is selected.
* Then the process is the same as described above as the category.
* **DUPLICATING BUDGET ITEM:**
* This will allow user to copy only budget values of previous month to the current as well next months.
* First select the “Duplicate” button under the Categories Display.
* Select required month and press “OK” button.
* Warning: This will Duplicate only budget values.
* The same process can be done using “copy” button.
* **RESET BUDGET :**
* This will allow user to “Reset” (new) budget of selected month.
* First select the “New” button .
* Select the month that you want to Reset.Here,You can Reset only future month.
* Warning:All the values of budget and actual will be Reset.It also change your balance.
* **VIEW AND EDIT DAILY REPORT:**
* This will allow user to “view” and “edit” daily Record.
* First Click “Open” button on toolbar.
* Enter date to view your daily Record of that day.
* If you see any wrong record inserted then click on that row to make appropriate change.
* Enter new values for that selected item into textfield and then press “Change” button.
* **VIEWING REPORTS:**
* This will allow user to see three types of Reports.
* **YEARLY REPORT**
* Select year.
* User can see data of that year after clicking on view button.
* **MONTHLY REPORT**
* Select month.
* User can see all existing users’ records of that selected month after clicking “view” button.
* User can see grand total of all existing users’ records .
* **DAILY REPORT-**
* User have to enter two dates.
* User can see records of given range of two dates.
* **VIEWING GRAPH:**
* This will provide graphical representation of Budget vs. Actual values of selected year and category.
* Select “Graph” from Toolbar.
* Select year and category.
* User can compare budget and actual values of given month as well as month wise of given year of selected

Category.