USER MANUAL FOR INCOME &

EXPENSE MANAGEMENT

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TABLE OF CONTENTS

[**1.** **INTRODUCTION** 3](#_Toc204006108)

[**2.** **SYSTEM REQUIREMENTS** 3](#_Toc204006109)

[**3.** **GETTING STARTED** 4](#_Toc204006110)

[3.1Accessing the Application 4](#_Toc204006111)

[3.2 Understanding the Interface 4](#_Toc204006112)

[**4.** **LOGGING IN** 5](#_Toc204006113)

[**5.** **USING THE DASHBOARD** 5](#_Toc204006114)

[5.1 Viewing Summary Cards 5](#_Toc204006115)

[5.2 Adding a New Entry 6](#_Toc204006116)

[5.3 Viewing Transaction History 7](#_Toc204006117)

[**6.** **LOGGING OUT** 8](#_Toc204006118)

[**7.** **RESPONSIVE AND MOBILE USE** 8](#_Toc204006119)

[**8. KEYBOARD SHORTCUTS & ACCESSIBILITY 9**](#_Toc204006120) **AND**

[**9.** **DETAILED WALKTHROUGH WITH EXAMPLES** 9](#_Toc204006121)

[**10.** **KNOWN LIMITATIONS** 11](#_Toc204006122)

[**11.** **TROUBLESHOOTING AND FAQ** 12](#_Toc204006123)

[**12.** **GLOSSARY** 13](#_Toc204006124)

[**13.SUPPORT AND FEEDBACK** 14](#_Toc204006125)

# **INTRODUCTION**

* The Income & Expense Management Application is a simple and user-friendly financial tracker developed for ASAD TECH admin and the stakeholders.
* With this app, you can quickly record your income and expenses, monitor your financial health, and review your transaction history with ease.
* The application is designed to be visually appealing, intuitive, and accessible across desktops, tablets, and smartphones.

# **SYSTEM REQUIREMENTS**

* Browser: Any modern web browser (Chrome, Firefox, Edge, Safari, Opera)
* Device: Desktop, laptop, tablet, or smartphone
* Internet: Not required after the application is loaded (works offline for session)
* Other: JavaScript enabled in the browser
* Installation: Not required; runs directly from index.html or a hosted link

# **GETTING STARTED**

# 3.1Accessing the Application

* If provided with a web link, open it in your browser.
* If you have the application files:
* Locate index.html on your computer or flash drive.
* Double-click to open it in your default browser.
* The Login Page will appear.

# Understanding the Interface

* Login Page: The first screen requests your username and password.
* Dashboard: After logging in, you will see;
* Three summary cards (Income, Expense, Balance)
* Add Entry form (for new income/expense)
* History table (showing all past entries)
* Logout button (top right)
* Footer note for helpful tips

# **LOGGING IN**

* On the login page, enter the following demo credentials:
* Username: user
* Password: 1234
* Click the Login button or press Enter after typing your password.
* If the credentials are correct, you will be taken to the dashboard.
* If credentials are incorrect, an error message will appear below the form ‘Try again.’
* Note: Only these credentials are accepted in this version.

# **USING THE DASHBOARD**

# 5.1 Viewing Summary Cards

* Income Card- Shows the sum of all your income entries in Ksh. The amount is displayed in green.
* Expense Card- Shows the sum of all your expense entries in Ksh. The amount is displayed in red.
* Balance Card- Shows your balance (Income minus Expense) in purple or orange. If your expenses exceed income, your balance may be negative.
* All amounts use the format Ksh X,XXX.

# Adding a New Entry

* Find the Add New Entry form just below the summary cards.
* Enter the following:
* Description: What is this transaction for? (e.g., "Salary", "Groceries", "Books")
* Amount: Enter the value in Ksh (must be a positive number, e.g., 500).
* Type: Select "Income" or "Expense" from the dropdown.
* Click Add Entry or press Enter (after the amount/type field).
* The entry will:
* Instantly appear in the history table (most recent at the top).
* Update the summary cards (income/expense/balance) immediately.
* Clear the form for your next entry.

