

Personal Finance Tracker

Complete User Documentation

1. Getting Started

Registration

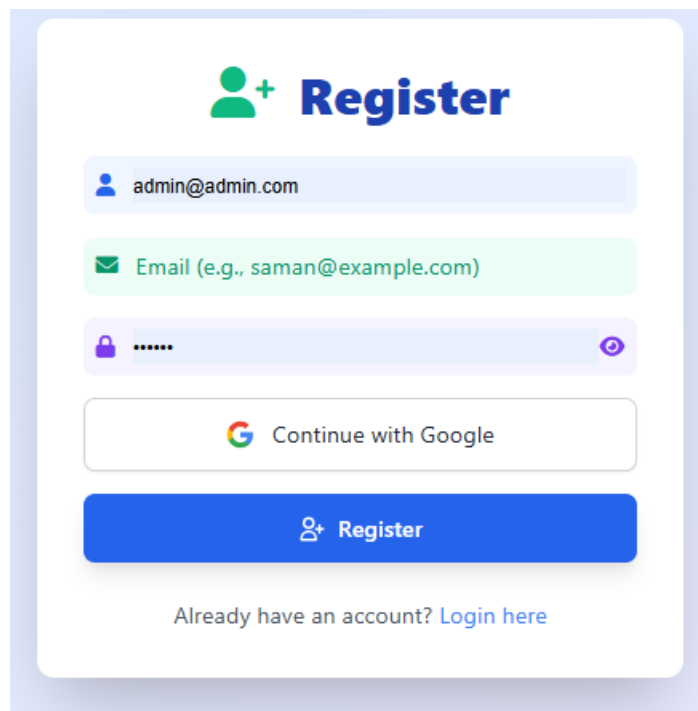
Users can create a new account in two ways:

1. Standard Registration:

- Enter your username
- Provide email address (format: [example@domain.com](#))
- Create a secure password
- Click "Register" button

2. Google Authentication:

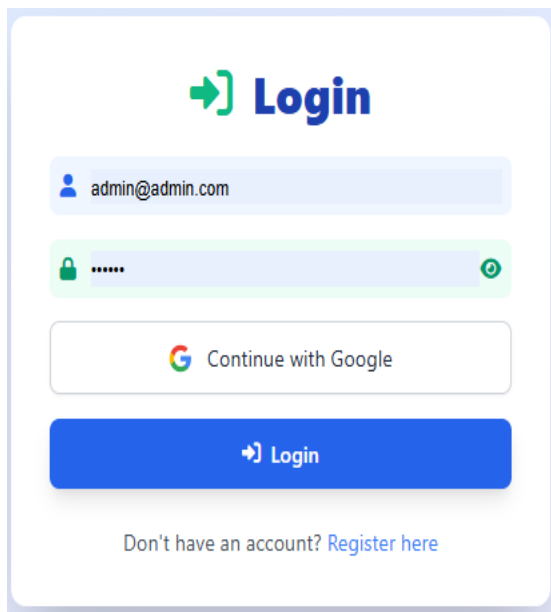
- Click "Continue with Google"
- Select your Google account
- Complete authorization



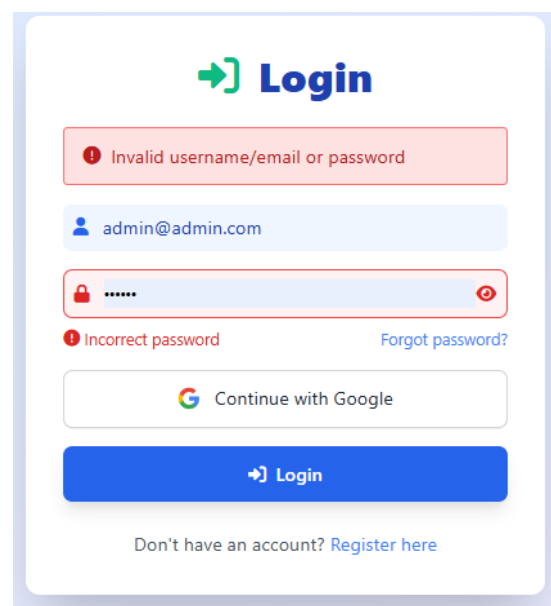
The image shows a registration form with a light blue border. At the top, there is a green person icon with a plus sign followed by the word "Register" in bold blue text. Below this, there are three input fields: the first is for a username with the placeholder "admin@admin.com", the second is for an email with the placeholder "Email (e.g., saman@example.com)", and the third is for a password with a lock icon and a toggle eye icon. Below the input fields, there is a button with the Google logo and the text "Continue with Google". At the bottom, there is a large blue button with a person icon and the text "Register". Below the button, there is a link that says "Already have an account? [Login here](#)".

