AI-Empowered Personal Finance Tracker User Manual

1. System Overview

The AI-Empowered Personal Finance Tracker is a desktop application designed for personal financial management. This application combines AI technology to help users easily track daily income and expenses, analyze spending habits, and provide personalized financial management advice.

2. Function Introduction

2.1 AI Financial Recommendations

Personalized Suggestions: AI system automatically generates personalized financial advice based on your spending habits and financial data

One-Click Access: Click "Generate New Recommendations" button to get the latest financial optimization solutions

Smart Analysis: Select transaction records for in-depth analysis and generate detailed financial insight reports

2.2 Transaction Management System

Flexible Recording: Support both income and expense transaction recording

Category Management: Customize income and expense categories with unique color coding for each category

Batch Import: Support CSV file batch import for transaction data to improve accounting efficiency

Filtered Viewing: Filter transaction records by income or expense type

Batch Operations: Support multi-select deletion of unwanted transaction records

2.3 Data Visualization & Analytics

Multi-dimensional Statistics: Provide spending trend analysis for different time dimensions such as monthly and quarterly

Chart Display: Intuitive pie charts, bar charts and other visual formats to display financial data

Proportion Analysis: Clearly show the proportion of each expense category in total expenditure

2.4 Holiday Spending Planning

Holiday Alerts: Automatically retrieve the latest holiday information

Budget Planning: Create dedicated consumption budget plans for upcoming holidays

Spending Guidance: Provide rational consumption advice during holiday periods

2.5 Multi-Currency Support

Currency Switching: Support multiple international mainstream currencies

One-Click Application: Select currency type through dropdown menu and click apply settings to take effect

Real-time Exchange: Ensure accurate conversion between different currencies

2.6 Report Export Function

Multi-format Export: Support report export in both CSV and PDF formats

Data Integrity: Exported reports contain complete transaction details and statistical analysis

Easy Sharing: Generated reports can be easily shared with financial advisors or family members

2.7 Transaction Record Query

Detailed Records: Complete preservation of detailed information for every transaction

Quick Filtering: Support quick filtering by transaction type, time and other conditions

Historical Tracking: Convenient viewing and tracking of historical financial activities

2.8 User Feedback System

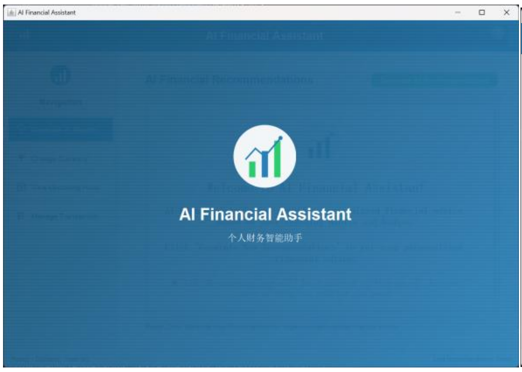
Question Search: Built-in search function to quickly find answers to common questions

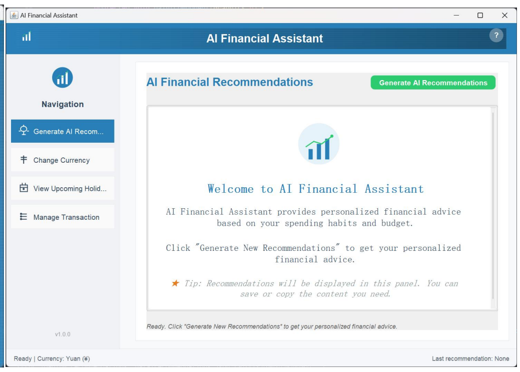
Feedback Submission: Support users to submit usage feedback and improvement suggestions

