ClariFi User Guide

Team Nova, 2025

Table of Contents

Introduction:

ClariFi is designed to empower users to take control of their finances by making expense tracking and goal setting simple and intuitive. Whether you're an individual looking to better manage your personal finances or a business manager overseeing a team, ClariFi adapts to your needs.

ClariFi provides a clean, visually engaging dashboard that offers a clear overview of your financial activity and progress toward your goals. Users can quickly access an integrated LLM-powered chat assistant for personalized financial insights and support whenever they need it. The platform also makes it easy to set, track, and edit financial goals efficiently, helping users stay focused and motivated.

Accessible on desktop, ClariFi ensures a seamless and secure login experience, allowing users to confidently manage their finances in one centralized, easy-to-use platform.

Getting Started:

System Requirements:

Personal Computer

Quick Start:

1. Clone the repo onto the computer
2. Open VS Code, and in a terminal window, navigate to frontend and run the package.json by running npm install
3. In a separate terminal, navigate into the backend folder, and install the requirements.txt file (ensure you are on version 3.12.x for the backend to work properly)
4. In the same backend folder, create an .env file. This should contain a secret key, database url, algorithm: hs256 access token expire minutes: 30
5. Once the file is installed, navigate to your Web Browser and install Ollama
6. Third terminal, enter in "ollama run Ollama3"
7. In the first terminal, navigate to frontend > src > and run "npm run dev"
8. Take the localhost link it displays and paste it into a web browser

---

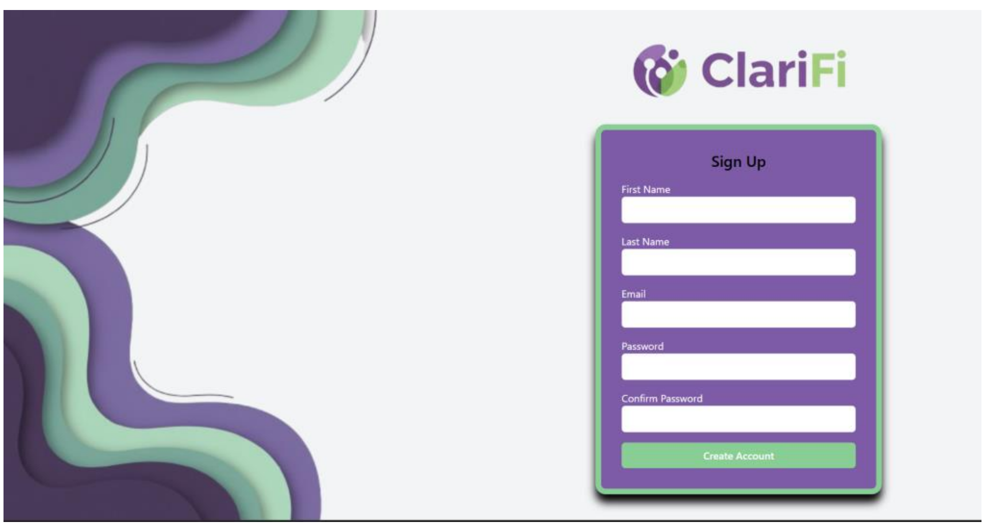
How to Use the ClariFi Website

Creating a new account

1. When on the login screen, you will be prompted to either create an account or enter credentials to login. Select "Create Account"

2. The website will ask if you are a business or personal user, select the corresponding option.
    a. Business users will be asked on the next page if they are creating a new business account or joining one. Select the corresponding option.