Login Process

1. Standard Login:
 - Enter email address
 - Input password (with show/hide option)
 - Click "Login"
2. Google Login:
 - Select "Continue with Google"
 - Choose account



The image shows a standard login form. At the top, there is a green arrow icon followed by the word "Login" in bold blue text. Below this, there is a light blue input field containing the email address "admin@admin.com". Underneath the email field is a light green input field for the password, which is masked with six dots. To the right of the password field is a green eye icon. Below the password field is a white button with a Google logo and the text "Continue with Google". At the bottom is a large blue button with a white arrow icon and the text "Login". At the very bottom, there is a link that says "Don't have an account? Register here".



The image shows the same login form as the previous one, but with error messages. At the top, there is a red error message box that says "Invalid username/email or password". Below the email field, there is a red error message box that says "Incorrect password". To the right of the password field, there is a blue link that says "Forgot password?". The "Continue with Google" button and the "Login" button are still present, as is the "Don't have an account? Register here" link at the bottom.

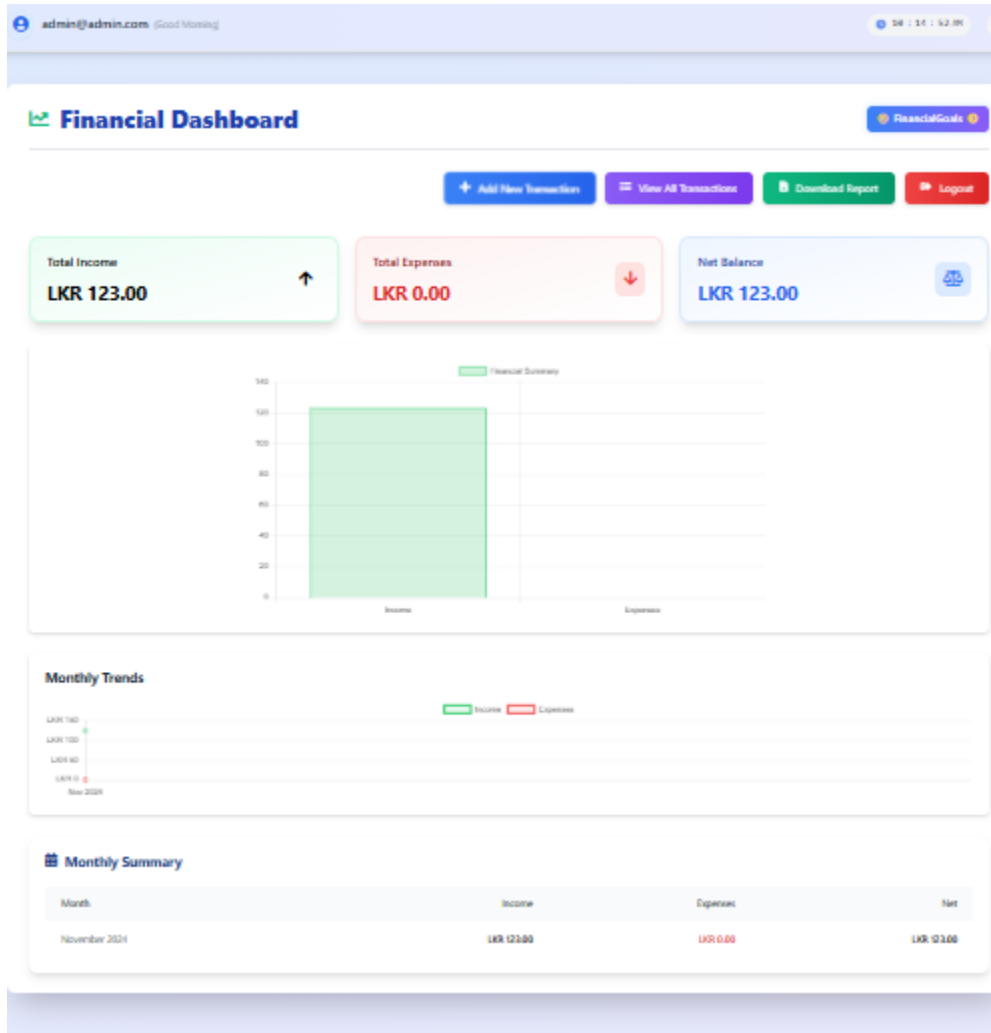
Note: Password recovery available via "Forgot password?" link

