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:

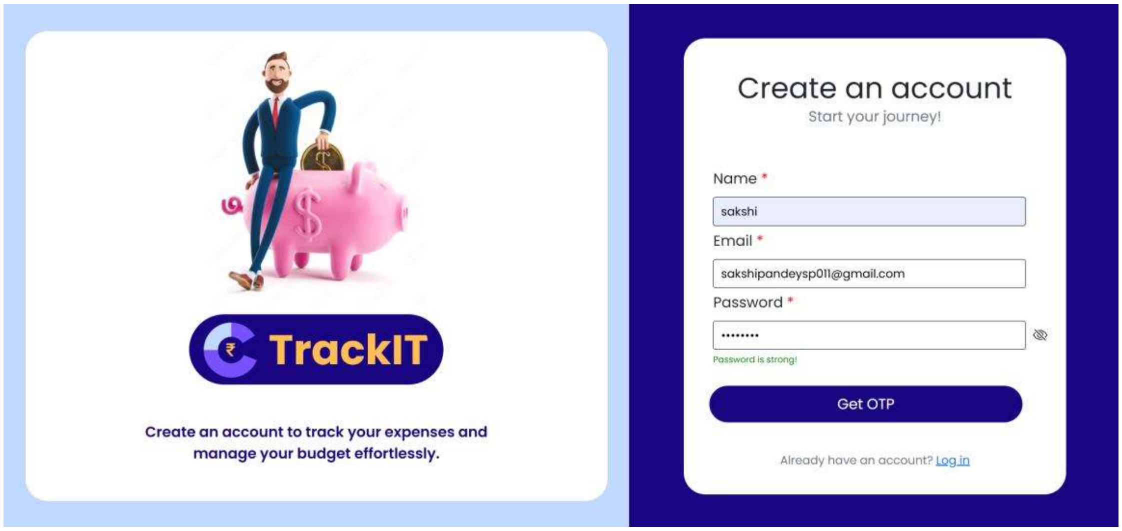
- **Operating System**: Windows 10/11, macOS 10.15 or later, Android 8.0 or later, iOS 13.0 or later
- **Browser**: Chrome, Edge
- **Internet Connection**: Required for syncing data across devices

*****Getting Started****

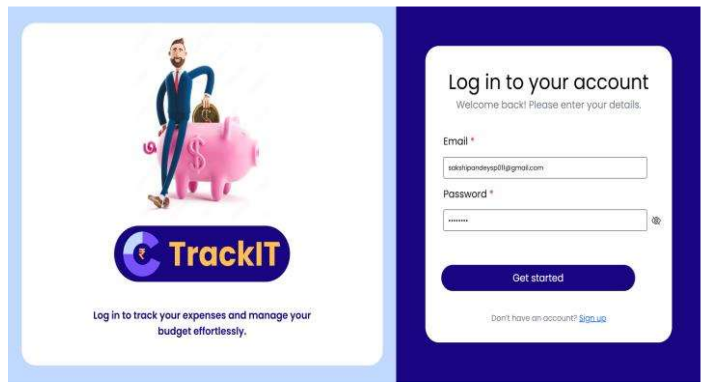
Creating an Account

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.



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.