3. On the next screen, fill out the fields that are displayed (name, email, password, etc.)



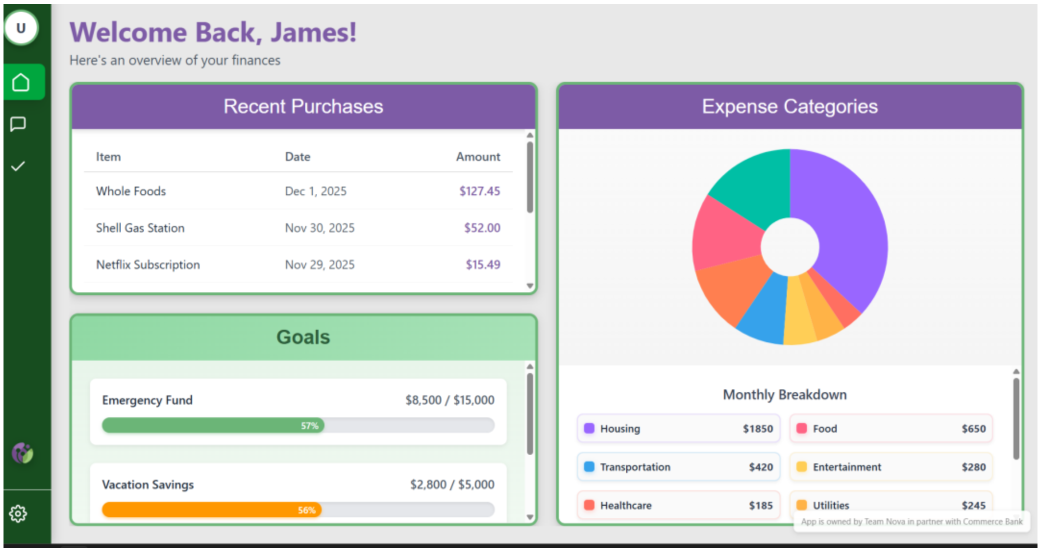
4. Press "Create Account"
5. From there, the website will route back to the login screen.

Logging into ClariFi

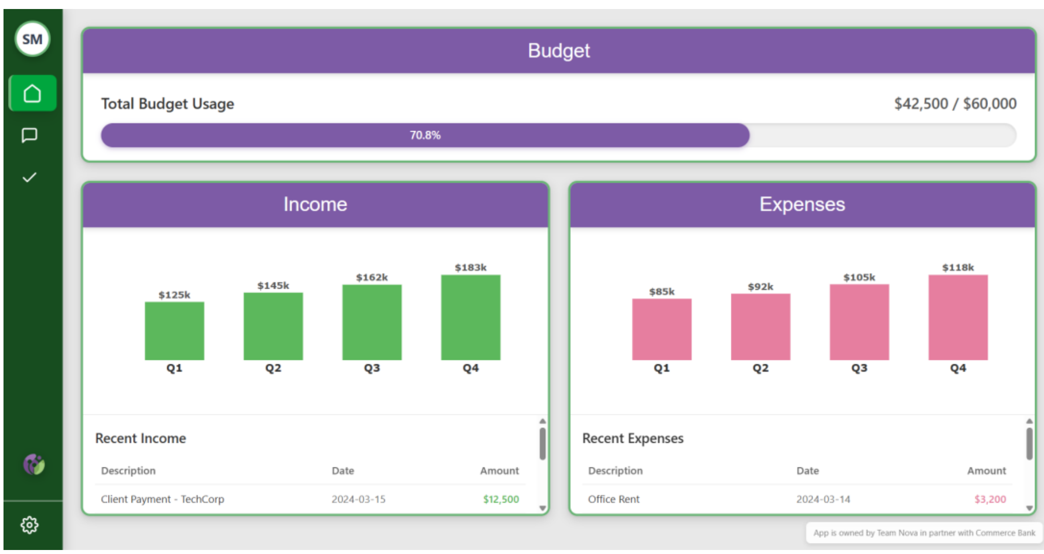
1. If you have an existing account, enter your username and password in the corresponding fields and click login. You should now be directed to your personalized dashboard.
    a. Existing accounts should see data for the following:
        i. Recent Expenses
        ii. Pie Chart with Expense Categories and how much was spent in each
        iii. Goals Overview

b. NOTE: Business users (including sub-users) will see income, expenses, and budget.

