

User Manual

Welcome to the *TrackIt* User Manual! This guide will walk you through how to use this finance tracker to efficiently manage your finances, track expenses, set budgets, and generate reports.

Ensure your device meets the following requirements to use the Finance Tracker:

- **Operating System:** Windows 10/11, macOS 10.15 or later, Android 8.0 or later, iOS 13.0 or later
- **Browser:** Chrome, Edge
- **Internet Connection:** Required for syncing data across devices

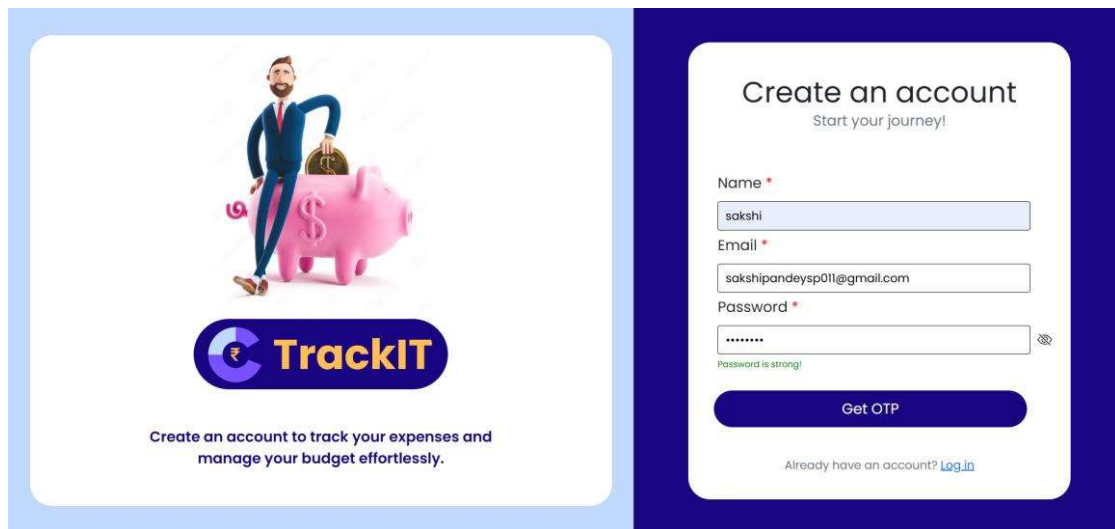
Getting Started

Creating an Account

1. Open the *TrackIt* website.
2. Click on the "Sign Up" button



3. Enter your email and create a password.
4. Click "Create Account." You will receive a confirmation email to verify your account.



The image displays two side-by-side screenshots of the TrackIT app interface. The left screenshot shows the 'Create an account' screen with a header 'Create an account' and a sub-header 'Start your journey!'. It features input fields for Name, Email, and Password, a 'Get OTP' button, and a link for existing users. The right screenshot shows the 'Log in to your account' screen with a header 'Log in to your account' and a sub-header 'Welcome back! Please enter your details.'. It features input fields for Email and Password, a 'Get started' button, and a link for new users. Both screens include a cartoon illustration of a man standing next to a piggy bank and the TrackIT logo.

Create an account
Start your journey!

Name *
sakshi

Email *
sakshipandeysp01@gmail.com

Password *

Password is strong!

Get OTP

Already have an account? [Log in](#)

Log in to your account
Welcome back! Please enter your details.

Email *
sakshipandeysp01@gmail.com

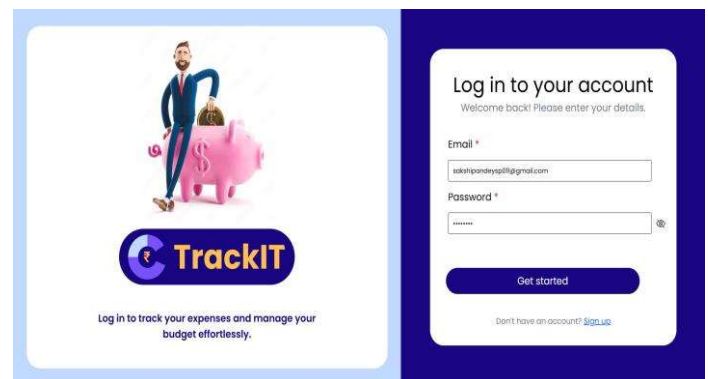
Password *

Get started

Don't have an account? [Sign up](#)

Logging In

1. After creating an account, return to the login screen.
2. Enter your email and password.
3. Click "Log In" to access your *TrackIt* dashboard.



