

Finances365 User manual

(Register or try)

Register yourself! It's very easy but you can try first with: login **test** / password **test**

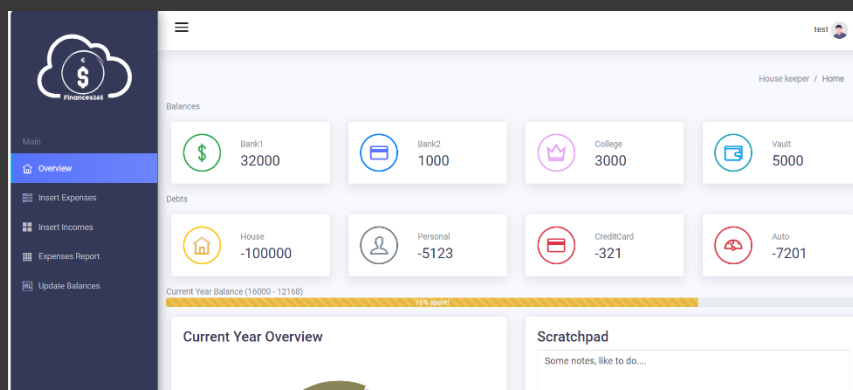
- Click on Sign up and fill in the required information.

The image shows two side-by-side screenshots of the Finances365 web application. The left screenshot is the login page, featuring the Finances365 logo at the top, followed by input fields for 'USERNAME' (containing 'test') and 'PASSWORD' (containing four asterisks). Below these is a 'SIGN IN' button and a link that says 'Don't have account ? Sign Up Here'. The right screenshot is the 'Sign Up' page, also with the Finances365 logo. It includes a 'Sign Up' heading, a subtext 'Please fill this form to create an account.', and input fields for 'Username' (containing 'test'), 'Password', 'Confirm Password', and 'Invite Key'. A 'SUBMIT' button is at the bottom.

- Try by doing login **test** / password **test**

This screenshot shows the login page of the Finances365 web application as it appears in a web browser. The browser's address bar shows the URL 'https://finances365.pt/login.php'. The page has a blue background with a white login form in the center. The form contains the Finances365 logo, input fields for 'USERNAME' (with 'test') and 'PASSWORD' (with four asterisks), a 'SIGN IN' button, and a 'Forgotten Password?' link. At the bottom of the form is a link that says 'Don't have account ? Sign Up Here'.

Overview, as the name implies, is an overview of your financial management.



You can insert your expenses or incomes by type and person's name.

The screenshot shows the 'Insert Expenses' form. On the left is a dark blue sidebar with a logo and a menu containing 'Main', 'Overview', 'Insert Expenses' (highlighted), 'Insert Incomes', 'Expenses Report', and 'Update Balances'. The main content area has a header 'Insert / Expenses' and a sub-header 'Insert Expenses - (Last inserted expense, 2023-08-28, Super , 137.76)'. The form includes a 'Calendar' field with '10/06/2023', a 'Type' dropdown set to 'House', and a 'Person' dropdown set to 'All'. To the right, there is a 'Subtract from balance' checkbox, a 'Value' field with 'Expense value...', and a 'Description' field with 'Expense description...'. A blue 'Submit' button is at the bottom right. The footer shows '2023 © Finance365'.

The screenshot shows the 'Insert Incomes' form and a table of total incomes. The sidebar is identical to the previous screenshot. The main content area has a header 'Insert / Incomes' and a sub-header 'Insert Incomes'. The form includes a 'Calendar' field with '10/06/2023', a 'Person' dropdown set to 'All', and an 'Increase to balance' checkbox. Below these are 'Value' and 'Description' fields. To the right, a box titled 'Total Incomes - 16000,00' contains a table:

Name	Income	Date	Comment	Ops
All	2000,00	2023-08-01	Monthly pay	<input checked="" type="checkbox"/>
All	2000,00	2023-07-01	Monthly pay	<input checked="" type="checkbox"/>
All	2000,00	2023-06-01	Monthly pay	<input checked="" type="checkbox"/>
All	2000,00	2023-05-01	Monthly pay	<input checked="" type="checkbox"/>
All	2000,00	2023-04-01	Monthly pay	<input checked="" type="checkbox"/>
All	2000,00	2023-03-01	Monthly pay	<input checked="" type="checkbox"/>

Increase and subtract updates automatically the first balance.