Customer Support: Provide convenient user support channels

Operation Guide

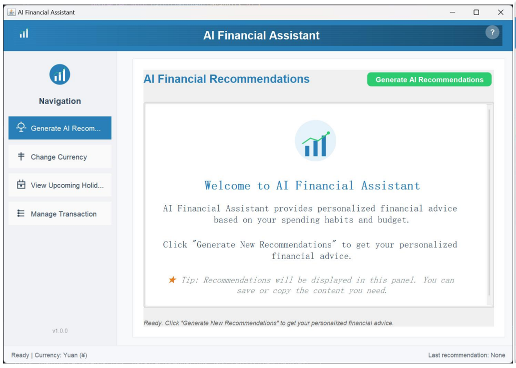
3.1Splash screens

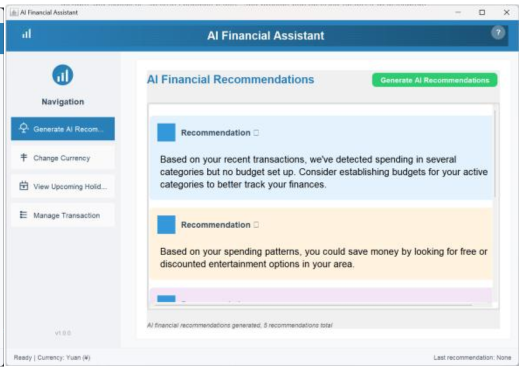




3.2AI financial Recommendations

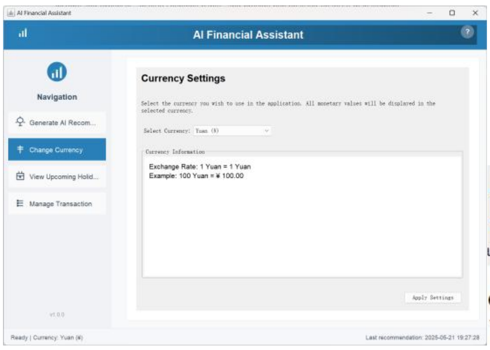
Click "Generate New Recommendations" to get your personalized financial advice

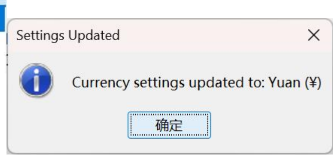




3.3Currency Setting

You can click on the dropdown menu to select the currency type you want to use in the program, and then click on "apply settings" in the bottom right corner after completing the selection