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Dashboard Overview

Upon logging in, the dashboard displays the budget page as the default view.

➤ Budget Section

The **Budget page** gives a summary of

- Budget allocations for the current month
- Overview of different spending categories like “Bills”, “Needs” and “Wants” each containing specific items .
- Each category includes three key columns:
 1. **Assigned:** The amount of money you've planned or assigned for that specific category.
 2. **Activity:** This shows any spending that has occurred within the month for that category.
 3. **Available:** The remaining amount of money left in that category for the month.

sakshi

sakshipandeysp01@gmail.com

October, 2024

Ready to Assign

₹0

Budget

Reports

All Accounts

Budget

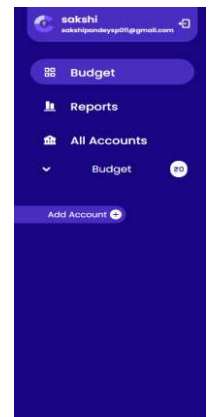
₹0

Add Account

CATEGORY	ASSIGNED	ACTIVITY	AVAILABLE
<div> <div>Bills</div> <div>+</div> </div>	₹0	₹0	₹0
<div> <div>Electricity</div> <div></div> </div>	<div>0</div>	₹0.00	₹0
<div> <div>Water</div> <div></div> </div>	<div>0</div>	₹0.00	₹0
<div> <div>Rent</div> <div></div> </div>	<div>0</div>	₹0.00	₹0
<div> <div>Internet</div> <div></div> </div>	<div>0</div>	₹0.00	₹0
<div> <div>Phone</div> <div></div> </div>	<div>0</div>	₹0.00	₹0
<div> <div>Needs</div> <div>+</div> </div>	₹0	₹0	₹0
<div> <div>Groceries</div> <div></div> </div>	<div>0</div>	₹0.00	₹0
<div> <div>Transport</div> <div></div> </div>	<div>0</div>	₹0.00	₹0

The sidebar contains:

- **Budget:** Main section for tracking and managing your budget.
- **Reports:** Likely for generating financial reports.
- **All Accounts:** Shows all linked accounts.
- **Add Account:** Option to link a new account.
- Profile information is displayed at the top.



➤ Accounts Section

Click **Add Account** to create a personal account, add income, and track expenses.

Add Account

Give it a name

What type of account are you adding?

Select account type...

What is your current account balance?

Save

Cancel

Add Account

Give it a name

What type of account are you adding?

Select account type...

