

Personal Finance Tracker

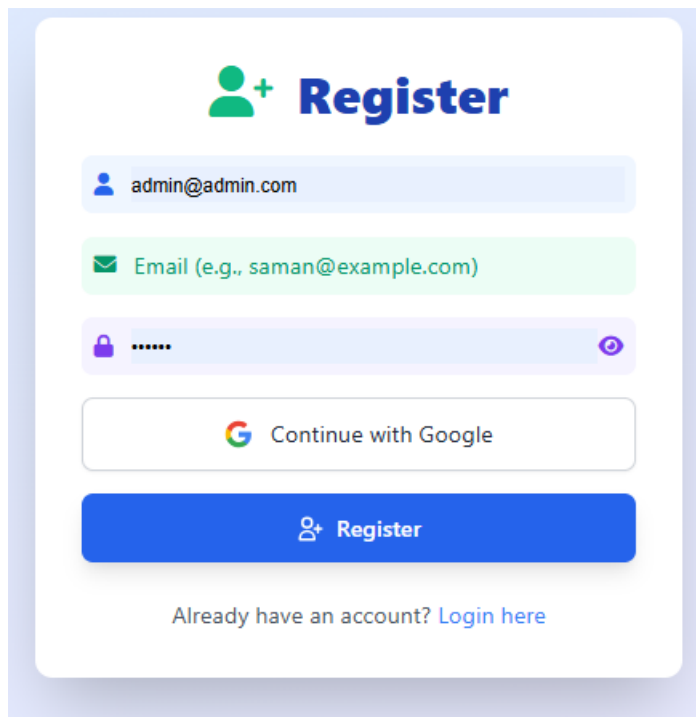
Complete User Documentation

1. Getting Started


Registration


Users can create a new account in two ways:


1. Standard Registration:

A registration form titled "Register" with a green person icon and a plus sign. It contains three input fields: a username field with "admin@admin.com", an email field with "Email (e.g., saman@example.com)", and a password field with "*****" and a toggle icon. Below these is a "Continue with Google" button with the Google logo. At the bottom is a blue "Register" button with a person icon. A link "Already have an account? Login here" is at the very bottom.

