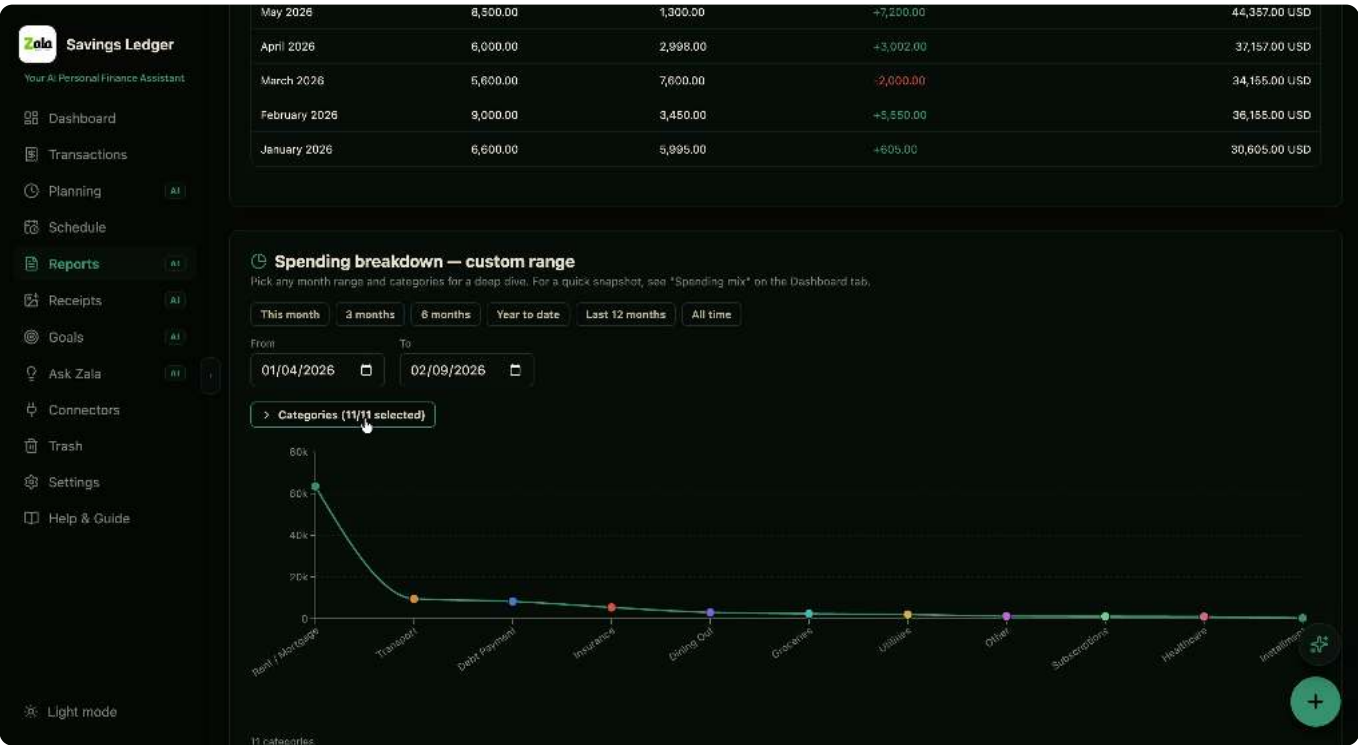


Financial Reporting and PDF Export in Zala

Use the Reporting tab to review your month-by-month financial performance, analyze spending in detail, and generate customized PDF reports (executive and detailed) for specific time periods and categories.

Step 1: Review Monthly Financial Performance

In the Reporting tab, review the financial performance information displayed month by month. Scroll down to see the overall spending breakdown for the selected period.

