

1 User Manual

1.1 Introduction

SmartBudget is a personal finance tracking application designed to help users record daily transactions, manage monthly budgets, view summaries, and analyze spending patterns. The application operates fully offline, ensures immediate data saving, and supports Windows, macOS, and Linux systems. This manual explains how to use all features of SmartBudget, including:

- Recording, editing, and deleting income or expense transactions
- Browsing and filtering financial history
- Setting category-based monthly budgets
- Receiving automatic overspending alerts
- Viewing summaries and category charts
- Understanding how data is loaded and saved

1.2 Getting Started

1.2.1 System Requirements

Operating Systems: Windows, macOS, Linux

Java Runtime: Any supported Java runtime compatible with JavaFX

Network: Not required (SmartBudget functions fully offline)

1.2.2 First Launch

On startup, SmartBudget will automatically:

- Load saved transactions (if any)
- Load monthly budgets (if previously set)
- Display your most recent financial data

If no prior data exists, SmartBudget will inform you that your finance database is empty.

1.3 Navigating SmartBudget

The SmartBudget interface consists of three main sections:

1. Dashboard - Summary of Total Income, Expenses, Budgets & Recent Transactions
2. Transactions – Record, view, filter, edit, and delete income or expense entries.
2. Budgets – Set monthly spending limits per category.
3. Reports – View summary totals and category charts.

1.4 Transactions

1.4.1 Adding a Transaction

You can record either an expense or income.

Steps:

1. Open the Transactions tab.
2. Click Add Transaction.
3. Choose Expense or Income.
4. Enter the required details.
5. Click Save.

1.4.2 Editing a Transaction

Steps:

1. Select a transaction from the list.
2. Click Edit.
3. Modify amount, category, date, or note.
4. Save changes.

1.4.3 Deleting a Transaction

Steps:

1. Open the transaction you want to delete.
2. Click **Delete**.
3. Confirm deletion in the confirmation prompt.

1.4.4 Viewing Transactions

Displays a table of all entries with totals for income, expenses, and balance.

1.4.5 Filtering Transactions

Filter by:

- Category
- Date range
- Combined filters
- Keyword search

Clear Filters resets the list.

1.5 Budgets

1.5.1 Setting a Budget

Steps:

1. Open Budgets tab.
2. Select a category.
3. Enter a monthly limit.
4. Save.

5.2 Updating a Budget

Modify the limit and save.

1.6 Overspending Alerts

Alerts appear when spending reaches or exceeds the budget limit for a category.

1.7 Reports

1.7.1 Summary Report

Open the Reports ab

Select reporting period:

- This Month
- Last Month
- Custom Range

Reports show totals for income, expenses, and balance.

1.7.2 Category Spending Chart

SmartBudget displays at least one visual chart (pie or bar) broken down by category.

Chart Behaviour:

- Automatically updates when transactions change
- Labels and legends clearly identify categories
- Values correspond exactly to underlying data

1.8 Data Persistence

All changes save instantly and load automatically on startup.

1.9 Offline Mode and Privacy

SmartBudget works 100% offline. All data remains local.

1.10 Performance & Responsiveness

Optimized for large datasets with fast loading and filtering.

1.11 Cross-Platform Support

Works uniformly on Windows, macOS, and Linux.

1.12 Maintenance & Updates

Modular architecture, clean code structure, and unit test support.

1.13 Frequently Asked Questions

Does SmartBudget work offline?

Yes, completely offline.

Is data synced?

Not in the current version. Data is stored locally on each device.

How to back up data?

Manually copy the app's storage folder to another location or device.

1.14 Summary

SmartBudget provides a clean, reliable, and intuitive way to:

- Track financial transactions
- Monitor category budgets
- Receive warnings about overspending
- Visualize spending in charts
- Operate securely and offline

This user manual should help you navigate and use all features confidently.