2. Dashboard Features

Financial Overview

- Total Income display
- Total Expenses summary
- Net Balance calculation

- Monthly trends visualization
- Recent transactions list



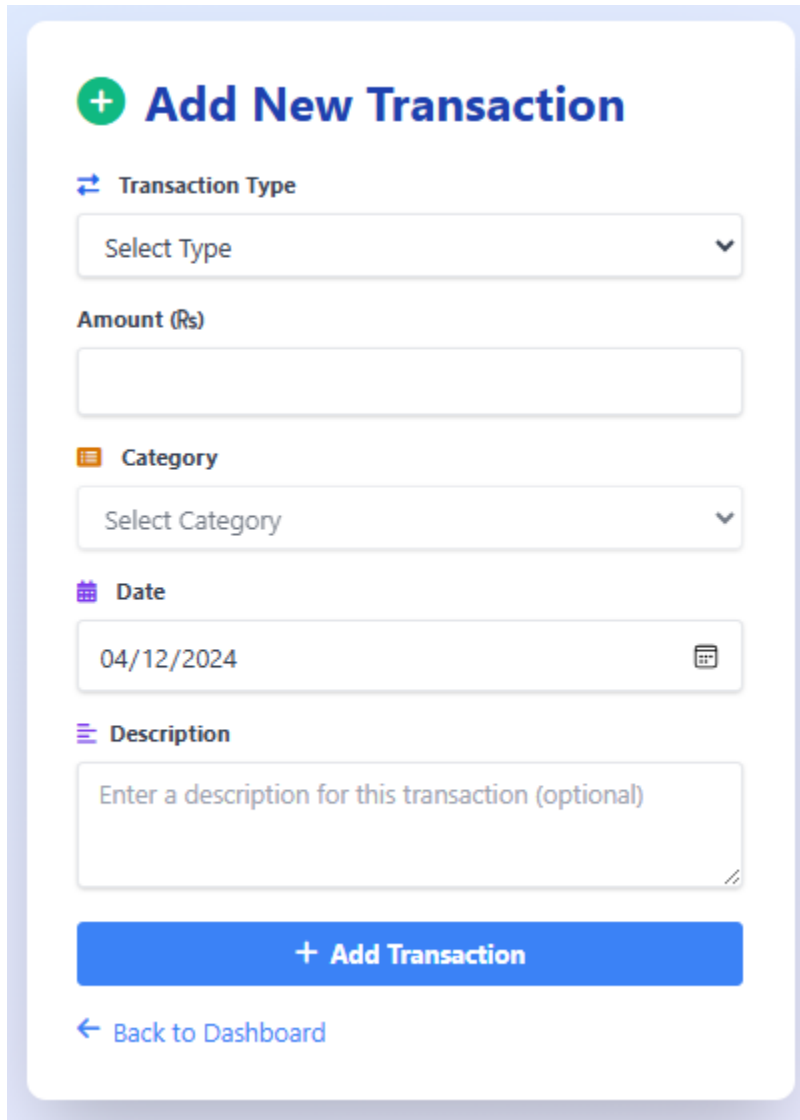
Quick Actions

- Add New Transaction
- View All Transactions
- Download Report
- Logout option

3. Transaction Management

Adding Transactions

1. Select "Add Transaction"



The screenshot shows a mobile application interface for adding a new transaction. At the top, there is a green plus icon followed by the text 'Add New Transaction'. Below this, there are several input fields: 'Transaction Type' with a dropdown menu showing 'Select Type', 'Amount (Rs)' with a text input field, 'Category' with a dropdown menu showing 'Select Category', 'Date' with a date picker showing '04/12/2024', and 'Description' with a text area containing the placeholder 'Enter a description for this transaction (optional)'. At the bottom, there is a blue button with a white plus icon and the text '+ Add Transaction', and a blue link with a left arrow and the text 'Back to Dashboard'.


2. Choose transaction type:


- Income
- Expense


3. Enter details:


- Amount

- Category
 - You can add a subcategory also

 **Category**





 Want to add a new category? [Click here](#)

--

- Date
- Description

4. Save transaction

Transaction List


- View all transactions

All Transactions					Export Monthly PDF	Export Full PDF
← Back to Dashboard						
