

# **HomeBank**

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<b>COLLABORATORS</b>
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	<i>TITLE :</i> HomeBank		
<i>ACTION</i>	<i>NAME</i>	<i>DATE</i>	<i>SIGNATURE</i>
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# Contents

<b>1</b>	<b>HomeBank</b>	<b>1</b>
1.1	HomeBank.guide . . . . .	1
1.2	HomeBank/Introduction . . . . .	2
1.3	HomeBank/Requirements . . . . .	2
1.4	HomeBank/Registering . . . . .	2
1.5	HomeBank/Copyright . . . . .	3
1.6	HomeBank/Installation . . . . .	4
1.7	HomeBank/Quick Introduction . . . . .	4
1.8	HomeBank/Overview . . . . .	5
1.9	HomeBank/Account . . . . .	6
1.10	HomeBank/Operations . . . . .	6
1.11	HomeBank/Groups . . . . .	8
1.12	HomeBank/Archives . . . . .	8
1.13	HomeBank/Filter . . . . .	8
1.14	HomeBank/Search . . . . .	9
1.15	HomeBank/AmigaDOS Pattern . . . . .	10
1.16	HomeBank/Statistics . . . . .	10
1.17	HomeBank/Overdrawn . . . . .	11
1.18	HomeBank/CarCost . . . . .	11
1.19	HomeBank/Settings . . . . .	12
1.20	HomeBank/History . . . . .	12
1.21	HomeBank/Future . . . . .	13
1.22	HomeBank/Author . . . . .	14
1.23	HomeBank/Credits . . . . .	14
1.24	HomeBank/MUI . . . . .	14

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# Chapter 1

## HomeBank

### 1.1 HomeBank.guide

HomeBank Version 1.12

(C)1995-98 by Maxime Doyen

- SHAREWARE -

**Introduction** - Features of HomeBank.

**Requirements** - What you need to use HomeBank.

**Registering** - How to register HomeBank.

**Copyright** - Your rights and legals.

**Installation** - How to install HomeBank.

**Quick Intro.** - 5 minutes to success.

**Overview** - Read this first.

**Account** - Account identity.

**Operations** - Overview on operations.

**Groups** - Overview on groups.

**Archives** - Overview on archives.

**Filter** - Edit the display.

**Search** - Locate some operations.

**Statistics** - Numeric report by period or group.

**Overdrawn** - Track and check for overdrawn.

**Car Cost** - A car consumption and cost report.

**Settings** - Some parameters you can adjust.

**History** - HomeBank History.

**Future** - Planned enhancements.

**Author** - How to reach the author.

**Credits** - Those deserving favour.

**MUI** - About MUI.

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## 1.2 HomeBank/Introduction

Why, blabla?... Because, blabla, not satisfy me, blabla, so blablabla...

A new concept in home accounting, easy to use, many options, powerfull, step by step follow, numeric analyzes, 'Euro' friend, 'Car Cost' inside, 'Overdrawn' checker, very nice design under MUI (© Stefan Stuntz)...

NOTE: Online help is available by just pressing 'Help' at anytime.

HomeBank main features:

- Very nice design with gfx
- Button rows for most important functions
- fully localized (currently only french)
- **Euro** currency support
- **Operations** contains extras infos fields with gfx
- **Groups** support for statistics report
- **Archives** book for frequent used operations
- **Filter** to select the display
- **Search** function very powerfull
- **Statistics** report by period or group
- **Overdrawn** display and checker
- **Car Cost** report for car fuel cost and consumption
- Sort the display in every order you want
- Multiple single field operations edit
- External file converter for registered users only (on demand)

## 1.3 HomeBank/Requirements

### SYSTEM REQUIREMENTS

- version 2.0 of the Amiga operating system or higher.

### OTHERS REQUIREMENTS

- **MUI 3.0** or higher
- A lot of bank accounts to deal with...

## 1.4 HomeBank/Registering

### REGISTERING

HomeBank is distributed under the concept of shareware, because very few people sends gifts or donations for giftware programs.

The unregistered version of HomeBank pops up a about requester sometimes to remind you should consider registering, and the number of lines is

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limited to 30 maxi.

