

MUIBank

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Chapter 1

MUIBank

1.1 MUIBank.guide

MUIBank 1.62 (28/10/97)
Banking Account Manager
(c) Copyright 1996-97, David PRESLE

Introduction

A few words about MUIBank.

Configuration

For which Amiga?

Installation

Installation of MUIBank (really simple!)

Mode d'emploi

How does it work?

Enregistrement

Registration in French!

Author

My address

Thank you!

I didn't do it all alone

Suggestions

So that MUIBank can evolve

Bogue

Bug in French!

Historique
A little history!

1.2 Introduction

MUIBank is a banking account manager, simple and clean, using MUI.

There are already numerous programmes of this sort available, but none that would satisfy me, because they all have their flaws: some are poorly programmed with regard to the system, others are incomprehensive (even those that claim that they are user-friendly!), and of course none of them uses MUI which I find to be a "must" for the modern Amiga!

MUIBank is simple, efficient and gives options for setting parameters.

1.3 Configuration

MUIBank was developed on an Amiga 1200 with MUI 3.8. Generally, the characteristics of your machine should be the following:

System : 2.1 and newer versions.
MUI : 3.3 and newer versions.
(The latest version of MUI is recommended!).
Processor : 68000 and up.
FPU : useless.
Memory : Enough to load MUI, and a little more for MUIBank.

1.4 Installation

The installation of MUIBank is absolutely simple!

Automatic installation:

A manual on how to install the program is provided with MUIBank for your convenience. Double-click on the installation icon and follow the instructions.

Uninstall:

If you are not satisfied with the software (oh well?!), you can uninstall it by deleting the MUIBank files.

Note:

Without the slightest exception, all the necessary files for MUIBank are installed within the MUIBank directory. If all software were installed in that manner, the hard drives would operate much cleaner!

1.5 Manual

This manual was not supposed to appear didactic, but it will provide important information about graphic objects that the user will encounter.

Main Window
The first window displayed.

Details Window
Edit a transaction.

Display Window
Display options.

Printer
Printing parameters.

Lists Window
Type and Characteristics dialog boxes.

Automatic Transaction
Automatic operations.

Query Window
Create queries.

Menus
The different menu options.

ToolTypes
The ToolTypes available.

Note: MUIBank provides on-line help. Do not hesitate to click the help button in MUIBank. If you leave the mouse pointer on certain objects for a certain time, a pop-up box will appear giving you specific information.

1.6 Main Window

The main window is basically composed of a list which displays all the possible operations. One can also see the debit, the credit and the total balance. This window also allows to add, modify or delete transactions.

Debit: This button opens the Details Window to add a debit transaction.

Credit: This button opens the Details Window

to add a credit transaction.

Details: This button opens the Details Window in order to modify the selected transaction in the list.

Delete: This button deletes the selected transaction from the list.

Query: This button allows to choose the query to activate. Only transactions selected by the criteria of the query are displayed. If you choose "None", every transaction is displayed because no query is activated.

To create queries, please refer to Query Window

Type of balance: This object allows to select which type of balance should be displayed. An explanation of the different types of balance follows.

Banking: This balance only takes those transactions into account that don't have "*", i.e. only the transactions that occurred by reopening the account.

The transactions without "*" indicating a date of the transaction ulterior to those of the system, if those are also not taken by the account.

Real: This balance takes transactions into account that don't have a date subsequent to those of the Amiga system.

Theoretical: This balance takes all transactions into account.

List: The list displays all the transactions of the account. If you double-click the column "*", the "*" dialog box changes. A transaction with an empty "*" dialog box has to have an operation date. If this is not the case, MUIBank will apply the system date.

Filter: The filter allows to display the transactions which correspond to a specified criterion. MUIBank filters in accordance with the date of the transmission. If the filter is typed by hand, it must be accepted by pushing enter.

- _ No filter: If the topic string is empty, all the transactions are visible.
 - _ Monthly filter: If the topic string contains a date, e.g. MM.YYYY, then only the transactions of the month MM in the year YYYY are displayed.
 - _ Year filter: If the topic string contains a date like YYYY, only the transaction of the year YYYY will be displayed.
 - _ *: This button deletes the filter.
 - _ - and +: With these two buttons you can change the filter value.
PS: If there is no existing filter, MUIBank will apply a month filter of the current month.
If the topic string contains a month filter, the filter will be increased or decreased by a month.
If the filter is a year filter, the value will be increased or decreased by a year.
 - _ <: Displays all the previous transactions in the filter.
-

_ >: Displays all the posterior transactions in the filter.
PS: If there is no existing filter, the month filter will be applied.