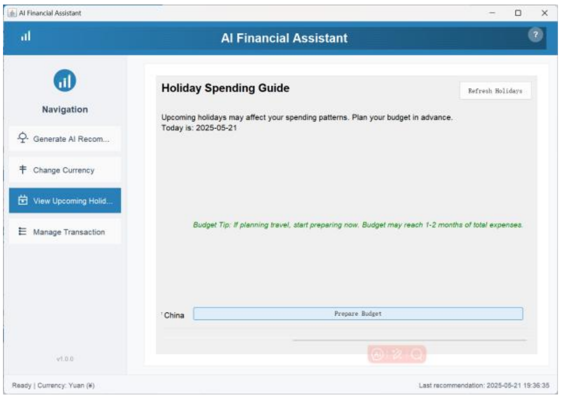


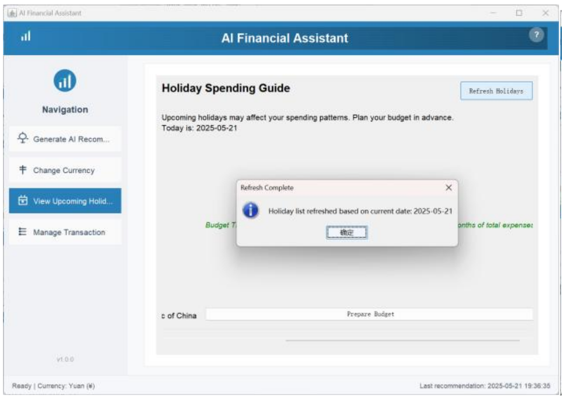


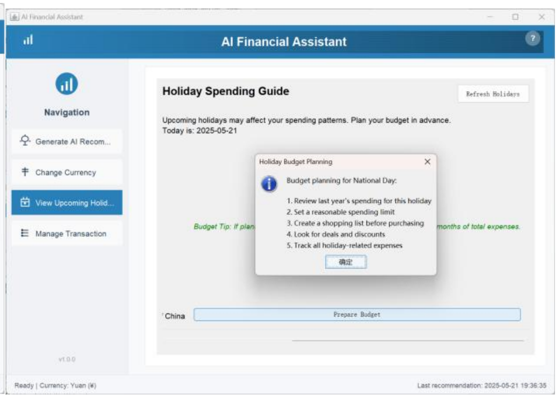
3.4Holiday Spending Guide

Click the 'refresh holidays' button to retrieve the most recent holidays based on the current date

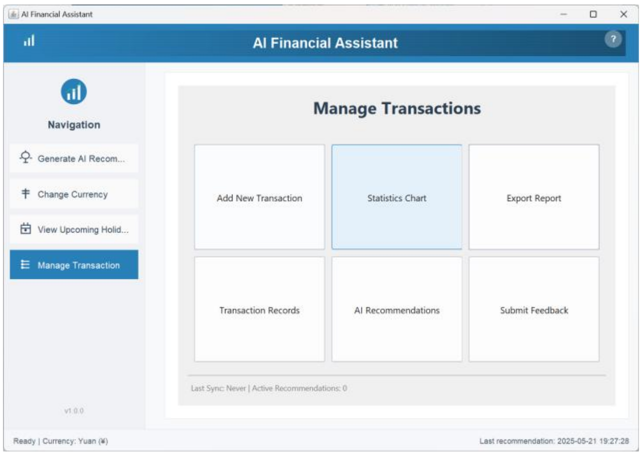
Click the "prepare budget" button to obtain the budget plan for the corresponding holidays