Registered users will receive the latest release of HomeBank, and a so-called personalized "keyfile". This keyfile, disables the ShareWare popup requester, and the 30 lines restriction. This keyfile will work with all future releases of HomeBank, so you can download the latest version from your Aminet site without having to wait weeks for your update passing through the slow mail channels. The keyfile must not be distributed in any way. Read also the converter paragraph (in orderform) if you want to convert other account manager datas to use with HomeBank.

HomeBank registration amount (Only Cash: FF, DM, £, US\$):

-----  
100 FF Cash (or eq. DM, £, US\$) - to receive via E-Mail

120 FF Cash (or eq. DM, £, US\$) - to receive on 3,5" DD via Slow Mail

The fastest, cheapest and only way to register is to put cash money together with the filled registration form into a letter (take care of hiding the cash in a sheet of paper (your registration form for example) for secure reason) and send the all to:

Maxime Doyen

A2/12 rés. Planche Epinoy

Avenue de Flandres

59170 Croix

France

Please do not send any kind of foreign cheques since the bank charges outrageous fees from both the sender and the receiver.

All registrations will be handled as fast as possible and should be finished in about two weeks.

## 1.5 HomeBank/Copyright

### COPYRIGHT

The copyright for this software is by Maxime Doyen. This archive may only be distributed in unmodified form. In particular the deletion of the documentation and this copyright-note is not allowed.

### DISTRIBUTION

This software is freely distributable. The distribution is permitted under the following conditions:

- All associated files included with the distribution archive are to remain intact and unaltered.

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## 1.6 HomeBank/Installation

#### INSTALLATION

HomeBank is distributed together with the an Installer-script that requires the Installer program from Commodore. Therefore making installation a breeze!

Just double-click on the 'Install' icon and the installation procedure is on it's way.

## 1.7 HomeBank/Quick Introduction

#### QUICK INTRODUCTION

This chapter gives you a step by step introduction of the principal operation of HomeBank. We assume that HomeBank is already **installed** on your system.

1. Start HomeBank with double click on its icon.
  2. We first define the account identity, so select 'Edit/Account...' menu, and fill in the gadgets, then click on 'Ok'.
  3. We create some groups to assign operations with and to make some statistics later, so select 'Edit/Groups' menu, and add some groups, like 'Food', 'Clothes', 'Taxes', etc... to do so, click on 'Add' then type the group name, then 'return'; then close the window.
  4. We can also create some archives now, select 'Edit/Archives' menu or click on the archive gadget and add some archives, like 'Wage', 'Taxes', 'Rent', etc... to do so, click on 'Add', then fill in the gadgets, changes take effect immediately; then close the window.
  5. We can now create as many operations as we want, select 'Entry/Add' menu,
-

or click on the add gadget, fill in the gadgets by hand, or just copy an archive by clicking on the popup button and selecting an archive, then edit fields and click on 'Ok'.

Reproduce this a few more times, or test inherit and edit functions...

6. We can also fast edit a single field on multiple lines, to do so, select several lines (with shift) and with shift pressed double click on group for example, a group list appears, select a group, and it's magic, the group as changed in all the lines.

7. Well, we have now a complete operational account, you can save it if you want...

8. You can also load the example account to test all the features...

x. For more detailed informations, please consult other sections...

## 1.8 HomeBank/Overview

### OVERVIEW

HomeBank actually start by opening a single an empty account window which is composed by the following:

<infos> ( G: 0, A: 0, F: --Y- )

displays groups number, archives number and filter options status, which are just the checked option gadgets in **Filter** window.

<horizontal buttons row>

open some windows: overdrawn, statistics, car cost, search, archives, filter help bubbles appears for them.

<account identity>

displays some account infos as set in **Account** window.

<operation infos> ( Sel: 0, Vis: 0, Hid: 0, Tot: 0 )

displays number of selected, visible, hidden and total operations.

<balances>

<Bank> is the balance for all validated operations,

<Real> is the balance for any operations, (i.e. validated or not).

theses balances can also be displayed in **Euro** if enabled.

<vertical buttons row>

actions on operations: add, inherit, edit, remove, (de)validate, archive, help bubbles appears for them.