1.7 Details Window

In the details window you can edit or create a transaction. The different dialog boxes of a transaction are displayed and, of course, can be modified. The following is a description of the dialog boxes.

Debit/Credit: This "cycle" allows you to choose wheather it is a credit or debit transaction.

Transmission: This dialog box indicates the date when the transaction was transmitted. The date has to be valid and it has to have the format "DD.MM.YY".

Transaction: This dialog box indicates the date when the transaction actually has or should take place. This section may stay empty; if this is not the case, the date cannot be anterior to that of the transmission.

Number: This dialog box indicates the number of the transaction. This section is optional.

Amount: This dialog box indicates the amount of the transaction.

Type: This cycle allows you to select the type of transaction (e.g.: check). The values can be edited in the lists window

Characteristics: This cycle allows you to select the characteristics of the transaction (e.g.: food). The values can be edited in the lists window

Commentary: This dialog box gives more information about the transaction. Its content is your choice.

1.8 Display Window

The display window allows you to set a parameter for the visualization of the transactions in the main window.

Available dialog boxes: This list allows you to sort the dialog boxes with "Drag and Drop" according to their display order in the main list. The dialog boxes appearing under "-----" will not be displayed. Select an element, keep the mouse button pushed, move the mouse (toward

the top or bottom) and let go of the mouse button: you now have changed the order of the dialog box display.

Default query: This object allows to choose the query to activate when loading the account. Suggested queries are those that you created.

Balance by default: By modifying the value of this object you choose a type of balance which will be displayed when charging the account.

Filter by default: This object allows to choose the type of filter type which should be displayed when charging the account.

- None : No transaction is filtered.
- Monthly : Only the transactions of the current month are being displayed.
- Annual : Only the transactions of the current year are being displayed.

Total by default: This object allows you to select the type of totals which will be displayed when charging the account.

- None : No total displayed.
- Anterior : Only the total of previous transactions in the filter are being displayed.
- Posterior : Only the total of posterior transactions in the filter are being displayed.
- Both : Both are being displayed.

Meaning of "*": This object allows you to modify the purpose of the "*" dialog box. If you select "Not valid", the transactions that have not appeared by reopening the account will have a "*". If you select "Valid" the transactions indicated in a reopened account will have "*". PS: in this manual "*" means not valid.

Date format: This object allows you to choose the display format and how to determine the date. The symbols are explained as follows:

- DD <=> Day
- MM <=> Month
- YYYY <=> Year

Date separator: The content of this object is used to separate the day, month and year.

Comma position: Allows you to choose the comma position in the amounts. For instance, if the comma is in the third position, the amount 12345678 will be indicated as 12345,678 .

1.9 Print window

The print window allows you to format the output by choosing a size for each field as well as its justification.

1st column: Indicates the name of the dialog box that is to be formatted.

2nd column: Allows you to set up the size of the dialog box with the number of characters.

3rd column: Allows you to assign the value of the dialog box. "Left" align toward left, "Right" align toward right, and "Center" align toward the center.

1.10 Lists window

The lists window allows you to edit the possible values for the type and the characteristics of a transaction. Thus you can create characteristics such as miscellaneous, car etc. The window will display this list while you are editing. The different possible actions are:

Type/Characteristics: This "cycle" allows you to select the value list you would like to edit.

Add: This button adds the value contents list to the topic string. The text cannot be empty.

Modify: This button replaces the selected value with the one in the topic string. The text cannot be empty.

Delete: This button deletes the selected value.

List: You can sort the list elements by means of drag and drop. Select an element, hold down the mouse button, slide the pointer (up or down) and release the mouse button: you have now successfully changed the value order.

Topic string: When you press Return two things might occur: If a value is selected you will modify it otherwise you add a supplementary value..

1.11 Automatic operations

The window "Automatic operations" allows you to manage the automatic operations. That way you can determine one periodical operation to be repeated when necessary.

List of operations: This list contains all of the automatic operations which have already been set up. You can sort using drag and drop.

