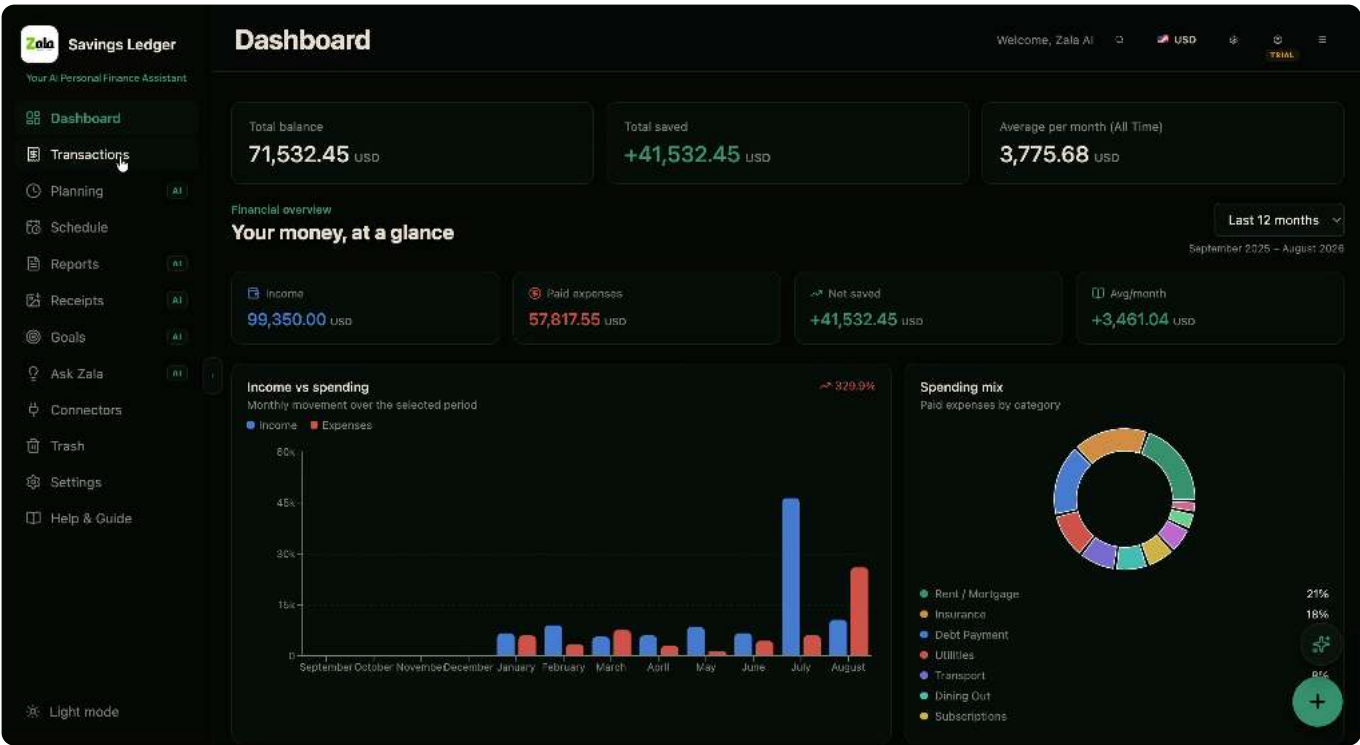


Managing Transactions in the Application

This document explains how to view, search, edit, and add transactions (expenses and income) across different months and years, and how those changes are reflected in real time on the dashboard.

