The applications main purpose is to help you meet your budget.

It does so by giving you up to date status of each goal (Category) on every transaction and with the very handy Forecast tool, you can plan the rest of your month, so you can meet your budget.

In order for the Forecast tool to give you an accurate view, it requires you to keep your budget app up to date with all your expenses.

Home Budget

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Home Screen:

This screen shows 4 quick menu buttons to access most used pages.

At the bottom right corner, you can see the version of the app. If you click on the version number, it will do an application refresh.

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Budget Setup:

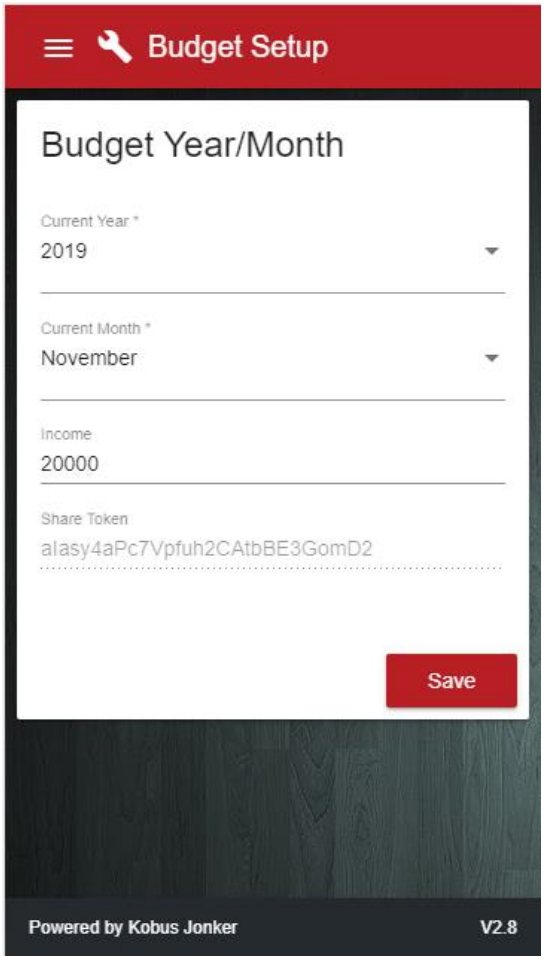
This page is used to enter your current budget month and also provide the application with your income. Your income is used to determine how much money you have left to spend so you can make informed decisions on your forecasting tool (explained later in this document).

Because all users don't get paid on the same day, the application requires you to use this screen and update the Current Year and Current Month every time you get paid (starting of a new budget month).

The budget year and month do not get synced between devices. The reason for this is in the case when 2 people uses the same credentials on 2 devices. The one person will not force the budget month change on the second person, in case he/she still needed to add a transaction to the previous month data.

If you have the site open on multiple devices, you will need to update the budget month on all devices manually.

It is also important to note that your income **will not** be saved on our servers. Because it's such a personal matter, it will only be saved on the device memory. If you open the website on another computer and login with your credentials, you will still need to set the Income value for that computer. Because it is recorded on the device itself, you only need to do this once per device.



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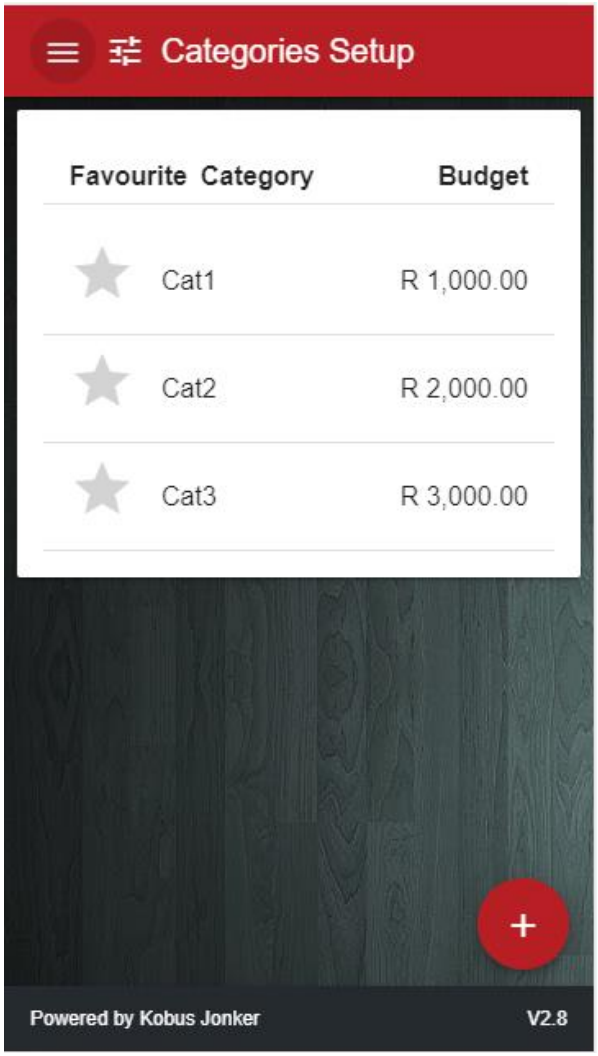
Category Setup:

This page is used to setup multiple areas of your budget. This can be for instance, groceries, petrol, medical, vehicle etc.