New: Allows you to initialize all the dialog boxes of the automatic operations.

Delete: Deletes selected operation.

Add: Adds an operation to the list.

Modify: Modifies the selected operation with the one you just determined.

Automatic operation dialog box: Here is a description of the

automatic operation dialog box which is different from the classic operations dialog box.

Name: Name of the automatic operation. Once the operation is added, this name will appear on the list of automatic operations.

Period: This dialog box indicates in numbers of months (0 to 12), how often an automatic operation is executed. If you select zero, the operation will be deleted as soon as you start it.

Day: This dialog box indicates the day when the operation is supposed to start. When the numbers shown are not applicable for the month (e.g.: 31. February), the highest possible number will be used (e.g.: 28. or 29. February depending on the year).

Transission: It contains the date for the next launch of the operation. The number of the date for this day may be different from the one in the Day dialog box. If the number is higher than zero this date will be incremented daily.

Operation: Indicates if the dialog box for Launching Operation is checked. If yes, the date in this box will be identical with the one in the Transmission box.

Other boxes: Please see
window details

.

1.12 Create queries

The query window allows to create queries. So, you can displayed transactions according to your criteria.

Queries list :

This list contains the queries which have been created. You can sort the list by a drag and drop.

New : Initialize the fields of the query.

Delete : Delete the selected query.

Ajout : Add the typed query to the list.

Modify : Modify the selected query.

Name : The "string" object which is below the list contains the name of the query.

Selection criteria :

By default, the fields of the query allow to select all the transactions. A "logical AND" is done, so a transaction is selected only if all the criteria match.

Booleans :

Booleans are represented by "checkboxes". If the box is checked, a

transaction must have the value to be selected.

- _ Valid : Select valid transactions.
- _ Not valid : Select not valid transactions.
- _ Credit : Select credit transactions.
- _ Debit : Select debit transactions.

Example : Selection of valid and credit transactions.
You have to check "Valid" and "Credit" boxes.

Intervals :

For each interval, you have to fill two "text" objects : the first for the marked inferior, and the second for the marked superior. If the object is empty, the marked is ignored.

- _ Transmission : Select transactions if their transmission date is inside this interval.
- _ Amount : Select transactions if their amount date is inside this interval.

Example : Selection of transaction having their transmission date between the 10/12/96 and the 20/03/97 and their amount greater than 2000.
You have to fill transmission interval by 10/12/1996 and 20/03/1997, and put 2000 in the first object of the amount interval and empty the second one.

Type and characteristics :

"Type" and "characteristics" are two lists which respectively contain all the types and characteristics. A transaction is selected if its type or characteristics is above the line "-----".

Example : Selection of transactions of type "Transfer" & "Cheque" and of characteristics "Food".
You have to put only "Transfer", "Cheque" and "Food" above the line "-----" (with a drag and drop).

Character map :

Fields "Transmission", "Number" and "Comment" must be filled by an AmigaDOS pattern.

Example : Selection of transactions having in their comment the word "house".

You have to put "#?house#?" in the comment textbox.

1.13 Menus

The MUIBank menus can only be accessed from the main window (the ← one that will be displayed when you start MUIBank).

Menu Project

New : Clears all the banking operations from the memory.

Open : Opens a savings account.
Save : Saves the current account.
Save As : Saves the current account under a different name.
Print : Prints the selected operation.
About... : Opens a little window displaying the author's
address and that MuiBank is a shareware.
About MUI : Opens a little window that will provide information
about MUI.
Exit : Exit MUIBank.

Menu Preferences

Display : Opens the
display window
.
Print : Opens the
print window
.
Lists : Opens the
lists window
.
Automatic operations: Opens the
automatic operation window
.
Query : Opens the
query window
.

1.14 ToolTypes

ToolTypes allow you to configure the applications. Currently MUIBank has only one ToolType.

ACCOUNT: This ToolType allows you to select the account you want to open when you start MUIBank. For example "ACCOUNT=Example.account".

1.15 Registration

If you like MuiBank, you should definitely register your copy ↔
with the

author
in order to support future developments! MUIBank responds
to all needs, and definitely to small wallets!

Registration (Obligatory):

A registration enables you to receive the newest version of MuiBank.
You will then be able to work your accounts without being reminded by
a message that you should register your programm.

A registration allows you to use five major updates of MUIBank.