Personal User Dashboard

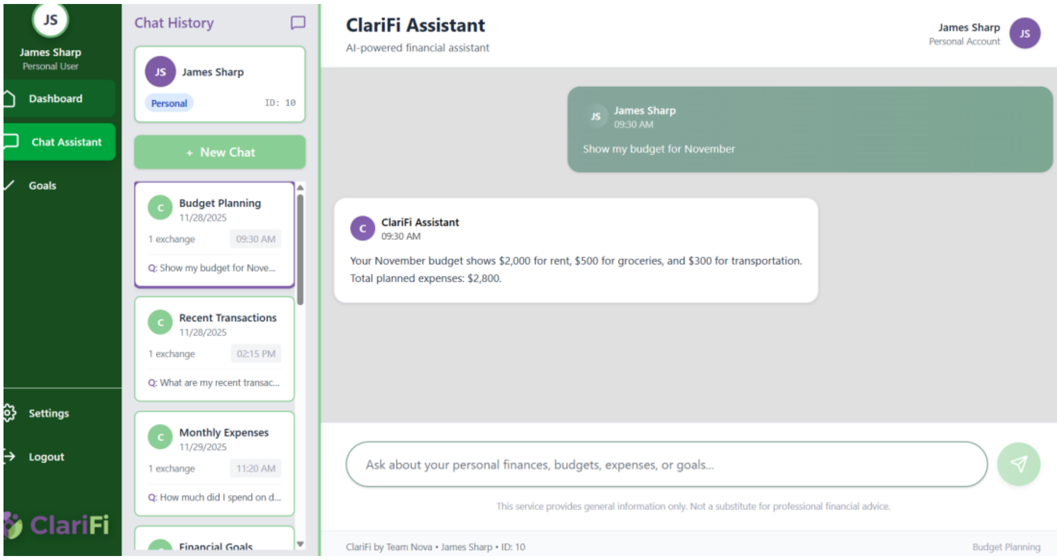


Business/Sub-User Dashboard



Sending a Prompt to the LLM Chat Assistant

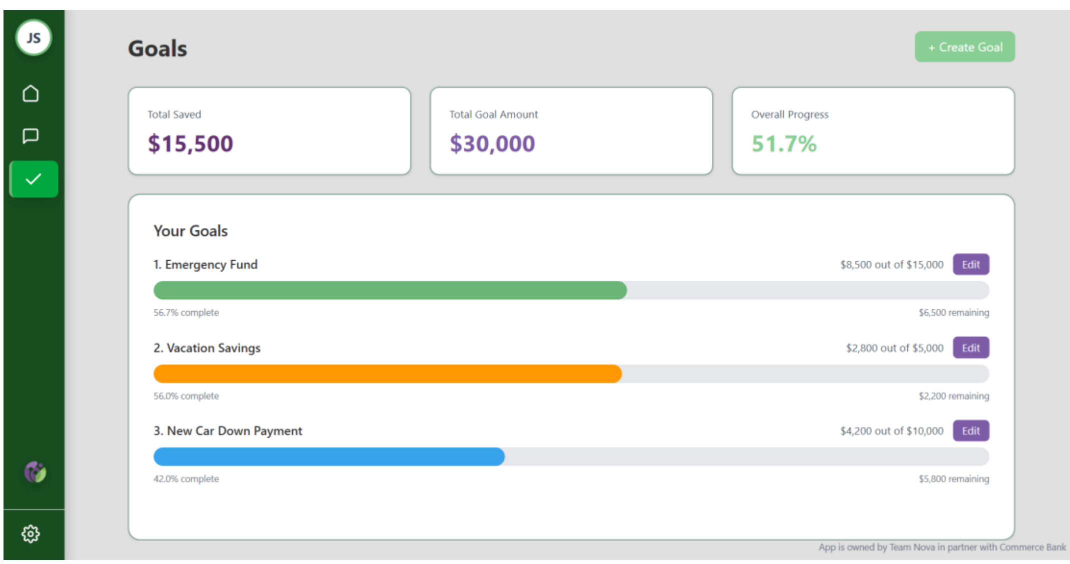
1. On the left of the screen, there is a green navigation bar that shows menu options when it is hovered over. Select the "Chat Assistant" option
2. The Chat Assistant will have generated prompts to select from. Select the one needed.
3. The Assistant will respond with data pulled from the database of the application.



