

User Manual: Finalytics

By Siri Vadlamudi

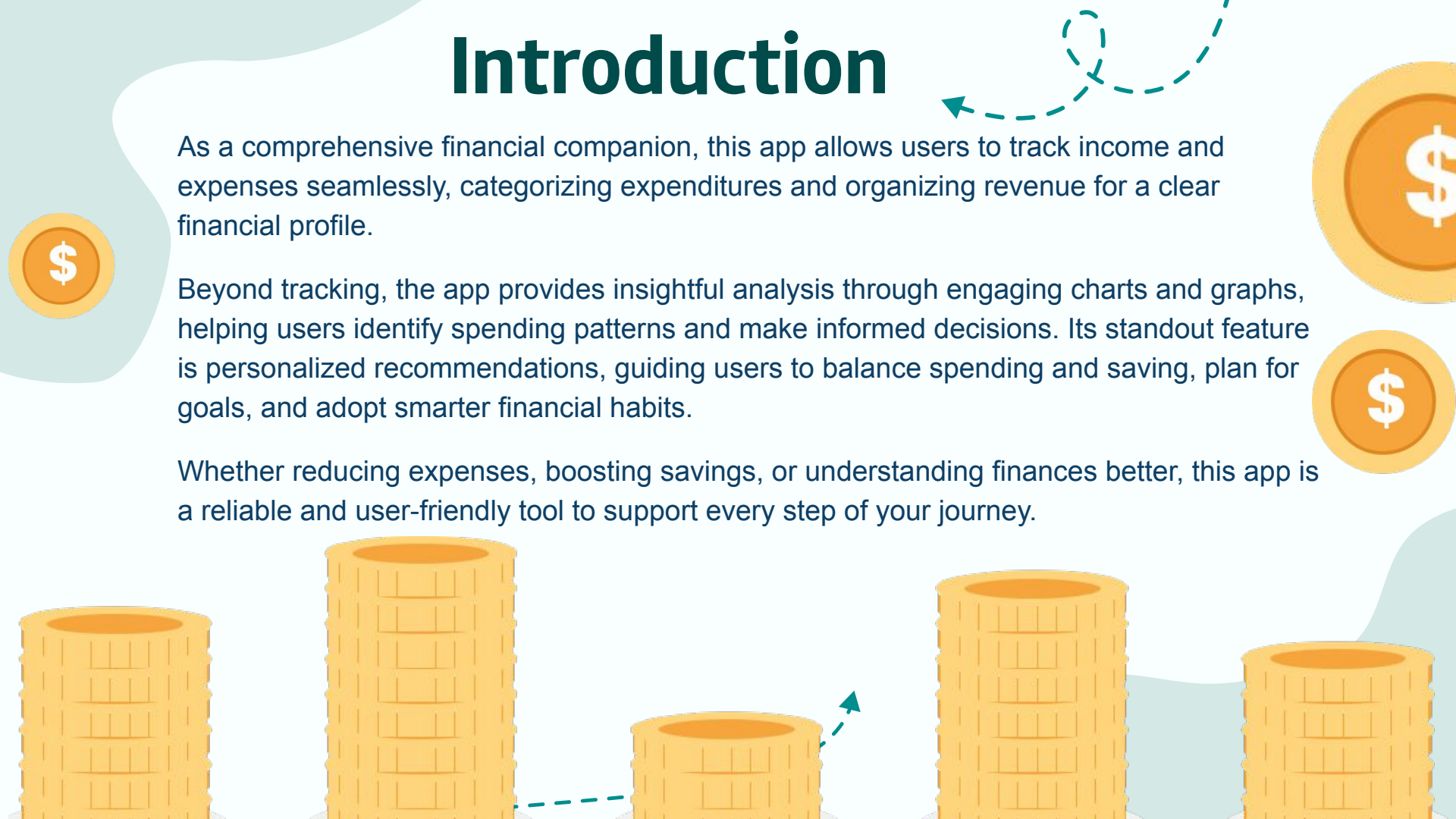


Introduction

As a comprehensive financial companion, this app allows users to track income and expenses seamlessly, categorizing expenditures and organizing revenue for a clear financial profile.