Register

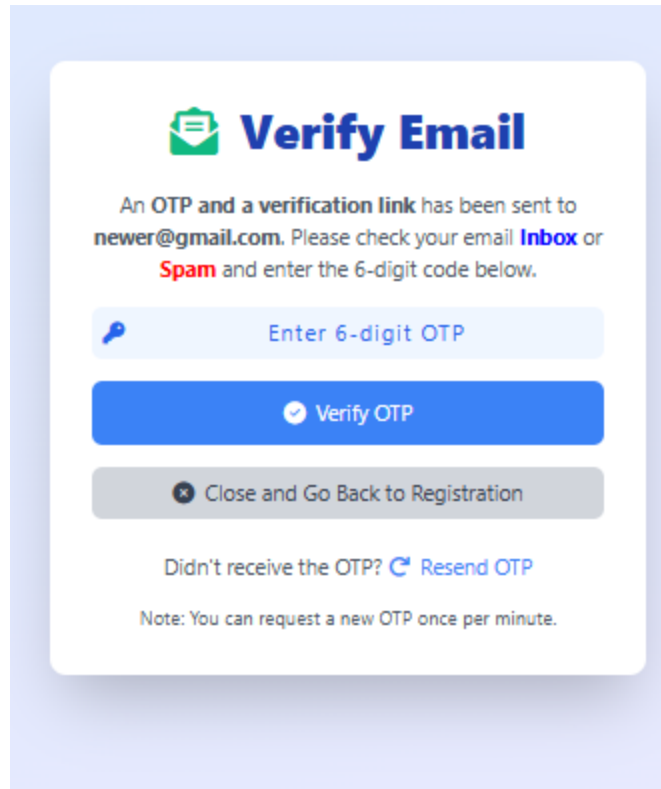


 Continue with Google

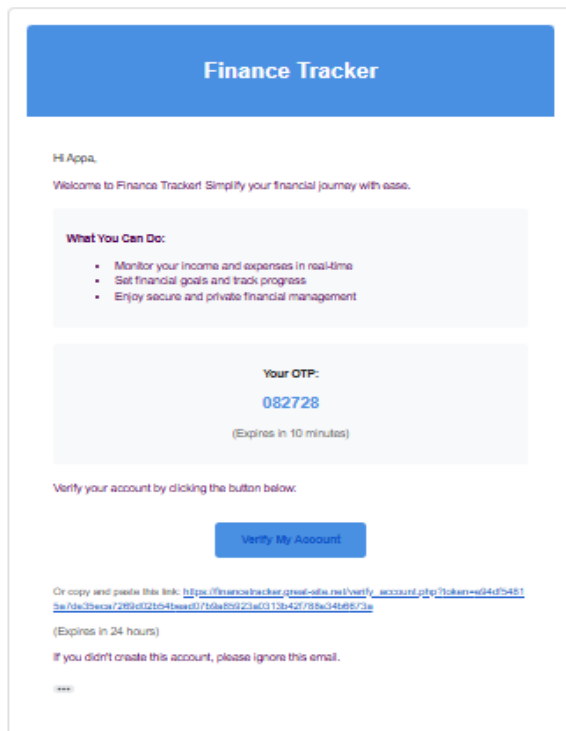
 **Register**

Already have an account? [Login here](#)

- Enter your username
- Provide email address (format: [example@domain.com](#))



- Verify your account through [verification Link](#) or by [Otp](#).



Finance Tracker <yasasnew@gmail.com>
to me ▾

Email Verification

Your One-Time Password (OTP) is: **642010**

This OTP will expire in 10 minutes.

- Create a secure password
- Click "[Register](#)" button

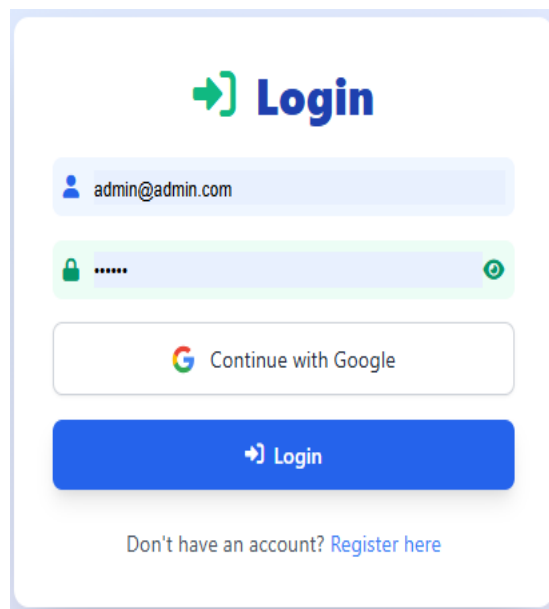
2. Google Authentication:

- Click "[Continue with Google](#)"
- Select your Google account
- Complete authorization

Login Process

1. Standard Login:

- Enter email address
- Input password (with show/hide option)
- Click "Login"




The image shows a login form with a light blue border. At the top, there is a green icon of a right arrow inside a bracket, followed by the word "Login" in bold blue text. Below this, there are two input fields. The first field has a blue user icon and contains the text "admin@admin.com". The second field has a green lock icon on the left, contains six dots, and a green eye icon on the right to toggle visibility. Below the input fields is a button with the Google logo and the text "Continue with Google". At the bottom is a large blue button with a white right arrow icon and the text "Login". At the very bottom, there is a link that says "Don't have an account? [Register here](#)".

2. Google Login:


- Select "Continue with Google"


- Choose account

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

 **Login**

❗ Invalid username/email or password


 admin@admin.com




❗


❗ Incorrect password


[Forgot password?](#)


 Continue with Google

 **Login**


Don't have an account? [Register here](#)

 **Reset Password**


 Enter your email or username


 Send Reset Link


[← Back to Login](#)


 **Login**


✔ Password reset instructions have been sent to your email.