The screenshot shows the 'Balances' section. It has two checkboxes: 'Subtract from balance' (checked) and 'Increase to balance' (checked). To the right, a box titled 'Balances' contains a green dollar sign icon, the text 'Bank1', and the value '32000'.

See all your expenses in a running report.

The screenshot shows the 'Expenses Report' table. The sidebar is identical to the previous screenshots. The main content area has a header 'Expenses / Report' and a sub-header 'Expenses Table'. Below the header, there is a 'Show 10 entries' link and a search bar. The table has columns: Year, Month, Person, Type, Expense, Description, Date, and Ops. The data rows are as follows:

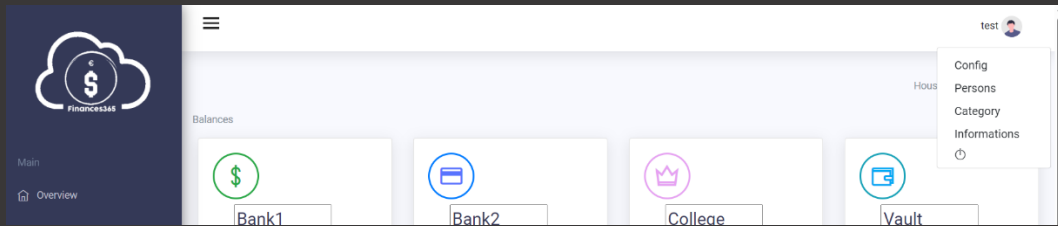
Year	Month	Person	Type	Expense	Description	Date	Ops
2023	August	All	Food	137,76	Super	2023-08-28	APAGAR
2023	August	All	Food	6,16	Super	2023-08-26	APAGAR
2023	August	All	Food	50,60	Restaurante	2023-08-26	APAGAR
2023	August	All	House	28,65	Água	2023-08-25	APAGAR
2023	August	All	Food	78,43	Super	2023-08-24	APAGAR

You can update your balances or debts to control your current account.

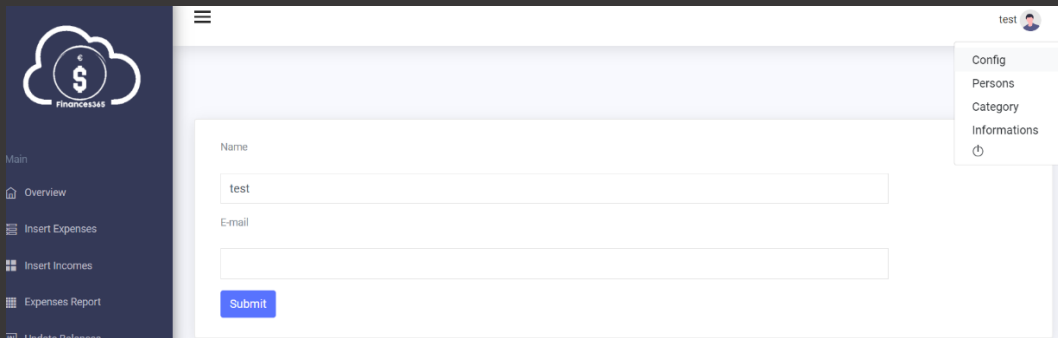
The screenshot shows the 'Update Balances' form. The sidebar is identical to the previous screenshots. The main content area has a header 'House keeper / Home' and a sub-header 'Balances'. Below the header, there are two rows of boxes. The first row, labeled 'Balances', contains four boxes: 'Bank1' (32000.00), 'Bank2' (1000.00), 'College' (3000.00), and 'Vault' (5000.00). The second row, labeled 'Debts', contains four boxes: 'House' (-100000.00), 'Personal' (-5123.00), 'CreditCard' (-321.00), and 'Auto' (-7201.00). A blue 'Update' button is at the bottom left.

