

# BudgetPlus

## User Guide 1.1



If you have any questions or need additional information, please contact  
at 800-123-4567 or [info@budgetplus.com](mailto:info@budgetplus.com)  
[www.budgetplusnow.com](http://www.budgetplusnow.com)

# Contents

1. Overview	3
2. Download the application	4
3. Sign up & Login in	5
4. Add Bank and Credit Card details	7
5. Import the transaction	8
6. Dashboard features	9
7. Create and edit budget	10
8. Add and edit transaction	12
9. Manage Account	14
10. Change password	15
11. Delete Transactions	16
12. Frequently Asked questions	17

# Overview

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## Audience

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This budgetplus app is designed for all users who want to manage and budget their financial transactions.

## Purpose

This user guide provides detailed information about how to use the application. Our free budget tracker will help you understand your spending, save you money and help you plan for a strong financial future.

## Installation - Customers

We designed our application to be installed in 3 easy steps

Download Budget+ using this link

Double Click to run it

You are all set!!

# Download the Application

To download the application directly from the website:

1. Go to [www.budgetplusnow.com](http://www.budgetplusnow.com)
2. Click on Download Now button.
3. Choose your operating system and click on Download Now.
4. Once the download is complete. Click on Budgetplus.exe This will install the application.
5. Then click on Budgetplus App. It will open the login page. As shown below fig 1.2



Fig 1.1

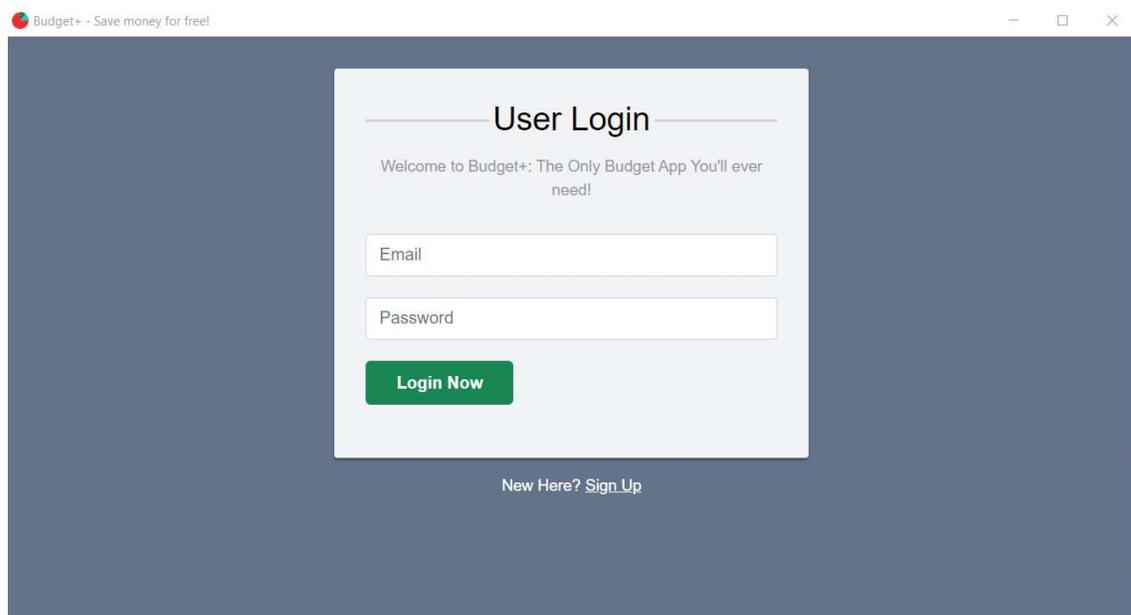
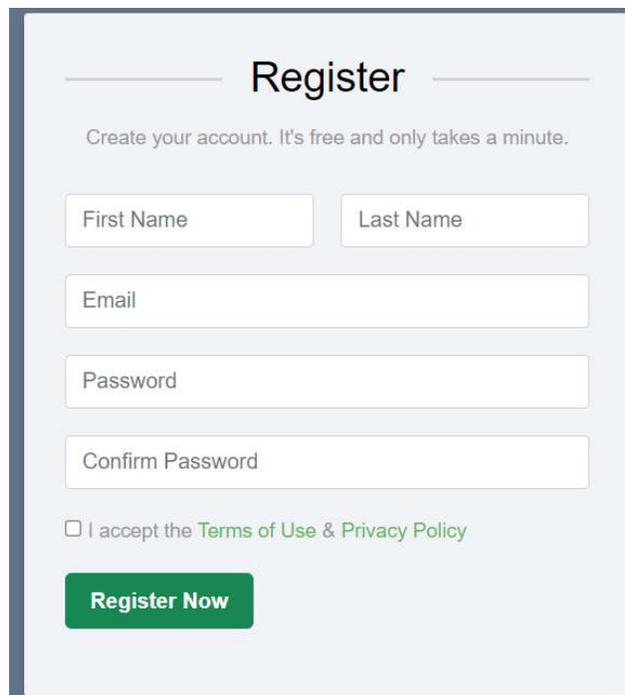


