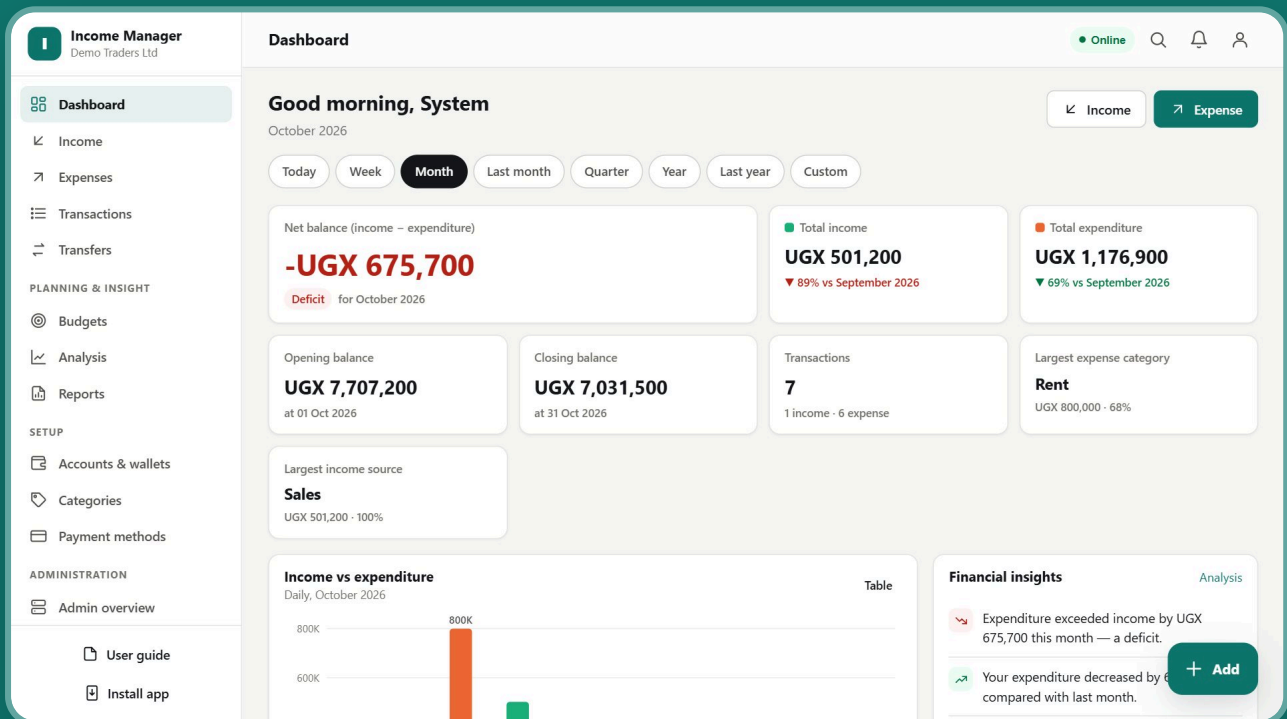




Income Manager

User Guide — recording, monitoring and reporting your finances

RECORD · UNDERSTAND · CONTROL · GROW



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1 Introduction

Income Manager is a simple, secure system for recording money coming in and going out, seeing your financial position at a glance, and producing professional reports — on a phone, tablet or computer, even without an internet connection.

It suits individuals, small businesses, churches, schools, NGOs and projects. Amounts are shown in **Uganda Shillings (UGX)** by default; your administrator can change the currency.

Key ideas

TERM	MEANING
Income	Money received — sales, donations, fees, grants, salary, rent, interest...
Expense (expenditure)	Money paid out — transport, rent, salaries, utilities, airtime...
Transfer	Money moved between your own accounts (e.g. Cash → Bank). It is <i>not</i> income or expenditure, so it never changes your totals.
Account / wallet	Where money is kept: Cash, Bank Account, MTN Mobile Money, Airtel Money, Savings, Petty Cash. Each has a live balance.
Category	What the money was for (expenses) or where it came from (income). Used for charts, budgets and reports.
Period	The date range you are looking at — today, this month, this year, or any custom range.
Net balance	Income – Expenditure for the chosen period. Positive = surplus , negative = deficit .

Every balance in the system follows one rule:

Closing balance = Opening balance + Income – Expenditure

For a single account, transfers into the account are added and transfers out are subtracted.

Who can do what

TASK	STANDARD USER	ADMINISTRATOR
Record income, expenses and transfers; attach receipts	Yes	Yes
Edit entries they recorded	Yes	Yes (any entry)
See the dashboard, budgets, reports; export reports	Own entries only	Everything
Delete or reverse transactions	—	Yes
Accounts, categories, payment methods, budgets	View	Manage
Users, roles, settings, periods, audit log, backups	—	Yes

Administrators can change these permissions or create new roles (see [chapter 17](#)). If a menu item described here is missing on your screen, your role does not include it.

2 Getting started

Signing in

- 1 Open the web address your administrator gave you (or the installed app).
- 2 Enter your **email address** and **password**, then click **Sign in**.
- 3 If you were given a temporary password you will be asked to choose a new one before continuing.

Figure 2.1 The sign-in page. Use “Show” to check what you typed.

Security

After 5 wrong passwords in a row the account is paused for 15 minutes. You are also signed out automatically after a period of inactivity (30 minutes by default).

Forgotten password

- 1 On the sign-in page click **Forgot your password?**
- 2 Enter your email address and click **Send reset link**.
- 3 Open the email and click the link within 60 minutes, then choose a new password.

If no email arrives, ask an administrator — they can set a temporary password for you under **Users**.

The screen layout

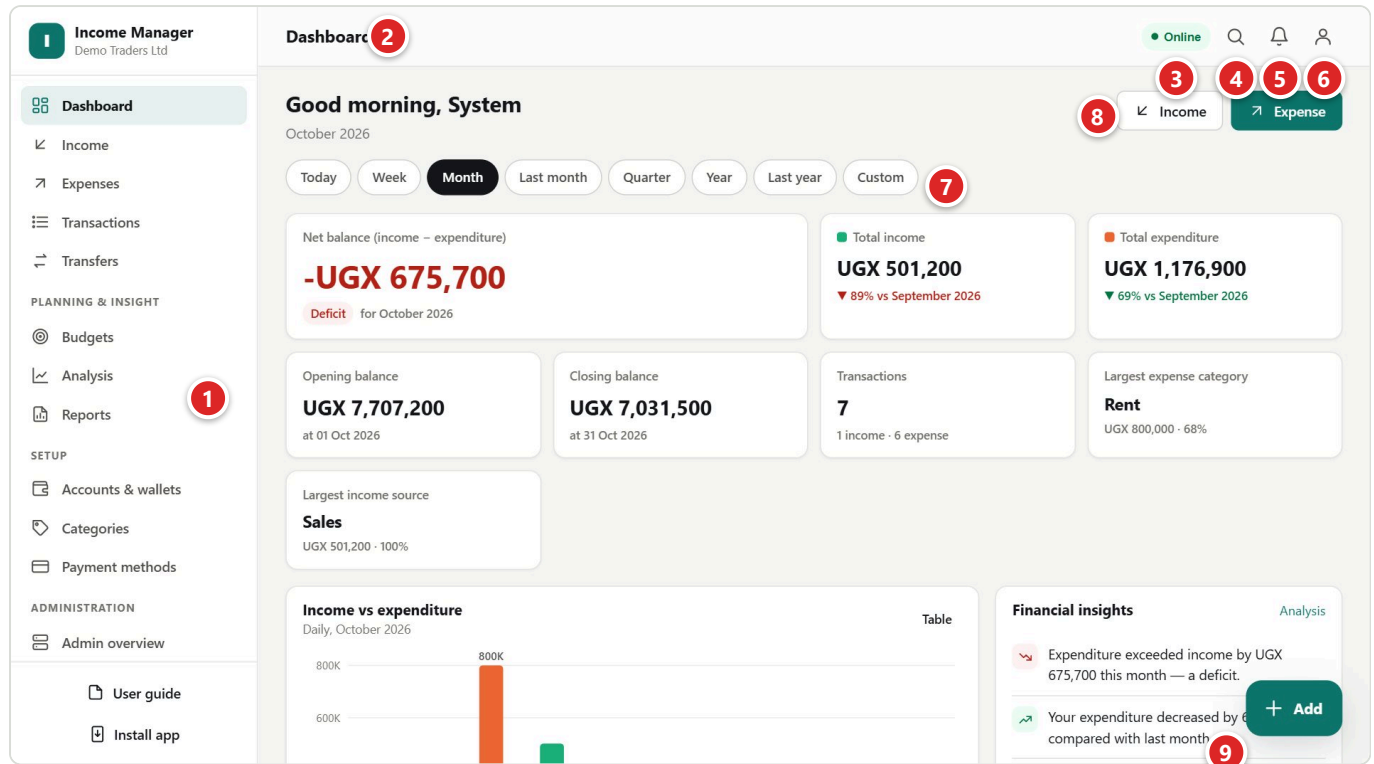


Figure 2.2 Main parts of the screen on a computer.

- 1 **Menu** — all sections, grouped. Items depend on your role.
- 2 **Page title** — where you are.
- 3 **Connection status** — Online, Offline, Syncing or “pending” entries. Click it to open Offline & sync.
- 4 **Search** — find any transaction.
- 5 **Notifications** — the red number shows unread alerts.
- 6 **Account menu** — profile, password, theme, sign out.
- 7 **Period** — Today, Week, Month, Quarter, Year or a custom range.
- 8 **Quick actions** for the page.
- 9 **Add** — record income, an expense or a transfer from any page.

3 Installing the app

Income Manager is a **Progressive Web App**: you install it straight from the browser — no app store. Once installed it opens full-screen from your home screen or desktop, starts quickly and works offline.

Android (Chrome)

- 1 Open the app in **Chrome** and sign in.
- 2 Tap **Install** on the banner at the bottom, or open the **:** menu and choose **Install app** / **Add to Home screen**.
- 3 Confirm. The Income Manager icon appears on your home screen.

iPhone and iPad (Safari)

- 1 Open the app in **Safari** and sign in.

2 Tap the **Share** button (square with an arrow) in the toolbar.

3 Scroll down and tap **Add to Home Screen**, then **Add**.

Windows, Mac or Chromebook (Chrome or Edge)

1 Click **Install app** at the bottom of the left menu (Figure 2.2), or the install icon at the right of the address bar.

2 Click **Install**. The app gets its own window and a Start-menu / Dock icon.

Updates are automatic

When a new version is published you will see “A new version of the app is available”. Click **Update now** — it takes a second and none of your data is affected.

Tip

The installed app on a phone has shortcuts: press and hold its icon to jump straight to *Add expense*, *Add income* or *Reports*.

4 The dashboard

The dashboard shows your financial position for the chosen period. Change the period with the buttons at the top — every card and chart updates instantly. Your choice is remembered next time.

Summary cards

CARD	WHAT IT TELLS YOU
Net balance	Income minus expenditure for the period, marked Surplus , Deficit or Break-even .
Total income / expenditure	Totals for the period with the % change compared with the previous period (▲ up, ▼ down; green is good, red needs attention).
Opening / closing balance	Money held across all accounts at the start and end of the period.
Transactions	How many income and expense entries were recorded.
Largest expense category / income source	Where most money went and came from.

Charts

- **Income vs expenditure** — side-by-side bars per day (or month for long periods).
- **Expenses by category** and **Income by source** — the share of each category.
- **Monthly cash flow** — money in and out for the last 12 months.
- **Net balance trend** — how your total balance moved through the period.
- **Transaction activity** — how many transactions were recorded each day.