Categories is a once-off setup. This will be saved to your servers. Where ever you login with your credentials, you do not have to re-enter the categories, it will sync between all your devices.
You can at any time add or update these budgets. It will automatically sync to all your other devices.



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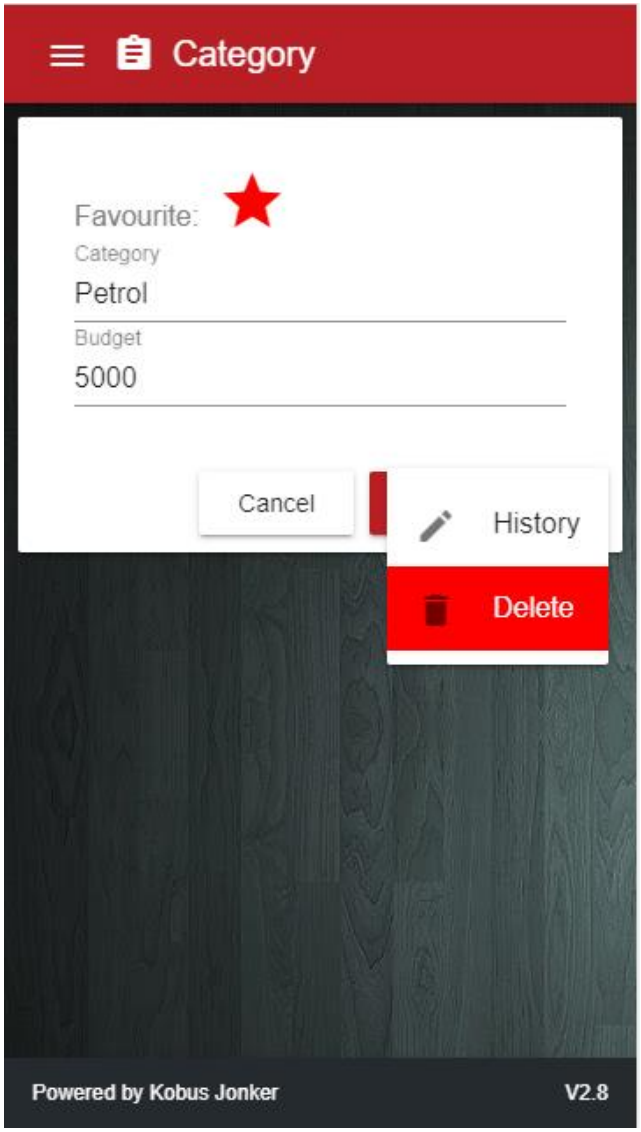
Category Edit:

Favourites (Star) will always appear in the top of alphabetical list of categories.

When editing a category, you can have a view of the last few months of that category by clicking on the button and then, click on History.



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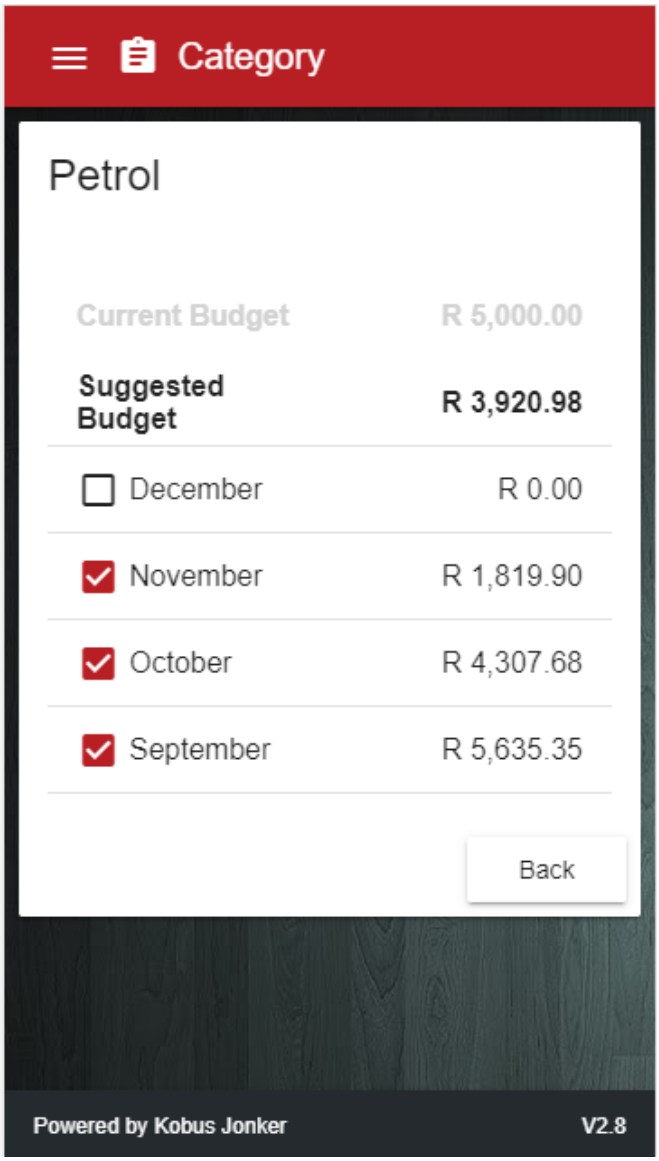
Category History:

By clicking on the category history, you will see the last few months of that category. By ticking or unticking the checkboxes next to the month it will give you a suggested budget you can use for this category.

Keep note, nothing on this page is saved. You will still need to set your budget to the desired amount on the category edit screen. It is only for information purposes.



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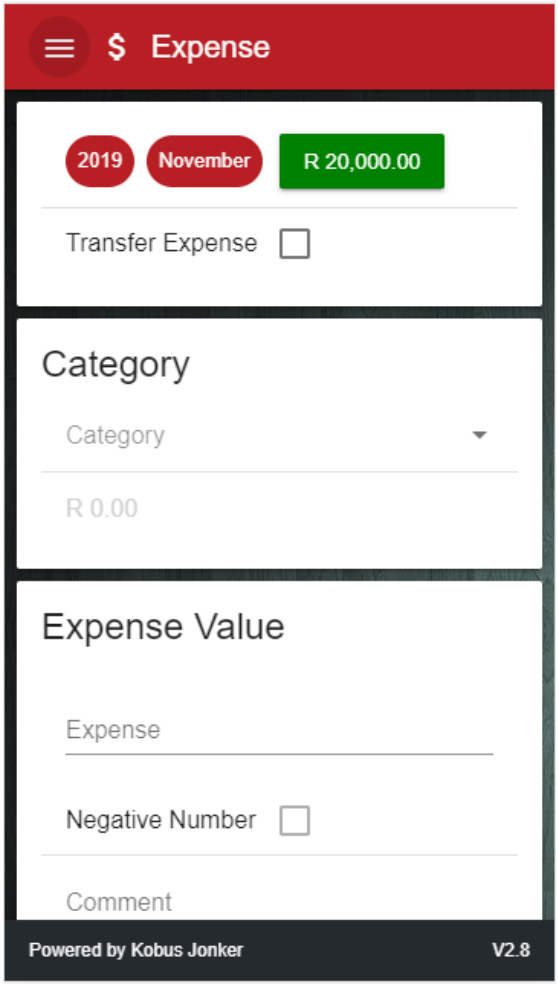
Expense:

This is the most used page of the application. You are required to record every transaction you make on this page.

On the top (red) you will see the year and month budget you are recording this transaction against.

The amount next to the budget, is how much money you have left for the month (This should match your bank account). It will use your income and subtract all the recorded transactions.

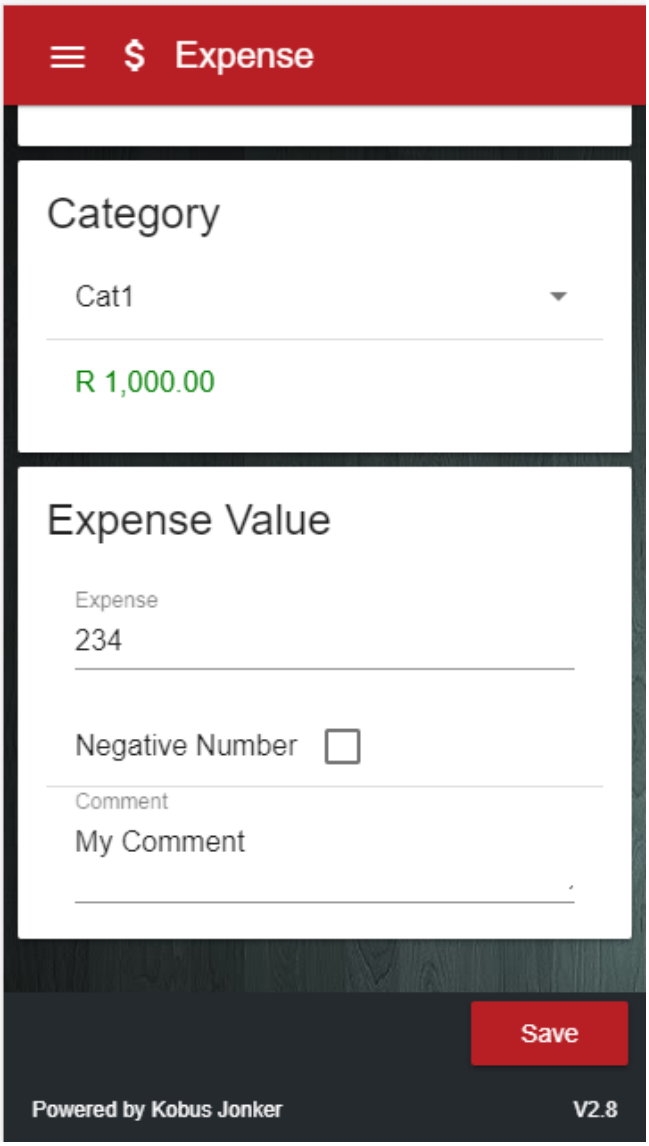
Once this amount goes to negative, it will show in red instead of green.



