

Laitusneo Track - User Guide

📖 Welcome to Laitusneo Track

Laitusneo is your comprehensive expense tracking and invoicing system. This guide will help you get started and make the most of all available features.

🚀 Getting Started

First Time Setup

1. **Registration**

- Visit the registration page
- Fill in your personal information
- Create a secure password
- Verify your email address

2. **Initial Configuration**

- Set up your default bank account
- Configure your business information
- Set your preferred currency and date format

3. **Create Your First Expense**

- Navigate to the Expenses section
- Click "Add New Expense"
- Fill in the required details
- Save your expense

👤 User Roles Explained

Main User (Client)

As a main user, you have full access to all system features:






****Capabilities:****

- ☒ Create and manage expenses
- ☒ Track all transactions
- ☒ Generate invoices and reports
- ☒ Create and manage sub-users
- ☒ Approve/reject sub-user requests
- ☒ Access complete financial analytics
- ☒ Export data in various formats




Sub User

Sub-users have limited access for team collaboration:

****Capabilities:****

-  Create expense and transaction requests
-  View approved transactions
-  Access personal dashboard
-  Update personal settings
-  Invoice management (Coming Soon)





****Limitations:****

-  Cannot directly create expenses (requires approval)
-  Cannot access main user's financial data
-  Cannot create other sub-users

Admin

Administrators have system-wide access:

****Capabilities:****

-  Manage all users
-  Access system-wide analytics
-  Configure system settings
-  Monitor system performance

Dashboard Overview

Main Dashboard Features

Summary Cards

- ****Total Expenses****: Shows your total expenses for the selected period
- ****Total Income****: Displays your total income
- ****Account Balance****: Current balance across all accounts
- ****Pending Requests****: Number of pending sub-user requests

Charts and Analytics

- ****Expense Trends****: Visual representation of expense patterns
- ****Category Breakdown****: Pie chart showing expense distribution
- ****Monthly Comparison****: Bar chart comparing monthly expenses
- ****Income vs Expenses****: Line chart showing financial flow

Quick Actions

- ****Add Expense****: Quick access to expense creation
- ****Add Transaction****: Direct link to transaction creation
- ****Generate Report****: One-click report generation
- ****Manage Sub-users****: Access to sub-user management

Expense Management

Creating Expenses

1. ****Navigate to Expenses****

- Click "Expenses" in the main navigation
- Click "Add New Expense" button

2. ****Fill Expense Details****

- ****Title****: Descriptive name for the expense
- ****Amount****: Expense amount (required)
- ****Category****: Select from predefined categories
- ****Purpose****: Detailed description (optional)
- ****Payment Method****: How the expense was paid
- ****Bank Account****: Which account was used
- ****Date****: When the expense occurred

3. ****Save Expense****

- Click "Save Expense" to create the record
- The expense will appear in your expense list

Managing Expenses

Viewing Expenses

- ****List View****: See all expenses in a table format
- ****Filter Options****: Filter by date, category, amount, or payment method
- ****Search****: Use the search bar to find specific expenses
- ****Sort****: Click column headers to sort by different criteria

Editing Expenses

1. Find the expense you want to edit
2. Click the "Edit" button (pencil icon)
3. Modify the details as needed
4. Click "Save Changes"

Deleting Expenses

1. Find the expense you want to delete
2. Click the "Delete" button (trash icon)
3. Confirm the deletion in the popup
4. The expense will be removed and your balance updated

Bulk Operations

- ****Select Multiple****: Use checkboxes to select multiple expenses
- ****Bulk Delete****: Delete multiple expenses at once
- ****Bulk Export****: Export selected expenses to PDF or CSV

Expense Categories

Default Categories

- Office Supplies

- Travel & Transportation
- Meals & Entertainment
- Utilities
- Marketing & Advertising
- Professional Services
- Equipment & Software
- Other

Custom Categories

- You can create custom categories in Settings
- Custom categories appear in the dropdown list
- Categories help with reporting and analysis

🏠 Transaction Management

Creating Transactions

1. **Navigate to Transactions**

- Click "Transactions" in the main navigation
- Click "Add New Transaction" button

2. **Transaction Types**

- ****Income****: Money coming into your account
- ****Expense****: Money going out of your account
- ****Transfer****: Moving money between accounts