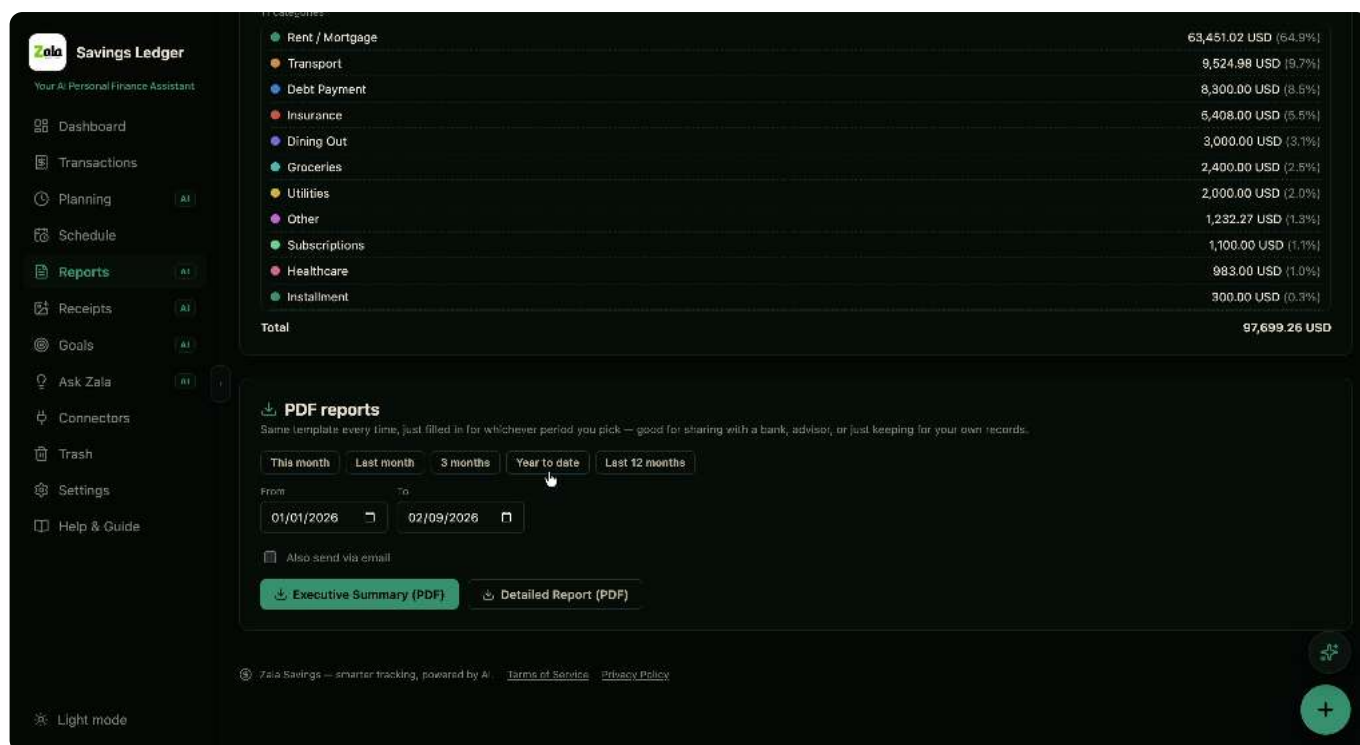


Step 2: Customize the Date Range and Categories

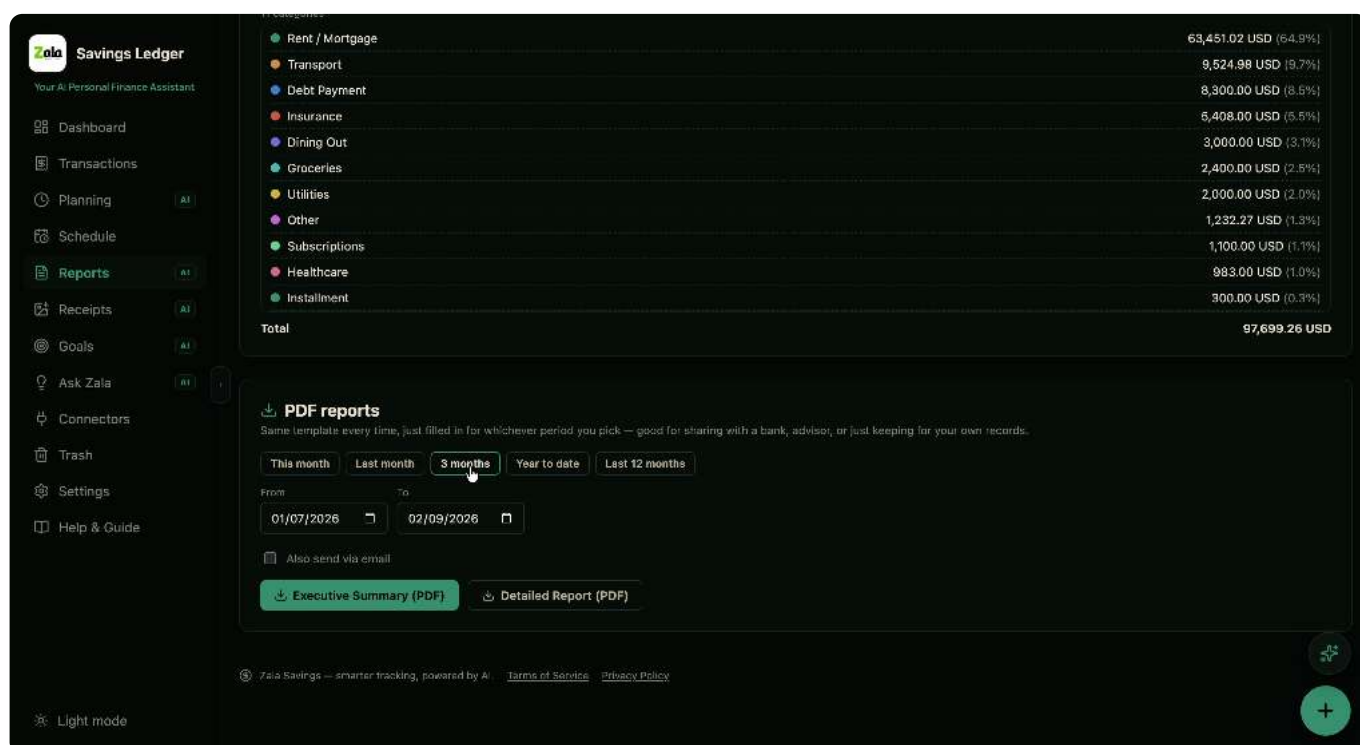
Use the customization options to set a specific date range for the report and select your preferred spending categories. This allows you to tailor the view beyond what is available on the main dashboard.

Step 3: Configure PDF Report Period and Type

Scroll down to the PDF Reports section and choose the reporting period you want to analyze (for example, up to today or the last three months).