Beyond tracking, the app provides insightful analysis through engaging charts and graphs, helping users identify spending patterns and make informed decisions. Its standout feature is personalized recommendations, guiding users to balance spending and saving, plan for goals, and adopt smarter financial habits.

Whether reducing expenses, boosting savings, or understanding finances better, this app is a reliable and user-friendly tool to support every step of your journey.



Key Features

01

Log-in screen

02

Dashboard

03

Expenditure

04

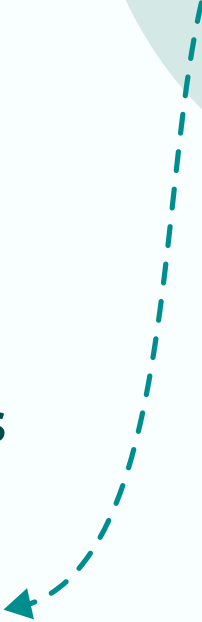
Revenue

05

Financial Analysis

06

Recommendations
for the future



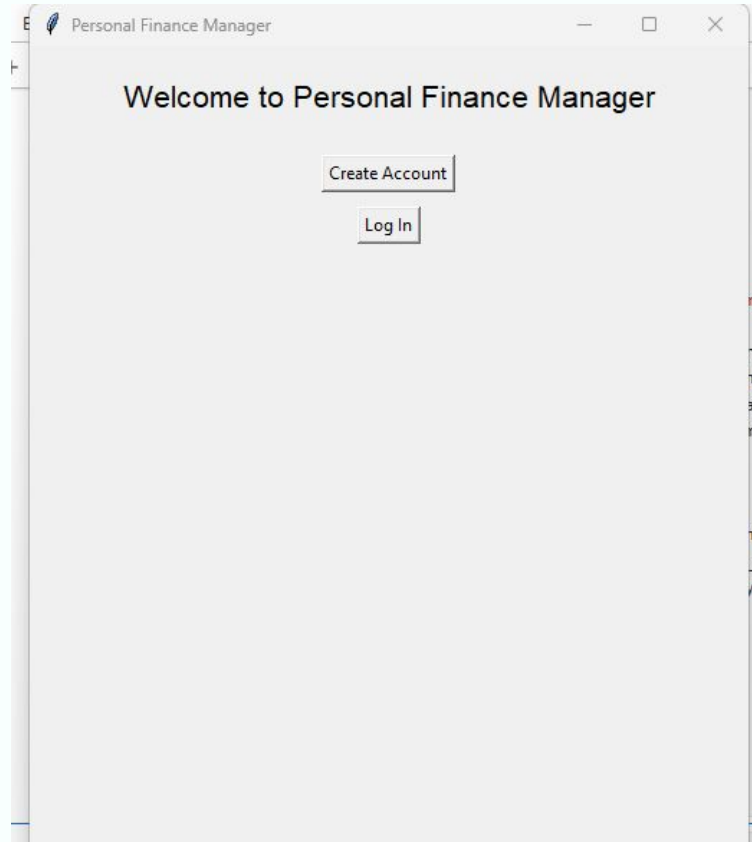
01

Log-in screen

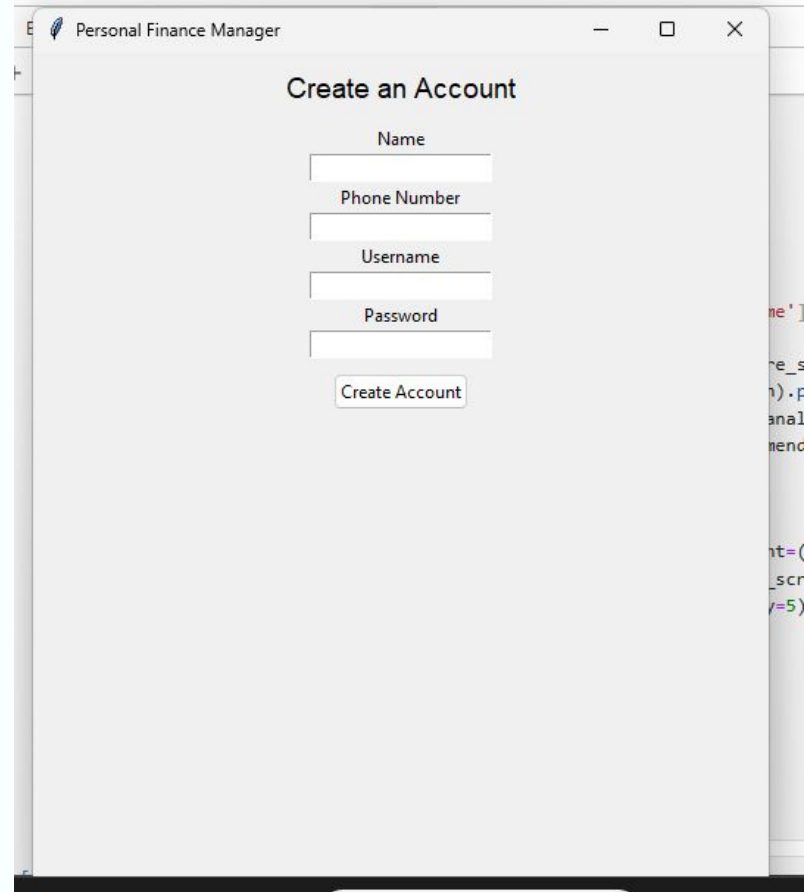


First page of the App

When the user enters the app, they are greeted with this first page.



They can choose to create account and then enter their Name and Phone number. Then, they can set a username and password and click create account.



The screenshot shows a window titled "Personal Finance Manager" with standard window controls (minimize, maximize, close). Inside the window is a form titled "Create an Account". The form contains four text input fields stacked vertically, labeled "Name", "Phone Number", "Username", and "Password". Below these fields is a button labeled "Create Account". A dashed teal arrow points from the bottom left of the slide towards the "Create Account" button. Another dashed teal arrow points from the right side of the slide towards the top right corner of the application window.

```
Personal Finance Manager
```