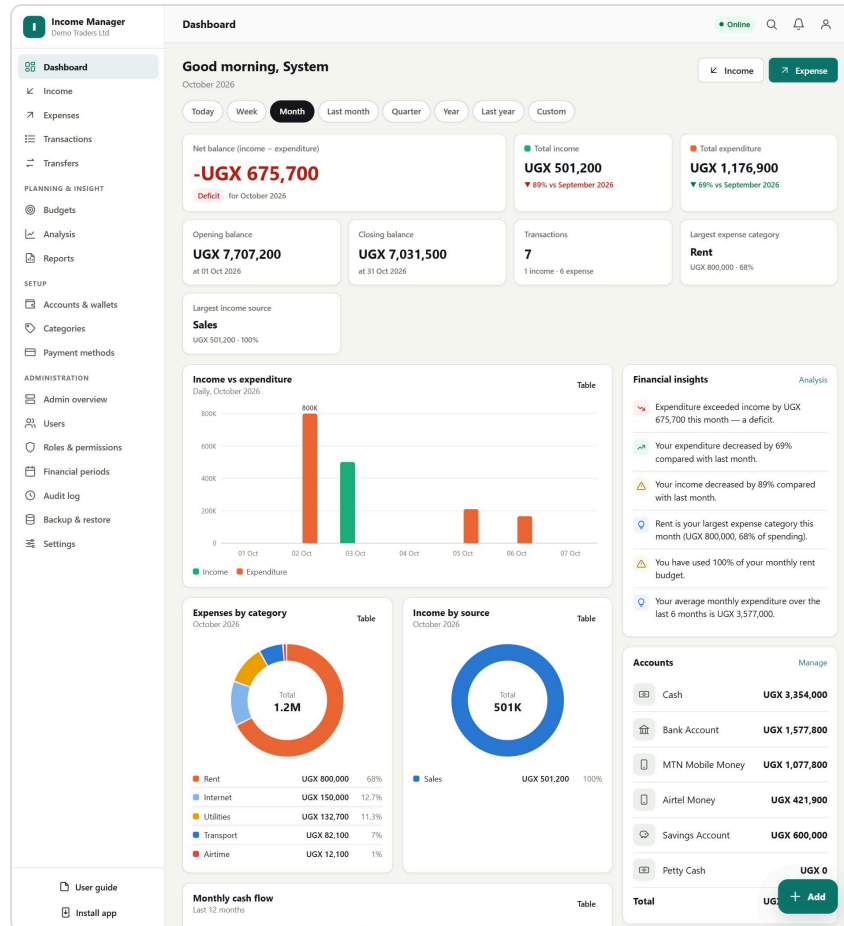


Figure 4.1 The full dashboard for the current month.

Tip

Hover over (or tap) any bar, line or slice to see exact amounts. Click **Table** on a chart to see its figures as a table.

On the right you will also find **Financial insights** (chapter 11), your **account balances**, the **budget status** and the **most recent transactions** — click any transaction to open it.

5 Recording income, expenses and transfers

Recording a transaction takes a few seconds. Click the **+ Add** button (bottom-right on every page) and choose what you want to record.

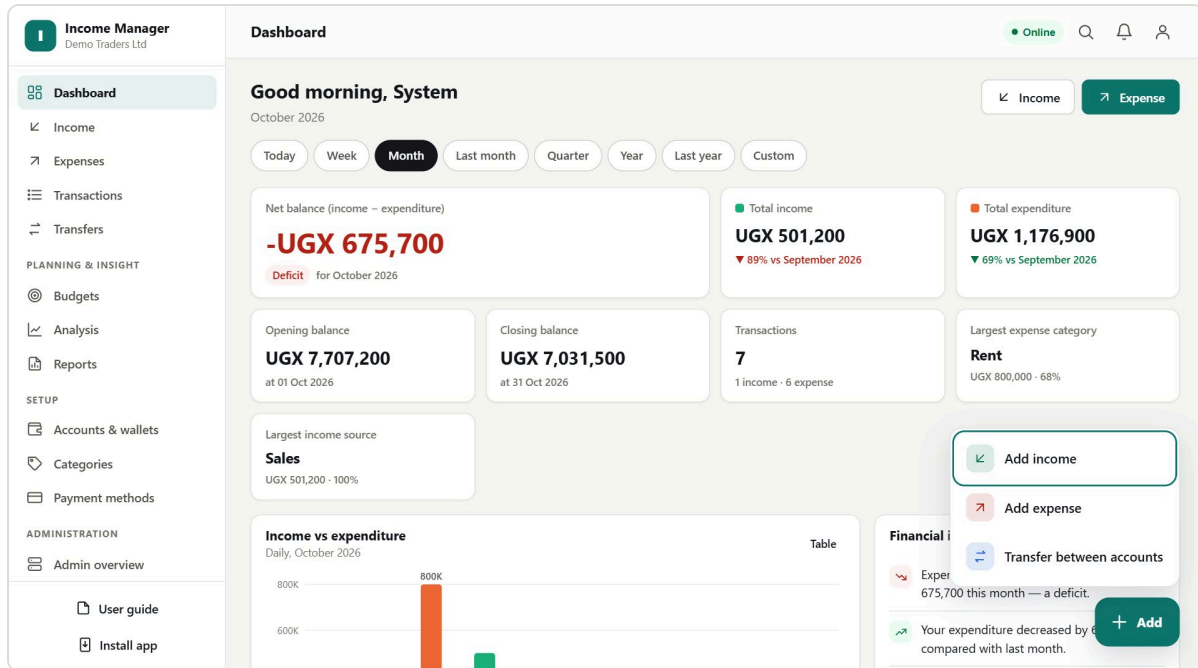


Figure 5.1 The Add menu.

Recording an expense

New transaction

Income

Expense

Transfer

Amount *

UGX 50,000

Category *

Transport

Food

Airtime

Office Supplies

Utilities

Fuel

Bank Charges

Equipment

Transport

Paid from *

Cash

Current balance: UGX 3,354,000

Date *

10/07/2026

Description

Taxi to town

More details (payment method, payee, receipt, attachment)

Cancel

Save & add another

Save transaction

Figure 5.2 A new expense: amount, category, account, date and description.

- 1 Type the **amount** (e.g. 50000 — commas are added for you).
- 2 Tap a **category** button. Your most-used categories appear first; choose others from the list underneath.
- 3 Choose the account it was **paid from**. The current balance of that account is shown below it.

- 4 Check the **date** (today by default) and add a short **description**, e.g. *Taxi to town*.
- 5 Click **Save transaction**. A green message confirms "Expense saved successfully".

Recording several in a row?

Use **Save & add another**. The form stays open and remembers the account and date.

More details and receipts

Open **More details** to add the **payee / vendor**, **payment method** (Cash, Bank, MTN Mobile Money...), a **reference number**, a **receipt or invoice number**, **notes** and **attachments**. On a phone, the attachment button can take a photo of the receipt directly.

The screenshot shows a mobile application form titled "New transaction" with a close button (X) in the top right corner. At the top, there are three category buttons: "Fuel" (selected with a blue dot), "Bank Charges" (with a pink dot), and "Equipment" (with an orange dot). Below these is a dropdown menu currently showing "Transport". Underneath is a "Paid from *" field with a dropdown menu showing "Cash". Below this, it says "Current balance: UGX 3,354,000". There are two fields: "Date *" with the value "10/07/2026" and a calendar icon, and "Description" with the value "Taxi to town". A section titled "▼ More details (payment method, payee, receipt, attachment)" is expanded. It contains a "Payee / vendor" field with "City Taxi". Below that is a "Payment method" dropdown menu showing a minus sign, and a "Reference number" field. Then there is a "Receipt / invoice number" field with "RCT-2041". Below that is a "Notes" text area. At the bottom of the form is an "Attach receipt / document" section with a "Choose Files" button, the text "No file chosen", and a note "JPG, PNG or PDF, up to 5 MB each.". At the very bottom of the form are three buttons: "Cancel", "Save & add another", and "✓ Save transaction".

Figure 5.3 Optional details. Attachments may be JPG, PNG or PDF (up to 5 MB each by default).

Recording income

Choose **Add income** (or switch the type at the top of the form to **Income**). The fields are the same; choose the account the money was **received into**, and under More details record the **income source** (who paid).

New transaction

Income

Expense

Transfer

Amount *

UGX 1,200,000

Category *

Sales

Service Income

Other Income

Donations

Interest

Grants

Membership Fees

Rent Income

Sales

Received into *

Bank Account

Current balance: UGX 1,577,800

Date *

10/07/2026

Description

Consultancy services – October

► More details (payment method, source, receipt, attachment)

Cancel

Save & add another

✓ Save transaction

Figure 5.4 Recording income.

Transferring between accounts

Use a transfer when money moves between your own accounts — for example depositing cash at the bank or loading mobile money. Transfers change the balances of the two accounts but **never** count as income or expenditure.

New transaction

Income

Expense

Transfer

Amount *

UGX 500,000

From account *

Cash

To account *

Bank Account

Date *

10/07/2026

Description

Cash deposit to bank

► More details (payment method, payee, receipt, attachment)

Cancel

Save & add another

✓ Save transaction

Figure 5.5 A transfer from Cash to Bank Account.

If something is missing

The form checks your entry before saving. Missing or invalid fields are highlighted in red with a short explanation.

The screenshot shows a 'New transaction' form with three tabs: 'Income', 'Expense' (selected), and 'Transfer'. The 'Amount' field is labeled 'Amount *' and contains 'UGX 0'. A red border and a red message 'Enter an amount greater than zero.' indicate it is invalid. The 'Category' field is labeled 'Category *' and shows a list of categories: Transport, Food, Airtime, Office Supplies, Utilities, Fuel, Bank Charges, and Equipment. A red border and a red message 'Choose a category.' indicate it is invalid. Below the category list is a dropdown menu showing 'All categories...'. The 'Paid from' field is labeled 'Paid from *' and shows 'Airtel Money' with a dropdown arrow. Below it, the current balance is shown as 'Current balance: UGX 421,900'. The 'Date' field is labeled 'Date *' and contains '10/07/2026' with a calendar icon. The 'Description' field is labeled 'Description' and contains 'e.g. Taxi to town'. At the bottom, there are three buttons: 'Cancel', 'Save & add another', and 'Save transaction' (with a checkmark icon). A link 'More details (payment method, payee, receipt, attachment)' is also present.

Figure 5.6 The amount and category are required.

Closed periods

If you choose a date inside a **closed financial period**, a yellow notice appears. Only an administrator can record or change transactions in a closed period.

6 Finding transactions

The menu has four lists — **Income**, **Expenses**, **Transactions** (everything) and **Transfers**. Each shows the totals for what is listed, newest first. Click any row to open it.

DATE	TYPE	CATEGORY	DESCRIPTION	ACCOUNT	METHOD	REFERENCE	BY	AMOUNT
06 Oct 2026	Expense	Utilities	Electricity – October Electricity provider	MTN Mobile Money	MTN Mobile Money	RCT-5315	System Administrator	-UGX 132,700
06 Oct 2026	Expense	Transport	Boda boda to client site Transport	Cash	Cash	REF-76142 RCT-1850	System Administrator	-UGX 33,900
05 Oct 2026	Expense	Airtime	Airtime & data bundles Telecom	Airtel Money	Airtel Money	REF-29188 RCT-8890	System Administrator	-UGX 12,100
05 Oct 2026	Expense	Internet	Internet subscription – October Internet provider	Bank Account	Bank	RCT-1174	System Administrator	-UGX 150,000
05 Oct 2026	Expense	Transport	Taxi to town Transport	Cash	Cash		System Administrator	-UGX 48,200
02 Oct 2026	Expense	Rent	Office rent – October Landlord – Plot 12	Bank Account	Bank	REF-56686 RCT-7097	System Administrator	-UGX 1,000,000

Figure 6.1 The Expenses list for the current month with its total.

Coloured labels show the type: **Income**, **Expense**, **Transfer** and **Reversal**. A paper-clip means the transaction has an attachment. Reversed entries are shown crossed out.