Fig 1.2

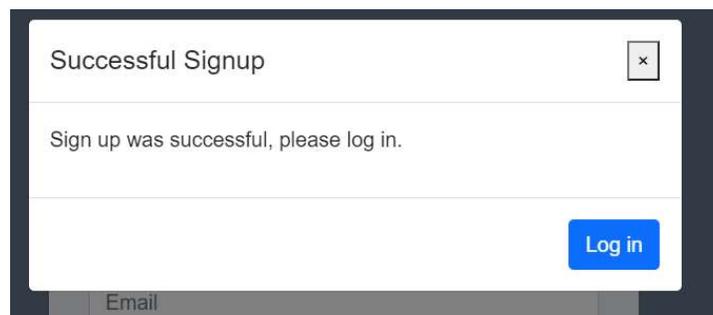
# Sign up and log in in

## First time user or new user:

1. Click on Sign up. It will take you to the Register page to sign up.
2. Provide your first name, last name, email address, and password.
3. Password must be at least 6 characters long
4. Read the Term of Use & Privacy policy. Then checked on I accept.
5. Click on Register Now.
6. You will see a Successful signup message box.
7. Congratulations you just register yourself.

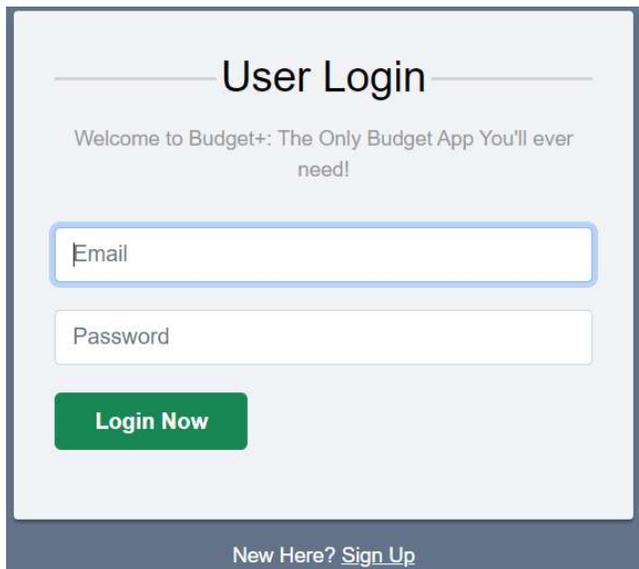


The image shows a registration form titled "Register". Below the title is a sub-header: "Create your account. It's free and only takes a minute." The form contains several input fields: "First Name" and "Last Name" (two separate boxes), "Email", "Password", and "Confirm Password". Below these fields is a checkbox labeled "I accept the Terms of Use & Privacy Policy". At the bottom of the form is a green button labeled "Register Now".



The image shows a "Successful Signup" message box. The title bar says "Successful Signup" with a close button (x). The main text reads "Sign up was successful, please log in." At the bottom right of the message box is a blue button labeled "Log in". Below the message box, the word "Email" is partially visible, suggesting it's part of a form or table.