Create an Account

Name

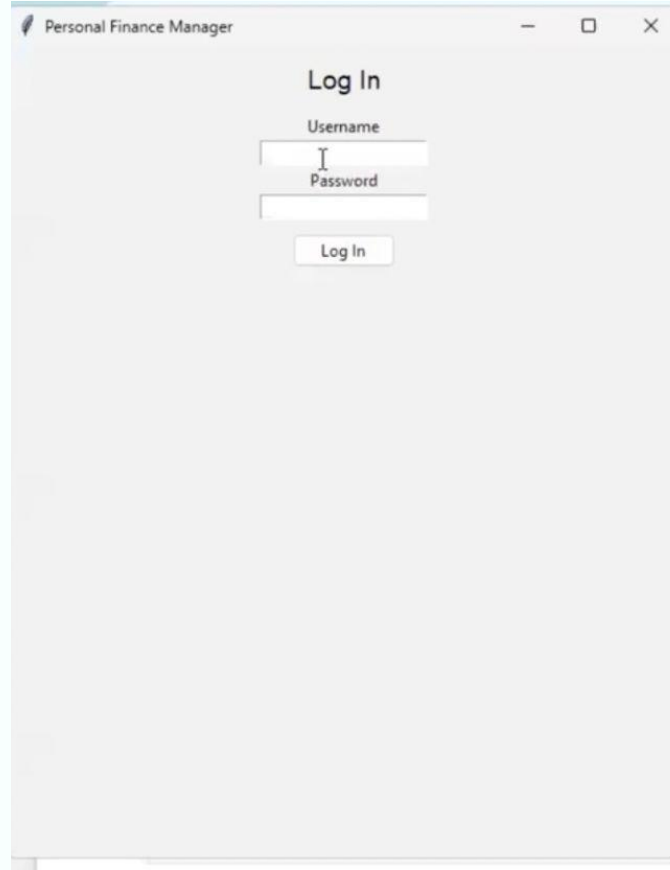
Phone Number

Username

Password

Create Account

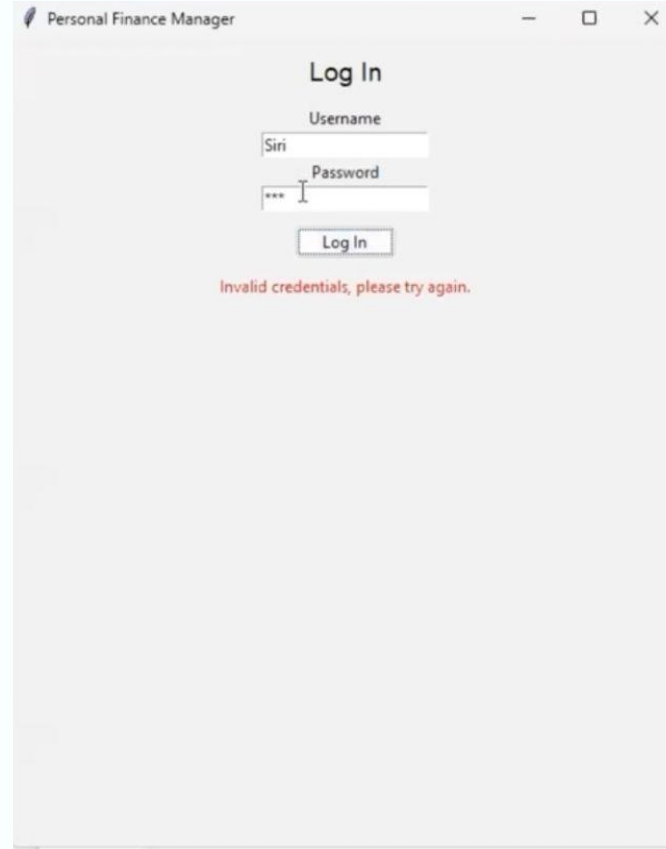
Then they will be returned to the first screen and can now choose to login. The user has to enter their username and password to log in.



The screenshot shows a window titled "Personal Finance Manager" with standard window controls (minimize, maximize, close). Inside the window is a "Log In" section. It contains two input fields: the first is labeled "Username" and the second is labeled "Password". Below these fields is a "Log In" button. A dashed teal arrow on the right side of the image points upwards, indicating a flow or action.

During log in, if an incorrect username or password is entered, a message will show saying invalid credentials.

The user will then have to retype their credentials



The screenshot shows a web application window titled "Personal Finance Manager". Inside, there is a "Log In" section with two input fields: "Username" containing the text "Siri" and "Password" containing three asterisks "***". Below the fields is a "Log In" button. A red error message, "Invalid credentials, please try again.", is displayed below the button. A dashed teal arrow on the right side of the image points from the error message towards the top right corner.

02

Dashboard



Once the correct credentials are entered, a successful log in occurs.

The user is taken to the dashboard of the app where they have four options.