<listview>

displays the account operations in the currently defined sort choice and according to the filter options. You move operations using drag&drop and double click works as follow:

- if 1 line is selected, then simply normal edit,

- if 2 or more lines are selected then fastedit the column,

see **Operations** for more details.

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## 1.9 HomeBank/Account

### ACCOUNT...

This window allow to set or change the account owner, kind, number, initial amount and overdrawn treshold:

#### Owner Name

the account owner full name

#### Account Kind

must be quite clear enough, isn't it ??!!

#### Account N°

the digits/letters number that identify this account

#### Initial Amount

maybe some money already there, this field can be used to set it

#### Overdrawn at

if you are allowed to expense more money than you have then use this field to define the overdrawn treshold for **Overdrawn**

## 1.10 HomeBank/Operations

### OPERATIONS...

HomeBank operations are differents from any other account manager, because you can enter more informations. Two fields comes in adjunction of the well known and boring unique 'Wording', which are 'Kind' and 'Info', (see below for further informations).

The 'Wording' field can also contains some additional informations about your car refuels to be used in the **CarCost** window.

#### Date

weekday, day, month, year of operation.

#### Kind

small image displayed to see the pay mode of operation:

- none
- credit card (like visa, eurocard, mastercard...)
- cheque in (those you cash to the bank)
- cheque out (the ones you fill & sign)
- note (cash money)
- transfert (bank to bank)

#### Infos

some direct information to 'Kind' especially for cheque numbers, or real date, or anything else you want.

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### Wording

the operation wording; can also contains some additional informations for your car refuels to be used in **CarCost**:

- d=99999 (distance) the car meter at refuel,

- v=99.99 (volume) liters numbers of refuel,

example: 'fuel service (d=92458 v=15.41)'

'fuel service d=92458, v=15.41'

### Amount

the operation amount, the '-' button enables you to negate fastly,

select **Euro** if you want to enter amount in euro currency.

### Validated

validate the operation, mean you've checked it with your bank statement.

### Copy Archive

to select a pre-defined operation that will fill some fields for you,

see also **Archives**.

### Group

the operation group, see also **Groups**.

## ACTIONS ON OPERATIONS

### Add (button & menu)

create a completely new operation.

### Inherit (button & menu)

create a sort of child operation, edit is very easy because you don't have to fill all the fields again.

### Edit (button & menu & double click)

edit the active operation, double click works as follow:

- if 1 line is selected, then simply normal edit,

- if 2 or more lines are selected then fastedit the column,

example:

you select 3 operations (with shift) and double click on 'Group' column,

a group listview appears, the group you will select will be set in the

3 previously selected operations.

limitation:

- in date column, year only can be changed,

- amount column is not editable at all.

### Remove (button & menu)

remove all the selected operations (after confirm).

### (De)Validate (button & menu)

toggle validation of all selected operations.

### Archive (button & menu)

copy all selected operations into the **Archive**.

---

## 1.11 HomeBank/Groups

### GROUPS...

This window allow to create and manage the groups. A group can be associated to several operations in the purpose of classifying them, and this to compute some numeric **Statistics**.

WARNING: CHANGES TAKE EFFECT INSTANTLY !!

#### Add

click 'Add' button, type the group name in the string gadget and press 'return'.

#### Remove

select the intruder and click 'Remove' button.

#### Rename

select the bad named, click 'Rename' button, type the new name and press 'return'.

## 1.12 HomeBank/Archives

### ARCHIVES...

Archives is a small database on which you can edit pre-defined operations that will frequently be used, in the purpose of copy them at edit time.

These pre-defined operations contains 'Validated', 'Kind', 'Wording', 'Amount' and 'Group' fields.

Archive book is in fact a replacement of the well known automatic operations that some other account manager have, which is not very useful to me...

This small database is more convenient, and we are not limited to so called «periodic» operations, but everything we want.

WARNING: CHANGES TAKE EFFECT INSTANTLY !!

#### Add

click on 'Add' button and then type and set the fields.

#### Remove

just select the intruder and click on 'Remove'.

#### Sort

sort the archives in alphabetic order.