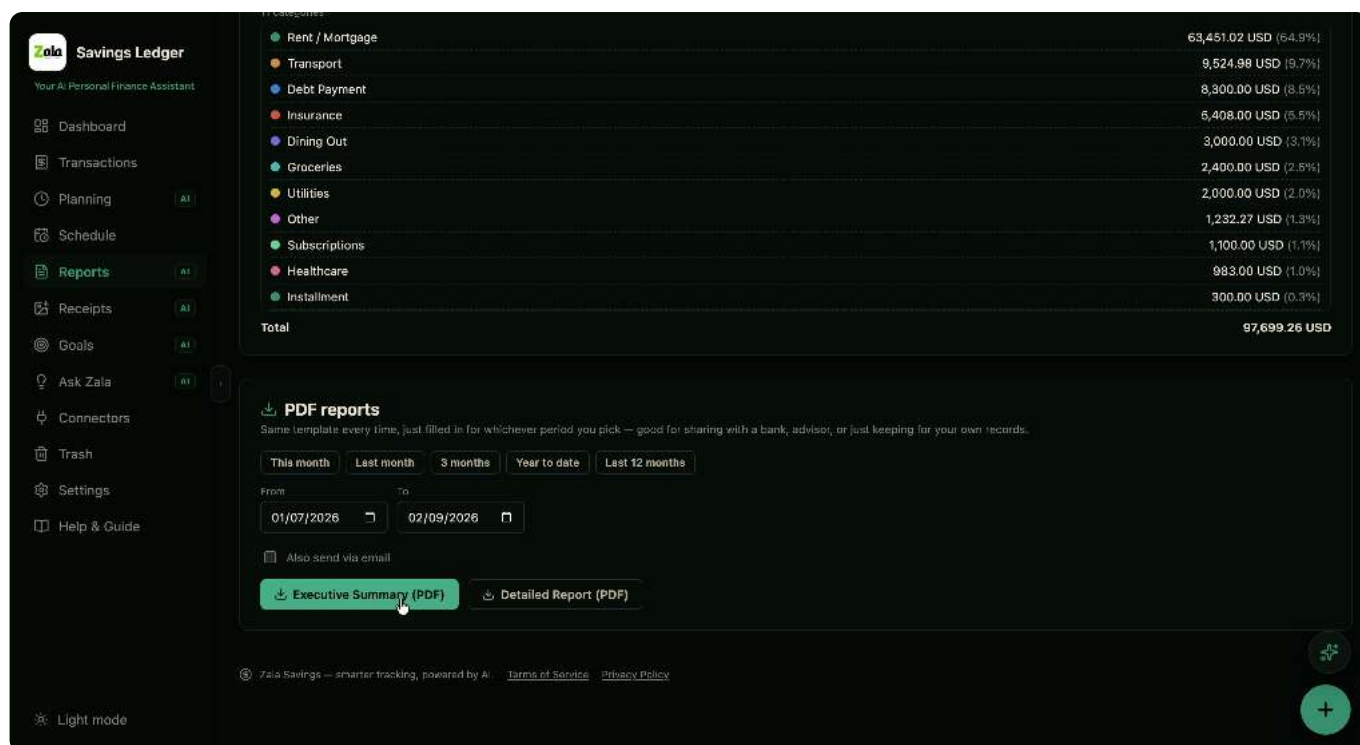


Select the exact range, such as the last three months, to narrow down the report.