Filtering

- 1 Choose the period with the buttons at the top (*All time* shows everything).
- 2 Type in the search box to match description, payee, reference, receipt number or amount.
- 3 Click **Filters** for category, account, payment method, person who recorded it, amount range, status and sort order.

DATE	TYPE	CATEGORY	DESCRIPTION	ACCOUNT	METHOD	REFERENCE	BY	AMOUNT
06 Oct 2026	Expense	Utilities	Electricity – October Electricity provider	MTN Mobile Money	MTN Mobile Money	RCT-5315	System Administrator	-UGX 132,700
06 Oct 2026	Expense	Transport	Boda boda to client site Transport	Cash	Cash	REF-76142 RCT-1850	System Administrator	-UGX 33,900
05 Oct 2026	Expense	Airtime	Airtime & data bundles Telecom	Airtel Money	Airtel Money	REF-29188 RCT-8890	System Administrator	-UGX 12,100
05 Oct 2026	Expense	Internet	Internet subscription – October Internet provider	Bank	Bank	RCT-1174	System Administrator	-UGX 150,000

Figure 6.2 The filter panel. Click "Clear filters" to start again.

Global search

Click the magnifying glass in the top bar to search **all** transactions at once — by description, reference, receipt number, payee, category, account, amount or transaction number (e.g. #457).

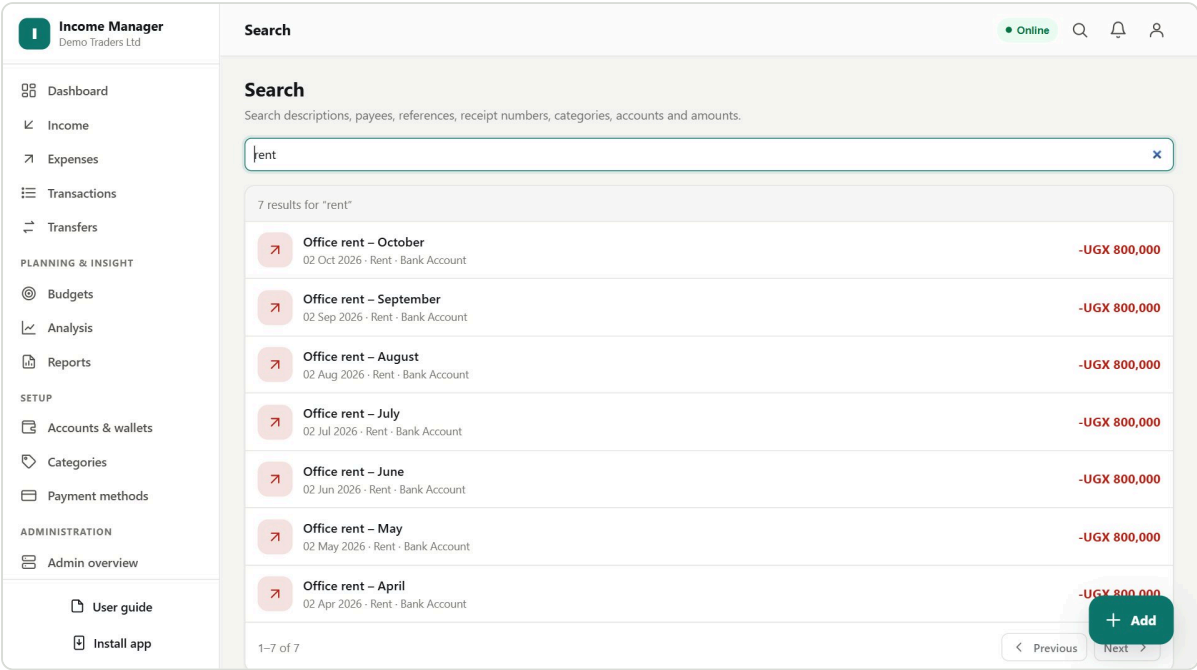


Figure 6.3 Searching for “rent”.

Exporting a list

Click **Export** and choose **Excel**, **CSV** or **PDF**. The export contains exactly what is on screen — the same period, search and filters.

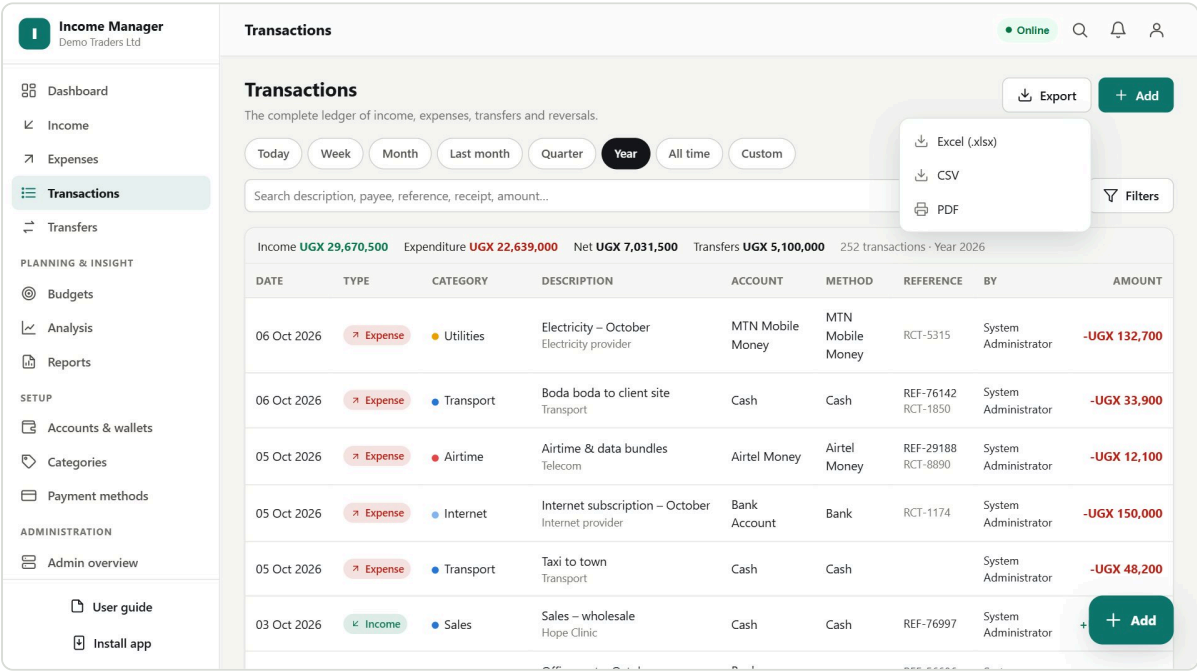


Figure 6.4 Export options.

7 Viewing and correcting a transaction

Click a transaction anywhere in the app to open its details: every field, who recorded it and when, attachments and the full history of changes.

Transaction #457

Expense

UGX 1,500,000

New laptop and printer

Date: 16 Aug 2026 Recorded by: System Administrator

Category: Equipment Recorded: 16 Aug 2026 10:06

Account: Bank Account Status: Posted

Payment method: Bank

Payee / vendor: Tech Supplies Ltd

Reference: REF-14131 Notes: —

Receipt no.: RCT-4674

ATTACHMENTS

No attachments.

[Add attachment](#) JPG, PNG or PDF · max 5 MB

Figure 7.1 Transaction details with the available actions.

ACTION	WHEN TO USE IT
Edit	Correct a mistake (amount, date, category...). Every change is recorded in the history. Needs a connection.
Record again	Create a new, similar transaction (e.g. this month's rent) with today's date.
Reverse	Cancel a transaction while keeping it on record. A reversing entry is posted today and both appear in the history. Use this for corrections in a closed period or when an audit trail matters.
Delete	Remove an entry made in error. It disappears from all totals and reports; the deletion is still kept in the audit log.

Conflicting changes

If someone else changed the same transaction while you were editing it, you will be told so and shown the latest version — your change is not saved over theirs.

Attachments

- [Add attachment](#) — upload a JPG, PNG or PDF receipt, invoice or slip.
- [View](#) opens it in a new tab; the download button saves it.
- The refresh button **replaces** an attachment; the bin **deletes** it.

8 Accounts and wallets

Accounts & wallets shows where your money is and how much each holds. Balances are calculated automatically from the opening balance and every transaction — you never type a balance.

Accounts & wallets

Where your money is held. Balances are calculated automatically from opening balances and every transaction.

Total balance (active accounts)
UGX 7,031,500
6 active accounts

ACCOUNT	TYPE	OPENING	MONEY IN	MONEY OUT	BALANCE	STATUS	
Cash Cash at hand	Cash	0	13,575,900	10,221,900	UGX 3,354,000	Active	...
Bank Account Main bank account	Bank account	0	15,841,300	14,263,500	UGX 1,577,800	Active	...
MTN Mobile Money MTN MoMo wallet	Mobile money	0	3,853,300	2,775,500	UGX 1,077,800	Active	...
Airtel Money Airtel Money wallet	Mobile money	0	900,000	478,100	UGX 421,900	Active	...
Savings Account Savings	Savings	0	600,000	0	UGX 600,000	Active	...
Petty Cash Petty cash box	Petty cash	0	0	0	UGX 0	Active	...
Total (active accounts)					UGX 7,031,500		

Figure 8.1 Account balances with money in and out.

Use the ... button on a row to see that account's transactions or its **statement** (a report with a running balance). Administrators can also edit, disable or delete accounts.

Adding an account (administrators)

- 1 Click .
- 2 Enter the name (e.g. *Stanbic Current Account*), choose the type and enter the **opening balance** — the amount held before the first transaction you record.
- 3 Optionally add the account or wallet number, then click .

Add account ✕

Account name *
e.g. Stanbic Current Account

Type: Cash
Opening balance: 0
Balance before the first recorded transaction.

Account / wallet number:
Currency: UGX

Description:

Status: Active
Display order: 0

Cancel Save

Figure 8.2 Adding an account.

Disable instead of delete

An account that already has transactions cannot be deleted (that would change history). Disable it — it disappears from new entries but its history and reports stay correct.

9 Categories and payment methods

Categories

Income and expenditure categories are kept separate (tabs at the top). For each category you can see how many transactions use it, the total and when it was last used. Choose a colour — it is used for that category in every chart.

NAME	DESCRIPTION	TRANSACTIONS	TOTAL	LAST USED	STATUS			
Airtime	Phone airtime	19	478,100	05 Oct 2026	Active	Edit	Disable	🗑️
Bank Charges	Bank and mobile money charges	6	113,500	26 Sep 2026	Active	Edit	Disable	🗑️
Equipment	Equipment purchases	1	1,500,000	16 Aug 2026	Active	Edit	Disable	🗑️
Food	Meals and refreshments	23	1,010,800	25 Sep 2026	Active	Edit	Disable	🗑️
Fuel	Fuel for vehicles and generators	6	1,211,500	14 Sep 2026	Active	Edit	Disable	🗑️
Internet	Internet and data	7	1,050,000	05 Oct 2026	Active	Edit	Disable	🗑️
Maintenance	Repairs and maintenance	2	530,600	19 Sep 2026	Active	Edit	Disable	🗑️
Marketing	Advertising and promotion	3	484,800	11 Sep 2026	Active	Edit	Disable	🗑️
Office Supplies	Stationery and consumables	15	1,806,400	23 Sep 2026	Active	Edit	Disable	🗑️

Figure 9.1 Expenditure categories.

- **Disable** hides a category from new entries but keeps it in history and reports.
- **Delete** works straight away for unused categories. If a category is in use you will be asked to **move its transactions to another category** first, so no transaction is ever left without one.

Payment methods

Cash, Bank, Mobile Money, MTN Mobile Money, Airtel Money, Visa, Mastercard, Cheque and Other are ready to use. Administrators can add more (e.g. *EFT*) and set the display order.

