User Manual

Project: Cost Wise Innovators – Cost Optimization Dashboard
Team: CSDD1
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1. Introduction

Welcome to the Cost Wise Innovators Dashboard. This user manual is designed to help you navigate the platform with ease. The dashboard is built to assist individuals and small businesses in managing and optimizing their daily, monthly, and yearly expenses. Whether you're tracking personal finances or managing a department budget, this tool helps you visualize your spending patterns and make smarter financial decisions.

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2. System Requirements

To use the Cost Wise Innovators Dashboard effectively, ensure your system meets the following minimum requirements:

- Operating System: Windows, macOS, Linux, iOS, or Android
- Web Browser: Latest version of Google Chrome, Mozilla Firefox, Safari, or Microsoft Edge
- Internet Connection: Minimum 1 Mbps
- Screen Resolution: Minimum 1280x720

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3. Getting Started

Follow these steps to begin using the dashboard:

1. Navigate to the dashboard URL using your preferred web browser.
2. Click on 'Sign Up' to create a new account. Provide your email, create a secure password, and confirm your credentials.
3. After email verification, log in with your credentials.
4. You will be directed to your personalized dashboard where your expense management begins.

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4. Dashboard Overview

The dashboard is organized into several sections:

- **Summary Cards**: Display total income, expenses, and savings for the selected period.
- **Spending Categories**: Shows how much you've spent in each category (e.g., Food, Rent, Travel).
- **Expense Charts**: Includes bar graphs for monthly trends, pie charts for category breakdown, and line charts for timeline-based analytics.
- **Budget Panel**: Set, update, and monitor your monthly or weekly spending limits.
- **Recent Transactions**: Chronological log of all your added expenses with edit/delete options.

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5. Adding an Expense

To add a new expense:

1. Click the '+ Add Expense' button located on the main navigation bar.
2. Enter the following details:
    - Amount (CAD or USD)
    - Category (select from predefined or add custom)
    - Description (optional but useful for tracking)
    - Date (defaults to current date)
3. Click 'Save Expense'.
4. The expense will immediately update charts and budget status.

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6. Setting a Budget

Budget management helps control spending. To set a budget:

1. Go to the 'Budget' tab.
2. Input your total allowable monthly or weekly spending.
3. Save changes to enable alerts.
4. Visual indicators will change color (green, yellow, red) based on proximity to your budget limit.

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7. Editing or Deleting Expenses

1. Scroll to 'Recent Transactions'.
2. Click the pencil icon next to the item to edit amount, category, or description.
3. Click the trash icon to permanently delete the entry. This change will reflect immediately in your dashboard.

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8. Generating Reports

Generate comprehensive reports for tax purposes, audits, or personal analysis:

1. Navigate to 'Reports'.
2. Select a date range or use filters (e.g., Category, Amount, Frequency).
3. Choose format: PDF or Excel.
4. Click 'Generate'. The file will be available for download immediately.

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9. Managing Your Account

1. Access your profile from the top-right menu.
2. Update your name, email, or password from 'Account Settings'.
3. Enable two-factor authentication (optional).
4. You may also delete your account from this section.

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10. Notifications & Alerts

You will receive:

- Budget threshold alerts when nearing 80% of budget
- Overspending alerts when budget is exceeded
- Monthly summary emails (if enabled)
- In-app badges for important updates

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11. FAQs

- **What happens if I log out accidentally?**
  You will be safely logged out and can return by logging in again.
- **Is my financial data safe?**
  Yes, all data is encrypted and stored securely in the cloud.
- **Can I share my dashboard with others?**
  Sharing options are currently in development.
- **Can I reset all data?**
  Yes, from Profile > Danger Zone, click 'Reset All Data'.

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12. Troubleshooting

- **Page not loading?** Try refreshing or check your internet connection.
- **Charts not updating?** Ensure you've entered a valid expense.
- **Forgot password?** Use the 'Forgot Password' link on the login screen to reset.

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13. Support

If you experience any issues or have suggestions:

- Email: support@costwiseinnovators.com
- Live Chat: Available Mon–Fri, 9 AM to 5 PM EST
- Feedback Form: Accessible from your dashboard menu