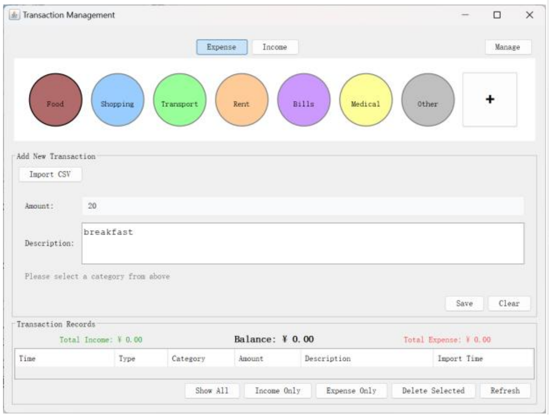
3.5Manage Transactions

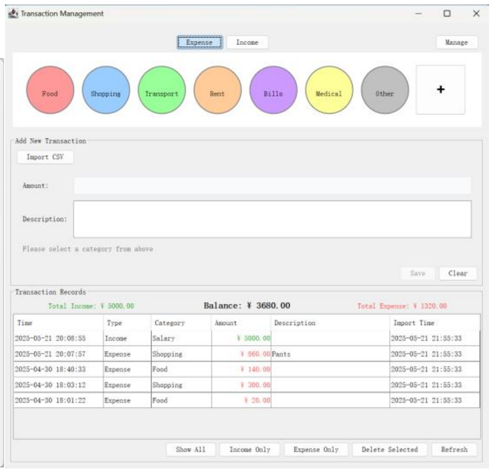


3.51 Add New Transaction

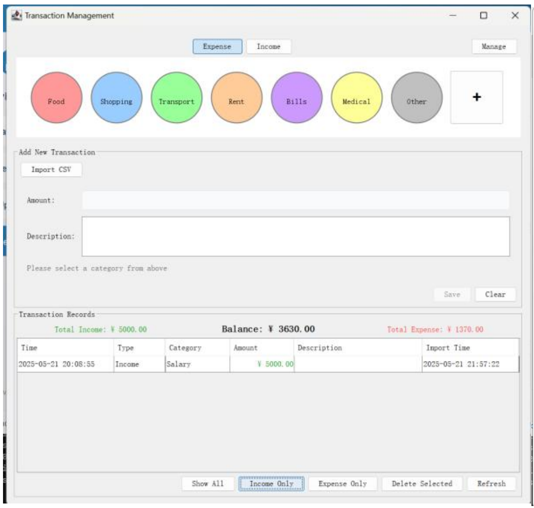
You can select the "expense" and "income" buttons above to record income or expenses, then choose the accounting category, enter the amount and corresponding description, and click "save" to proceed with the accounting. If there is an error in the input before saving, you can also click "clear" to clear it

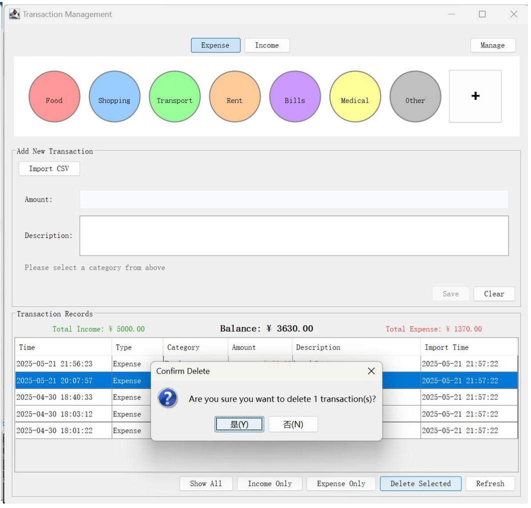
You can also upload CSV files and have them automatically included in the bill details



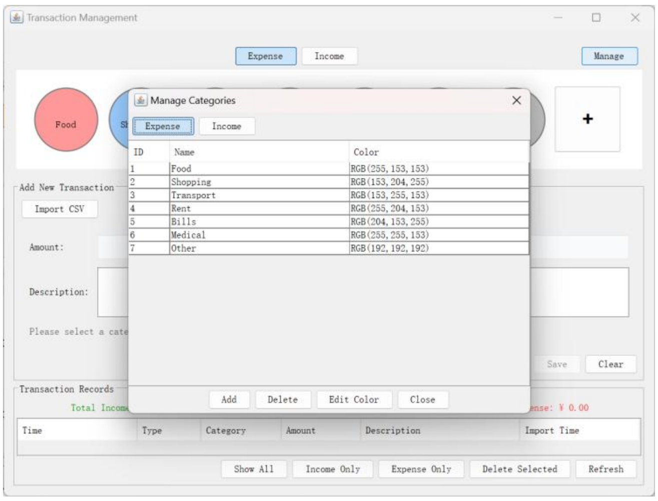


You can click on "income only" and "expense only" below to filter out billing details that only include income or expenses， you can also select one or more billing details and click "delete selected" below to delete them