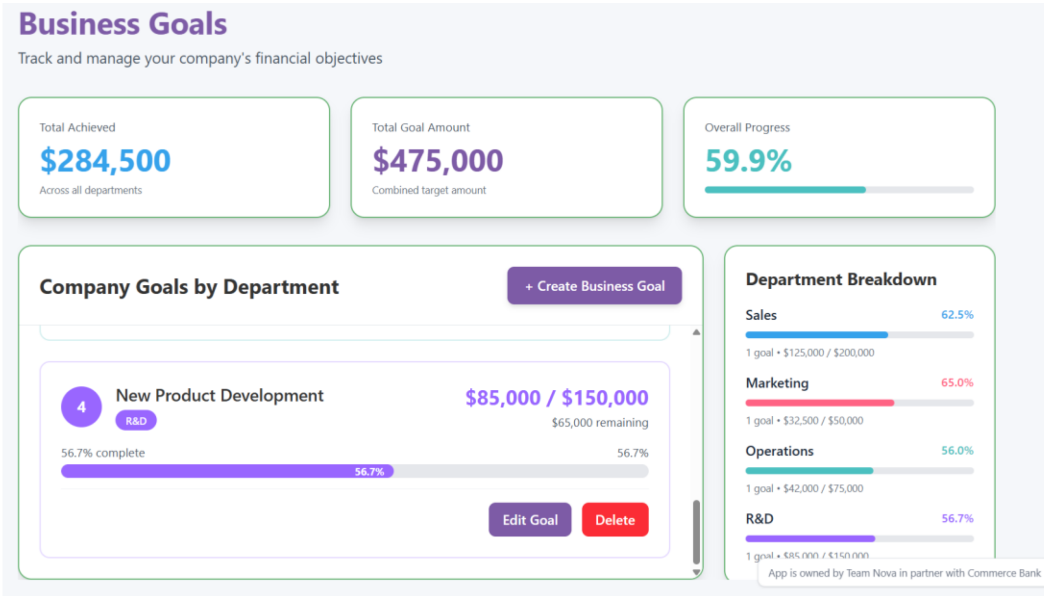
Setting a Goal

1. On the left navigation bar, click the option labeled "Goals"
2. Every active goal under the account will be displayed. To create one, press the "Create Goal" button.

