# Account-Book System User Manual

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## Operating Environment

### 1.1 System Requirements

* **Operating System**: Windows 7/10/11, macOS, Linux
* **Java Runtime Environment**: Java SE Runtime Environment 11 or higher
* **RAM**: Minimum 4GB of RAM
* **Hard disk space**: at least 100MB of available space
* **Display resolution**: 1280 × 720 or higher

### 1.2 Installation Steps

1. Make sure your computer has installed the Java Runtime Environment (JRE 11+).
2. Download the “Account-Book” zip package from github.
3. Unzip the installation package to any directory
4. Double-click the executable file (jar file or script file) to run it.

## Getting Started

### 2.1 Main interface layout

Account-Book adopts a simple and intuitive interface design, which is mainly divided into the following areas:

图形用户界面, 图表, 应用程序, Excel, 饼图

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**1. Left side navigation bar**

- Top display of current user's avatar and user name

- Four main function buttons:

- **Budget management** (budget): view and manage the budget

- **Statistical charts** (charts): visualize income and expenditure data

- **Transaction management** (find): query and manage transaction records

- **User settings** (user): account management and data import

**2. Right side content area**

- Different function panels are displayed according to the navigation bar on the left.

- All panels adopt a unified interaction design style

### 2.2 Basic Manual Guide

**First time startup**

* At the first startup, the system uses “default” user to login by default.
* The left navigation bar displays the current user information.
* The right content area displays the budget management page by default.

**Toggle Functions**

* Click the buttons on the left navigation bar to switch between different pages.
* The system will save your operation in real time, no need to save manually.

**Exit System**

* Click the close button on the top right corner of the window.
* The system will automatically save all the data and exit.

## Core Functions

### 3.1 Transaction Management

The transaction management function allows you to record, query and analyze all income and expenditure transactions.

**Viewing Transaction Records**

**表格

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1. Click the “find” button on the left navigation bar to enter the transaction management page.

2. The page displays all the transaction records in a table format, containing the following information:

- Transaction ID

- Transaction ID

- Transaction ID Amount

- Transaction ID Amount Transaction Date Transaction Creation Time

- Transaction Description

- Tags

**Add New Transaction**

**图形用户界面, 应用程序

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1. Click the “Add/Edit” button on the transaction management page.

2. In the pop-up dialog box, fill in the transaction information:

- Select the transaction type (Income/Expense)

- Select the type of transaction (Income/Expense)

- Enter a description.

- Select the transaction type (Income/Expense) Enter the amount Enter the description

- Select the transaction category

- Add customized tags (use “|” to separate multiple tags).

3. Click the “Confirm” button to save the transaction.

**Editing Trades**

**图形用户界面, 应用程序

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1. Select the trade you want to edit in the trade list.

2. Click the “Add/Edit” button.

3. Modify the transaction information in the pop-up dialog box.

4. Click “Confirm” to save the changes, or click “Delete” to delete the transaction.

**Filtering Transactions**

**图形用户界面, 文本, 应用程序

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1. Click “Filter” button to open the filter dialog box.

2. Set the filter conditions:

- Description Keywords

- Date Range

- Amount range

3. Click on “Confirm” to apply the filter.

4. Only transactions that meet the criteria will be displayed.

5. Click the “Refresh” button to reset the filter to show all transactions.

### 3.2 Budget Management

The Budget Management feature helps you set and track financial goals.

**Viewing Budgets**

**表格

AI 生成的内容可能不正确。**

1. Click the “Budget” button on the left navigation bar to enter the budget management page.

2. The page displays all budgets in a tabular format and contains the following information:

- Description

- Description

- Description Start Date End Date

- Budgeted Amount

- Amount Used

- Remaining Amount

- Progress bar (to visualize budget usage)

**Adding a New Budget**

**图形用户界面, 应用程序, Word

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1. Click the “Add/Modify Budget” button on the Budget Management page.

2. In the pop-up dialog box, fill in the budget information:

- Description

- Description

- Budget Amount

- Customize tags (use “|” to separate multiple tags)

3. Click the “Confirm” button to save the budget.

**Modify Budget**

**图形用户界面, 应用程序, Word

AI 生成的内容可能不正确。**

1. Select the budget you want to modify from the budget list.

2. Click “Add/Modify Budget” button.

3. Modify the budget information in the pop-up dialog box.

4. Click “Confirm” to save the changes or “Delete” to delete the budget.

**Budget Progress Tracking**

- The progress bar color indicates the budget usage:

- Green: less than 80% utilization

- Orange: Over budget

### 3.3 Budget exceeded

The Statistical Chart feature provides a visual tool for financial analysis.

**Viewing Charts**

**图形用户界面, 图表, 应用程序, Excel, 饼图

AI 生成的内容可能不正确。**

1. Click the “charts” button on the left navigation bar to enter the charts page.

2. At the top of the page, there are year and month selectors.

**Pie Chart Analysis**

1. Two pie charts are displayed at the top of the page:

- Left side pie chart: income source analysis

- Pie chart on the right side: Expenditure category analysis

2. Each sector displays the category name, amount and percentage.

**Bar Chart Analysis**

1. A bar chart is displayed at the bottom of the page to compare income and expenses.

2. if you select “All Year”, a 12-month comparison of income and expenses is displayed

3. If you select a specific month, the income and expenses for that month will be displayed.

**Data Filtering**

**图形用户界面, 图表, 应用程序, Excel, 饼图

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1. Select the year you want to analyze from the “Year” drop-down menu.

2. Select the month to be analyzed from the “Month” drop-down menu (“All Year” means the whole year).

3. The chart will automatically update according to the selection

## Advanced Features

### 4.1 AI Assisted Import

图形用户界面

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AI Assisted Import allows you to intelligently import WeChat Pay bills.

**Importing WeChat Bill**

1. Click the “user” button on the left navigation bar to enter the user settings page.

2. Click “Import WeChat CSV” button to import WeChat bill in standard format.

3. The system will automatically parse the bill content and create corresponding transaction records.

**AI Assisted Import**

1. Click “Import WeChat CSV (AI)” button on the user settings page.

2. The system will use AI technology to intelligently parse the bill content.

3. AI can handle more complex or irregular bill formats.

4. Once imported, new transactions will be automatically added to the transaction history.

### 4.2 AI Budget Advice

The AI Budget Advice feature provides you with intelligent budget planning advice.

**to get AI suggestions**

1. Click the “AI Budget Advisor” button on the user settings page.

2. The system will analyze your historical transaction data.

3. AI will generate personalized budget advice based on your spending habits.

4. The advice includes:

- Reasonable monthly budget allocation

- Possible cost-saving and revenue-boosting options

- Spending pattern analysis and optimization recommendations

### 4.3 Switching User Accounts

1. Click on the “Switch Account” button on the user settings page.

2. Enter your user name and password.

3. Click the “OK” button to switch to the specified user.

4. After successful switching, the left navigation bar will be updated to show the current user information.