**Log in after registration or existing user:**



The image shows a 'User Login' form. At the top, it says 'User Login' with horizontal lines on either side. Below that is a welcome message: 'Welcome to Budget+: The Only Budget App You'll ever need!'. There are two input fields: 'Email' and 'Password'. Below the fields is a green button labeled 'Login Now'. At the bottom of the form, there is a link: 'New Here? [Sign Up](#)'.

1. Enter the email address that you use during registration
2. Enter your password
3. Then login Now
4. It will take you to the Dashboard page.

**Incorrect username or password:**

5. If the password is incorrect, a password incorrect message will be displayed.
6. Click on the try again button to reenter the password.'
7. Then start again from step 1 - step 3
8. If forget you the password, then click on forget the password to retrieve or create a new password( a new feature will be added soon)

# Add bank and credit card account

## New user:

you will see the following message.

**No account selected.**

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Please follow these steps below fully interact with this application

- 1) Create an account
- 2) Select the account
- 3) Import transactions

close window

1. Then click the close window button
2. You will see Account Balance page.
3. Click on Add Account button on the upper right area.
4. Then create a new Account by filling up all the required information.

### Add New Account

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Account (Last 4 digits):

Name:

Type: Please select the category ▼

Current Balance:

Close
Create Account

5. provide the last 4-digit numbers of your bank or credit card number
6. Enter the name of the bank or credit card name.
7. Select the right category
8. Enter the current Balance you have on the bank account.
9. Repeat steps 3 – steps 8, if you are adding another account information.

The screenshot shows the Budget+ web application interface. On the left is a dark blue sidebar with the Budget+ logo and navigation links: Dashboard, Budget, Transactions, and Manage Account. The main content area has a light blue header with 'Budget Status: Passing' and a user profile for 'Welcome Bob Johnson'. Below this is the 'Account Balances' section, which includes a table with one entry: Wells Fargo Checking Account with a balance of \$2000.00. The 'Select' checkbox for this entry is circled in red. Below the table are 'Import Transactions' options: a folder icon with '>> Import Transactions' and a bank icon with '>> Import with Bank'. A red 'COMING SOON' stamp is overlaid on the bottom right of the interface.

Budget+ - Save money for free!

Budget+ Budget Status: Passing

Welcome Bob Johnson

### Account Balances

Select	Account	Name	Type	Last Updated	Balance
<input checked="" type="checkbox"/>	*****2545	Wells Fargo	Checking Account	11/5/2021	\$2000.00

Showing 1 to 1 of 1 entries 1 row selected

### Import Transactions

>> Import Transactions

>> Import with Bank

COMING SOON

Click on import transaction and import the transactions.