Category	Date	Description	Amount	Actions		
Rental	2024-11-27	sddddd	LKR 123.00	Edit Delete		

- Sort by category/date

- Edit existing entries

Edit Transaction


 Transaction Type

Income


Rs


Amount


123.00

 Category


Rental




 Want to add a new category? [Click here](#)


 Date


27/11/2024



 Description

sddddd

 Update Transaction

 Cancel

- Delete transactions

Confirm Deletion

Are you sure you want to delete this transaction? This action cannot be undone.

Cancel

Delete

- Export options:
 - Monthly PDF

Financial Report

2024-12-04

Current Month Summary (December 2024)

Monthly Income: LKR 3,000.00
Monthly Expenses: LKR 0.00
Monthly Net Balance: LKR 3,000.00

Detailed Monthly Breakdown

car leasing:
Income: LKR 3,000.00

- Full PDF

Full Financial Report

2024-12-04

Overall Summary

Total Income: LKR 3,123.00
Total Expenses: LKR 0.00
Net Balance: LKR 3,123.00

Detailed Breakdown by Category

car leasing:
Income: LKR 3,000.00

Rental:
Income: LKR 123.00

4. Category Management

Creating Categories

1. Access "Manage Your Categories"
2. Click "Create New Category"

Manage Your Categories

[← Go Back](#)
+ Create New Category





Category Name

Category Type

Income

+ Create Category

Your Categories

CATEGORY NAME	CATEGORY TYPE	ACTIONS
<div>car leasing</div>	<div>Income</div>	<div> Update</div> <div> Delete</div>
<div>monthly salaray</div>	<div>Income</div>	<div> Update</div> <div> Delete</div>