To record an expense, you first pick a category to save this transaction to. Once you selected your category, it will show you how much of that category you have left to spend. It will not stop you in any way to go over your category budget but will show the amount left to be a negative value, in red, in that case.

Once you selected your category, you can enter the expense value and supply a comment if needed.

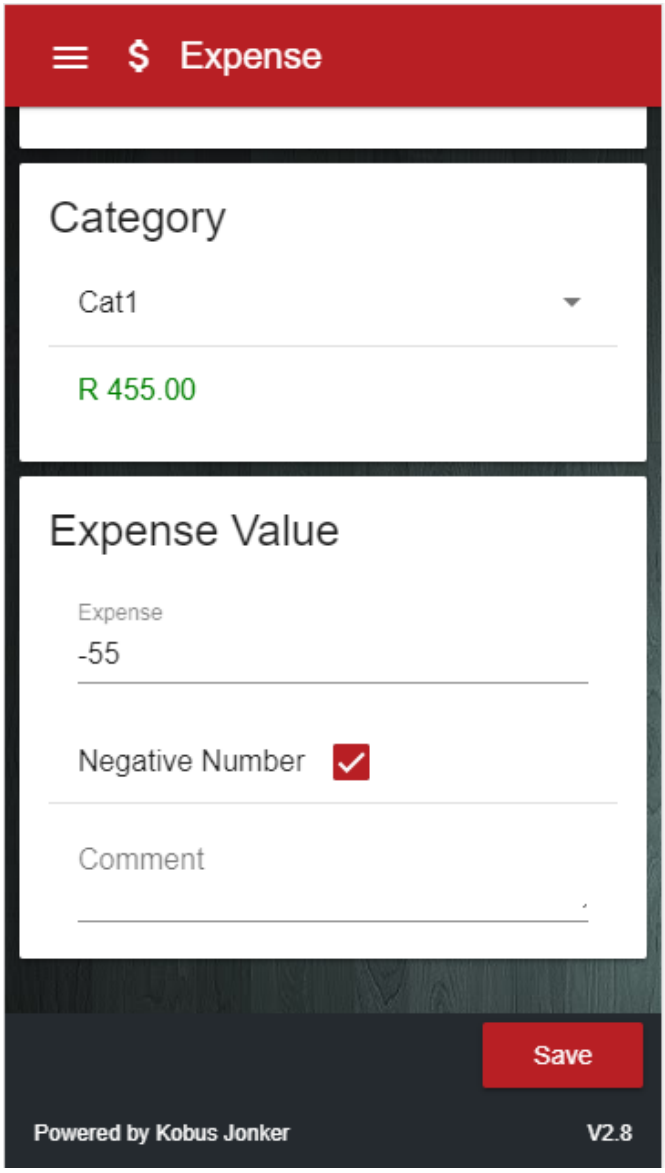
Once the transcation is saved, it will be uploaded to our servers and synced between all your devices. This means, if you save an expense on your phone it will, within seconds, show on all your devices.



In case you need to do a correction, or you received money, you can use the “Negative Number” checkbox to make the expense a negative value.

This might be confusing but to enter an expense we don’t want you to keep adding a negative sign for every expense. So, expenses will be recorded as positive values and income will be recorded as negative values.

Negative Expense is a positive Income.



You can also transfer expenses from one category to another by clicking on the Transfer Expense checkbox on the top.