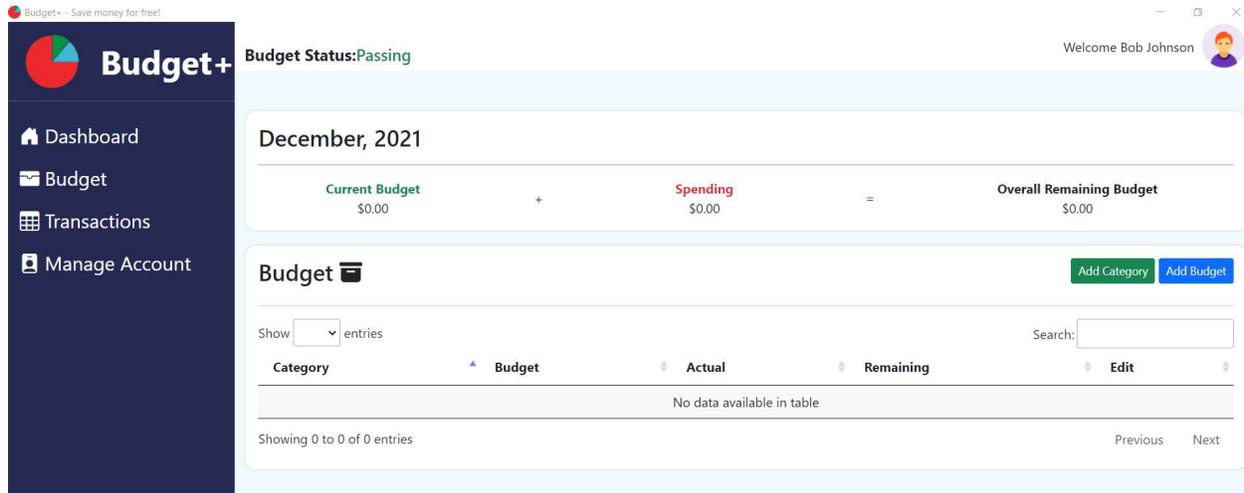
# Dashboard features

1. Click on Dashboard from the menu on the right side
2. Spending Overview can be visualized on the page
3. All the transaction that occurs can be seen here.

The screenshot displays the Budget+ dashboard interface. On the left is a dark sidebar with navigation options: Dashboard, Budget, Transactions, and Manage Account. The main content area shows a 'Budget Status: Passing' indicator and a 'Welcome Bob Johnson' message. A 'December, 2021' summary card indicates '\$672.51 You've Spent this month' and '\$0.00 Budget Remaining'. A bar chart shows spending by category: Auto/Transport (pink), Entertainment (blue), Fast Food (yellow), and Transfer (green). A 'Spending' pie chart also visualizes these categories. Below these is a 'Transactions' table with columns for Account, Description, Category, Amount, Date, and Edit. The table lists five transactions from Wells Fargo, including gas refills, a Taco Bell purchase, a transfer to savings, and a Netflix subscription. A search bar and pagination controls are also visible.

Account	Description	Category	Amount	Date	Edit
Wells Fargo	Holiday Gas Refill	Auto/Transport	\$43.59	12/14/2021	✓
Wells Fargo	Taco Bell	Fast Food	\$13.59	12/13/2021	✓
Wells Fargo	Transfer to Saving	Transfer	\$150.00	12/12/2021	✓
Wells Fargo	Netflix Subscription	Entertainment	\$16.99	12/11/2021	✓
Wells Fargo	Holiday Gas Refill	Auto/Transport	\$43.59	12/10/2021	✓

# Create and edit budget



## Creating budget:

1. Go to the Budget page by clicking on the budget menu on the right side.
2. You will see the page as the figure above.
3. Click on Add Budget button.
4. Select the Category.
5. Add the budget amount.
6. Click on Create Budget.
7. Repeat steps 3 – step 6 as you add more budget on different categories.
8. To create a new budget category. Click Add Category.

The 'Add New Budget' dialog box is shown. It has a title bar 'Add New Budget'. Below the title, there is a 'Category:' label followed by a dropdown menu showing 'Please select an option'. Below that is a 'Budget Total:' label followed by an input field containing '\$0.00'. At the bottom of the dialog, there are two buttons: a grey 'Close' button and a blue 'Create Budget' button.

### Add New Category

Category Name:

Budget page display after adding budgets:

Budget+ - Save money for free!

Budget Status: Passing

Welcome Bob Johnson 

#### December, 2021

<b>Current Budget</b>	+	<b>Spending</b>	=	<b>Overall Remaining Budget</b>
\$750.00		\$0.00		\$750.00

#### Budget

Show  entries Search:

Category	Budget	Actual	Remaining	Edit
Auto/Transport	\$150.00	\$0.00	\$150.00	<input checked="" type="checkbox"/>
Bills/Utilities	\$400.00	\$0.00	\$400.00	<input checked="" type="checkbox"/>
Fast Food	\$200.00	\$0.00	\$200.00	<input checked="" type="checkbox"/>

Showing 1 to 3 of 3 entries Previous  Next

# Create and Edit Transaction

Budget+ - Save money for free!