3. **Fill Transaction Details**

- ****Title****: Description of the transaction
- ****Amount****: Transaction amount
- ****Type****: Select income, expense, or transfer
- ****Category****: Transaction category
- ****Description****: Additional details
- ****Payment Method****: How the transaction was processed
- ****Bank Account****: Which account was affected
- ****Date****: When the transaction occurred

Transaction Features

Balance Tracking

- Real-time balance updates
- Account-specific balances
- Historical balance tracking
- Balance reconciliation tools

Payment Methods

- Cash

- Credit Card
- Debit Card
- Bank Transfer
- Check
- Digital Wallet
- Other

Bank Account Integration

- Multiple bank account support
- Account-specific transaction tracking
- Balance management per account
- Transfer between accounts

👤 Sub-User Management

Creating Sub-Users

1. **Navigate to Sub-Users**

- Click "Sub-Users" in the main navigation
- Click "Add New Sub-User" button

2. **Sub-User Details**

- **Sub-User ID**: Unique identifier (auto-generated)
- **First Name**: Sub-user's first name
- **Last Name**: Sub-user's last name
- **Email**: Contact email (optional)
- **Password**: Temporary password (user can change)

3. **Permissions**

- **Expense Requests**: Allow expense request creation
- **Transaction Requests**: Allow transaction request creation
- **Invoice Requests**: Allow invoice request creation (Coming Soon)

Managing Sub-User Requests

Request Types

- **Expense Requests**: Sub-users can request expense approvals
- **Transaction Requests**: Sub-users can request transaction approvals
- **Invoice Requests**: Sub-users can request invoice approvals (Coming Soon)

Approval Process

1. **Review Request**: Sub-user submits a request
2. **Main User Review**: You receive notification of pending request
3. **Approve/Reject**: Review details and make decision
4. **Automatic Processing**: Approved requests create main user records
5. **Balance Update**: Account balances are updated automatically

Request Status

- **Pending**: Awaiting your review
- **Approved**: Request approved and processed
- **Rejected**: Request denied with reason
- **Deleted**: Request removed by sub-user

📄 Invoice Management

Creating Invoices

1. **Navigate to Invoices**
 - Click "Invoices" in the main navigation
 - Click "Create New Invoice" button
2. **Invoice Types**
 - **Out Invoice**: Invoice you send to clients (money coming in)
 - **In Invoice**: Invoice you receive from vendors (money going out)
3. **Invoice Details**
 - **Client Information**: Name, email, phone, address
 - **Invoice Number**: Unique invoice identifier
 - **Invoice Date**: Date the invoice was created
 - **Due Date**: Payment due date
 - **Items**: Products or services with quantities and prices
 - **Taxes**: Tax calculations
 - **Total Amount**: Final amount including taxes

Invoice Features

Professional Templates

- Multiple invoice templates
- Customizable branding
- Professional PDF generation
- Email delivery options

Invoice Status

- **Draft**: Invoice being prepared
- **Sent**: Invoice sent to client
- **Paid**: Payment received
- **Overdue**: Payment past due date

Invoice Management

- **Edit**: Modify invoice details
- **Duplicate**: Create copy of existing invoice
- **Send**: Email invoice to client

- ****Export****: Download as PDF
- ****Delete****: Remove invoice (if not sent)

📊 Reports and Analytics

Dashboard Analytics

Key Metrics

- ****Total Revenue****: Sum of all income
- ****Total Expenses****: Sum of all expenses
- ****Net Profit****: Revenue minus expenses
- ****Account Balance****: Current available funds

Visual Charts

- ****Expense Trends****: Line chart showing expense patterns over time
- ****Category Breakdown****: Pie chart of expense categories
- ****Monthly Comparison****: Bar chart comparing monthly performance
- ****Income vs Expenses****: Dual-axis chart showing financial flow

Report Generation

Available Reports

- ****Expense Report****: Detailed expense breakdown
- ****Transaction Report****: Complete transaction history
- ****Invoice Report****: Invoice status and payments
- ****Financial Summary****: Comprehensive financial overview

Export Options

- ****PDF****: Professional formatted reports
- ****CSV****: Data for spreadsheet analysis
- ****Excel****: Advanced spreadsheet format

Report Customization

- ****Date Range****: Select specific time periods
- ****Categories****: Filter by expense categories
- ****Accounts****: Filter by bank accounts
- ****Format****: Choose report layout and style