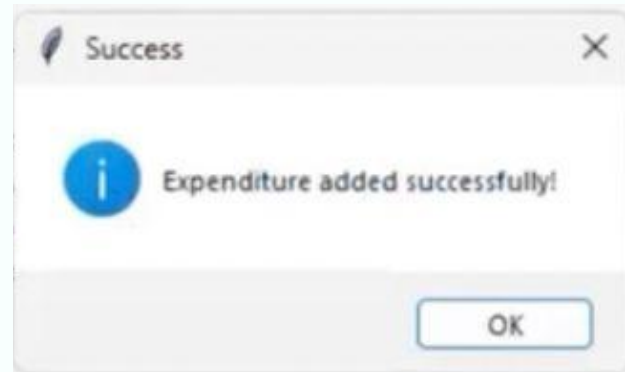
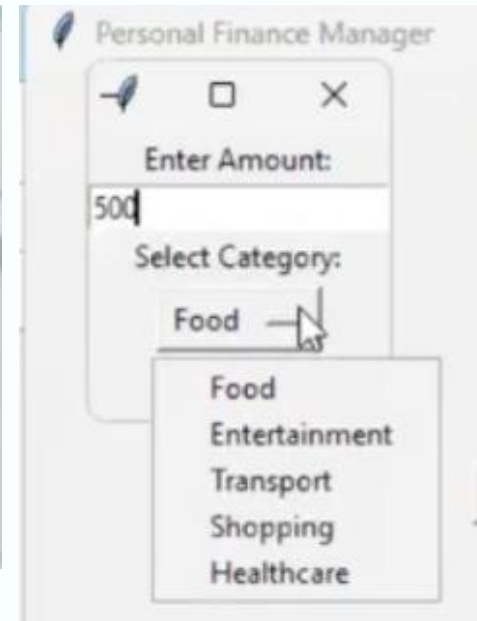
03

Expenditure



If “Add expenditure” is clicked, then the user can select an expenditure amount and choose a category for that expenditure.

Once they save the expenditure, they will receive a notification saying that expenditure has been successfully added.



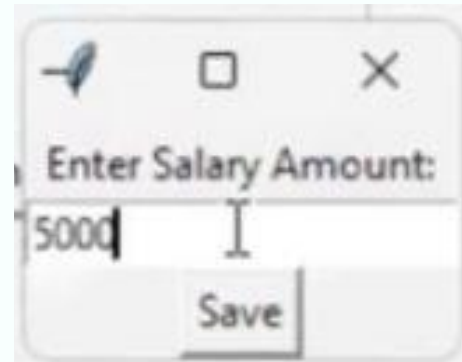
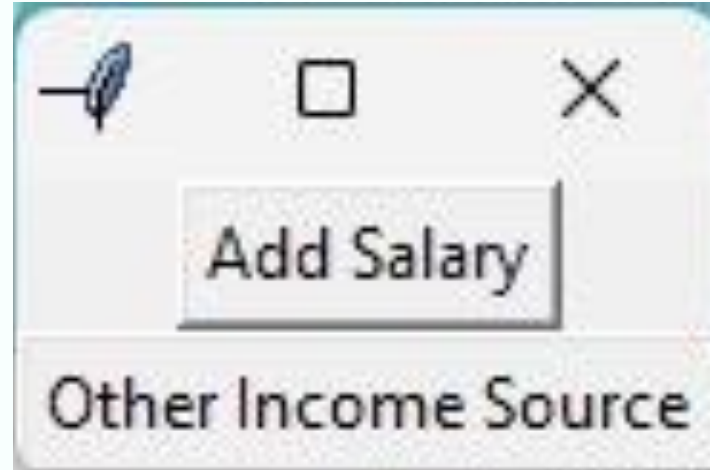
04

Revenue



When add revenue is clicked, the user has a popup.