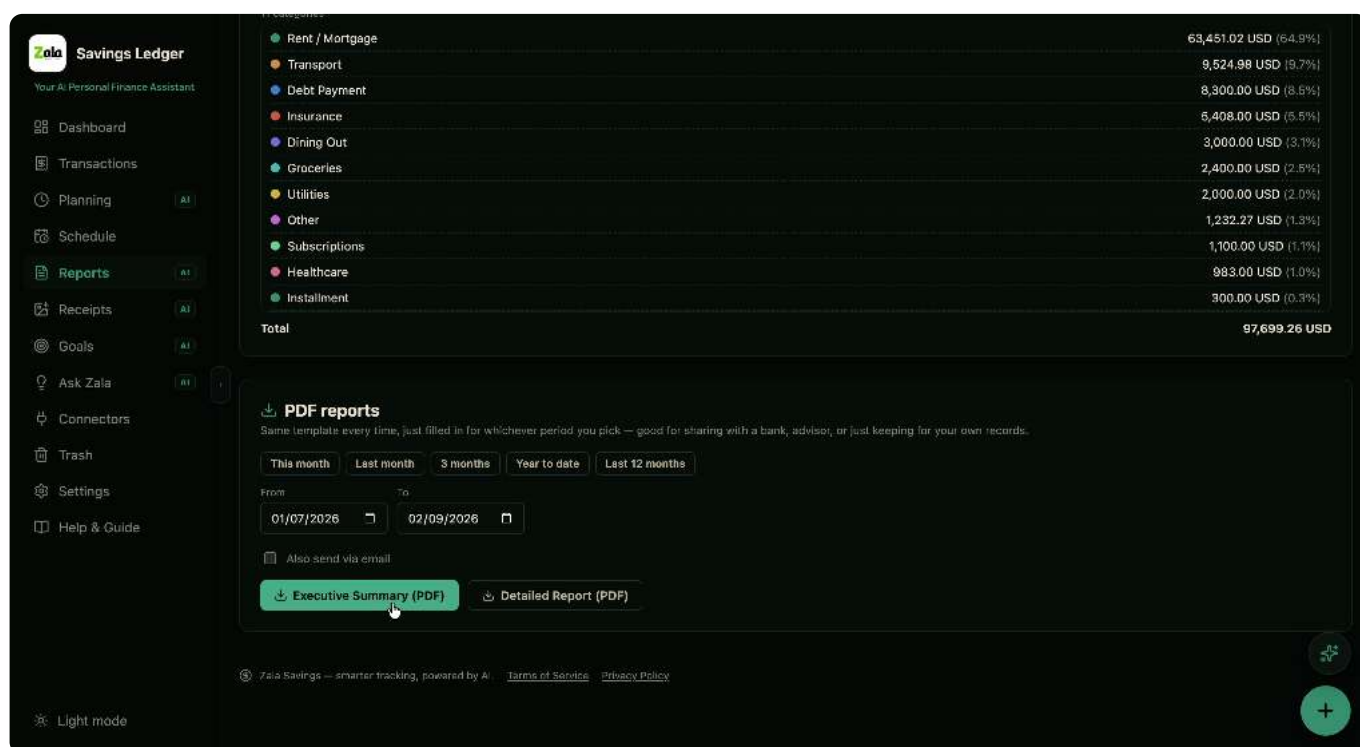


Choose one or both report types:

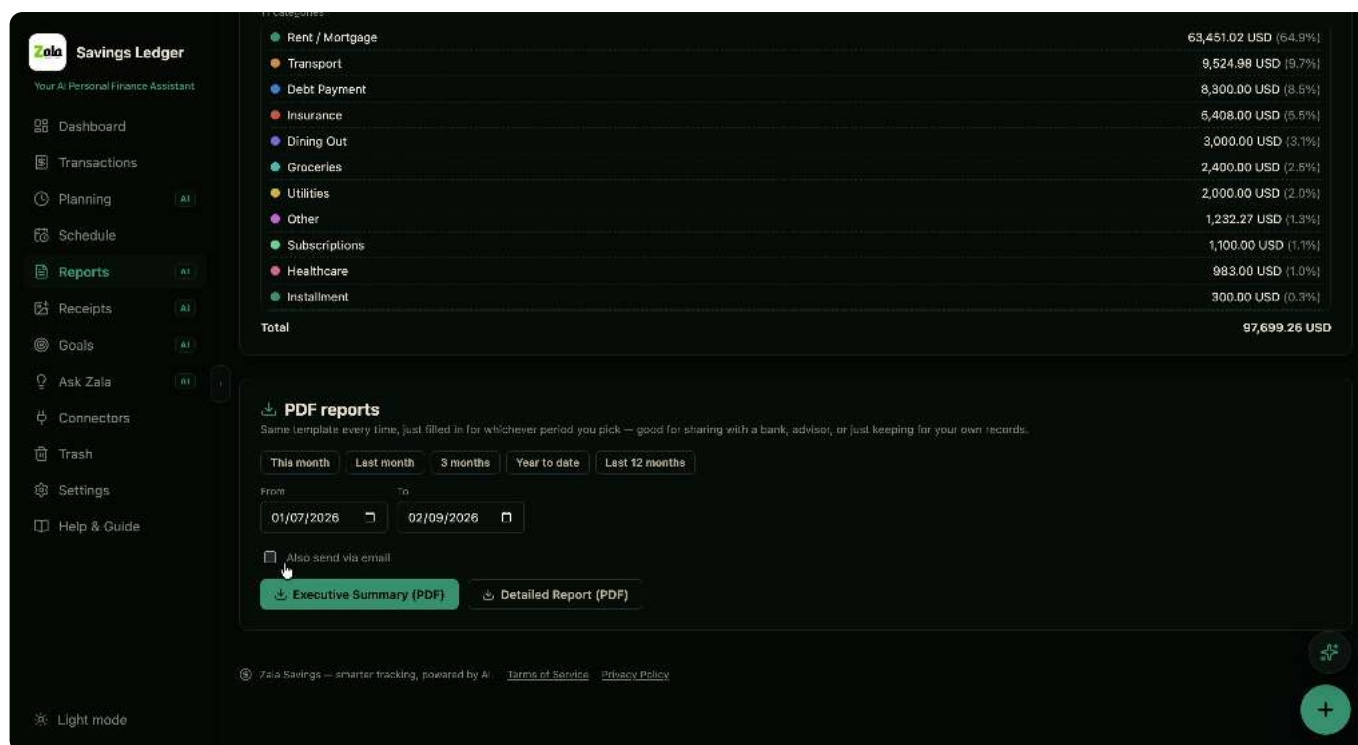
- Executive Summary Report
- Detailed Report