(Use and Config)

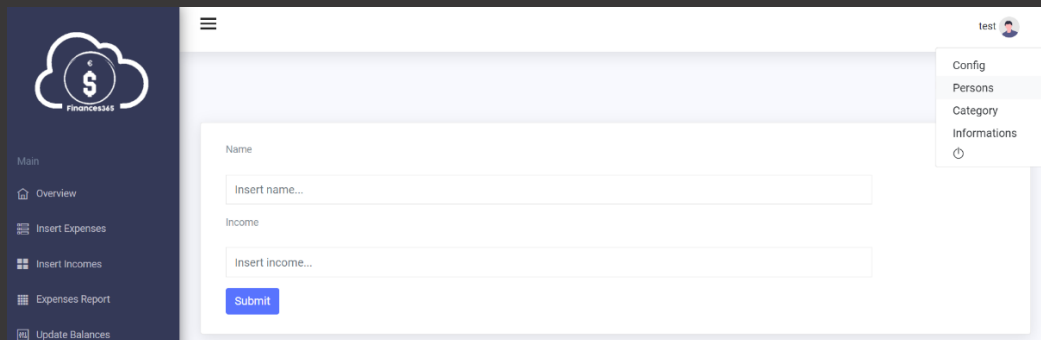
Click on the avatar and access to the configuration menu.



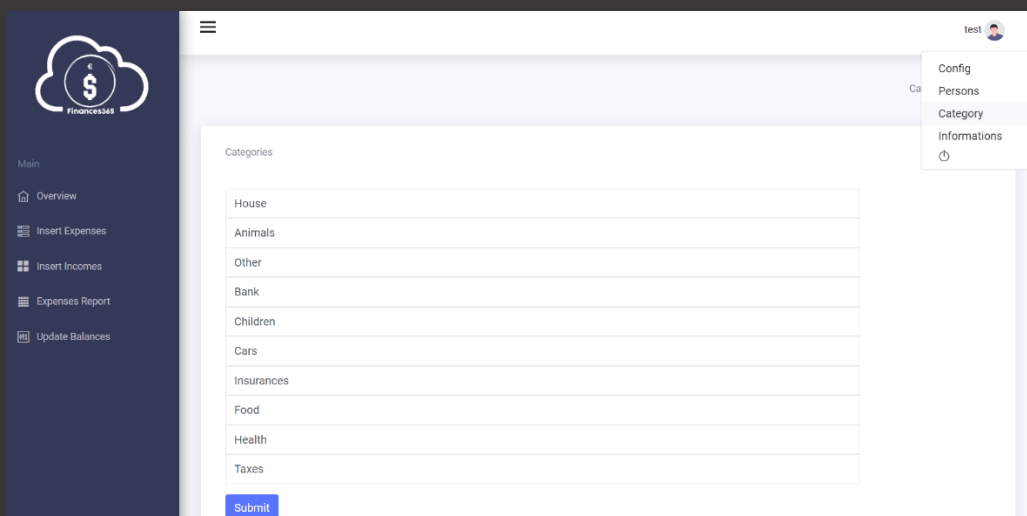
You can change your name and insert your email to future communications.



Add persons to complete your expenses and incomes.



If you want, you can change your categories.



Popups Info's (personal alerts) have to be defined per month, and they only appear on the first login until the day on the selected date. Every year the information inserted on each month will be recurrent.

The image displays two screenshots of the Finance365 web application. The top screenshot shows the 'Month' configuration screen, where users can set a month (currently 'October') and enter information to show (currently '06/10/2023'). A 'Submit' button is visible. The bottom screenshot shows the 'Overview' dashboard, which displays a 'Current Year Balance' of 16000 - 12166, a 'Scratchpad' for notes, and a list of accounts and debts.

Month Configuration

Month	Information	Date
10	Personal messages in specific month!!!	2023-10-30

Overview Dashboard

Current Year Balance (16000 - 12166)

Scratchpad

Some notes, like to do...

Balances

Account	Balance
Bank1	32000
Bank2	1000
College	3000
Vault	5000

Debts

Account	Balance
House	-100000
Personal	-5123
CreditCard	-321
Auto	-7201

This service is free and for personal use.

Enjoy it!