Budget Status: Passing

Welcome Bob Johnson

**December, 2021**

<b>Cleared Transactions</b> \$672.51 12 Transactions	+	<b>Pending Transactions</b> \$0 0 Transactions	=	<b>Total Transactions</b> \$672.51 12 Transactions
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**Transactions** 🏠 Add Transaction

Show  entries Search:

Account	Description	Category	Amount	Date	Edit
Wells Fargo	Holiday Gas Refill	Auto/Transport	\$43.59	12/14/2021	<a href="#">✎</a>
Wells Fargo	Taco Bell	Fast Food	\$13.59	12/13/2021	<a href="#">✎</a>
Wells Fargo	Transfer to Saving	Transfer	\$150.00	12/12/2021	<a href="#">✎</a>
Wells Fargo	Netflix Subscription	Entertainment	\$16.99	12/11/2021	<a href="#">✎</a>
Wells Fargo	Holiday Gas Refill	Auto/Transport	\$43.59	12/10/2021	<a href="#">✎</a>

Showing 1 to 5 of 12 entries Previous 1 2 3 Next

Adding transaction:

1. Click on Add Transaction
2. Add New Transaction will display.
3. Select the account that the transaction is linked.
4. Provide the description of the transaction.
5. Select the right category the transaction belongs to.
6. Enter the amount.
7. Select the date.
8. Click on Create Transaction.
9. Repeat steps 1 – step 8 to add more transactions.
10. Then just close the message box.

**Add New Transaction**

Account:

Description:

Category:

Amount:

Date:

Close Create Transaction

**Editing Transaction:**

1. Click on edit next to the transaction that needs to be edited.
2. Select the right category and click update.

**Deleting Transaction:**

1. Click on edit next to the transaction that needs to be edited.
2. Click the delete button.
3. It will display the warning.
4. Click delete transaction to confirm the delete.

### Editing Transaction

Account: Wells Fargo

Description: Holiday Gas Refill

Category:

Amount: \$43.59

Date: 12/14/2021

### Warning!

Are you sure? Please make sure before proceed!! 

# Manage Account

Budget+ Budget Status: Passing Welcome Bob Johnson

Account Balances Add Account

Select Account Name Type Last Updated Balance

<input type="checkbox"/>	*****1234	US Bank	Credit Card	11/5/2021	\$5000.00
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Showing 1 to 1 of 1 entries Previous 1 Next

Import Transactions

>> Import Transactions

>> Import with Bank

COMING SOON

## Add account:

1. Click on Add Account button in the upper right area.
2. Then create a new Account by filling up all the required information.
3. provide the last 4-digit numbers of your bank or credit card number
4. Enter the name of the bank or credit card name.
5. Select the right category
6. Enter the current Balance you have on the bank account.
7. Repeat step 1 - step 6 if you are adding another account information

### Add New Account

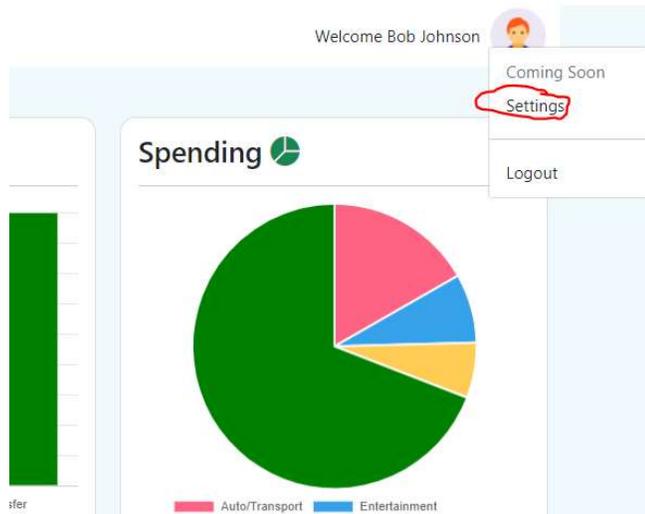
Account (Last 4 digits):

Name:

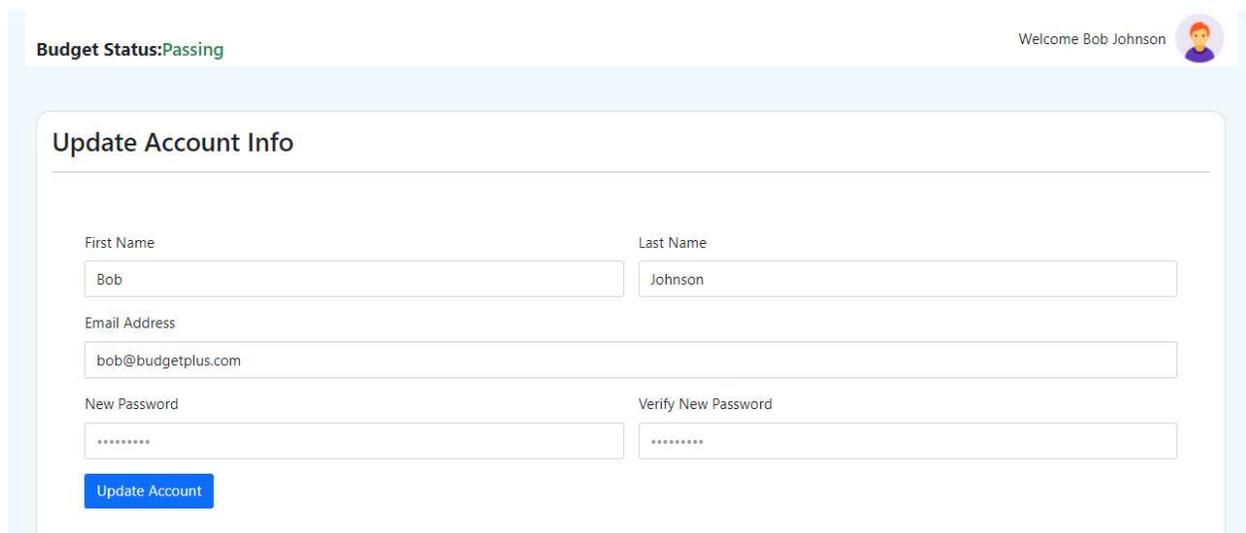
Type:

Current Balance:

# Change password



1. Click on the picture on the top right.
2. Then click on Settings
3. Update Account Info page will appear.
4. Type the new password
5. Then re-type the new password.
6. Click Update Account button