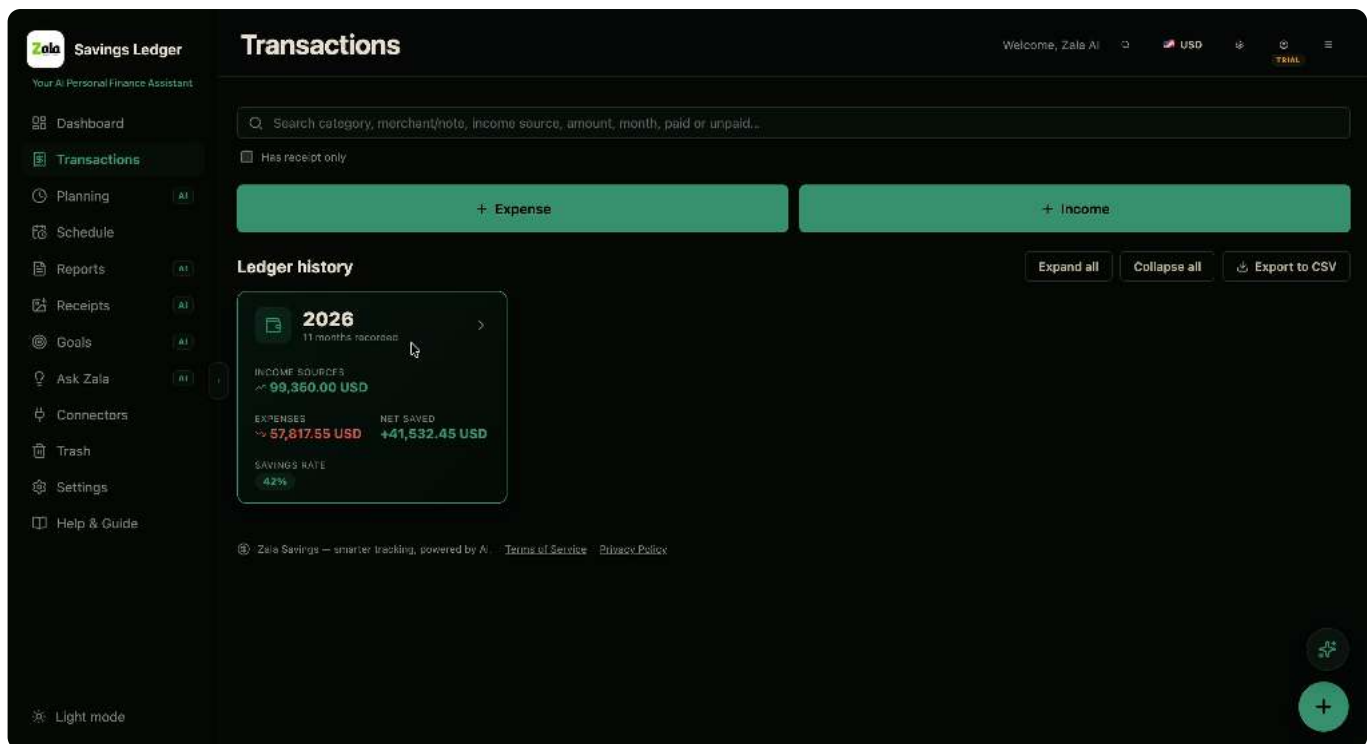
Step 1: Access the Transactions Section

Open the Transactions section from the web app or mobile app (iOS/Android) to manage your expenses and income.