They can add a salary or another income source. Eg. business

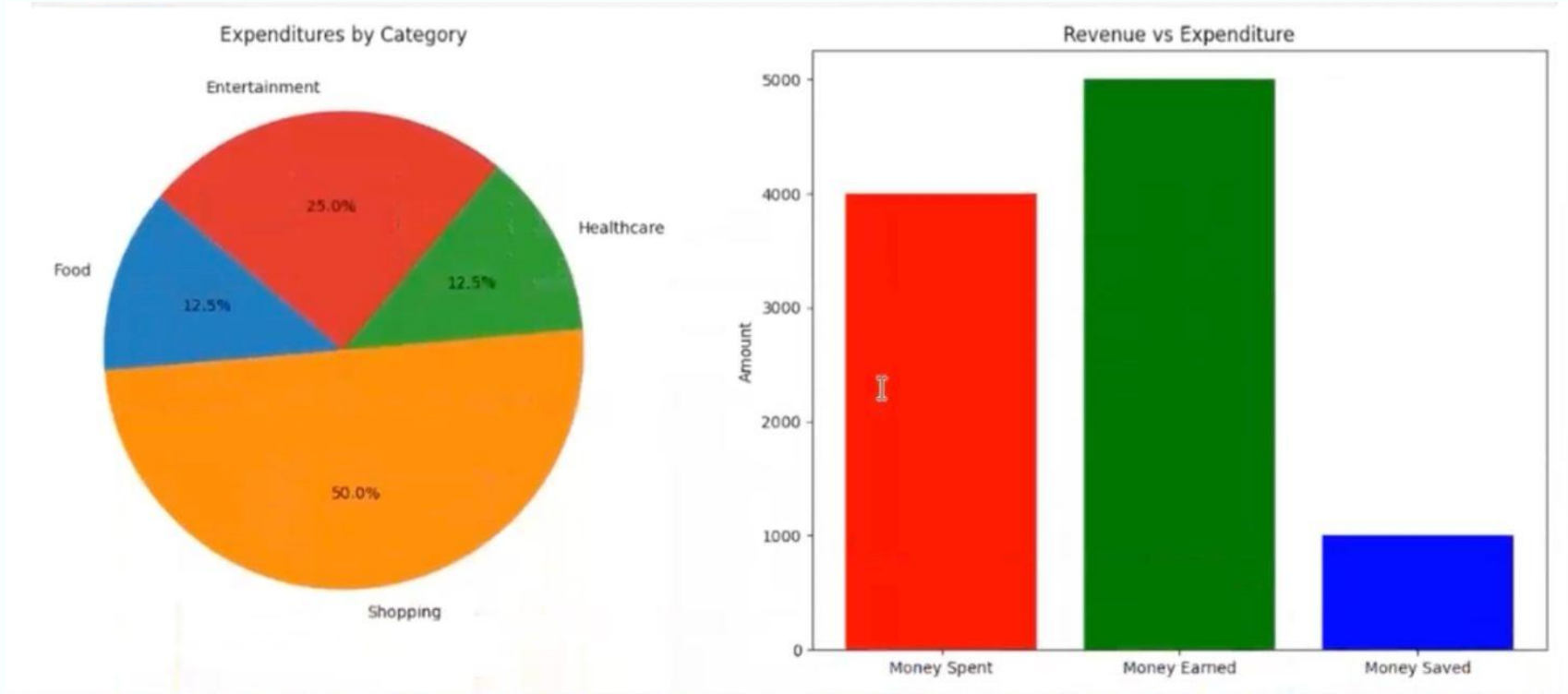


05

Financial Analysis



When “financial analysis” is clicked, two charts would be generated.



A pie chart will show expenditures by category.

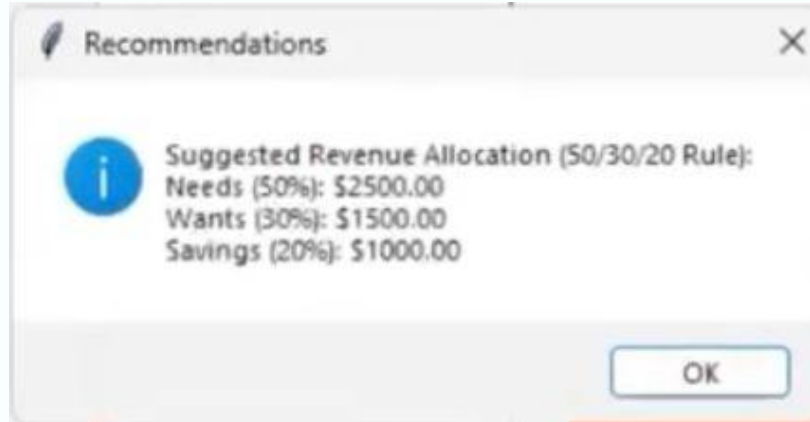
A bar graph compares money earned with money spent and money saved.