 newrr

 Password



 Continue with Google

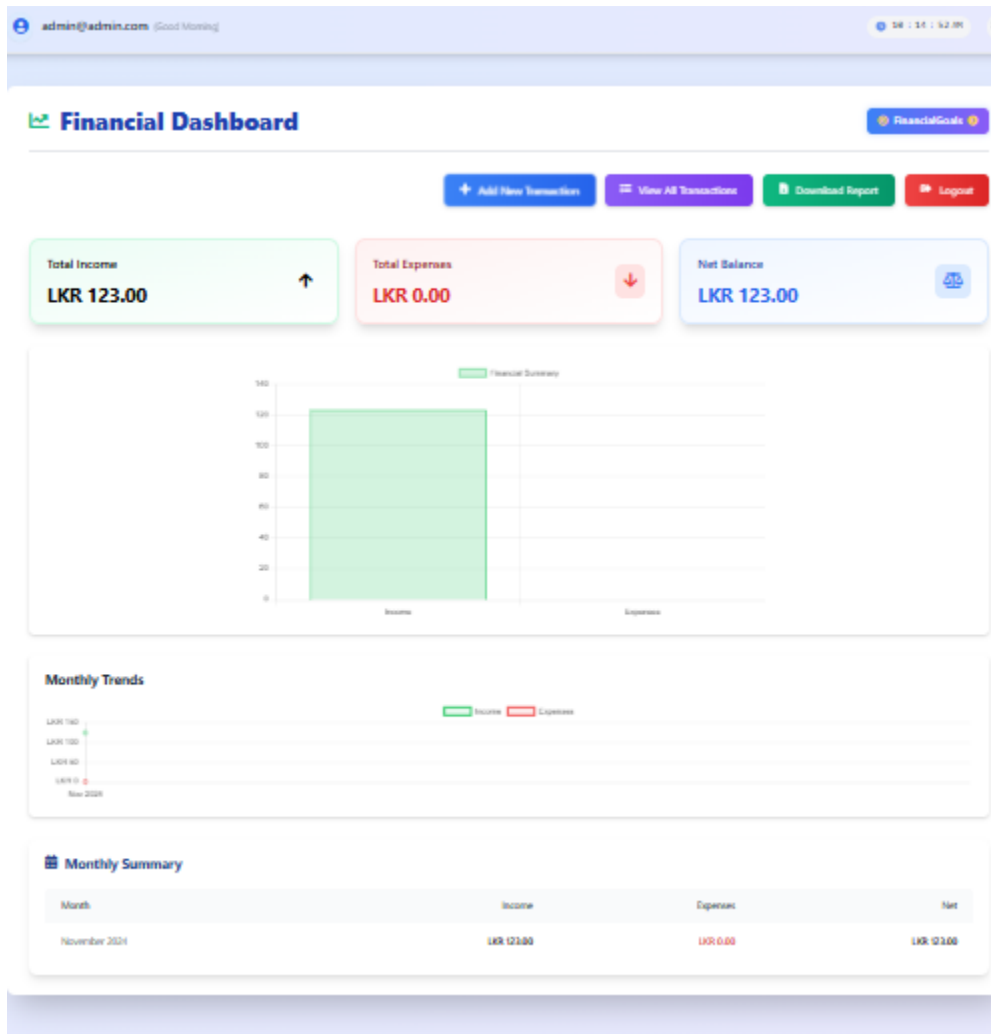
 **Login**

Don't have an account? [Register here](#)

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"


 **Add New Transaction**

 Transaction Type

Select Type


▼

Amount (Rs)


 Category


Select Category

▼


 Date


04/12/2024



 Description

Enter a description for this transaction (optional)

 Add Transaction

 Back to Dashboard

2. Choose transaction type:

- Income
- Expense

3. Enter details:

- Amount
- Category

- You can add a subcategory also

 **Category**

Select 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	<div><div>Edit</div><div>Delete</div></div>

- 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"

Manage Your Categories

[← Go Back](#)
+ Create New Category

Category Name





Category Type

Income

▼

+ Create Category

Your Categories

CATEGORY NAME	CATEGORY TYPE	ACTIONS
<input type="text" value="car leasing"/>	<div>Income</div> <div>▼</div>	<div> Update</div> <div> Delete</div>
<input type="text" value="monthly salaray"/>	<div>Income</div> <div>▼</div>	<div> Update</div> <div> Delete</div>

2. Click "Create New Category"

3. Enter:

- Category Name
- Category Type (Income/Expense)