Tips

* Use clear, short descriptions for easy tracking.
* Always double-check the amount and type before submitting.

Validation

* If you leave the description empty or enter a non-positive amount, an alert will notify you to correct the input.

# 5.3 Viewing Transaction History

* The History table lists all your past entries, with the most recent at the top.
* Each row includes:
* Description: What the transaction was for.
* Amount (Ksh): How much, formatted as Ksh X,XXX.
* Type: "Income" or "Expense" (color-coded).
* If there are no entries, a message says “No entries yet. Add some!”

# **LOGGING OUT**

* Click the Logout button at the top right of the dashboard.
* Or, press ALT+L on your keyboard to log out instantly.
* You will be returned to the login page, and all data will be cleared.

# **RESPONSIVE AND MOBILE USE**

* The application is designed to work on all screen sizes.
* On phones and small tablets:
* Summary cards stack vertically.
* Forms and tables resize for easier touch interaction.
* All features remain accessible.

# **KEYBOARD SHORTCUTS & ACCESSIBILITY**

* Tab: Move between input fields and buttons.
* Enter: Submit login or add entry forms.
* ALT+L: Instantly log out from the dashboard.
* Text and color contrast is optimized for readability.
* Large, clickable buttons make the app user-friendly for all.

# **DETAILED WALKTHROUGH WITH EXAMPLES**

Adding Your First Income

* Log in using the demo credentials.
* In the Add New Entry form;
* Description: Type "Allowance".
* Amount: Type 3000.
* Type: Select "Income".
* Click Add Entry.
* You will see:
* "Allowance" appears in the history.
* The Income card shows Ksh 3,000.
* The Balance card shows Ksh 3,000.

Adding an Expense

* In the Add New Entry form:
* Description: Type "Lunch".
* Amount: Type 250.
* Type: Select "Expense".
* Click Add Entry.
* You will see:
* "Lunch" appears at the top of the history.
* Expense card shows Ksh 250.
* Balance card shows Ksh 2,750.

Reviewing Your Balance

* The Balance is always calculated as total income minus total expense.
* If you have multiple entries, the balance reflects all.
* Example;
* Income: Ksh 5,000
* Expenses: Ksh 1,500
* Balance: Ksh 3,500

# **KNOWN LIMITATIONS**

* No data persistence: All entries are lost if you refresh or close your browser.
* Single-user demo: Only one username and password; no registration or multi-user support.
* No editing/deleting: Entries cannot be changed or removed after adding.
* No export/import: You cannot download or upload your data in this version.
* No advanced analytics: Summary is limited to total income, expense, and balance.

# **TROUBLESHOOTING AND FAQ**

* Q: Why can’t I log in with my own username?
* A: Only the demo credentials (user/1234) are accepted in this version.
* Q: I refreshed/closed the browser and my data is gone. What happened?
* A: This version does not save data. All information is lost when you refresh or close the app.
* Q: Can I use this on my phone or tablet?
* A: Yes! The app is fully responsive and works on all modern devices.
* Q: Can I edit or remove an incorrect entry?
* A: Editing or deleting entries is not supported in this version.
* Q: How do I quickly log out?
* A: Click the Logout button, or press ALT+L.
* Q: I entered a negative or zero amount and it didn’t work.
* A: Amounts must be positive numbers. The app will alert you if the value is invalid.
* Q: Are my entries private?
* A: Yes. All data stays in your browser and is not sent anywhere, but is lost when you refresh/close.
* Q: Can I add decimal (cents) values?
* A: This version only supports whole Ksh amounts.

# **GLOSSARY**

* Income: Money received (e.g., salary, gift, allowance)
* Expense: Money spent (e.g., food, transport, books)
* Balance: Total income minus total expense
* Ksh: Kenyan Shillings, the currency used in the app
* Entry: A single record of income or expense

# **13.SUPPORT AND FEEDBACK**

* For questions, feedback, or suggestions:
* Contact ASAD TECH support or your instructor
* Reach out to the project maintainer