NAME	DESCRIPTION	TRANSACTIONS	STATUS		
Cash		148	Active	Edit	🗑️
Bank		54	Active	Edit	🗑️
Mobile Money		0	Active	Edit	🗑️
MTN Mobile Money		31	Active	Edit	🗑️
Airtel Money		19	Active	Edit	🗑️
Visa		0	Active	Edit	🗑️
Mastercard		0	Active	Edit	🗑️
Cheque		0	Active	Edit	🗑️
Other		0	Active	Edit	🗑️

Figure 9.2 Payment methods.

10 Budgets

A budget sets how much you plan to spend per category over a month, quarter, year or custom range. The app compares it with actual spending automatically.

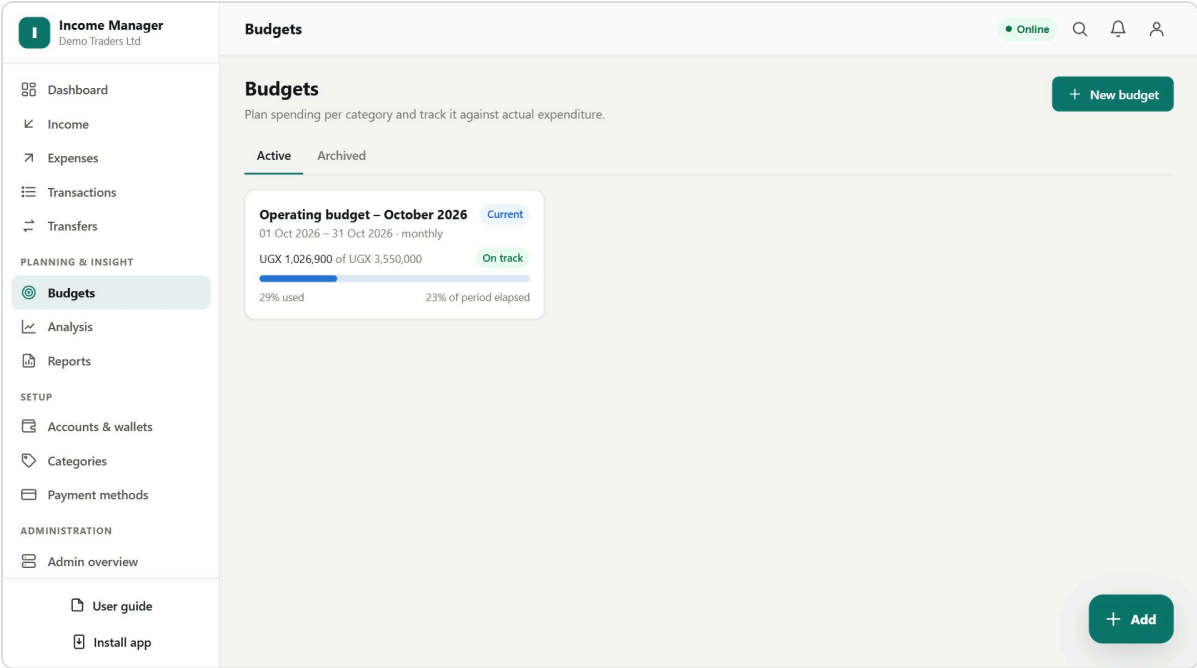


Figure 10.1 Budgets with the share used and time elapsed.

Open a budget to see each category: **budget**, **actual**, **remaining** (or overspent), **% used** and status. Bars turn **amber** when a category nears its limit (80% by default) and **red** when it is exceeded. Compare “% used” with “% of period elapsed” to see if spending is on pace.

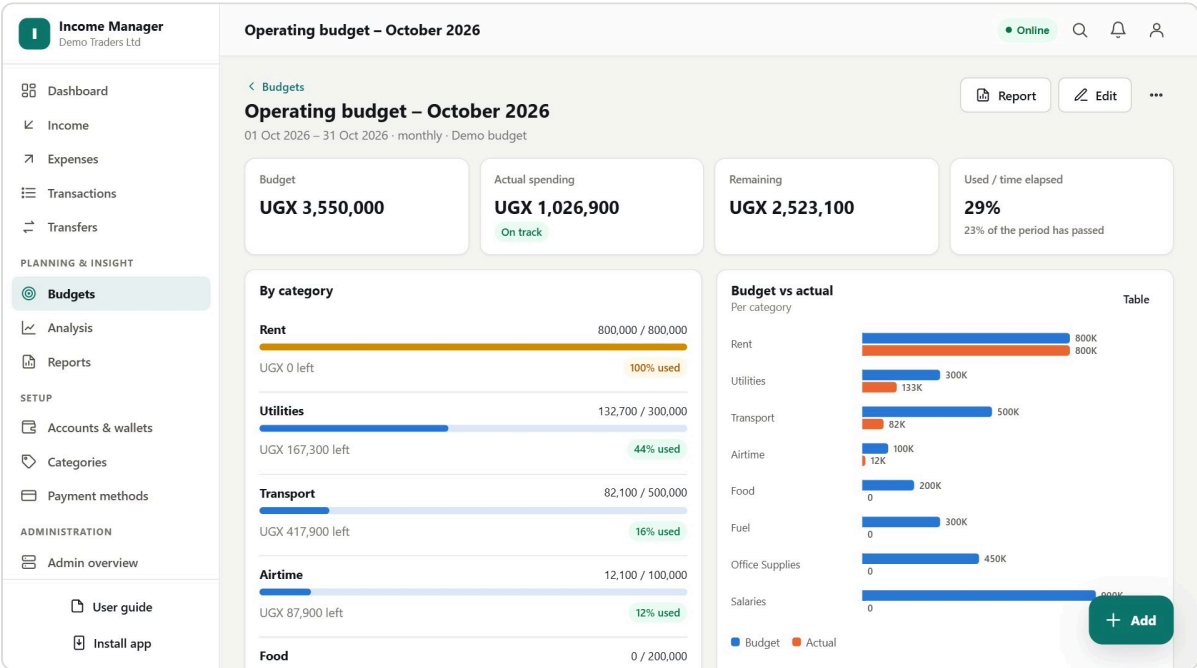


Figure 10.2 A budget in detail. Click a category to see its transactions.

Creating a budget (administrators)

- 1 Click **New budget** ; enter a name and choose **Monthly, Quarterly, Annual** or **Custom** — dates are filled in for you.
- 2 Add a line per category with its amount (**+ Add category** for more lines). The total is shown at the bottom.
- 3 Click **Save budget** .

Edit budget

Budget name *

Budget period

Start date *

End date *

Notes

CATEGORY BUDGETS

Airtime

Food

Fuel

Office Supplies

Rent

Salaries

Transport

Utilities

+ Add category

Total: UGX 3,550,000

Cancel

Save budget

Figure 10.3 Editing a budget.

Next month in one click

On a budget’s page use ... → **Duplicate for next period**. Old budgets can be archived to keep the list tidy.

11 Financial analysis and insights

Analysis explains how your finances are changing: income and expenditure compared with the previous period, the share and growth of every category, the largest expense, top payees, monthly and daily averages, and 12-month trends.

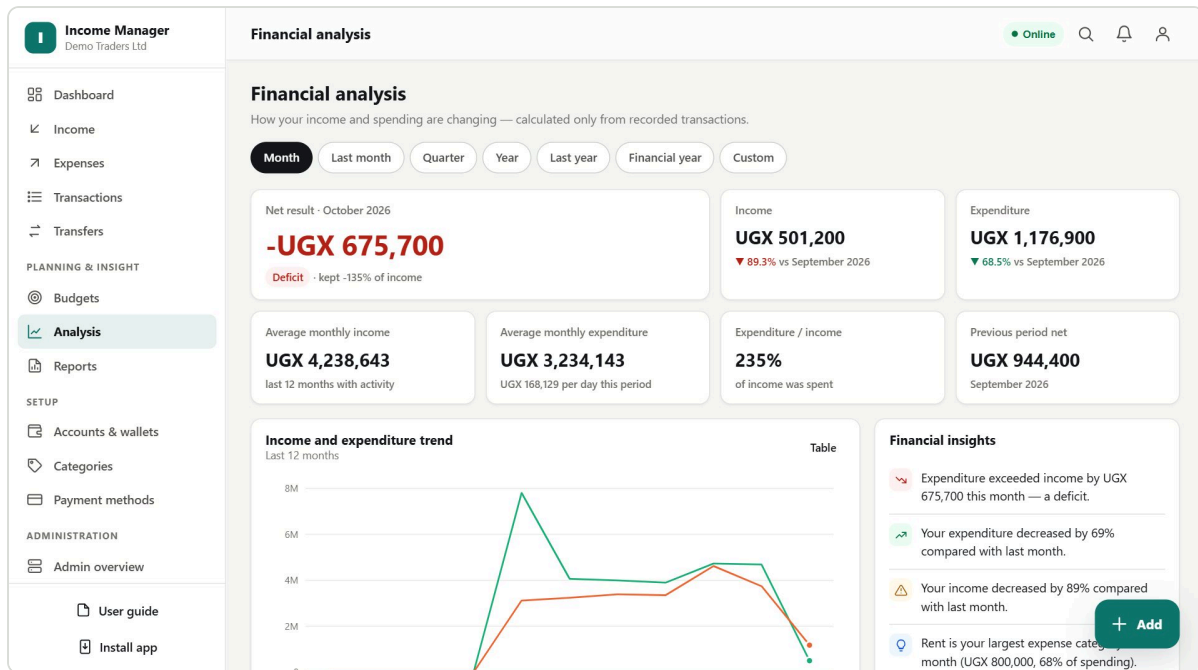


Figure 11.1 Financial analysis.

Financial insights

Insights are short sentences written from your own figures, for example:

- "Your expenditure increased by 18% compared with last month."
- "Transport is your largest expense category this month."
- "You have used 82% of your monthly transport budget."
- "Your monthly income has increased for three consecutive months."

Only real data

Insights are calculated from transactions that have been recorded. Nothing is estimated or invented — if there is not enough data, no insight is shown.

12 Reports

Open **Reports** and choose a report. Pick the period (and, where offered, an account, category, payment method or budget); the report appears on screen immediately.

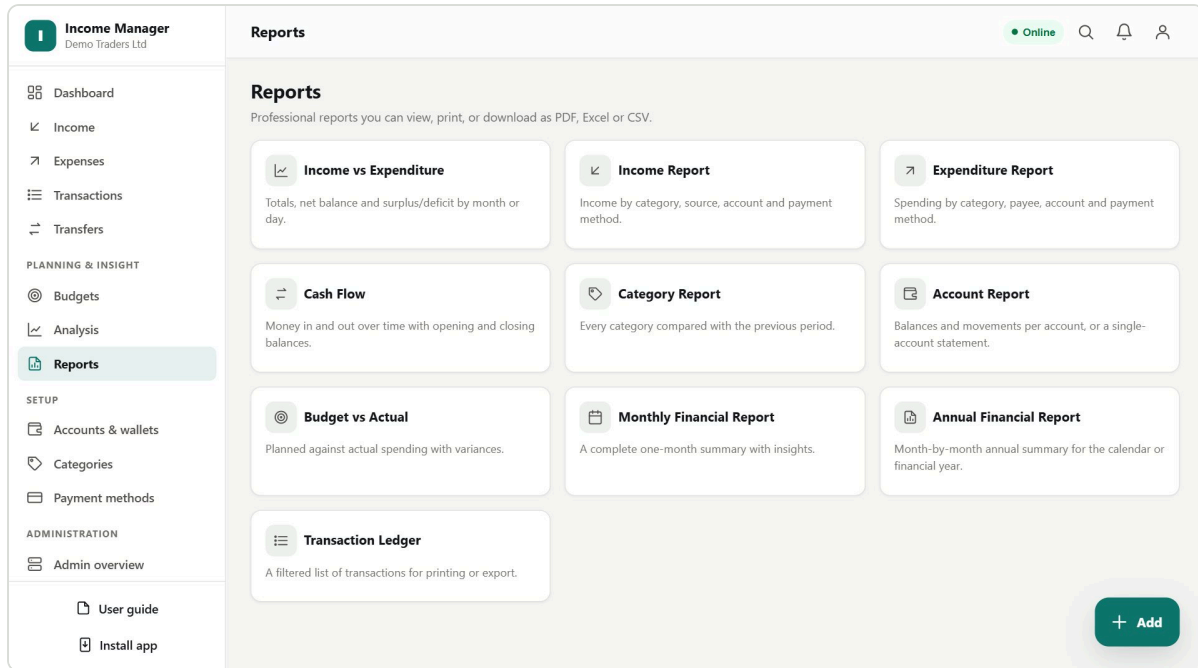


Figure 12.1 The ten available reports.