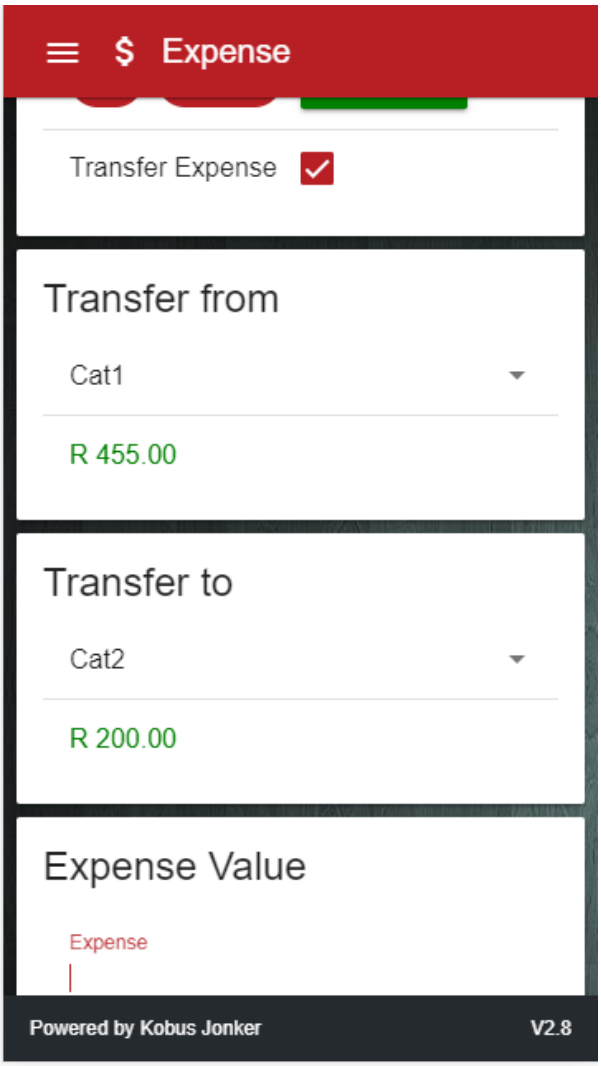
You will now have a “Transfer From” and a “Transfer To” section to select categories.

This will create a negative expense value on the “Transfer From” category and add the same positive expense on the “Transfer To” category.

Eg. If the expense is R50, it will result in 2 transactions:

Transfer From:	Cat1:	R-50
Transfer To:	Cat2:	R50

The comment will be on both records.



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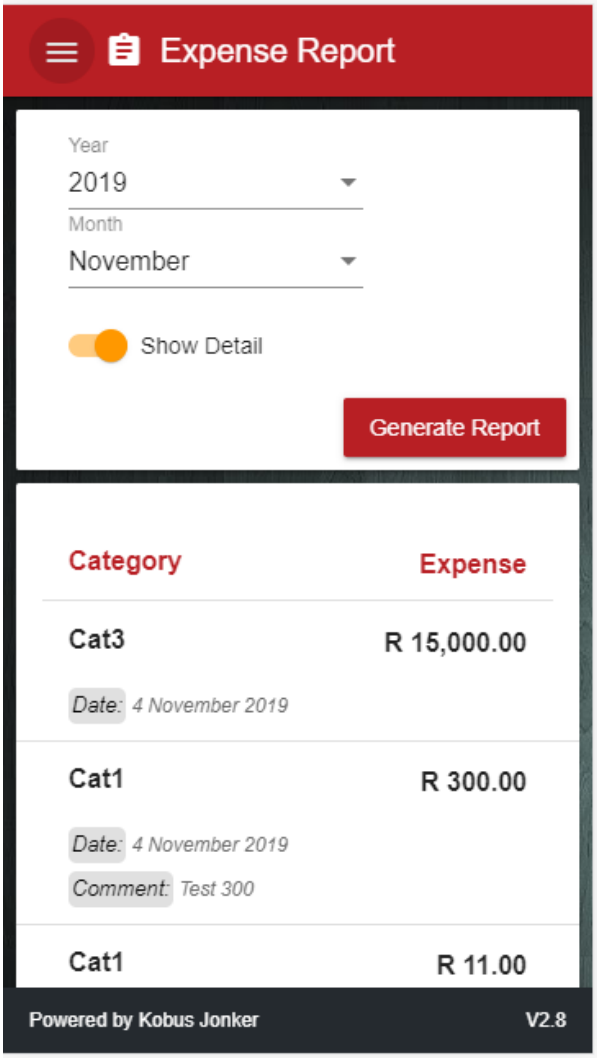
Expense Report:

In order to see all your expense records for this month, you can navigate to the Expense Report.

Here you can select the Budget Year and Month you want to see (It will default to the current budget Year and Month).

