

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 (50% of expenses)
 - Entertainment: \$500 (11% of expenses)
- Your Savings Progress:
 - Goal: Save \$1,000 for a vacation by December 2024.
 - Current: \$500 (50%)
 - 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 (¥) Total assets (¥) Liabilities (¥)

Asset account

Bank account title (¥) Visa account title (¥)

Budget for Month Year

Details Statistics Asset Budget

Total budget (¥) Already paid (¥) Remaining (¥)

Classification budget

Category name (¥) Already paid (¥) Remaining (¥)

Transaction Details & Statistics

Breakdown of accounts

Details Statistics Asset Budget

Income and expenditure view Calendar view

Balances for the month Spending this month This month's income

Records of income and expenditure

Details Statistics Asset Budget

Statistics on account expenditures

Account income statistics

Details Statistics Asset Budget

Transaction Entry & Export

Current Ledger

Import documents

Enter transaction info

Today

A calendar to select date

Current Ledger

Enter transaction info

Today

Delete Category

Custom Type

User Setting Page

Alex

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

Appearance settings Date 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 Date 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 Date Management

Account Security Application Information

User feedback About us

Looking forward to your feedback!

Appearance settings

Day/Night Mode: 034077432 (Weekdays online)

Background Music: (None)

Change language: English - United States

FAQs

Submit Feedback

savings plan

Savings Plan

Plan List

In Progress / Completed

Default Savings Plan 1
\$ 2000.00
Deposited: \$ 1000.00 Remaining: \$ 1000.00

Default Savings Plan 2
\$ 2000.00
Deposited: \$ 2000.00 Remaining: \$ 0.00

+ Create New Savings Plan

Savings Plan

Plan List

In Progress / Completed

Default Savings Plan 1
\$ 2000.00
Deposited: \$ 1000.00 Remaining: \$ 1000.00

Default Savings Plan 2
\$ 2000.00
Deposited: \$ 2000.00 Remaining: \$ 0.00

+ Create New Savings Plan

Savings Plan

Set Savings Plan

Plan Name: Target Savings Amount: Start Date: End Date: Save

Savings Plan

Default Savings Plan 1 Details

Default Savings Plan 1
\$ 2000.00
Deposited: \$ 1000.00 Remaining: \$ 1000.00

Statement

Deposits: \$ 500.00 (15/01/2025) Withdrawals: \$ 500.00 (15/01/2025) - \$ 500.00 (15/01/2025)

Deposit Withdraw

Savings Plan

Deposit

Deposited Amount: Account Ledger: Deposit Date: Confirm

Savings Plan

Withdraw

Withdrawn Amount: Account Ledger: Withdraw Date: Cancel Confirm

We are developing high-fidelity prototypes...

The image displays a grid of 20 screenshots from a financial management application prototype. The features shown include:

- Dashboard:** Shows a summary of financial health with metrics like Total Balance (\$24,562.00), Total Income (\$8,350.00), and Total Expenses (\$3,788.00). It includes sections for Last Month's Spending, Year Savings Progress, and a goal to save \$10,000 by December 2024.
- Transactions:** Displays a list of transactions with filters for Income, Expenses, and Transfers. It shows a transaction for "Salary Deposit" of \$4,850.00 and another for "Bank Payment" of -\$120.00.
- Bank Accounts:** Manages linked bank accounts (Chase Bank, Bank of America) and security settings (Two Factor Authentication, Biometric Login).
- Notification Preferences:** Allows users to manage transaction alerts and security alerts.
- Help & Support:** Provides links to Frequently Asked Questions, Account & Billing, Technical Support, and Getting Started.
- Popular Articles:** Offers articles on topics like Two Factor Authentication, Understanding Your Monthly Statement, and Protecting Your Account from Fraud.
- Savings Goals:** Tracks monthly savings goals and active goals, such as "Dream House Down Payment" and "New Car Fund".
- Bills Management:** Manages bills for the current month, showing due dates and amounts.
- Import Transactions:** Features for importing CSV files, manually entering transactions, and using webhooks.
- Upcoming Bills:** Lists bills due in the next month, including Mortgage Payment, Electricity Bill, and Internet Service.
- Payment Confirmation:** A modal for confirming payment details for a bill.