REPORT	CONTENTS
Income vs Expenditure	Totals, net result and surplus/deficit by month or day.
Income Report	Income by category, source, account and payment method, plus every income transaction.
Expenditure Report	Spending by category, payee, account and payment method, plus every expense.
Cash Flow	Opening balance, money in, money out and closing balance per month or day.
Category Report	Every category compared with the previous period.
Account Report	Movements and balances per account; choose one account for a statement with running balance.
Budget vs Actual	Planned against actual spending with variance and status.
Monthly Financial Report	A complete summary of one month with comparisons and insights.
Annual Financial Report	Month-by-month summary for the calendar year or your financial year.
Transaction Ledger	A filtered list of transactions, ready to print or export.

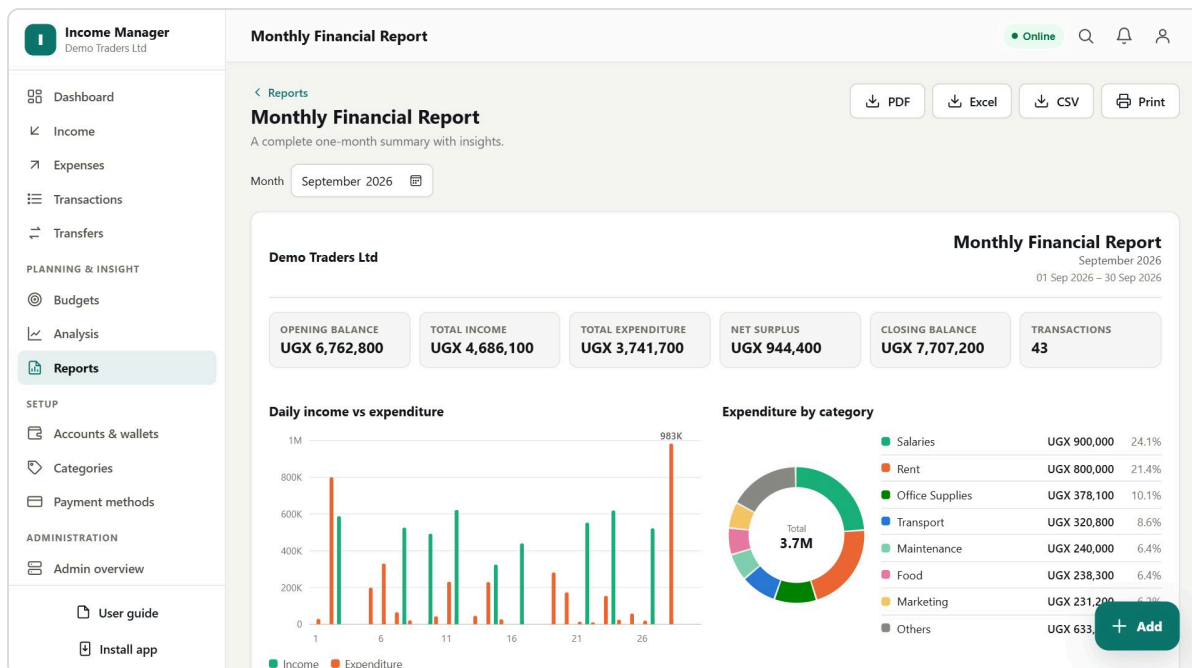


Figure 12.2 The Monthly Financial Report with the export buttons at the top right.

Downloading and printing

BUTTON	RESULT
PDF	A professional PDF with your organisation name and logo, summary, charts, tables, totals, page numbers and a “prepared by / approved by” block — ready to sign or email.
Excel	An .xlsx workbook: a Summary sheet plus one sheet per table, with real numbers you can calculate with.
CSV	A plain file for other accounting tools.
Print	Prints the report as shown, laid out for paper (wide reports print in landscape automatically).

Tip

Exports use exactly the period and filters you selected. Downloading needs an internet connection.

13 Notifications

The bell in the top bar shows a red number when something needs your attention. Click it to see the list; [Open](#) takes you to the related page.

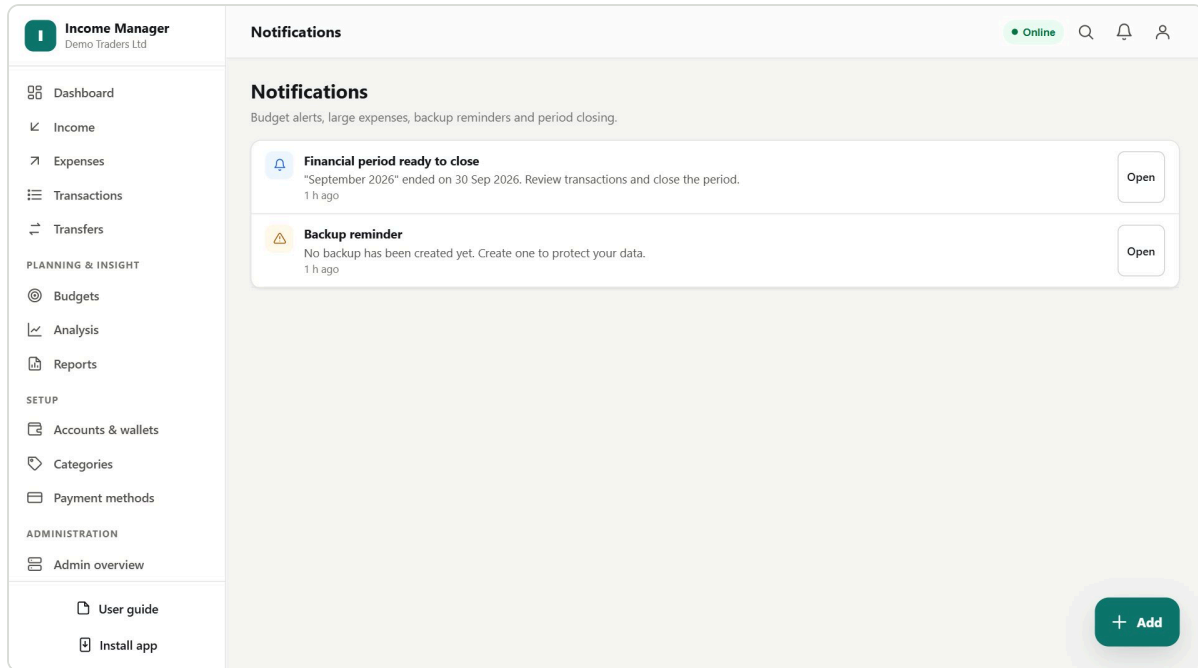


Figure 13.1 Notifications.

You may be notified when:

- a budget category is **nearly used** or **exceeded**;
- a **large expense** is recorded (over UGX 1,000,000 by default);
- a significant expense has **no receipt, reference or attachment**;
- a **backup** is due (administrators);
- a **financial period** is ending or ready to close (administrators).

14 Working offline

You can keep working when the internet drops — at the market, in the field or during an outage.

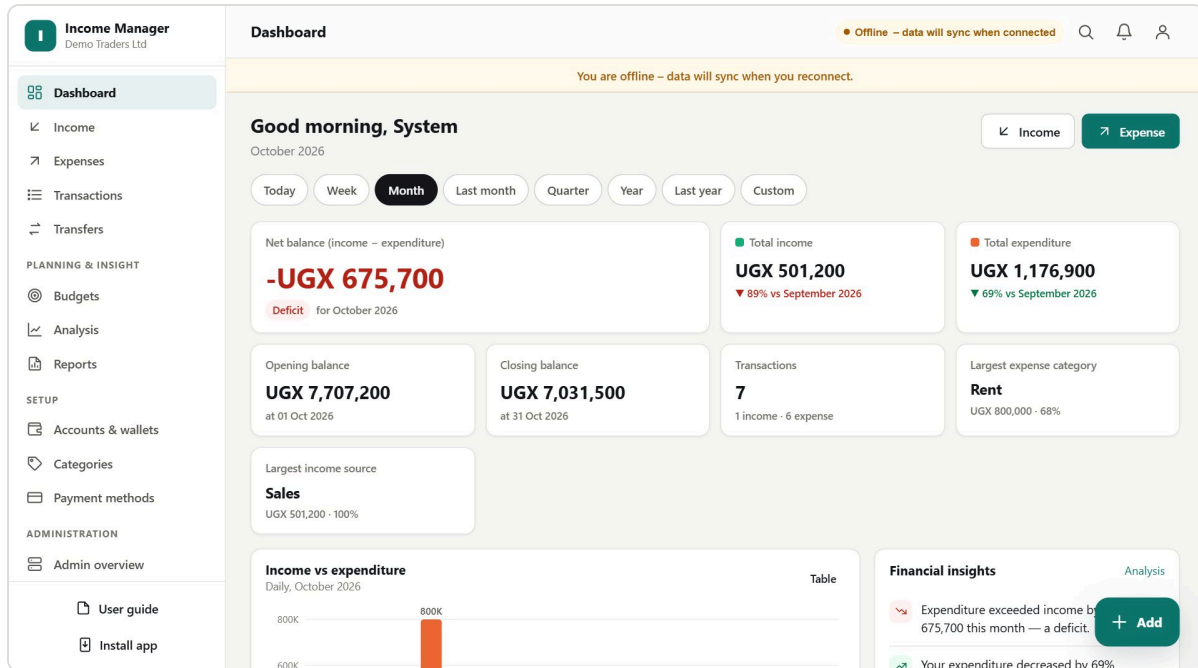


Figure 14.1 Offline: the yellow bar and the “Offline” status explain that data will sync when connected.

WORKS OFFLINE	NEEDS A CONNECTION
Opening the installed app	Editing or deleting existing transactions
Viewing pages you have opened before	Downloading reports and exports
Recording income, expenses and transfers (with photos)	Administration pages

How syncing works

- 1 When you save while offline you will see *“Transaction saved on this device and will sync when the connection returns”*.
- 2 The status in the top bar shows how many entries are **pending**.
- 3 When the connection returns they are sent automatically — *“2 offline transactions synced successfully”*. Each entry is sent only once, even if the connection is unstable.