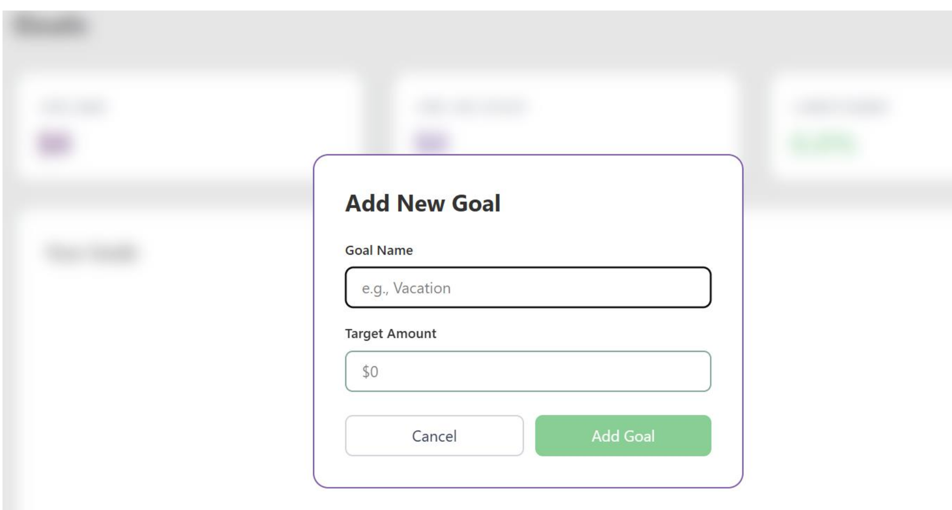
Personal User Goals



Business User Goals

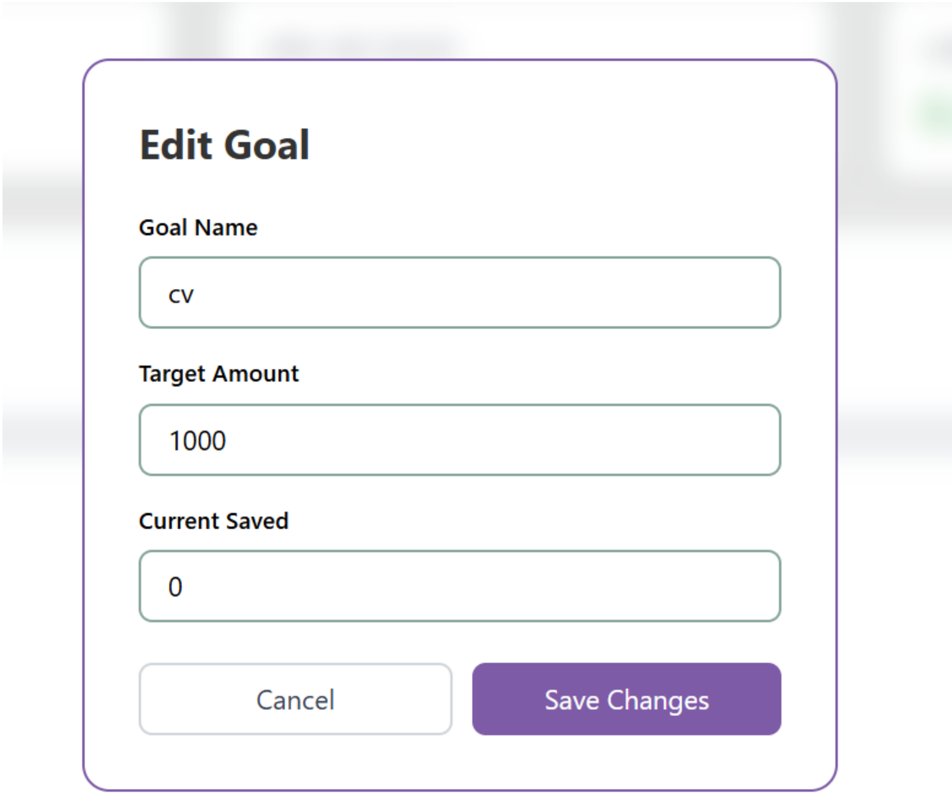


3. From here, enter the amount to be saved, and the amount that has been saved (if applicable).
4. Enter in a name for the goal and press "Create Goal". Now the goal should display on the page.



