

Main Page

Hilf mir! your Finance Manager, how can I help you?

Hi Jennifer! Here's a quick financial tip for you:

- Last Month's Spending:
 - Food & Dining: \$1,200 (30% of expenses)
 - Entertainment: \$500 (15% of expenses)
- Your Savings Progress:
 - Goal: Save \$1,000 for a vacation by December 2024.
 - Current: \$500 (50% of goal)
 - On Track? Yes You're saving 20% of your income, which is perfect for reaching your goal.
 - Suggestion: Try reducing dining out by \$200 next month. Cancel 1 unused subscription to save \$50. You're on track to reach your savings goal & keep it up!

Please enter your question:

OPT-IN | OPT-OUT | Delete

AI Conversational Page

Teach me some tips

Here are some useful financial management tips for you:

Budgeting

- Track Your Income and Expenses:** Keep a detailed record of all your sources of income, such as salary, bonuses, and investment returns. Similarly, record every expense from major bills like rent or mortgage payments to small daily purchases like coffee. You can use apps like Mint or Excel spreadsheets to help with this. By tracking your income and expenses, you can identify areas where you may be overspending and make adjustments accordingly.
- Set Realistic Goals:** Determine what you want to achieve, saving for a vacation in the next six months and buying a house in three years. Financial goals, based on these goals, allocate your income into different categories in your budget. For example, if your goal is to save for a down payment on a house, set aside a certain percentage of your income each month specifically for that purpose.

Please enter your question:

OPT-IN | OPT-OUT | Delete

Trading Asset & Budget

My assets

Details | Statistics | Asset | Budget

Net assets: ¥ [input field]

Total assets: ¥ [input field]

Asset account

Bank account title: ¥ [input field]

VISA account title: ¥ [input field]

Budget for Month Year

Details | Statistics | Asset | Budget

Total budget: ¥ [input field]

Already paid: ¥ [input field]

Remaining: ¥ [input field]

Classification budget

Category name: Already paid: ¥ Remaining: ¥

Transaction Details & Statistics

Breakdown of accounts

Details | Statistics | Asset | Budget

Records of income and expenditure

Details | Statistics | Asset | Budget

Statistics on account expenditures

Details | Statistics | Asset | Budget

Account income statistics

Details | Statistics | Asset | Budget

Transaction Entry & Export

Current Ledger

Import documents

Transaction Entry Grid

A calendar to select date

Today

7 8 9 10 11 12 13

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31 FINISH

Current Ledger

Transaction Entry Grid

Delete Category

Custom Type

Plan Savings

Plan Name: Default Savings Plan 1

Target Savings Amount: ¥ 2000.00

Start Date: 10/01/2025 End Date: 10/31/2026

Deposited: ¥ 1000.00 Remaining: ¥ 1000.00

User Setting Page

Alex

Good morning, Alex! Today is the first day of your accounting!

Appearance settings | Data Management | Account Security | Application Information

User Feedback | About us

Happy to see you!

Alex

Good morning, Alex! Today is the first day of your accounting!

Appearance settings | Data Management | Account Security | Application Information

User Feedback | About us

Looking forward to your feedback!

Common Q&A

FAQs

Submit Feedback

Alex

Good morning, Alex! Today is the first day of your accounting!

Appearance settings | Data Management | Account Security | Application Information

User Feedback | About us

Looking forward to your feedback!

Appearance settings

Day/Night Mode: Day (Weekdays online) | Night (Weekends online)

Background Music: Music 1 | Music 2 | Change language: English | Chinese

FAQs

Submit Feedback

savings plan

Savings Plan

Plan List

In Progress / Completed

Default Savings Plan 1

Deposited: ¥ 1000.00 Remaining: ¥ 1000.00

Default Savings Plan 2

Deposited: ¥ 2000.00 Remaining: ¥ 2000.00

+ Create New Savings Plan

Savings Plan

Plan List

In Progress / Completed

Default Savings Plan 1

Deposited: ¥ 2000.00 Remaining: ¥ 2000.00

Default Savings Plan 2

Deposited: ¥ 2000.00 Remaining: ¥ 2000.00

+ Create New Savings Plan

Savings Plan

Set Savings Plan

Plan Name: Default Savings Plan 1

Target Savings Amount: ¥ 2000.00

Start Date: 10/01/2025 End Date: 10/31/2026

Deposited: ¥ 1000.00 Remaining: ¥ 1000.00

Save

Savings Plan

Default Savings Plan 1 Details

Deposited: ¥ 2000.00 Remaining: ¥ 2000.00

Statement

Deposits: ¥ 500.00 (15/09/2025) Withdrawals: ¥ 500.00 (15/09/2025)

Deposit | Withdraw

Savings Plan

Deposit

Deposited Amount: ¥ 500.00

Account Ledger: Deposit Date: 15/09/2025

Cancel | Confirm

Savings Plan

Withdraw

Withdrawn Amount: ¥ 500.00

Account Ledger: Withdraw Date: 15/09/2025

Cancel | Confirm