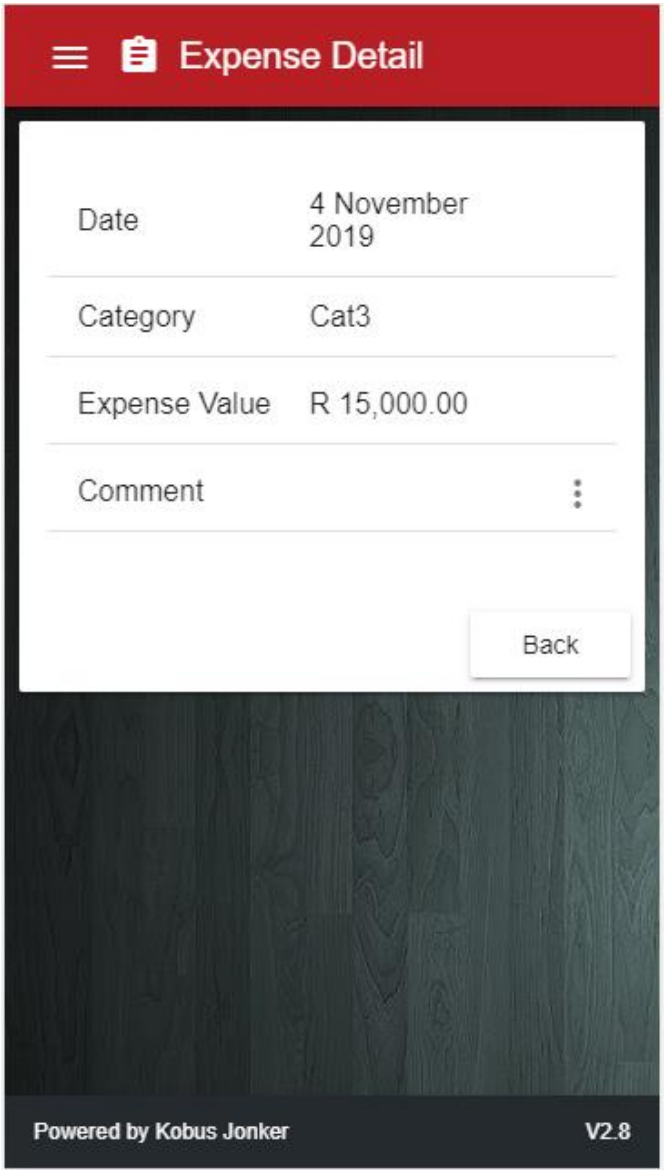
The expense report will show records from latest to oldest.

The “Show Detail” toggle will show and hide the date and comment from each line.



If you click on any of the expense records in the Expense report you will see a detailed view of that expense.

The button can be used to edit the comment. Expense values can not be edited. Rather create another expense with a negative value on that category.



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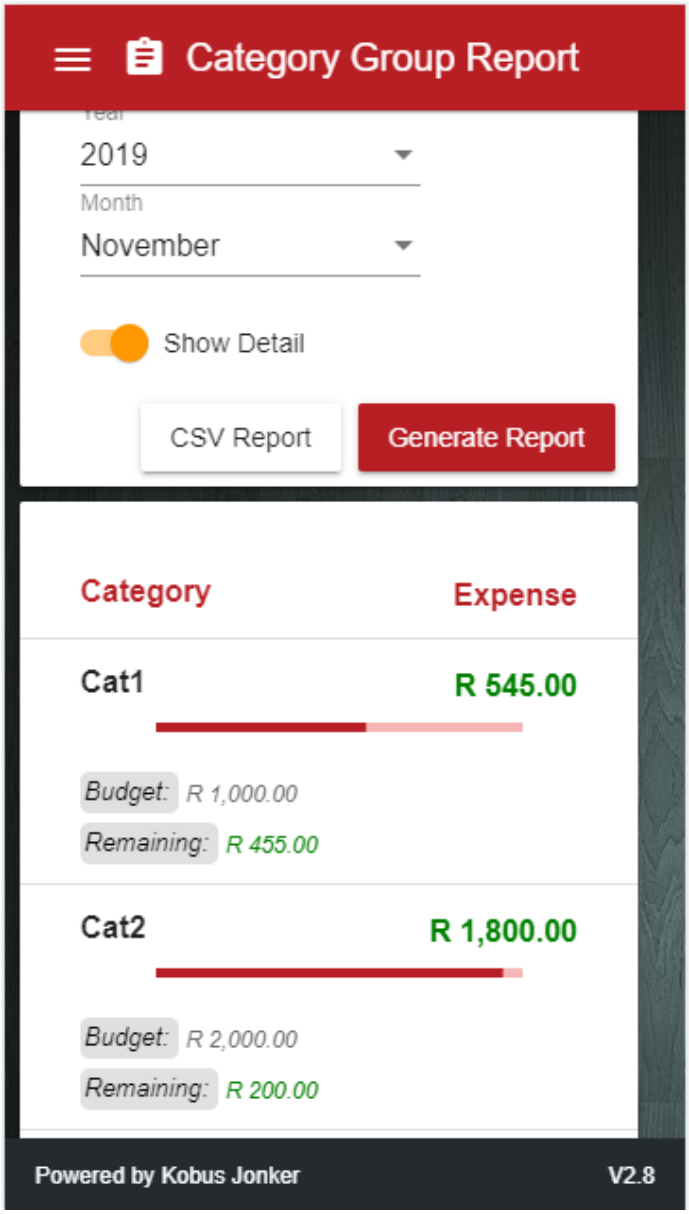
Category Group Report:

The Category Group Report will show you all your expenses, grouped by category.