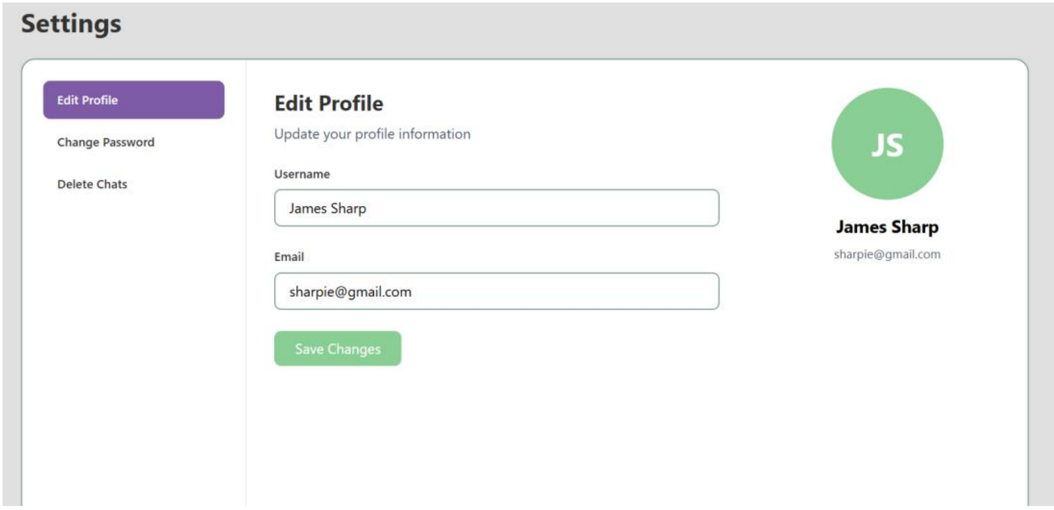
Editing a Goal

1. On the Goals page (Navigation Bar > Goals), select "Edit" on the goal that needs to be changed.
2. From here, enter in the amount that has been added or removed from the goal and click "Save"



Changing Your Name

1. In the Navigation Bar on the left, hover it and select “Settings” in the bottom.
2. The app should navigate to the settings page. Name and email are the first options displayed.
3. Click in the box with the Display Name in it and type in the box to start editing it.
4. Click “Save Changes”

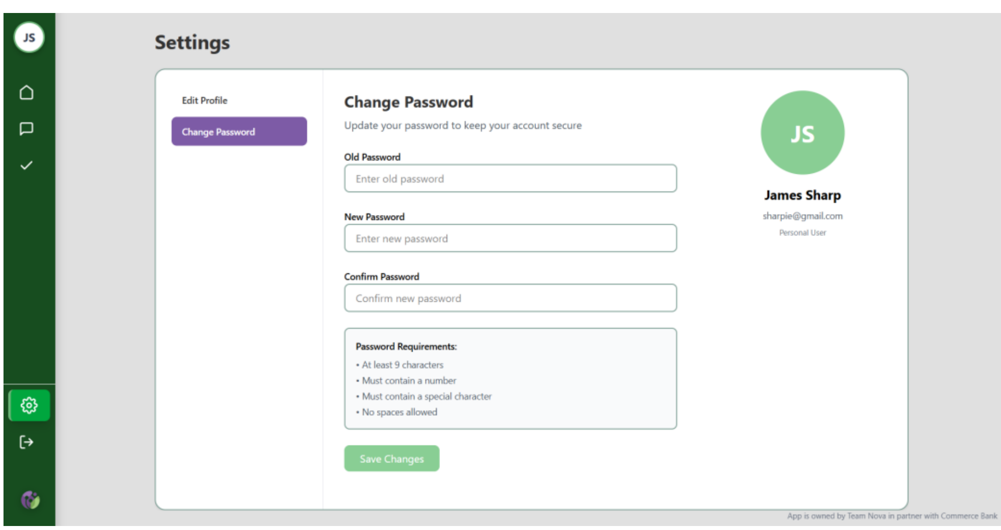


Updating Your Email

1. In the Navigation Bar on the left, hover it and select "Settings" in the bottom.
2. The app should navigate to the settings page. Name and email are the first options displayed.
3. Click in the box with the Email in it and type in the box to start editing it.
4. Select "Save Changes"

Changing Your Password

5. In the Navigation Bar on the left, hover it and select "Settings" in the bottom.
6. The app should navigate to the settings page with its own menu. Select "Change Password"
7. The site will prompt you to enter your old password and then a new password twice.
    a. NOTE: Follow the requirements on the page in order to successfully update the password.



8. Click “Save Changes”. If the password meets the requirements, the website will show a prompt saying that the password was successfully changed. If it fails, check the new password and try again.

Deleting Chat Assistant Chats

NOTE: This is limited to personal and business-admin users only. Sub-users do not have permissions for this.

1. In the Navigation Bar on the left, hover it and select “Settings” in the bottom.
2. The app should navigate to the settings page. Select “Delete Chats”
3. The app will warn that deleting chats is permanent, if this is okay, then select “Delete Chats”
4. There will be a popup to confirm deletion, select this.