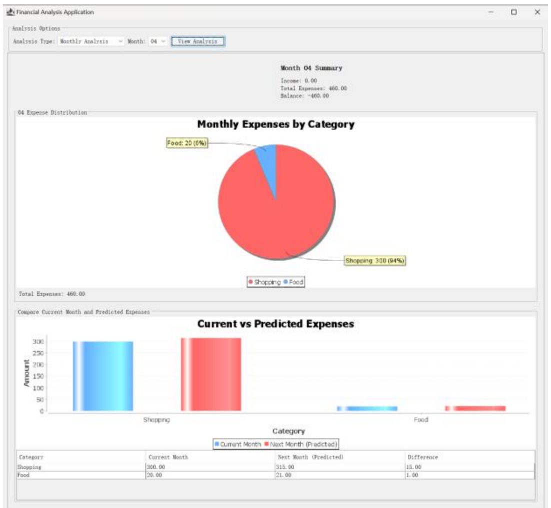


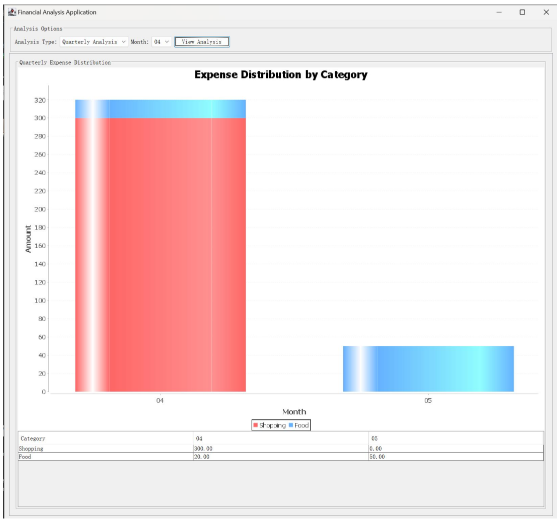
You can click the "manage" button in the upper right corner to delete or add categories, and also edit colors for the corresponding categories

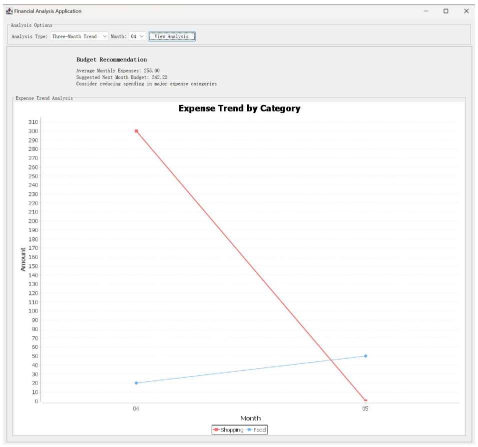


3.52 Statistics Chart

You can filter the analysis types through the drop-down menu above to obtain monthly and quarterly expenditure trends, proportions, and other content