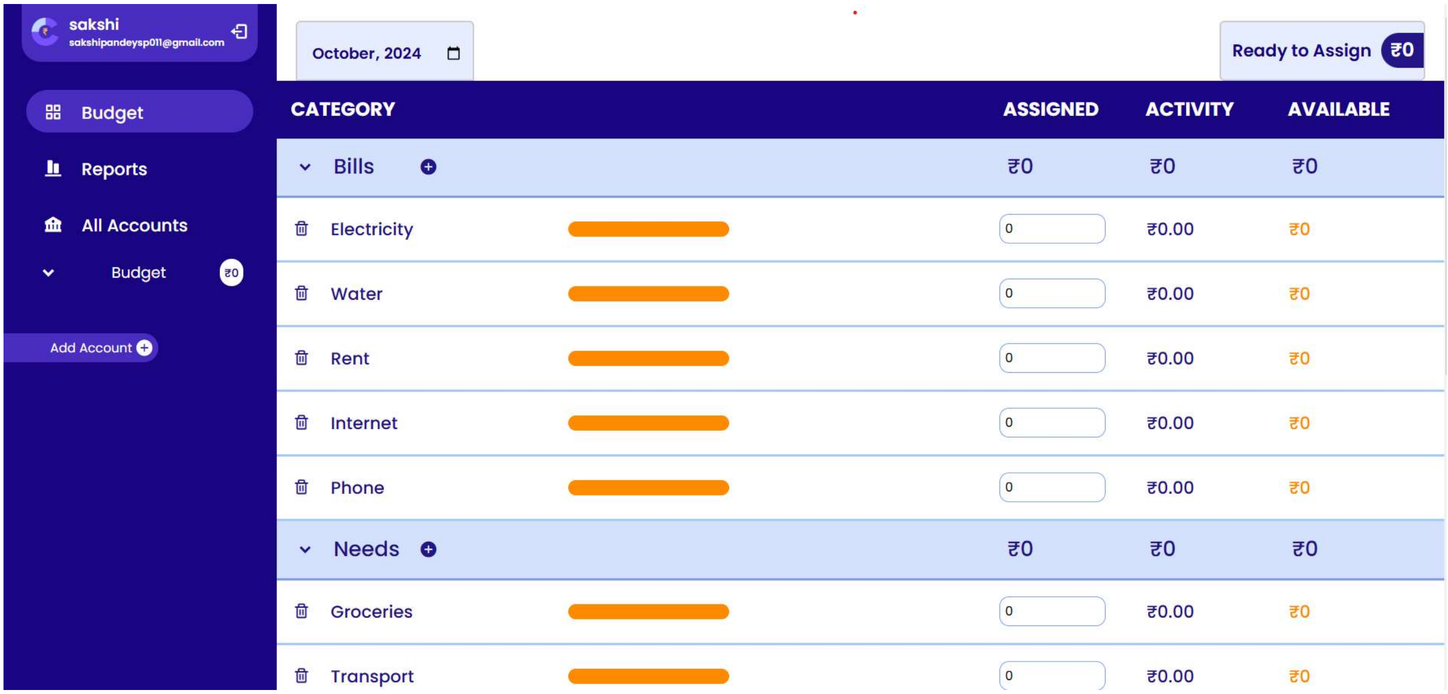
Dashboard Overview

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

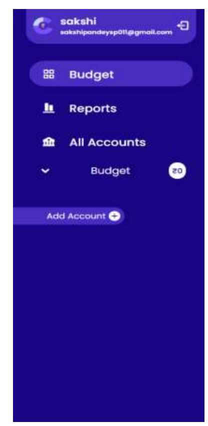
➢ ***Budget Section***

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.



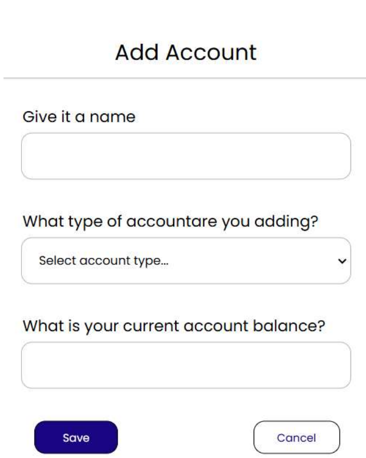
The sidebar contains:

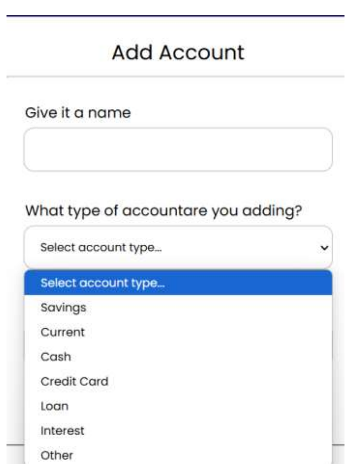


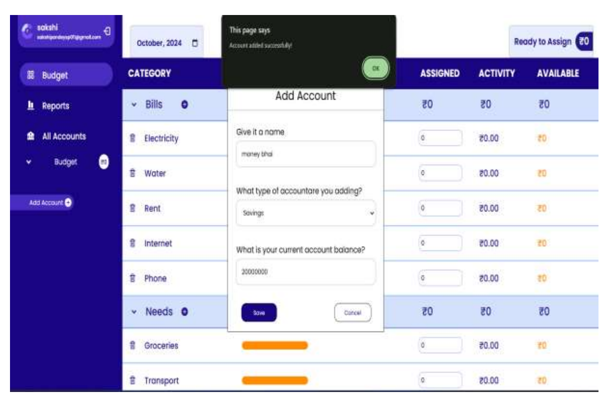
- **Budget**: Main section for tracking and managing your budget.
- **Reports**: Likely for generating financial reports.
- **All Accounts**: Shows all linked accounts.
- **Add Account**: Option to link a new account.
- Profile information is displayed at the top.