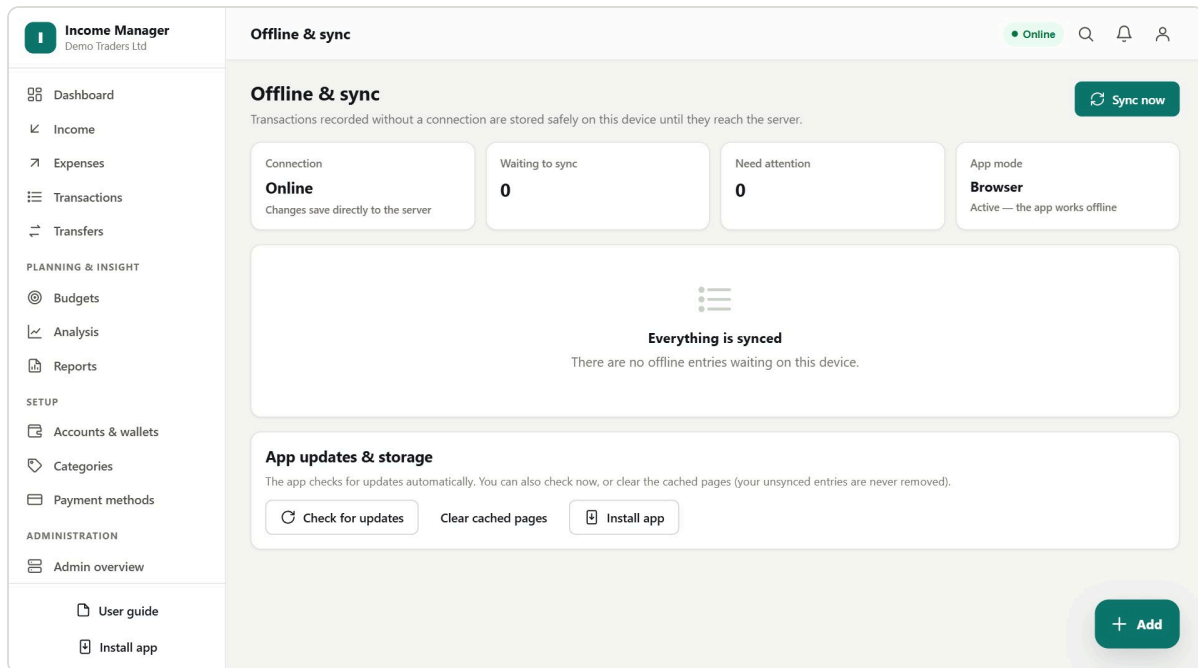


Figure 14.2 Offline & sync (click the status in the top bar).

“Needs attention”

Occasionally the server cannot accept an offline entry — for example the period was closed, or the account was disabled, while you were offline. The entry is **kept** and listed under **Offline & sync** with the reason. Click **Edit** to fix and resubmit it, or discard it. Nothing is ever lost silently.

Signing out with pending entries

Pending entries stay on the device and sync the next time *you* sign in on it. Open the app online once on each new device so it is ready for offline use.

15 Using the app on a phone

On a phone the menu moves to the bottom: **Home**, **Income**, **Expenses**, **History** (all transactions), **Reports** and **More** (everything else). The green **+ Add** button is always within reach of your thumb.

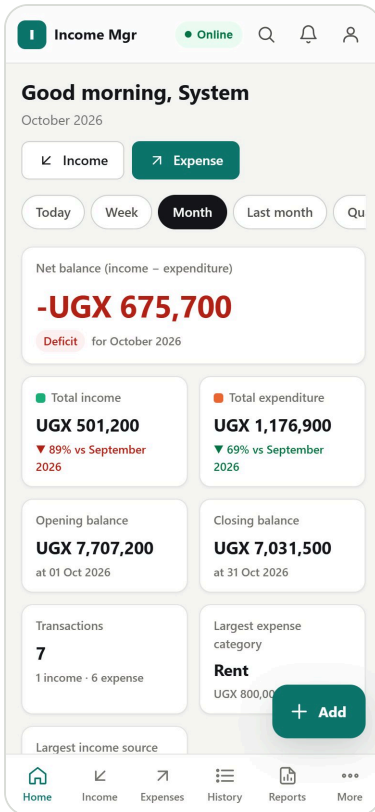


Figure 15.1 Dashboard.

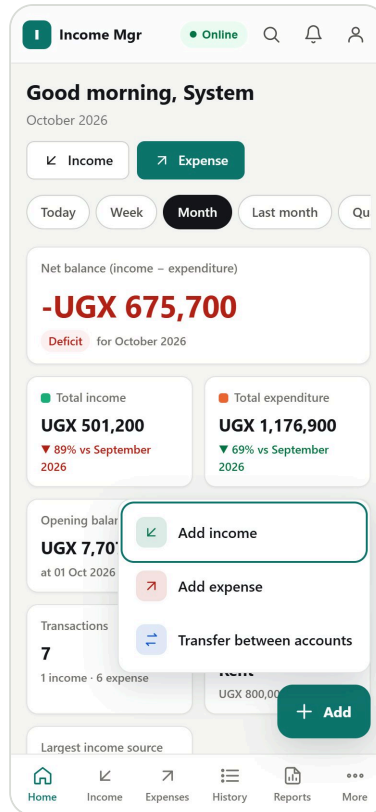


Figure 15.2 The Add menu.

Income Mgr • Online

New transaction

Income Expense **Transfer**

Amount *
UGX **15,000**

Category *
Transport Food Airtime Office Supplies Utilities Fuel Bank Charges Equipment

Paid from *
Cash

Current balance: UGX 3,354,000

Date *
10/07/2026

Description

Cancel Save and add another

✓ Save transaction

Figure 15.3 Quick expense entry.

Income Mgr • Online

Expenses Export + Add expense

Money spent.

Today Week **Month** Last month Qu

Search description, payee, reference Filters

Expenditure **UGX 1,176,900**
6 transactions · October 2026

Electricity – October	06 Oct 2026 · Utilities · MTN ...	-UGX 132,700
Boda boda to client site	06 Oct 2026 · Transport · Cash	-UGX 33,900
Airtime & data bundles	05 Oct 2026 · Airtime · Airtel ...	-UGX 12,100
Internet subscription – ...	05 Oct 2026 · Internet · Bank ...	-UGX 150,000
Taxi to town	05 Oct 2026 · Transport · Cash	-UGX 48,200
Office rent – October	02 Oct 2026 · Rent · Bank Acc...	-UGX 800,000

1–6 of 6 < Previous + Add

Home Income Expenses History Reports More

Figure 15.4 Expenses list.

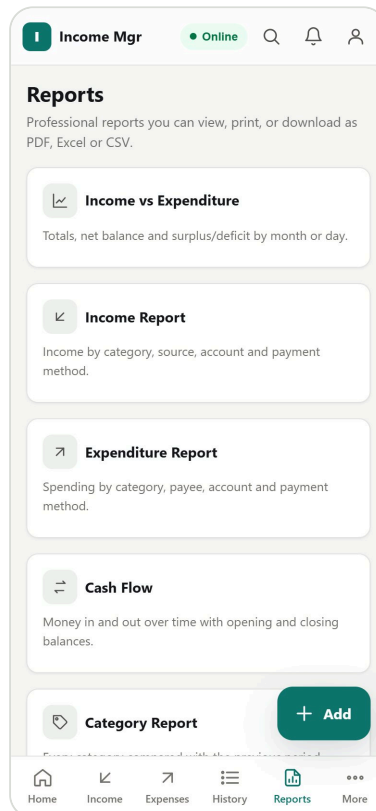


Figure 15.5 Reports.

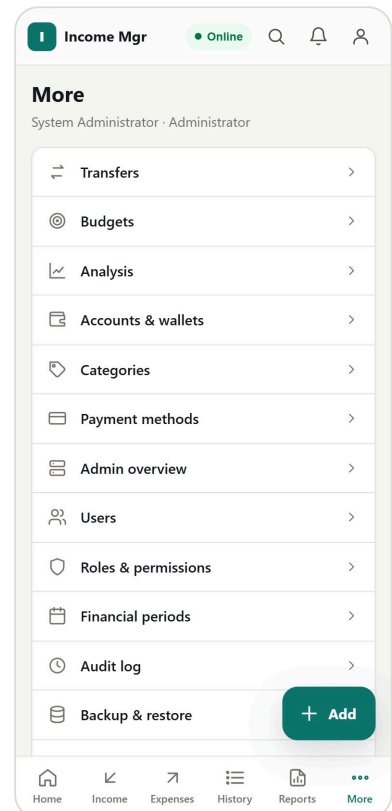


Figure 15.6 The More menu.

16 Your profile, password and theme

Open the person icon at the top right and choose **My profile & password**. You can change your name and phone number and see when you last signed in.

The screenshot shows the 'My profile' page in the Income Manager app. The left sidebar contains a navigation menu with categories: Dashboard, Income, Expenses, Transactions, Transfers, PLANNING & INSIGHT (Budgets, Analysis, Reports), SETUP (Accounts & wallets, Categories, Payment methods), and ADMINISTRATION (Admin overview, User guide, Install app). The main content area is titled 'My profile' and shows the user's role as 'Administrator'. It is divided into two sections: 'Personal details' and 'Security'. The 'Personal details' section has input fields for 'Full name' (System Administrator), 'Email' (admin@example.com), and 'Phone'. A note below the email field says 'Ask an administrator to change your sign-in email.' There is a 'Save profile' button. The 'Security' section shows 'Previous sign-in' (07 Oct 2026 10:26 from ::1) and 'Session timeout' (30 minutes of inactivity). It includes a 'Change password' button and a 'Sign out' link. At the top right, there is a status bar with 'Online', a search icon, a bell icon, and a person icon. At the bottom right, there is a '+ Add' button.

Figure 16.1 My profile.

The screenshot shows a 'Change password' dialog box. It has a title bar with a close button (X). The dialog contains three input fields: 'Current password', 'New password', and 'Confirm new password'. Below the 'New password' field, there is a note: 'At least 8 characters, with letters and numbers.' At the bottom, there are two buttons: 'Cancel' and 'Update password'.

Figure 16.2 Changing your password.

Passwords must have at least 8 characters including letters and numbers (your administrator may set a different rule). Changing your password signs you out on your other devices.

Light and dark theme

Choose **Theme** in the account menu to switch between *System* (follow the device), *Light* and *Dark*.

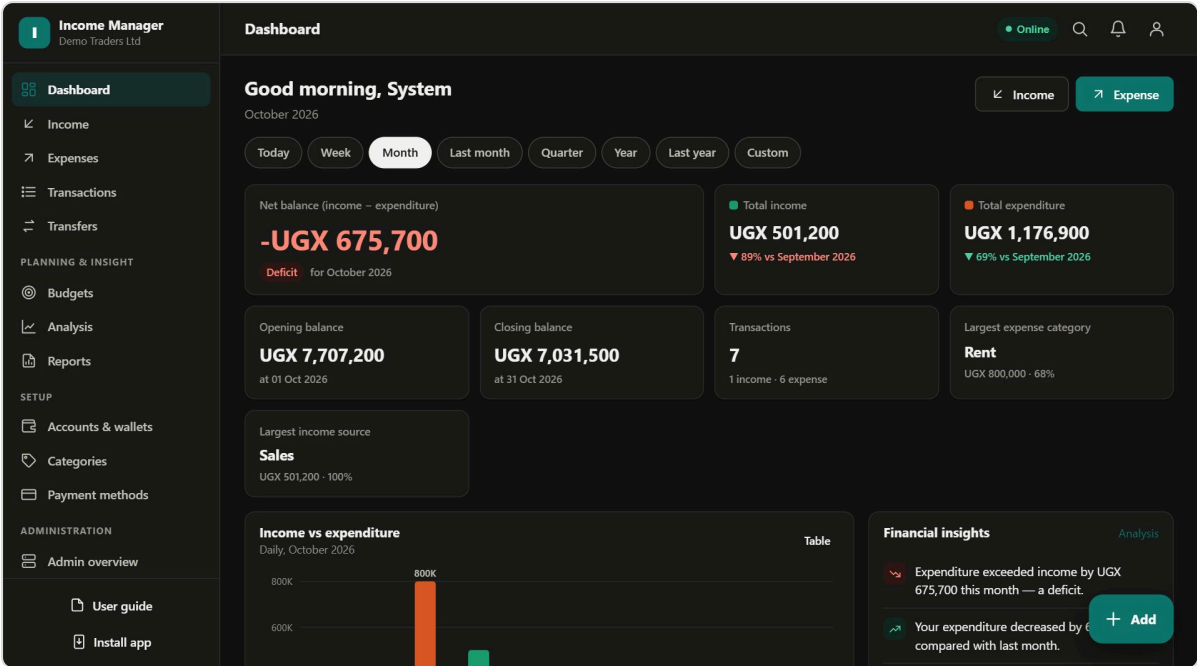


Figure 16.3 The dashboard in dark theme.