## 1.13 HomeBank/Filter

### FILTER...

This window allow to define a filter to apply on the operations display, which make the edit more easy, filter can be applied on groups, month, year with an exceptions on unvalidated operations as follow:

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[Valid.]

when set, the unvalidated operation are also filtered, which mean they will not appear if they doesn't matche the options.

[Months]

when set, the selected months only are displayed.

[Year]

when set, the selected year only is displayed.

[Groups]

when set, the selected groups only are displayed.

<Months>

select the month(s) to be displayed.

<Groups>

select the group(s) to be displayed.

<Year>

select the year to be displayed.

## 1.14 HomeBank/Search

SEARCH...

This window allow to fastly locate some operations, the search can be made in 'Wording' and/or 'Info', or by 'Amount' with options as follow:

Pattern

This is the standard match **AmigaDOS pattern**, to search.

By default, 'Whole word' option is disable, so if you type 'toto' in the pattern, it will be converted to '#?toto#?' which will search any string that contain the substring 'toto'.

Amount

when 'Numeric' is set, you can locate an operation by its amount.

[Info only]

when set, search will be applied to the 'Info' field only.

[Whole word]

when unset, convert any pattern string to substring, explanation:

if you type 'toto' in the pattern, it will be converted to '#?toto#?' which will search any string that contain the substring 'toto'.

Numeric

when set, enable to search operation by amount but disable pattern search.

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## 1.15 HomeBank/AmigaDOS Pattern

### AmigaDOS Pattern

This section is for people that are not familiar with AmigaDOS pattern on version 2.0 of the Amiga operating system or higher.

The patterns are fairly extensive, and approximate some of the ability of Unix/grep "regular expression" patterns. Here are the available tokens:

? Matches a single character.

# Matches the following expression 0 or more times.

(ab|cd) Matches any one of the items separated by '|'.

~ Negates the following expression. It matches all strings that do not match the expression (aka ~(foo) matches all strings that are not exactly "foo").

[abc] Character class: matches any of the characters in the class.

[~bc] Character class: matches any of the characters not in the class.

a-z Character range (only within character classes).

% Matches 0 characters always (useful in "(foolbar!%)").

\* Synonym for "#?", not available by default in 2.0. Available as an option that can be turned on.

"Expression" in the above table means either a single character (ex: "#?"), or an alternation (ex: "#(ab|cd|ef)"), or a character class (ex: "#[a-zA-Z]").

## 1.16 HomeBank/Statistics

### STATISTICS

Statistics is a report window that displays some totalisation by period or group.

It shows total 'Expense', 'Income', 'Balance' for each, and for the all.

The report is in numeric only, because numbers are always more precise and interesting than graphical to me.

View by

toggle the view selection between periods & groups

Year

optionaly enable and select a year.

Real Mode

optionaly include not validated operations in sum.

The active selection is showed in the listview.

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## 1.17 HomeBank/Overdrawn

### OVERDRAWN

Overdrawn is a report window that displays the balances date by date for a selected period. It is dedicated to check and display overdrawn:

Month

optionally enable and select a month.

Year

optionally enable and select a year.

<overdrawn> ( Found: 0, Tot: 0 )

this is the number of found overdrawn and total number of operation corresponding to the selection.

Jump Next

jump to the next overdrawn operation in the list, starting from the current active line (means everytime you select a line in the list, the next overdrawn will be search starting from it).

## 1.18 HomeBank/CarCost

### CARCOST

CarCost is a report window that will enable to keep an eye on fuel cost and consumption of your car. To be able to get some results here, you must have some operations with special informations in their 'Wording':

- d=99999 (distance) the car meter at refuel,

- v=99.99 (volume) liters numbers of refuel,

example: 'fuel service (d=92458 v=15.41)'

'fuel service d=92458, v=15.41'

<listview>

the bottom line is the total, except for 'Price' which is the average price.

Month

optionally enable and select a month.

Year

optionally enable and select a year.

For 100Km

comsum. -> average consumption,

cost -> average cost.

## 1.19 HomeBank/Settings

### SETTINGS

Settings window is dedicated to define some global parameters,  
it is composed by 3 pages:

#### Filter

these 4 gadgets are the same as those in **Filter** window.