3. Enter:
 - Category Name
 - Category Type (Income/Expense)

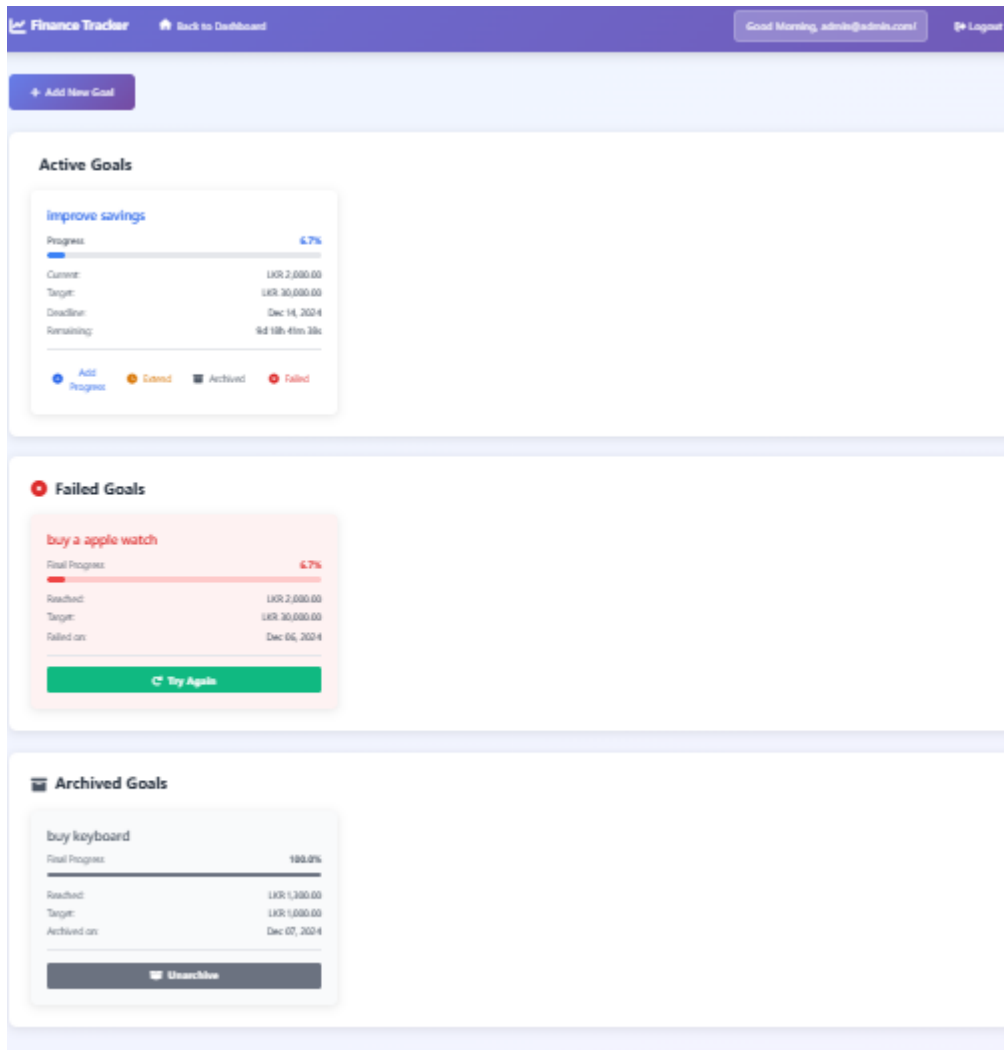
4. Save category

Managing Categories

- View all categories
- Update category details
- Delete categories
- Back navigation option

5. Financial Goals

Goal Management



1. Active Goals:

- Set target amount
- Define deadline
- Track progress
- Add progress updates
- Extend deadlines
- Archive completed goals

2. Failed Goals:

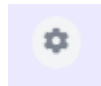
- View failed goals
- Retry option
- Progress history


3. Archived Goals:

- Access completed goals
- View achievement history

6. Account Settings

Profile Management



 **Account Settings**

← Back to Dashboard

Update Your Personal Transaction Categories

Username

admin@admin.com

Email


admin@admin.com

Current Password

[Forgot password?](#)

New Password (leave blank to keep current)

Update Profile

 **Danger Zone**

Once you delete your account, there is no going back. Please be certain.