06

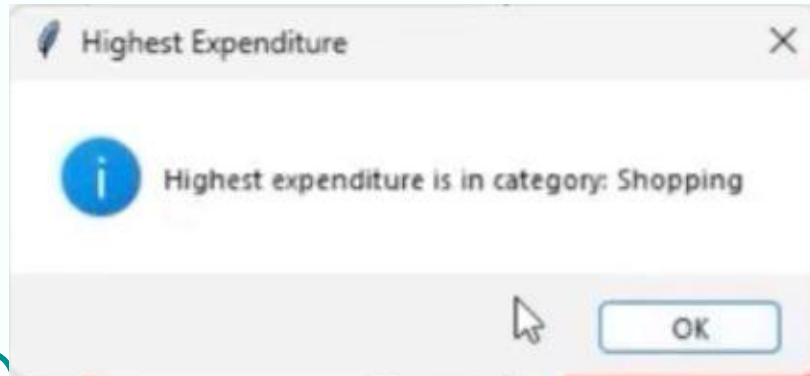
Recommendations for the future



When “get recommendations” is clicked, two pop-ups are generated:

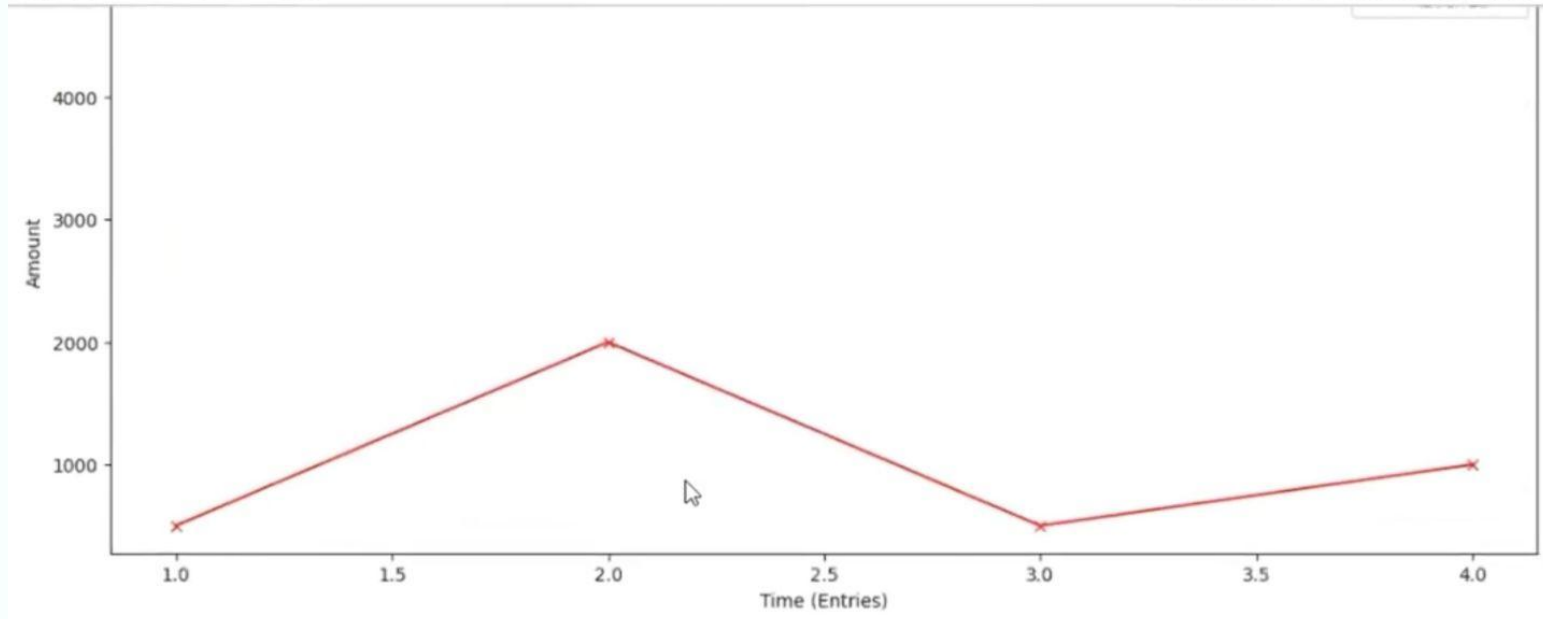


Advice is given on how the user can split their total revenue according to the 50:30:20 rule.