Savings

Current

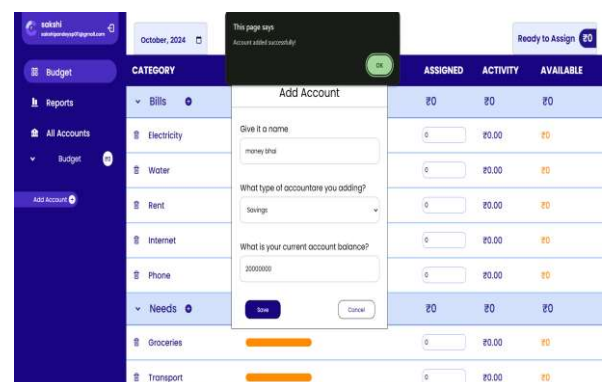
Cash

Credit Card

Loan

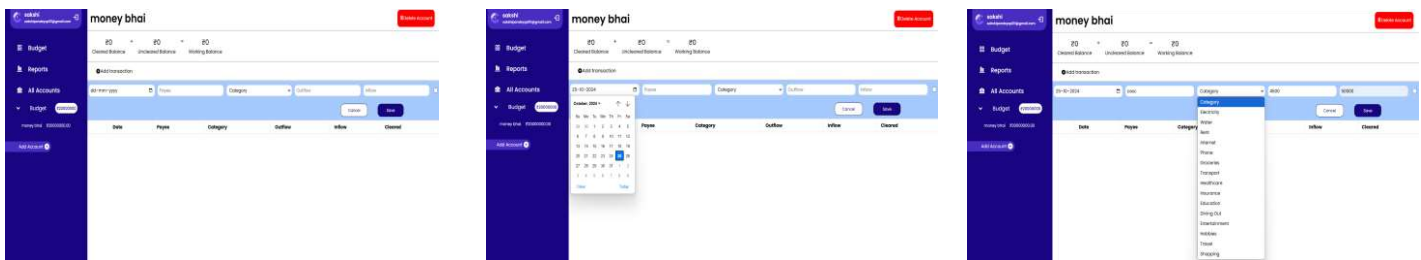
Interest

Other



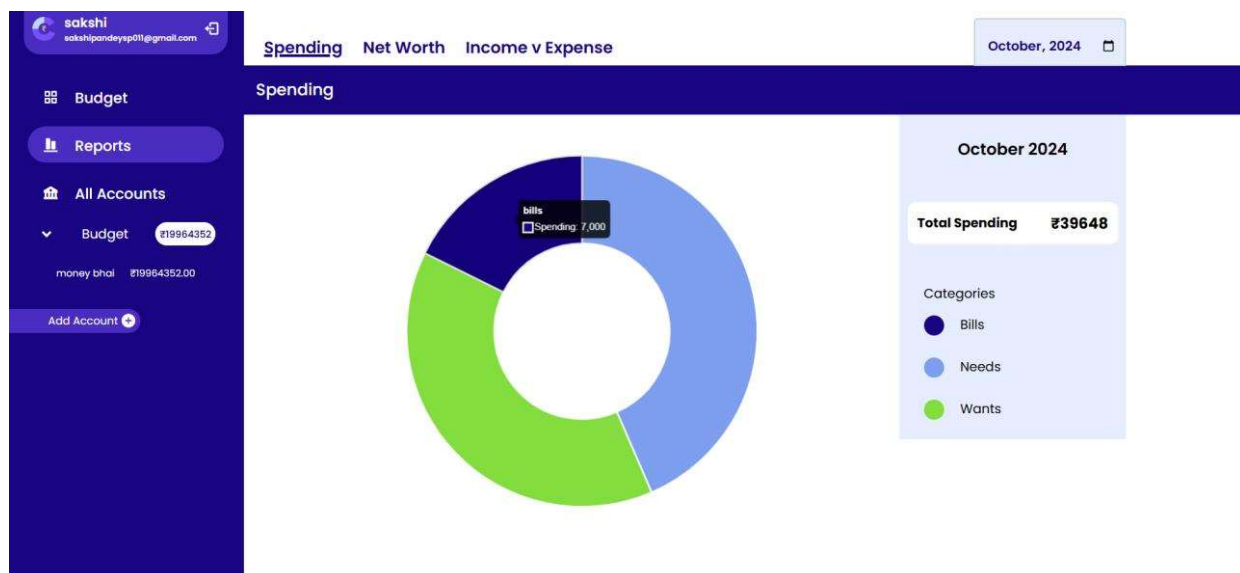
Your account will be displayed in the sidebar, with the account balance shown under the budget arrow. Click on it to view your account page.

- **Record Transactions:** Users can log financial transactions by entering details like the date, payee, category (e.g., food, rent), and whether the money is an **outflow** (expense) or **inflow** (income). This helps track where money is going and coming from.
- **Monitor Balances:** The page shows three key balances:
 1. **Cleared Balance:** Funds that have been processed and are available.
 2. **Uncleared Balance:** Funds that have not yet been processed.
 3. **Working Balance:** The total available balance, combining cleared and uncleared amounts. This gives users a clear view of their current financial status.



➤ Reports Section

To create an effective finance tracker, users need to log a sufficient number of transactions across key spending categories—such as bills, needs, and wants. This data entry will allow the website to generate accurate and insightful graphical representations in the reports section, helping users visualize and analyze their spending patterns.





The net worth page displays a bar chart of the last five months. If no data is available for previous months, only the current month's data is shown.



Income Source	Sep 2024	Oct 2024	Nov 2024	Avg	Total
Total All Income Sources	₹50700.00	₹79058.00	₹200.00	₹43316.33	₹129958.00

Expense	Sep 2024	Oct 2024	Nov 2024	Avg	Total
BILLS					
Electricity	₹0.00	₹4500.00	₹0.00	₹4500.00	₹4500.00
Water	₹0.00	₹400.00	₹0.00	₹400.00	₹400.00
Rent	₹0.00	₹0.00	₹0.00	₹0.00	₹0.00
Internet	₹0.00	₹1600.00	₹0.00	₹1600.00	₹1600.00
Phone	₹0.00	₹500.00	₹0.00	₹500.00	₹500.00
NEEDS					
Groceries	₹0.00	₹10000.00	₹0.00	₹10000.00	₹10000.00
Transport	₹0.00	₹700.00	₹0.00	₹700.00	₹700.00
Healthcare	₹0.00	₹400.00	₹0.00	₹400.00	₹400.00

Troubleshooting

Common Issues and Solutions:

- **Can't log in:** Ensure you are using the correct email and password.
- **Transactions not saving:** Check your internet connection or refresh the page.