➢ *Accounts Section*

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

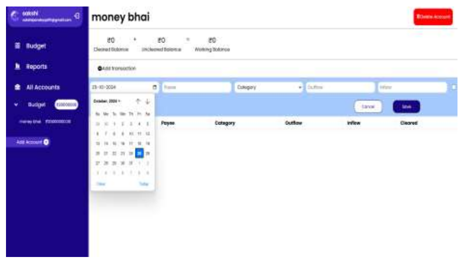


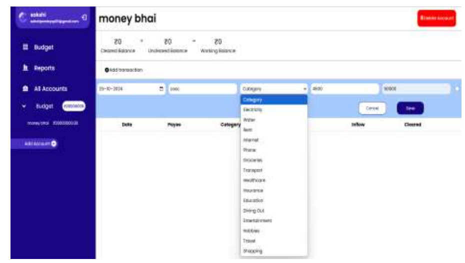




Your account will be displayed in the sidebar, with the account balance shown under the budget arrow. Click on it to view your account page.

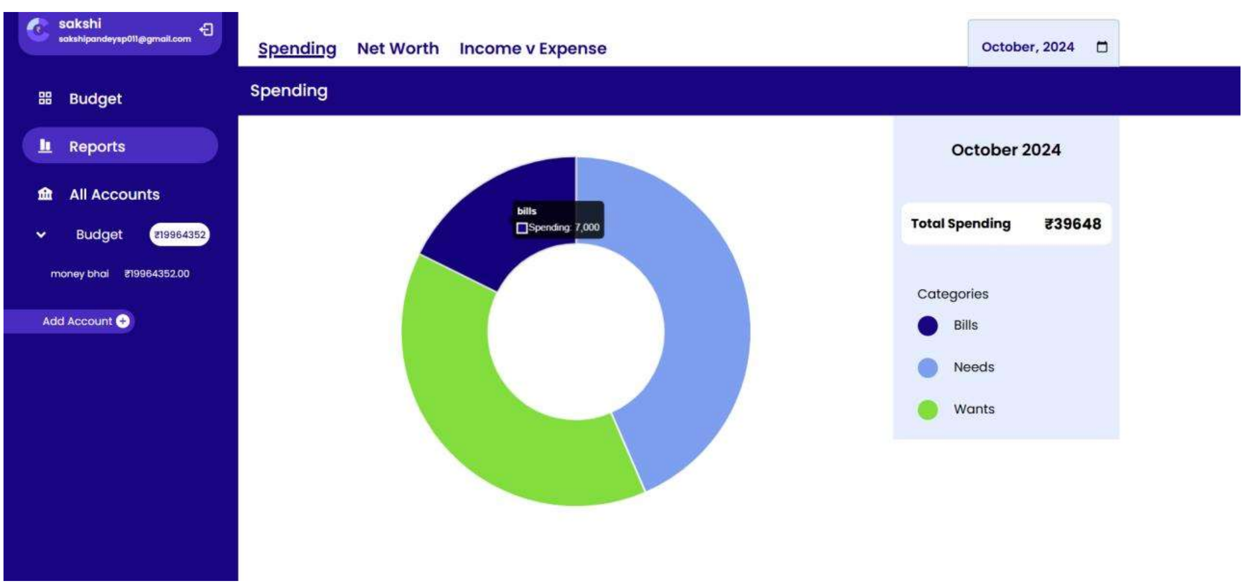
- **Record Transactions**: Users can log financial transactions by entering details like the date, payee, category (e.g., food, rent), and whether the money is an **outflow** (expense) or **inflow** (income). This helps track where money is going and coming from.
- **Monitor Balances**: The page shows 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.

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.