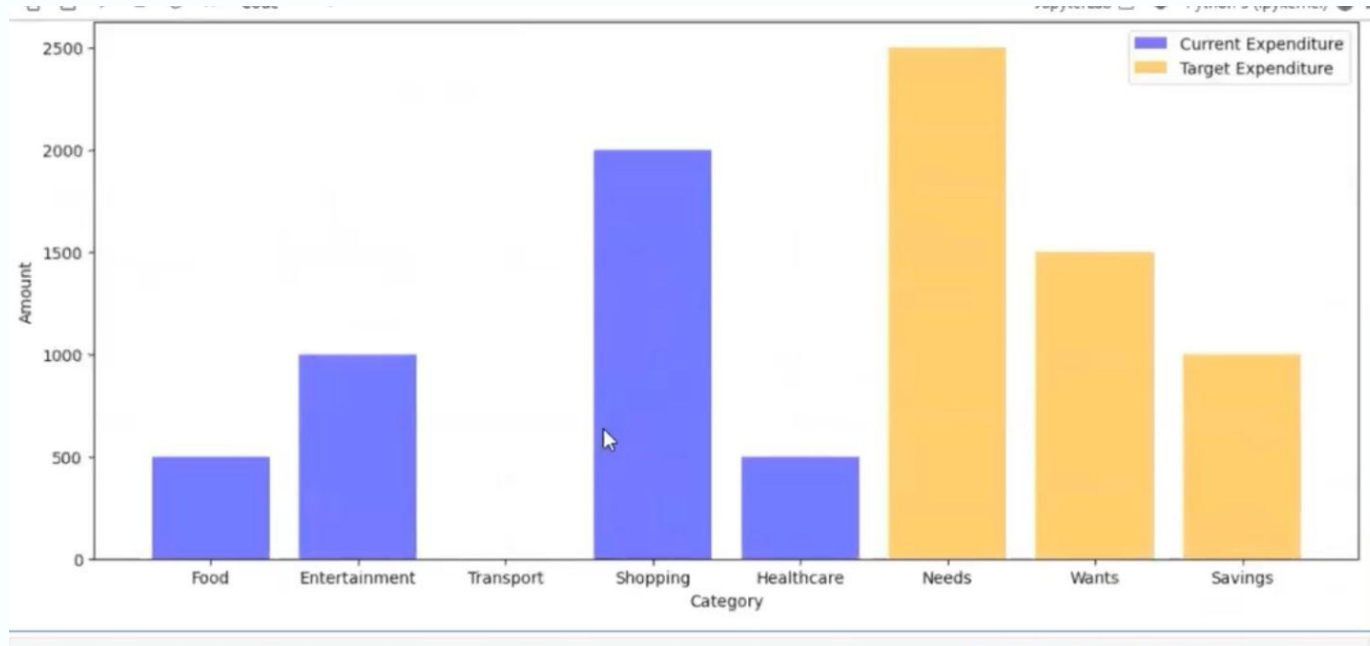
The category with the highest expenditure is identified so that the user can reduce their spending in that category.

Two charts are also generated:



This chart predicts spending overtime. As more values are entered, the accuracy of this graph will increase.

Two charts are also generated:



This chart compares current spending with the ideal spending that each person should aim for.

App Development ToolKit

<https://docs.google.com/spreadsheets/d/1nA-PxISN6X8Xbm11vSxSWGfLH23a7kO1/edit?usp=sharing&ouid=110925305724286858266&rtpof=true&sd=true>

Thank you!