17 Administration

These sections are available to administrators (or roles given the matching permission).

Administrator overview

A health check of the whole system: users and sign-ins, all-time totals, failed sign-in attempts, backup status, financial periods and recent activity.

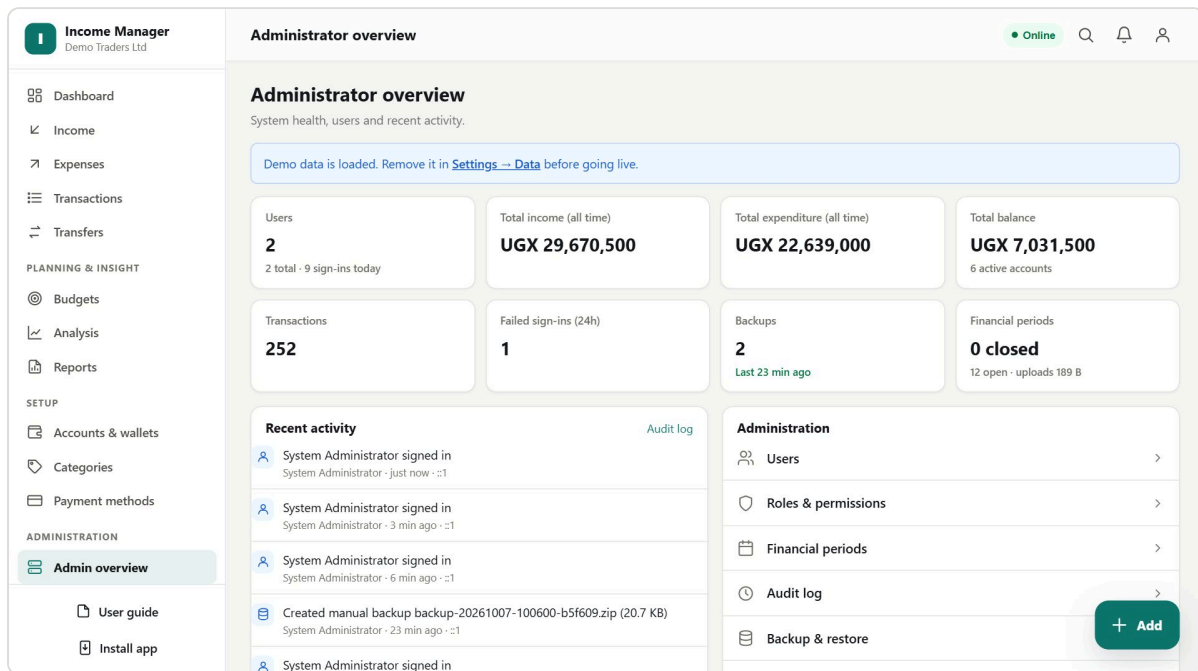


Figure 17.1 Administrator overview.

Users

- 1 Open **Users** and click [Add user](#).
- 2 Enter the name and email, choose a **role** and set an initial password.
- 3 Leave *Require a password change at next sign-in* ticked so the person chooses their own password.

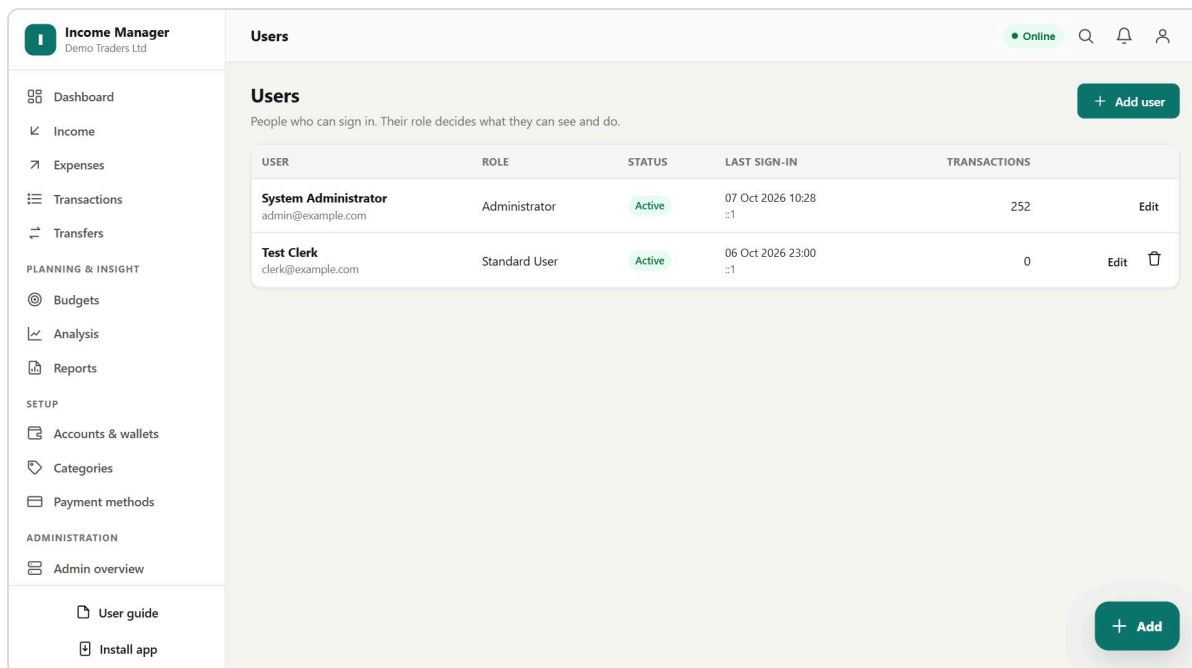


Figure 17.2 Users with role, status and last sign-in.

Add user [X]

Full name *

Email * Phone

Role Status

Standard User Active

Initial password *

At least 8 characters, letters and numbers.

☒ Require a password change at next sign-in

Cancel Save

Figure 17.3 Adding a user.

To stop someone signing in, set their status to **Disabled** (or delete them — their past transactions are kept). To reset a forgotten password, edit the user and type a new one.

Roles and permissions

Tick exactly what each role may do. For example, give a *Treasurer* role permission to view all transactions and manage budgets, or create a read-only *Auditor*. The Administrator role always keeps every permission.

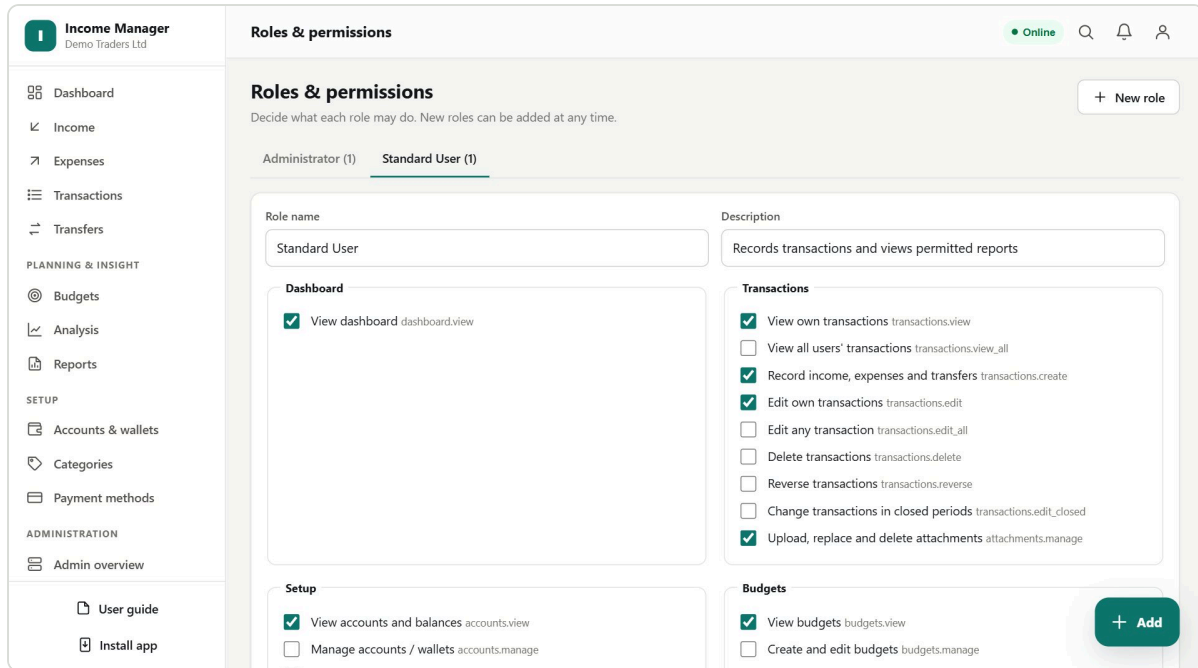


Figure 17.4 Permissions of the Standard User role.

Settings

TAB	WHAT YOU CAN SET
Organisation	Organisation name, address, phone, email, website and logo (used in the app, on reports and as the installed-app icon).
Financial	Currency (UGX by default), decimal places, number separators, date format and the month your financial year starts.
Application	App name and short name, tagline, theme colour, default appearance, time zone.
Security	Inactivity sign-out, failed sign-in limit and lockout time, password rules, maximum upload size.
Notifications	Which alerts are sent and their thresholds (budget warning %, large-expense amount, backup reminder days...).
Data & demo	Load or remove the demonstration data.

Organisation / business name

Demo Traders Ltd

Address

Phone

Email

Website

https://

LOGO

No logo uploaded. [Upload logo](#)

PNG or JPG. Used in the app, on reports and to generate the installed app icon.

Save settings

Figure 17.5 Organisation settings, including the logo.

Currency code

UGX

Decimal places

0 (e.g. UGX 50,000)

ISO code, e.g. UGX, KES, USD.

Thousands separator

Comma (1,000)

Decimal separator

Point (0.50)

Date format

06 Oct 2026

Financial year starts in

January

Save settings

Figure 17.6 Financial settings: currency, number and date formats, financial year.

Sign out after inactivity (minutes)

30

Maximum upload size (MB)

5

Failed sign-ins before logout

5

Lockout duration (minutes)

15

Minimum password length

8

☒ Passwords must contain letters and numbers

☐ Prepare for two-factor authentication

Database and settings are ready for 2FA/OTP; enforcement can be switched on in a future update.

Save settings

Figure 17.7 Security settings.

☒ Budget nearly used or exceeded

Warn when a budget reaches (%)

80

☒ Large expenditure recorded

Large expenditure threshold (UGX)

1000000

☒ Significant expense without receipt, reference or attachment

Checked for expenses above a quarter of the large-expenditure threshold.

☒ Backup reminder

Remind when the last backup is older than (days)

7

☒ Financial period ending soon / ready to close

Days before the period end

3

Save settings

Figure 17.8 Notification settings.

Demo data adds about seven months of sample income, expenses, transfers and a budget so you can explore the app. Every demo record is marked and can be removed in one step before you go live.

Demo data is loaded

Remove demo data

Figure 17.9 Data & demo: remove the demonstration data before going live.

Before you go live

Open **Settings** → **Data & demo** and click **Remove demo data**. Only records marked as demo are deleted.

Financial periods

Closing a period (for example a month after its books are reconciled) **locks** its transactions so they cannot be casually changed.

- 1 Click **Generate periods** to create monthly, quarterly or yearly periods for the financial year (or **Add period** for a custom one).
- 2 When a period is final, click **Close**. Its income, expenditure and net are shown for confirmation.
- 3 To make corrections later, an administrator can **Reopen** it (a reason is required and recorded) — or, better, post a **reversal** in the current period.