4. Save category

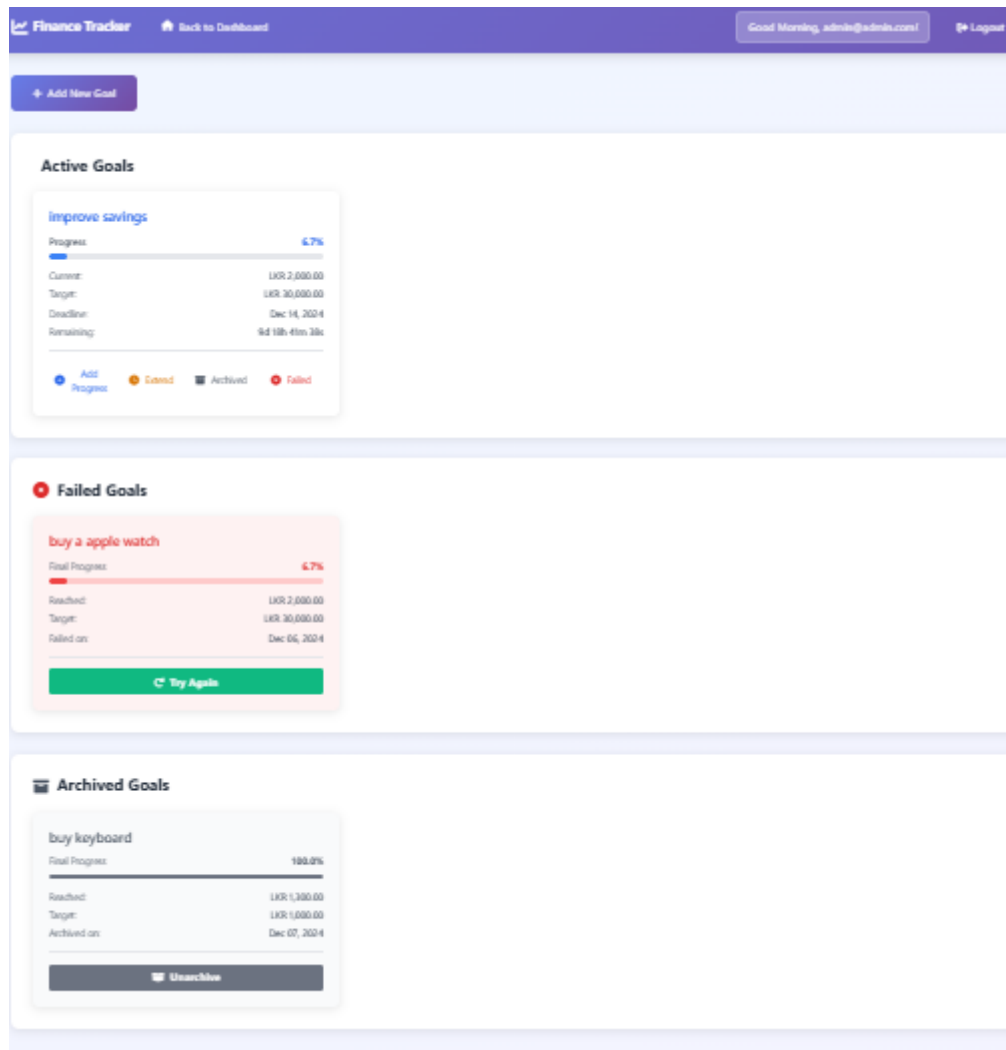
Managing Categories

- View all categories
- Update category details
- Delete categories

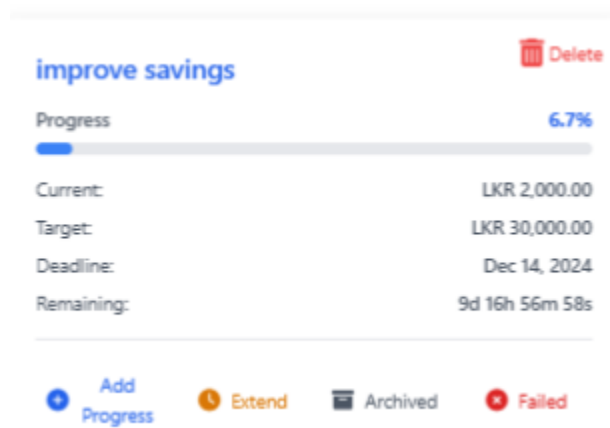
- Back navigation option

5. Financial Goals

Goal Management



1. Active Goals:
 - Set target amount
 - Define deadline



- Track progress
- Add progress updates

A modal titled "Add Daily Progress" is shown. It contains a label "Amount (LKR)" above a text input field. At the bottom right, there are two buttons: "Cancel" (grey) and "Add Progress" (blue).