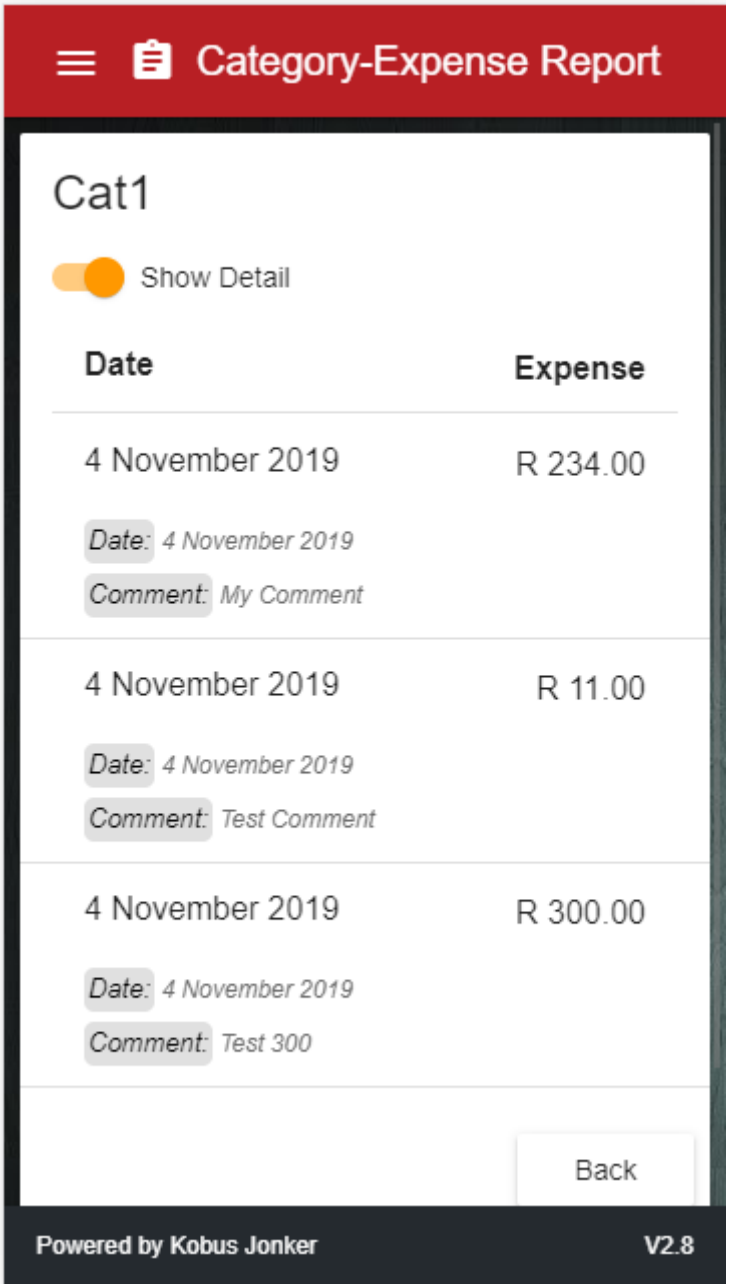
It will show the category name and the amount spend on that category.

Green means there are still budget left on that category and red means you are already exceeding the budget for the category.

The red bar in the middle gives a graphical view of the budget.



Once you click on any of the category records in the Category Group Report, it will show you all the expense transactions made on that category



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Forecast:

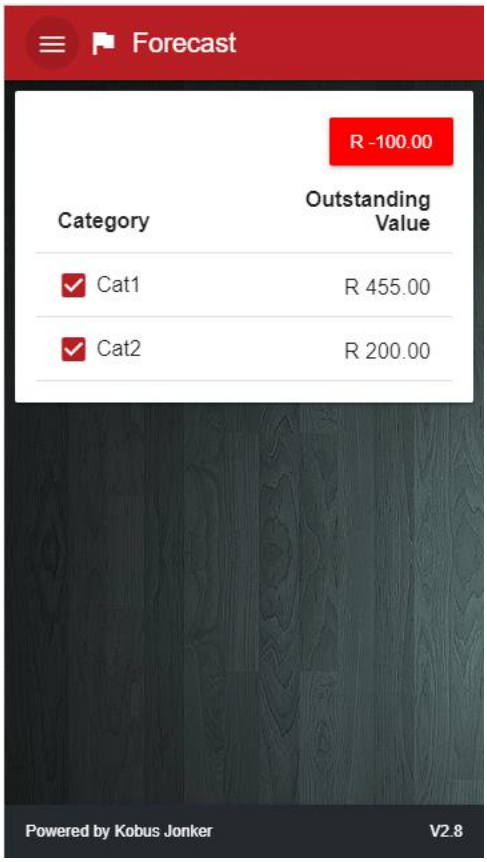
The forecast page is a very useful tool to plan the rest of your month.