Price: 55 French Francs

Postage fees (Optional):

If you do not have an e-mail address, you should add the shipping and handling costs to your bill.

Price: 15 French Francs

For users who do not live in France:

If you don't live in France you can pay me in your currency (please add 10% to the price). For the small amounts I ask you to please pay me in bills (no checks) and not in coins (I cannot exchange coins). If you cannot help but paying me with a check, please add 25% to the amount. The cost for shipping and handling for foreign countries amounts to 15 Francs Français.

Remember: A software worth using is worth buying!

1.16 Author

To send me money, suggestions and bug reports (where?), please write in French or in English, because those are the only languages that I can understand. My coordinates are as follows:

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(Valid until 30/06/98)

1.17 Acknowledgements

I would like to thank all the people who actively collaborated in the development of MuiBank. I hope that this list of names will get longer in time!

Amiga Translators Organization :

I thank ATO having made translations. So many users will be able to enjoy my software.

The list of registered users:

In this mean world money appears to be the motor of all energy. I would therefore like to thank all of the users who already have or are planning to register the programm. By registering you honor my work, and I assure you that it is extremely motivating to not just work for one-self.

1.18 Suggestions

I would like MUIBank to progress, to improve and to get enriched ↔
with
new new ideas. Therefore my imagination leads me to believe that you
might have great ideas that I never thought of.
Please be so kind as to send
me
your suggestions.

PS: You could particularly send me icon ideas for MUIBank and/or offer
your translation talents.

1.19 Bugs

I am proud to tell you that MUIBank is 100% bug-free!
I can assure you that thorough tests have been made to find them. To tell
you the truth, I also use MUIBank. However, if inspite of my diligence
you should encounter one of these satanic bugs, please report to
author
by indicating your hardware and software configuration as well as ↔
which
version of MUIBank you are using.

Remember: A bug known is a bug gone!
(No matter how vicious it might be!)

1.20 History

The history of MUIBank would like to point out the programm evolution.
The eradication of the bugs is not mentioned since this is an on-going
process.

- 1.62 (28/10/97)
 - _ Addiction of the english documentation.
 - 1.61 (18/09/97)
 - _ Addiction of the english catalog.
 - 1.60 (12/06/97)
 - _ Addiction of the queries management. Transactions are now selected according to your criteria.
 - _ Addiction of a button which allows to delete the filter.
 - _ In the main window, the fields are now separated by a vertical bar.
 - 1.52 (05/05/97):
 - _ Eradication of an error in the storage files of the MUIBanque version 1.10. It is possible that the order of the display panels has changed. If this is the case, use the display window to restore the order.
-

- 1.51 (15/04/97):
- _ The file MUIBank can be renamed without ignoring the tooltypes.
 - _ When the filter is used, a total of the anterior and posterior operations can be displayed in the filter..
 - _ The date set-up is no longer limited; you can type 3.5.1997 instead of 03.05.1997.
 - _ The date separator can be changed.
 - _ Multiple date formats are available.
 - _ The comma position in the amount can be changed.
- 1.50 (07/04/97):
- _ Addition of an automatic operation administration as well as an associated property dialog box.
- 1.40 (17/03/97):
- _ MUIBank makes specific versions available now for different processors.
 - _ Addition of the print option as well as a print property dialog box.
- 1.30 (06/01/97):
- _ Addition of a filter which allows you to select the operations following their transmission dates.
 - _ Addition of an option which allows you to reverse the meaning of the "*" -dialog box.
- 1.20 (14/12/96):
- _ Application localisation. MUIBanque changed it's name to MUIBank. The ToolType COMPTE has been renamed to ToolType ACCOUNT.
 - _ Modification of the Display window.
- 1.11 (24/11/96):
- _ Addition of the ToolType COMPTE which allows you to open an account during the instalation of MUIBanque.
- 1.10 (03/11/96):
- _ All characters are accepted in the Number dialog box of an operation.
 - _ Addition of the Operation, the dialog box and renaming of the Date dialog box into Transmission dialog box to distinguish the transmission date from the date that it actually took place.
 - _ Addition of the "*" dialog box to distinguish the operations which are configured after the reopening of the account.
 - _ Implementation of different types of balance.
 - _ Implementation of a choice of panels to be displayed in the main list.
- 1.00 (13/10/96):
- _ First public version of MUIBanque.
-