- Extend deadlines

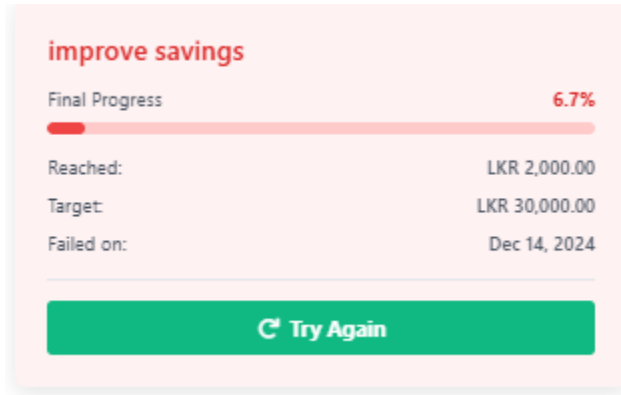
A modal titled "Extend Goal Deadline" is shown. It contains a label "New Deadline" above a date input field with the placeholder "dd/mm/yyyy" and a calendar icon. At the bottom right, there are two buttons: "Cancel" (grey) and "Extend" (blue).

- 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

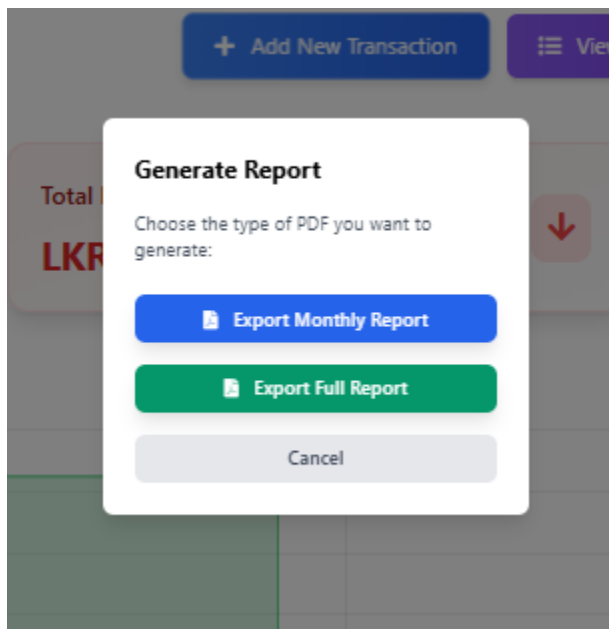
Account Security

- Password updates
- Account deletion option
- Security preferences

7. Reports and Analytics

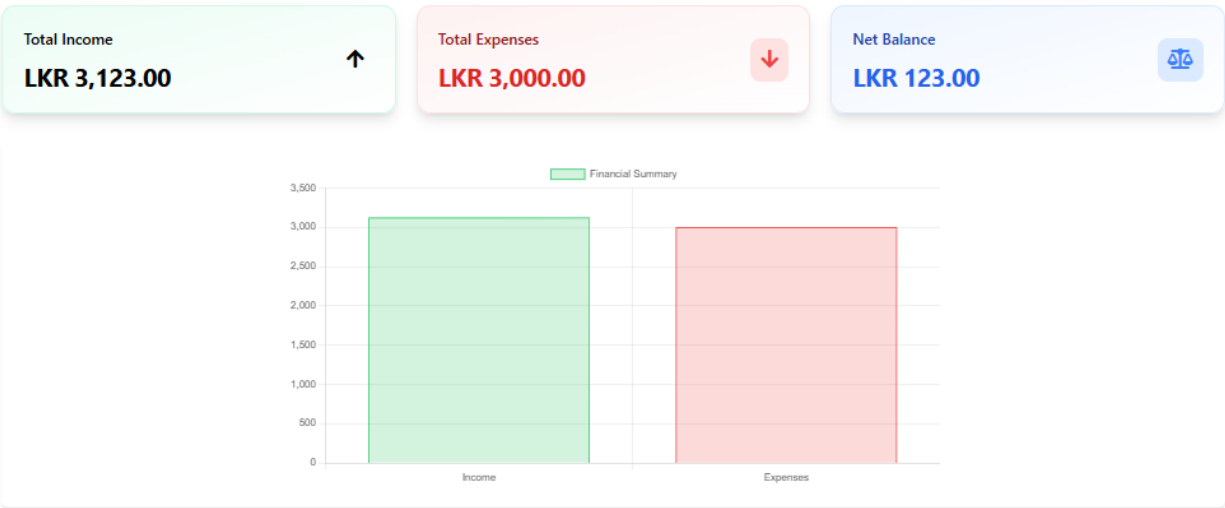
Report Generation

- 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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- Software Status: Active Development

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