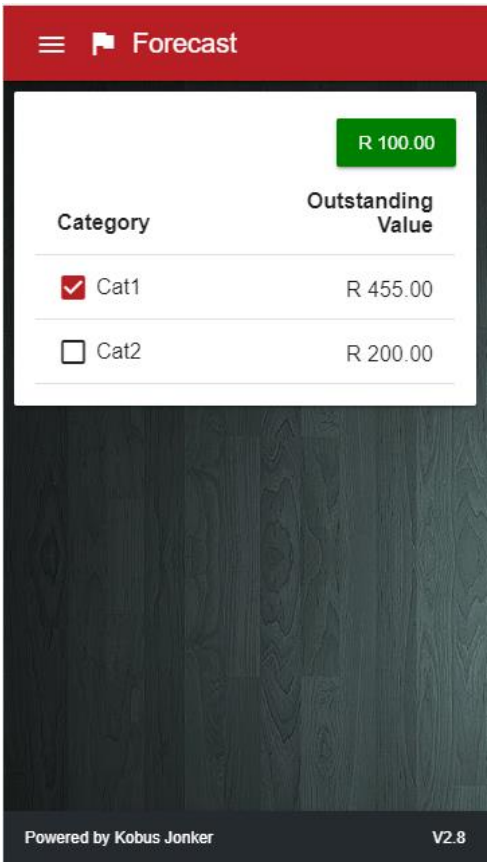
It will show how much of each category is left to spend and then an overall resulting bank amount on the top.

In this case I have already spend all the money of Cat3 (this is why its not showing in this view).
I also have R455 left on Cat1 and R200 left on Cat2.

If I continue spending that money, I will result in a negative bank account of R-100

I can now decide not to spend Cat2 by unchecking Cat2. This will result in a positive bank account of R100. Please note, nothing on this page will be saved. Its only a tool to give you a guidance for the rest of the month.





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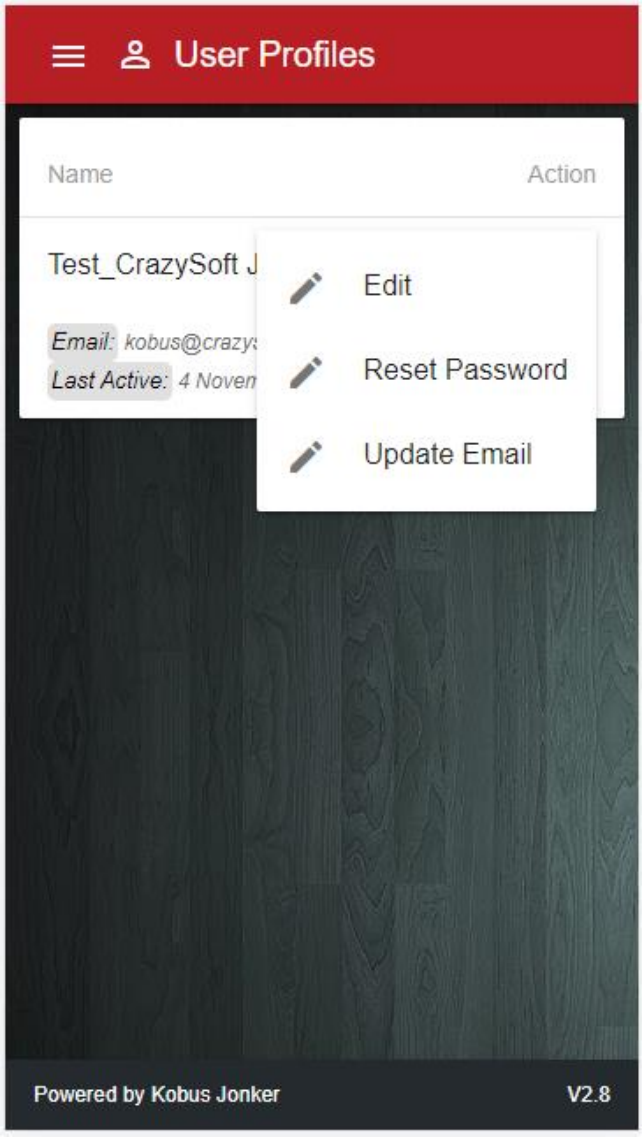
User Profile:

The User Profile page can be used to update your email address or reset your password.