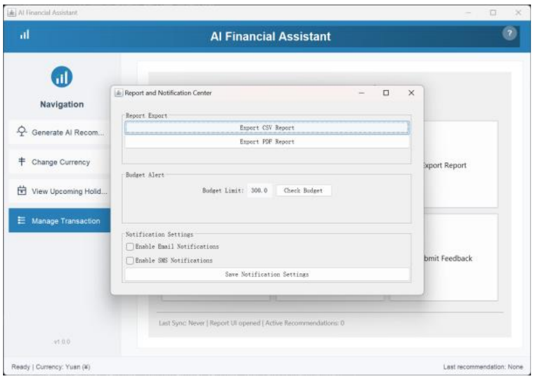


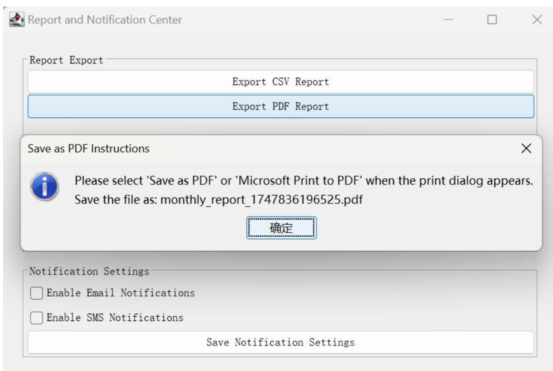


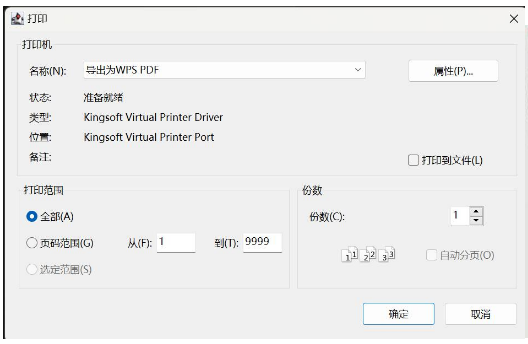


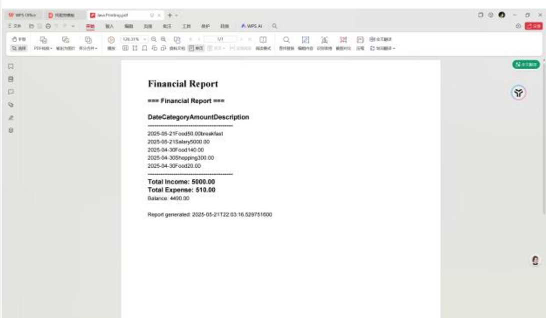
3.53 Export Report

You can export the current bill and generate CSV or PDF files



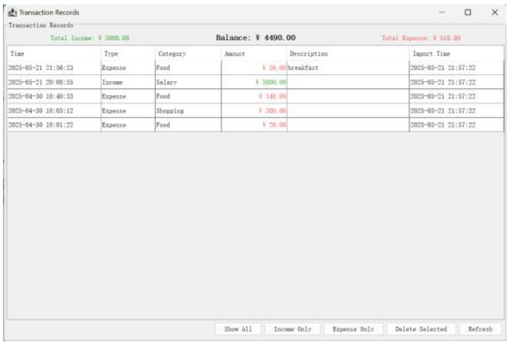






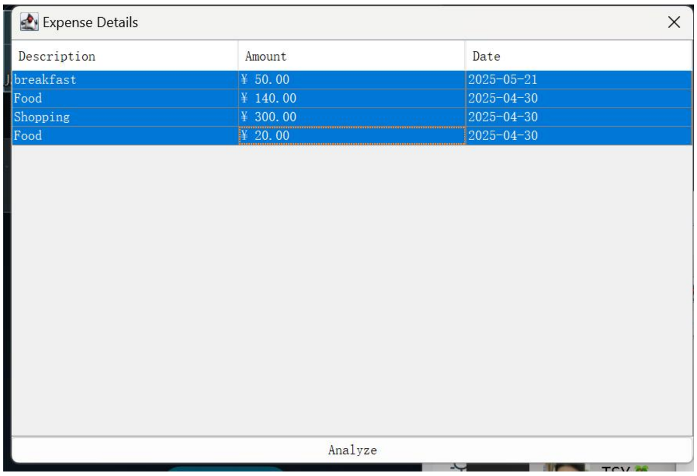
3.54 Transaction Records

Here you can see detailed transaction records, just like the accounting section. You can filter only expenditure or income details by clicking the button below, and also batch delete details



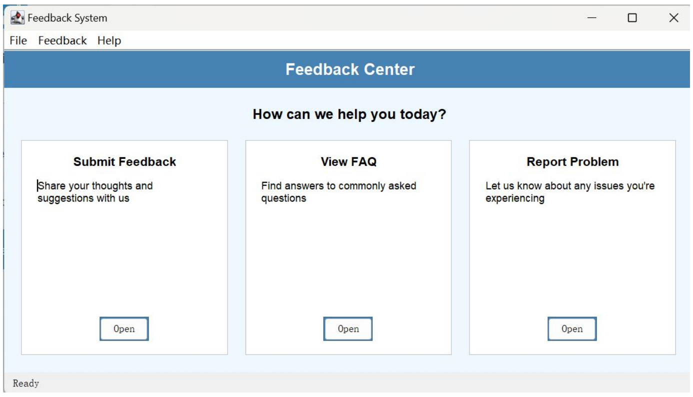
3.55 AI Recommendations

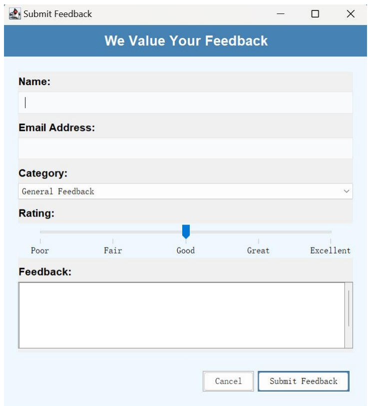
You can select the details, click on "analyze" below to analyze, and a detailed analysis report will be generated