Income Manager

Demo Traders Ltd

Dashboard

Income

Expenses

Transactions

Transfers

PLANNING & INSIGHT

Budgets

Analysis

Reports

SETUP

Accounts & wallets

Categories

Payment methods

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Install app

Financial periods

Generate periods

+ Add period

Financial periods

Close a period when its books are final. Closed periods are locked: only administrators can change them, and every change is audited.

PERIOD	DATES	INCOME	EXPENDITURE	NET	STATUS			
December 2026 month	01 Dec 2026 – 31 Dec 2026	0	0	0	Open	Close	Edit	
November 2026 month	01 Nov 2026 – 30 Nov 2026	0	0	0	Open	Close	Edit	
October 2026 month	01 Oct 2026 – 31 Oct 2026	501,200	1,176,900	-675,700	Open	Close	Edit	
September 2026 month	01 Sep 2026 – 30 Sep 2026	4,686,100	3,741,700	944,400	Open	Close	Edit	
August 2026 month	01 Aug 2026 – 31 Aug 2026	4,727,800	4,620,900	106,900	Open	Close	Edit	
July 2026 month	01 Jul 2026 – 31 Jul 2026	3,898,200	3,351,500	546,700	Open	Close	Edit	
June 2026 month	01 Jun 2026 – 30 Jun 2026	3,994,200	3,385,500	608,700	Open	Close	Edit	
May 2026 month	01 May 2026 – 31 May 2026	4,066,400	3,242,100	824,300	Open	Close		+ Add

Figure 17.10 Financial periods with their totals.

Audit log

A permanent record of who did what and when: sign-ins and failed sign-ins, every transaction created, edited (with old and new values), reversed or deleted, exports, settings and permission changes, period closing, backups and restores — with the IP address and device. Filter by user, action or date and click an entry for full details.

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Demo Traders Ltd

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Who did what, and when. Entries cannot be edited or deleted from the application.

Search description, user or IP

All users

All actions

mm/dd/yyyy

mm/dd/yyyy

WHEN	USER	ACTION	DESCRIPTION	IP ADDRESS
07 Oct 2026 10:28	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 10:26	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 10:22	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 10:06	System Administrator	create backup	Created manual backup backup-20261007-100600-b5f609.zip (20.7 KB)	::1
07 Oct 2026 10:05	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 10:01	System Administrator	create backup	Created manual backup backup-20261007-100117-4e27f4.zip (20.7 KB)	::1
07 Oct 2026 10:01	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 09:59	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 09:58	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 09:56	System Administrator	login	System Administrator signed in	::1
07 Oct 2026 09:26	System Administrator	delete backup	Deleted backup backup-20261007-092641-ec8971.zip	

Figure 17.11 The audit log.

Backup and restore

- 1 Click **Create backup**. The backup contains the full database **and** all uploaded receipts.
- 2 Click **Download** and keep the file somewhere safe off the server (cloud drive, external disk). Do this at least weekly — the app reminds you.

- 3 To restore, click **Restore**, enter your password and type **RESTORE**. A safety backup of the current data is made first; everyone is signed out afterwards.

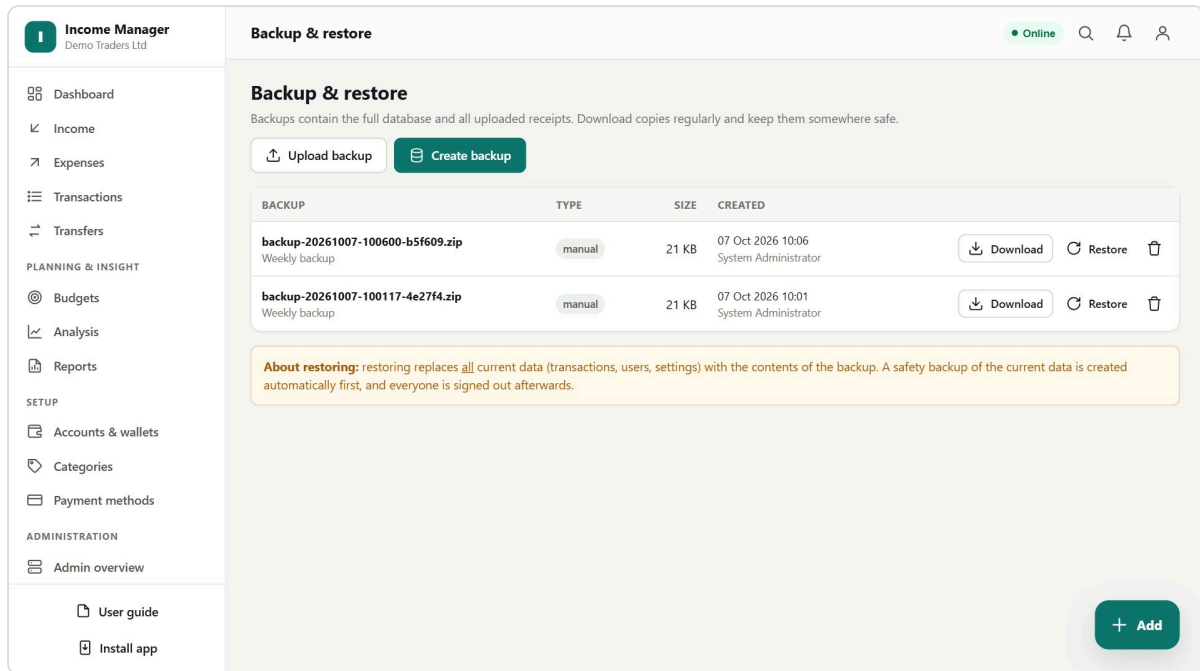


Figure 17.12 Backup & restore.

Restoring replaces everything

All current transactions, users and settings are replaced by the backup's contents. Anything recorded after the backup was made is lost (except in the automatic safety backup).

System information

Shows versions, storage used, whether HTTPS is active, entries rejected during offline sync and the technical error log — useful when asking for support.

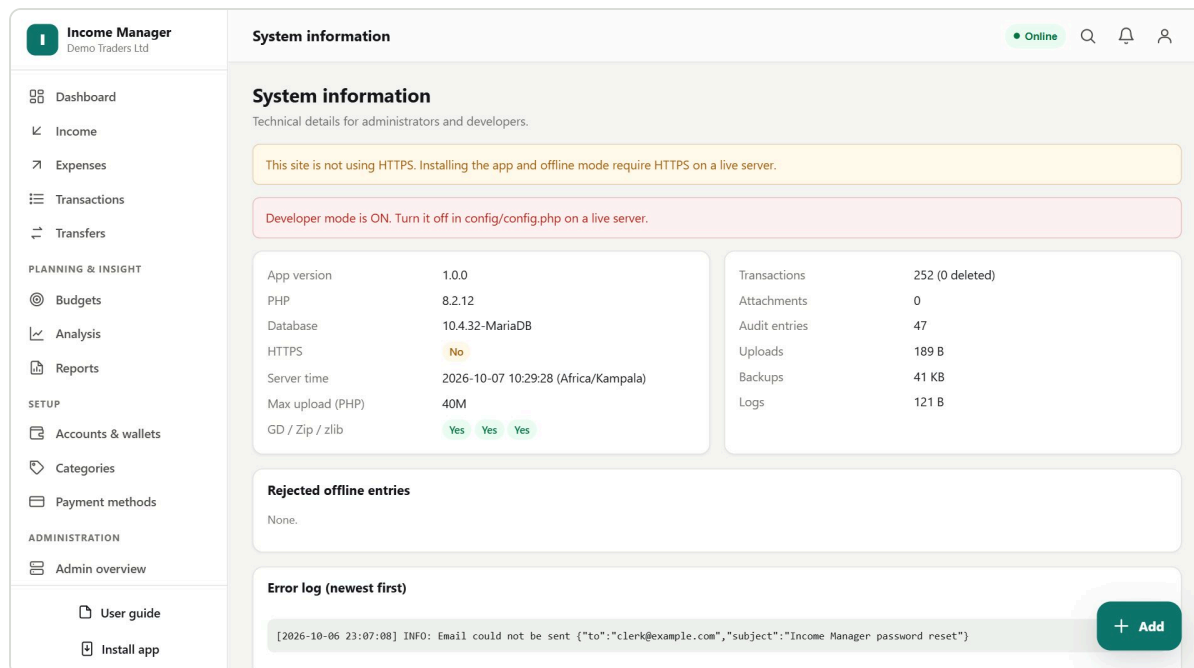


Figure 17.13 System information. (The yellow and red warnings appear here because this screenshot was taken on a local test computer; on a properly configured live server they disappear.)

18 Troubleshooting and FAQ

QUESTION	ANSWER
I cannot see a menu item from this guide.	Your role does not include it. Ask an administrator.
"Too many failed sign-in attempts."	Wait 15 minutes, or ask an administrator to set a new password for you.
I was signed out while working.	For security you are signed out after a period of inactivity. Sign in again; offline entries are kept.
The dashboard shows only my own entries.	Standard users see the transactions they recorded. An administrator can grant "View all users' transactions".
A balance looks wrong.	Check the account's statement (Accounts → ... → Account statement) — every movement and the running balance are listed. Check the opening balance and that transfers were recorded as transfers, not as income/expenses.
I recorded something twice.	Open one of them and click Delete (or Reverse if the period is closed).
"The financial period is closed."	Choose a date in an open period, or ask an administrator.
No "Install app" option appears.	On iPhone use Safari → Share → Add to Home Screen. Elsewhere use Chrome or Edge; the site must use https://. If the app is already installed, the option is hidden.
An offline entry shows "needs attention".	Open Offline & sync , read the reason, click Edit to correct and resubmit (chapter 14).

My attachment will not upload.	Only JPG, PNG and PDF files are accepted, up to the size limit shown (5 MB by default).
The Excel button gives an error.	Use CSV, and ask the administrator to enable the PHP "zip" extension on the server.
"A new version is available".	Click Update now . It takes a second and your data is not affected.

19 Glossary and quick reference

Glossary

Attachment	A receipt, invoice or slip (JPG, PNG, PDF) stored with a transaction.
Audit log	The permanent record of activity in the system.
Budget	Planned spending per category for a period.
Closed period	A date range whose transactions are locked.
Deficit	Expenditure greater than income for a period.
Financial year	Your 12-month accounting year (e.g. July – June).
Ledger	The complete list of transactions.
Opening balance	Money held at the start of a period (or before an account's first transaction).
Pending	An offline entry saved on the device and waiting to sync.
PWA	Progressive Web App — a website that installs and works like an app.
Reversal	An entry that cancels an earlier transaction while keeping both on record.
Surplus	Income greater than expenditure for a period.
Sync	Sending offline entries to the server when the connection returns.
Variance	Budget minus actual: what is left, or how much was overspent.

Quick reference

I WANT TO...	DO THIS
Record an expense	+ Add → Add expense → amount, category, account → Save
Record income	+ Add → Add income → amount, category, account → Save
Move money between accounts	+ Add → Transfer between accounts
Attach a receipt	In the form: More details → Attach; or open the transaction → Add attachment
See this month's position	Dashboard → Month
Find a transaction	Magnifying glass (top bar) → type description, receipt no. or amount

Correct a mistake	Open the transaction → Edit (or Reverse if the period is closed)
Check an account balance	Accounts & wallets (statement: ... → Account statement)
See how a budget is going	Budgets → open the budget
Monthly report as PDF	Reports → Monthly Financial Report → choose month → PDF
Export transactions to Excel	Transactions → set filters → Export → Excel
Install on a phone	Chrome: : → Install app · Safari: Share → Add to Home Screen
Check offline entries	Click the status (Online / Offline / pending) in the top bar
Back up the data (admin)	Backup & restore → Create backup → Download
Lock a finished month (admin)	Financial periods → Close
Open this guide in the app	Menu → User guide (or More → User guide on a phone)