⚙️ Settings and Configuration

Personal Settings

Profile Information

- ****Name****: Update your display name
- ****Email****: Change your email address
- ****Password****: Update your password

- ****Avatar****: Upload profile picture

Preferences

- ****Currency****: Set your default currency
- ****Date Format****: Choose date display format
- ****Time Zone****: Set your time zone
- ****Language****: Select interface language

Business Settings

Company Information

- ****Business Name****: Your company name
- ****Address****: Business address
- ****Phone****: Contact phone number
- ****Email****: Business email address
- ****Website****: Company website URL

Financial Settings

- ****Default Bank Account****: Set primary account
- ****Tax Rate****: Default tax percentage
- ****Invoice Numbering****: Invoice ID format
- ****Payment Terms****: Default payment terms

System Settings

Notifications

- ****Email Notifications****: Enable/disable email alerts
- ****Dashboard Alerts****: Show/hide dashboard notifications
- ****Request Alerts****: Notify of pending requests
- ****Report Alerts****: Notify when reports are ready

Security

- ****Two-Factor Authentication****: Enable 2FA (Coming Soon)
- ****Session Timeout****: Set automatic logout time
- ****Password Requirements****: Configure password rules
- ****Login History****: View recent login attempts

🔒 Security and Privacy

Data Protection

- ****Encryption****: All data encrypted in transit and at rest
- ****Secure Storage****: Data stored in secure, encrypted databases
- ****Access Control****: Role-based access to sensitive information
- ****Audit Trail****: Complete log of all system activities

Password Security

- ****Strong Passwords****: Enforced password complexity
- ****Password Hashing****: Passwords never stored in plain text
- ****Session Management****: Secure session handling
- ****Automatic Logout****: Sessions expire after inactivity

Privacy Features

- ****Data Ownership****: You own all your data
- ****Data Export****: Export all your data at any time
- ****Data Deletion****: Request complete data removal
- ****Privacy Controls****: Control who can see your information

📱 Mobile Access

Responsive Design

- ****Mobile Optimized****: Works on all device sizes
- ****Touch Friendly****: Optimized for touch interfaces
- ****Fast Loading****: Optimized for mobile networks
- ****Offline Capability****: Basic functionality without internet

Mobile Features

- ****Quick Entry****: Fast expense and transaction entry
- ****Photo Receipts****: Attach photos to expenses
- ****Location Tracking****: Automatic location tagging
- ****Push Notifications****: Real-time alerts

🆘 Troubleshooting

Common Issues

Login Problems

- ****Forgot Password****: Use password reset feature
- ****Account Locked****: Contact administrator
- ****Session Expired****: Log in again
- ****Browser Issues****: Clear cache and cookies

Data Issues

- ****Missing Data****: Check date filters
- ****Incorrect Balances****: Verify all transactions
- ****Duplicate Entries****: Use search to find duplicates
- ****Export Problems****: Try different export format

Performance Issues

- ****Slow Loading****: Check internet connection
- ****Browser Freezing****: Close other browser tabs
- ****Memory Issues****: Restart browser
- ****Mobile Problems****: Update mobile browser

Getting Help

Support Channels

- **Help Documentation**: Comprehensive online help
- **Video Tutorials**: Step-by-step video guides
- **Email Support**: Direct email assistance
- **Community Forum**: User community support

Contact Information

- **Technical Support**: [support-email]
- **General Inquiries**: [info-email]
- **Feature Requests**: [feedback-email]
- **Emergency Support**: [emergency-phone]

📖 Additional Resources

Training Materials

- **Video Tutorials**: Comprehensive video library
- **Webinars**: Live training sessions
- **Documentation**: Detailed technical documentation
- **Best Practices**: Tips for effective usage

Integration Guides

- **API Documentation**: For custom integrations
- **Third-party Tools**: Integration with other software
- **Import/Export**: Data migration guides
- **Backup Procedures**: Data backup strategies

Updates and News

- **Release Notes**: Latest feature updates
- **Maintenance Schedule**: Planned system maintenance
- **Feature Roadmap**: Upcoming features
- **User Community**: Connect with other users

Thank you for choosing Laitusneo!

This user guide should help you get the most out of your expense tracking and invoicing system. If you have any questions or need additional assistance, please don't hesitate to contact our support team.

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