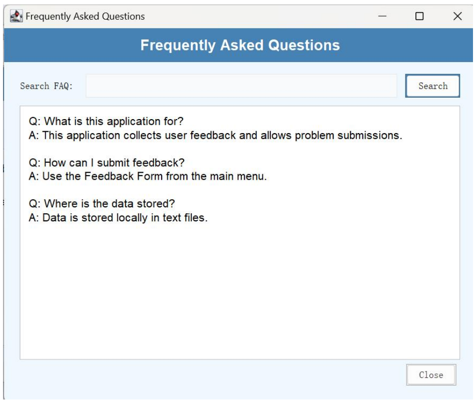


3.56Submit Feedback

You can submit your feedback here, or search for your question






Frequently Asked Questions
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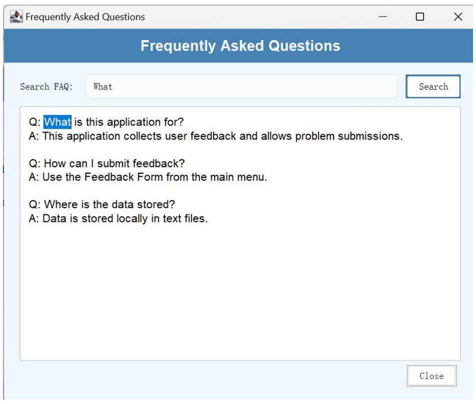
Search FAQ:
Search
Q: What is this application for?
A: This application collects user feedback and allows problem submissions.
Q: How can I submit feedback?
A: Use the Feedback Form from the main menu.
Q: Where is the data stored?
A: Data is stored locally in text files.
Close


Frequently Asked Questions
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Search FAQ:
What
Search
Q: What is this application for?
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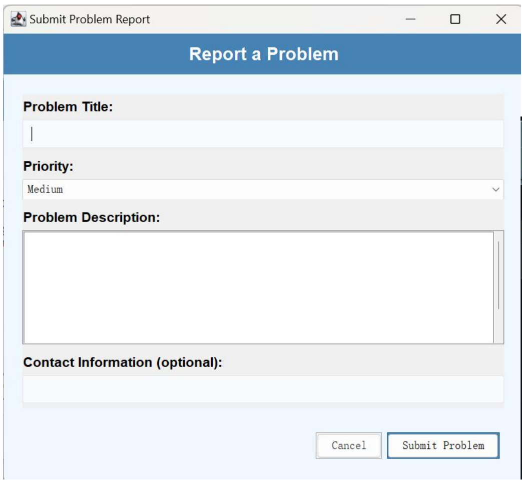
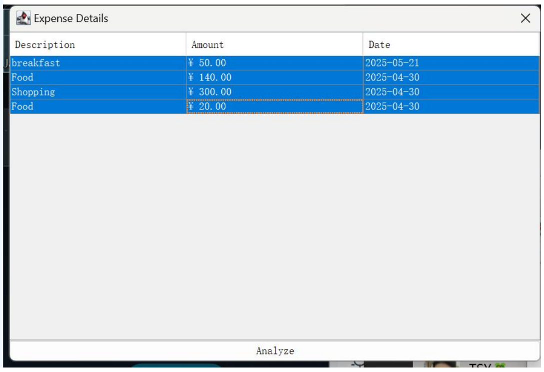

Submit Problem Report
Report a Problem
Problem Title:
Priority:
Medium
Problem Description:
Contact Information (optional):
Cancel
Submit Problem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Food
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2025-04-30
Shopping
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2025-04-30
Food
¥ 20.00
2025-04-30
Analyze