Click on the desired report type(s) to generate them.

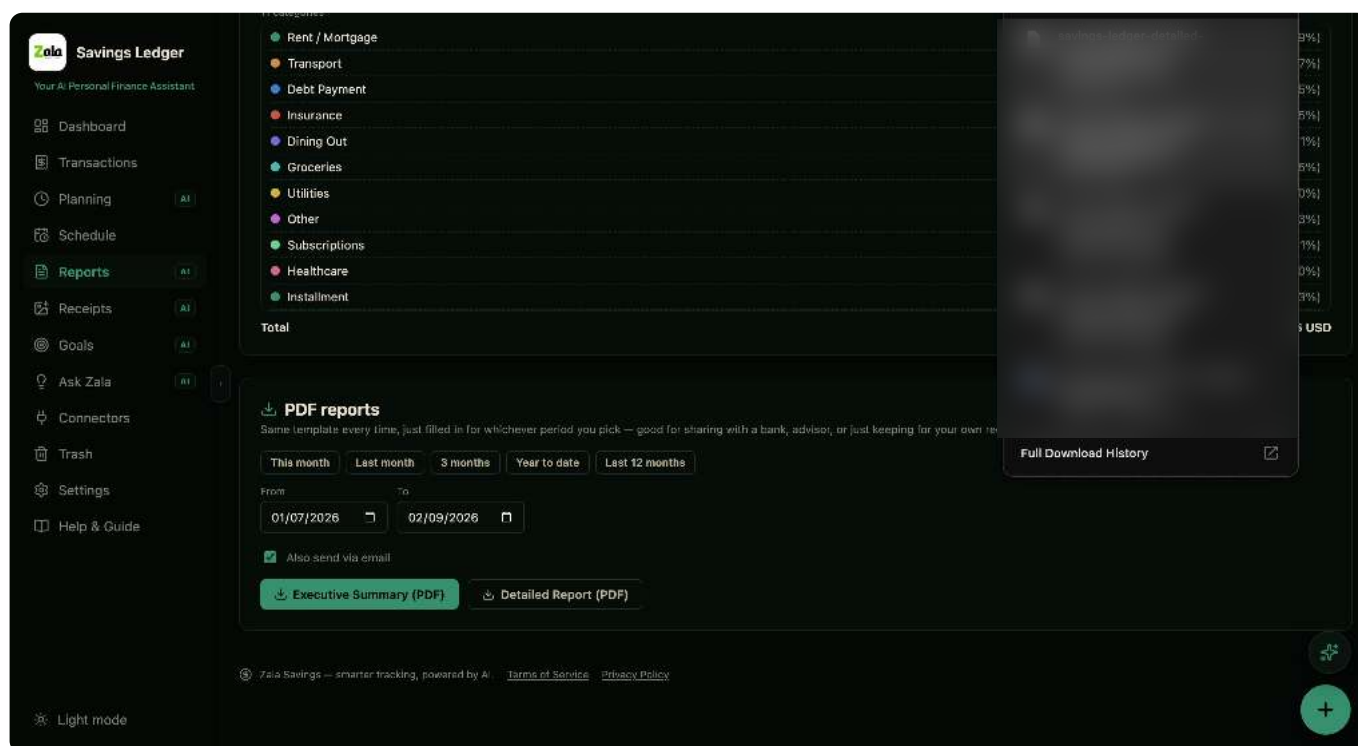


You can optionally send the generated reports by email to the address configured in your settings.