#### Euro

if Euro is active, balances & amounts are also showed in euro and you  
can enter amount in euro for operation (don't forget to set the 'Euro'  
gadget euro value is amount in your currency  
don't forget to set the change amount,  
example:

for french people, it should be to 6.63 (actually)

#### System

set the external calculator fullpathname  
set file save options 'backup' & 'icons'

## 1.20 HomeBank/History

### Version 1.12 (01-May-98)

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- Fixed an enforcer hit in CarCost window.
- Fixed a bug. It was impossible to change the 2 last digits '.00' without prior deleting them.

### Version 1.11 (18-Apr-98)

-----

- Added Deutsch catalog to distribution.
- Fixed a bug. Amount string gadgets was enable to enter 3 consecutive '.'.
- Fixed a bug. Sign was not updated in numeric string gadget when value was lower than 1,00.
- Fixed display. Displayed amounts where not thousand separate (1 000,00).
- Fixed a bug. Amount string control char was not responding.

### Version 1.1 (14-Mar-98)

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- Some layout changes.
  - Added Weekday in add/inherit/edit window.
  - Added negate button in every amount string.
  - Added inc/decrease buttons on every numericbuttons.
-

- Wrote an overdrawn viewer:  
date by date real balance display and fast overdrawn tracking.
- Added a field in account window to set default overdrawn treshold.
- Wrote a small Car Cost to track car's fuel consumption and cost.
- Added 7 new imagebuttons.
- Added group and archive numbers in info text field.
- Added 'Sort' button in Archive window.
- Fixed a nasty bug. When adding, removing or renaming groups, Archived operations groups where getting wrong.
- Fixed a nasty bug. Search in numeric mode was not working.
- In the stats window, text selection is now in the listview title.
- In Search window, by default search apply on 'Info' and 'Wording', which can be set back to 'Info' only.
- Devalidated operations are now always displayed by default, because the check field 'Valid' in Filter window is disable by default.
- Keyfile was changed.
- Some correction in documentations, form and readme, especially for e-mail addresses 'nornet' was in fact 'nordnet'.
- Documentation was completely re-written.

Version 1.0 (02-Jan-98)

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- First public release

## 1.21 HomeBank/Future

### HOME BANK FUTURE

A software is always distributed in the purpose that some people find some interest in using it. If HomeBank is echoed in the Amiga community, in a word if people register, its developement will continue.

Some improvements are planned, but your constructive suggestions are also welcome, see [Author](#) to reach me.

A brief list of functions which I may perhaps put into the next version:

- More statistics with more options
- Some simple kind of graphics
- Password (if users request it)
- Pay off option (to break account year by year)
- Include file option
- Multi windows with Drag&Drop ability
- and more...



## 1.22 HomeBank/Author

### THE AUTHOR

In care of constantly improve what he does, a programmer need to be open to people opinion and remarks about its work, so if you have suggestions, questions, comments, bug reports please feel free to contact me at one of the following addresses:

e-mail

<mdoyen@nordnet.fr>

slow mail

Maxime Doyen

A2/12 rés. Planche Epinoy

Avenue de Flandres

59170 Croix

FRANCE

## 1.23 HomeBank/Credits

### CREDITS

My sincere thanks goes to the following people:

- \* Stefan Stuntz for his nice graphical user interface package MUI.
- \* Michael Lünse - deutsch translator
- \* all users who decide to register HomeBank.

## 1.24 HomeBank/MUI

### MUI

This application uses

MUI - MagicUserInterface

(c) Copyright 1992-98 by Stefan Stuntz

MUI is a system to generate and maintain graphical user interfaces. With the aid of a preferences program, the user of an application has the ability to customize the outfit according to his personal taste.

MUI is distributed as shareware. To obtain a complete package containing lots of examples and more information about registration please look for a file called "muiXXusr.lha" (XX means the latest version number) on your local bulletin boards or on public domain disks.

If you want to register directly, feel free to send

DM 30.- or US\$ 20.-

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to

Stefan Stuntz

Eduard-Spranger-Straße 7

80935 München

GERMANY

Support and online registration is available at

<http://www.sasg.com/>

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