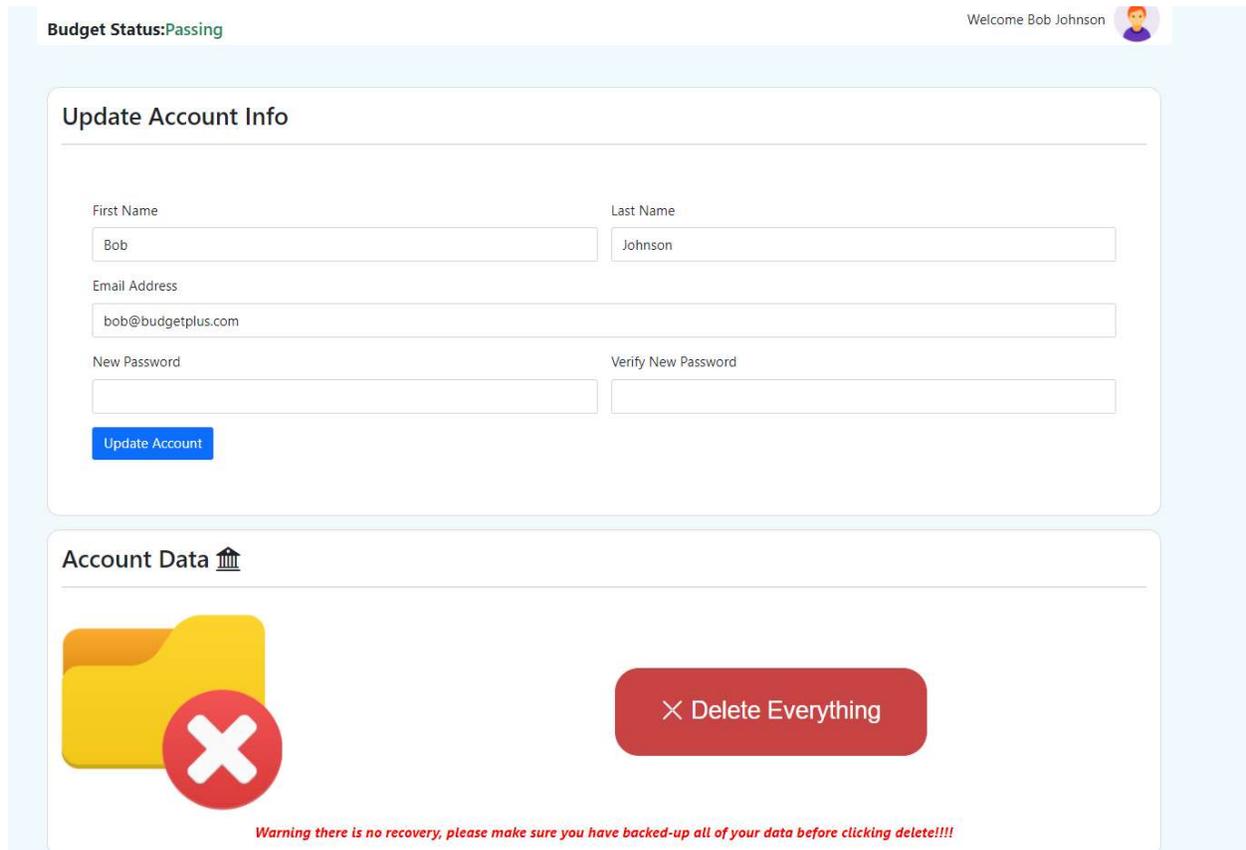


The screenshot shows the 'Update Account Info' form in the Budget+ dashboard. The form is titled 'Update Account Info' and is located below the 'Budget Status:Passing' indicator and the 'Welcome Bob Johnson' greeting. The form contains the following fields:

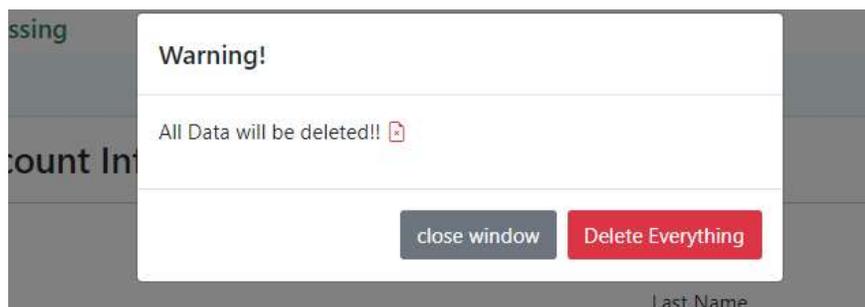
- First Name: Bob
- Last Name: Johnson
- Email Address: bob@budgetplus.com
- New Password: [Redacted]
- Verify New Password: [Redacted]

At the bottom of the form is a blue button labeled 'Update Account'.

# Deleting transactions



1. Click on the profile image on the top right.
2. Click on settings.
3. Click the Delete Everything button.
4. Confirm Everything by clicking the button.



# Frequently Asked Questions

## 1. How to change my password?

- a. Log in to the account.
- b. Click on the picture on the top right.
- c. Then click on Settings
- d. Update Account Info page will appear.
- e. Type the new password
- f. Then re-type the new password.
- g. Click the Update Account button

## 2. How to download transactions from my bank?

This feature is coming soon. You need to add the transactions manually at this time.

## 3. Can I use Budget+ for my business?

This is in our plan to upgrade this feature. Sign up to our mailing list for the latest news.

## 4. Do you have a plan to release the Budget+ Pro version?

Yes, we are planning on releasing early 2023.

## 5. Where and how to download Budget+?

Go to [www.budgetplusnow.com](http://www.budgetplusnow.com)