Step 4: Review the Executive Summary Report

Open the Executive Summary report to view key information for the selected period.

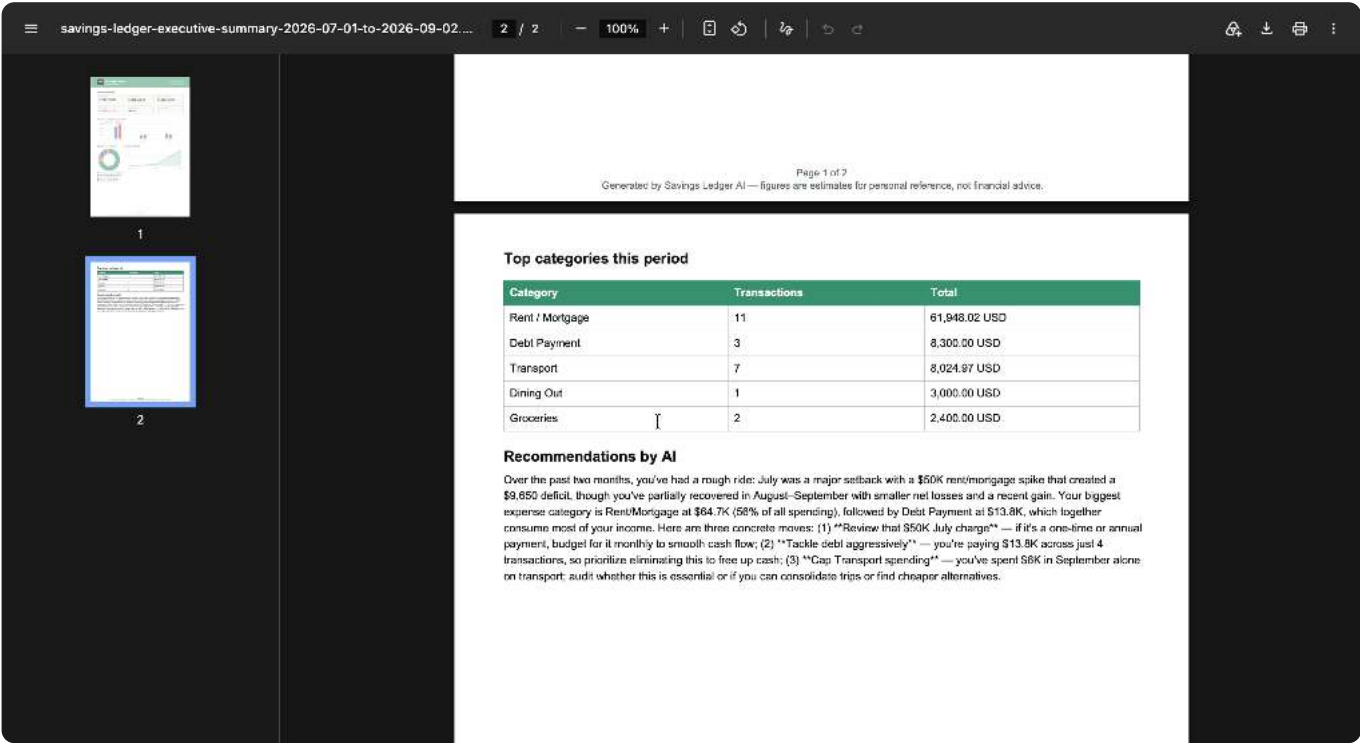


In this report, you will see:

- A high-level overview of what happened during the chosen period
- Recommendations generated by Zala AI on how to better control your spending
- Suggestions for improving savings and other financial behaviors

Step 5: Analyze the Detailed Report

Open the Detailed Report for a deeper breakdown of your finances.



Here you can review:

- Spending by category and subcategory
- Spending by different payment methods
- Spending patterns by day of the week
- Progress against any financial goals you have set, including whether targets were met or missed