Delete Account

- Update username

- Modify email address
- Change password
- Customize categories

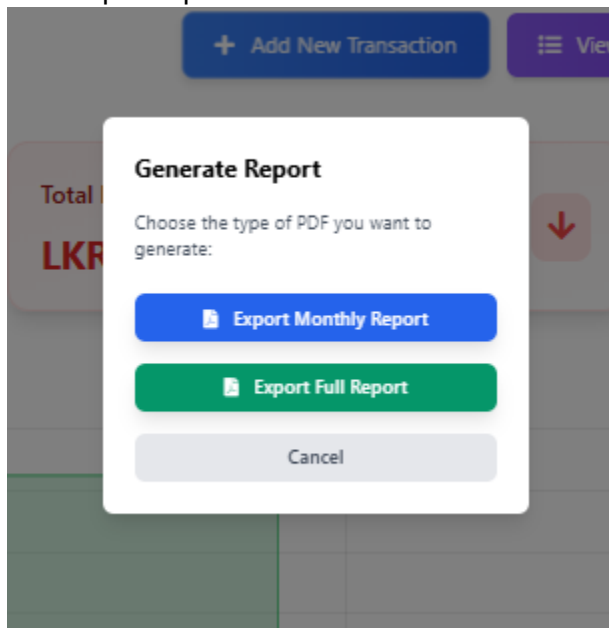
Account Security

- Password updates
- Account deletion option
- Security preferences

7. Reports and Analytics

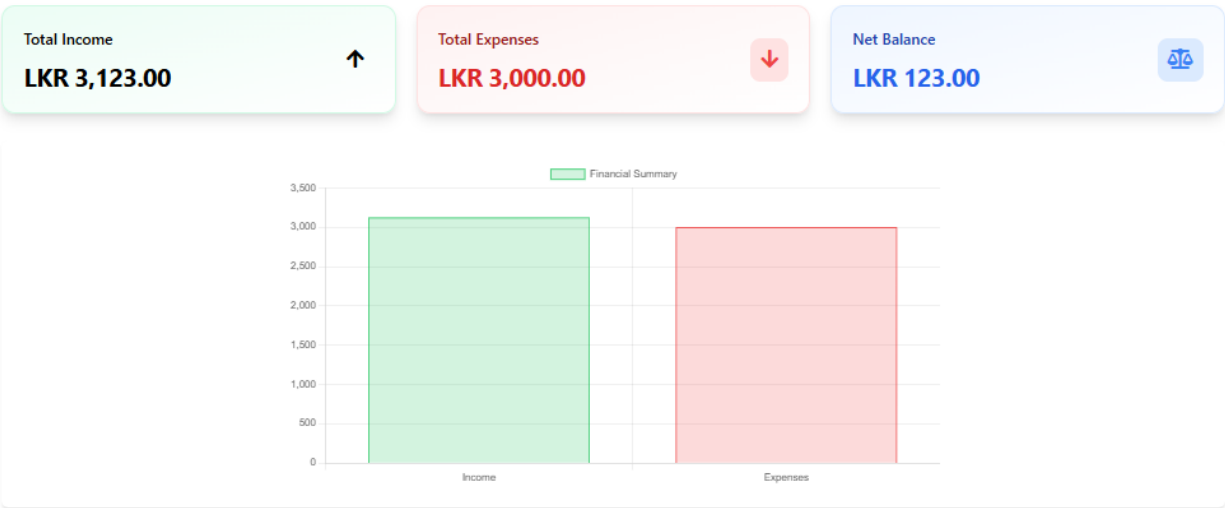
Report Generation

- Monthly summaries
- Full transaction history
- Custom date ranges
- PDF export options



Financial Analysis

- Income vs. expenses



- Monthly-wise breakdown

Monthly Summary

Month	Income	Expenses	Net
December 2024	LKR 3,000.00	LKR 3,000.00	LKR 0.00
November 2024	LKR 123.00	LKR 0.00	LKR 123.00
October 2024	LKR 2,500.00	LKR 0.00	LKR 2,500.00

- Monthly trends



8. Security Guidelines

Best Practices

- Regular password updates
- Secure logout after sessions
- Private credential management
- Regular transaction verification

5. Backup important reports

Security Warnings

- Avoid sharing login details
- Report suspicious activities
- Use secure internet connections
- Keep account information private

Technical Support

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Version Information

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For additional assistance or feature requests, please contact technical support.