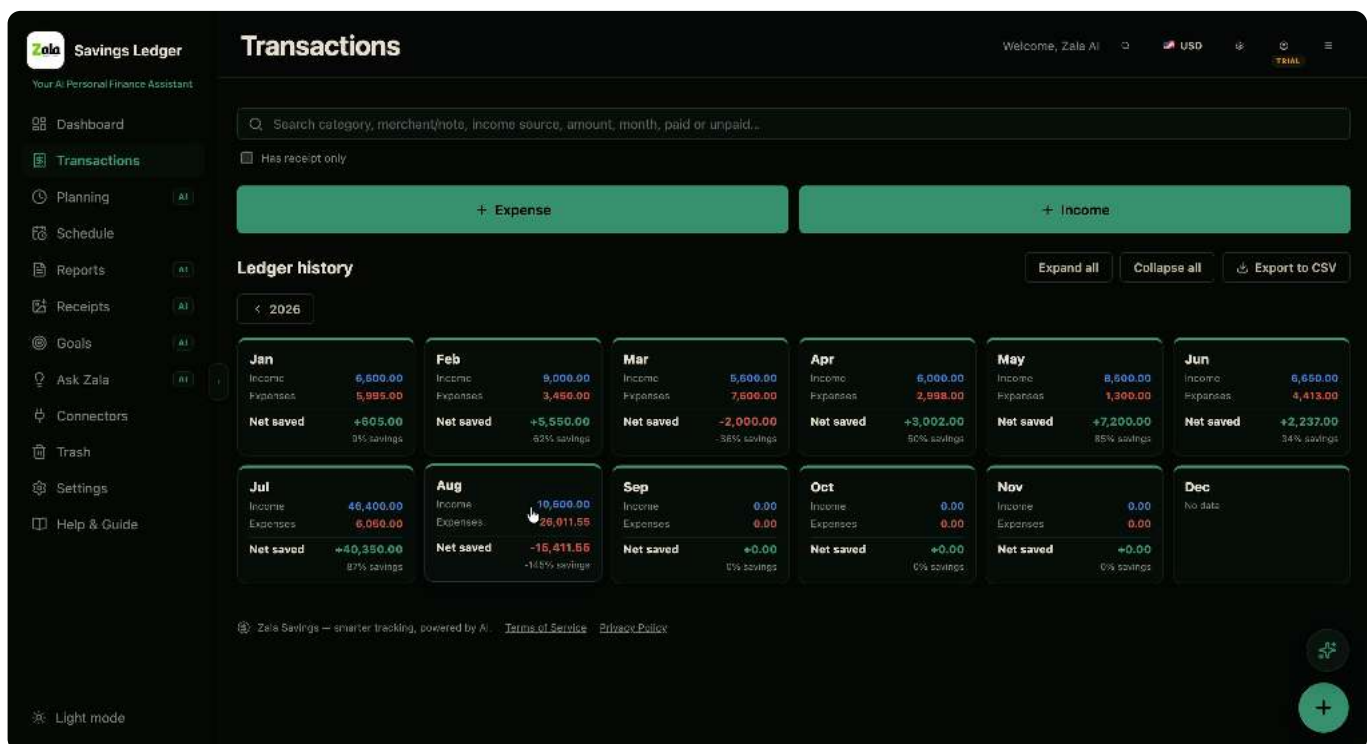


Step 2: Browse Transactions by Year and Month

Use the search and navigation options to find transactions based on the available information. If your data spans multiple years, scroll through the list of years. In this example, there is only one year available.

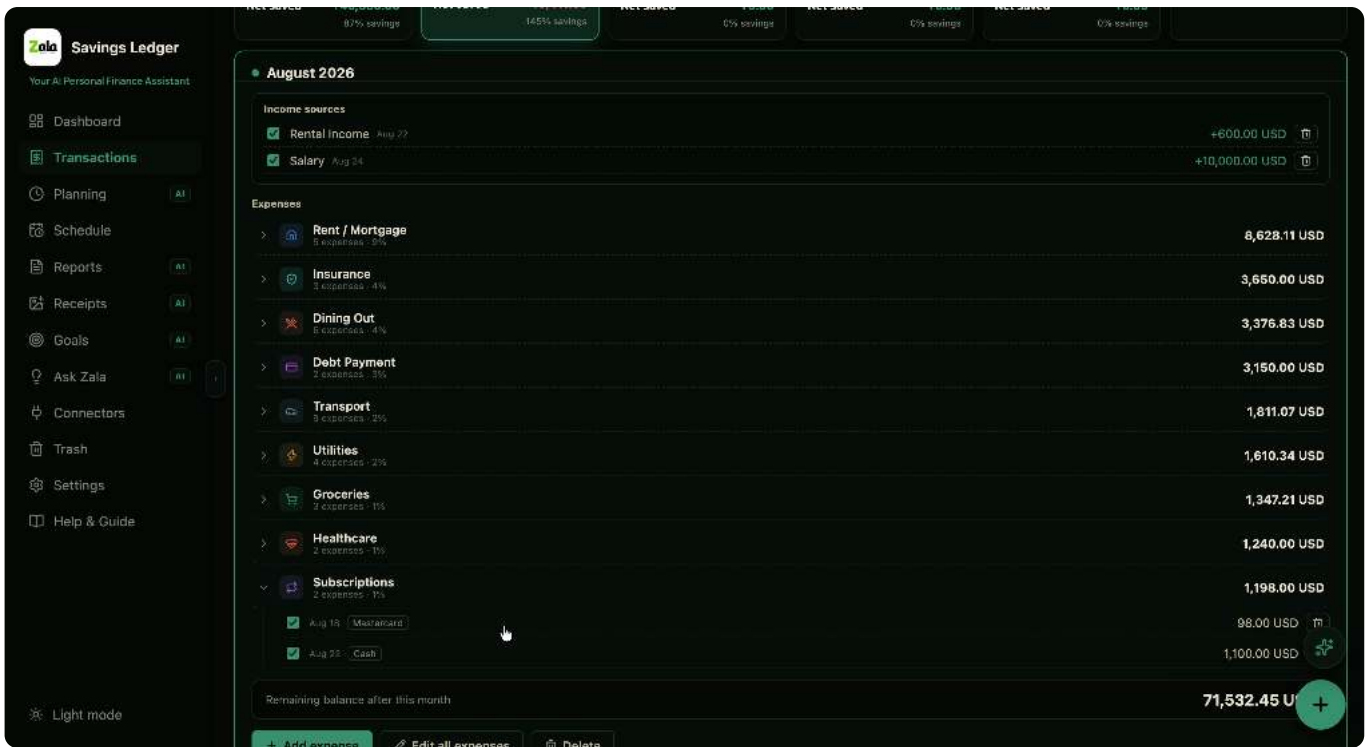


Click on the year to expand and display all the months within that year. Select the current month (e.g., August) to view all income sources and expenses for that month.

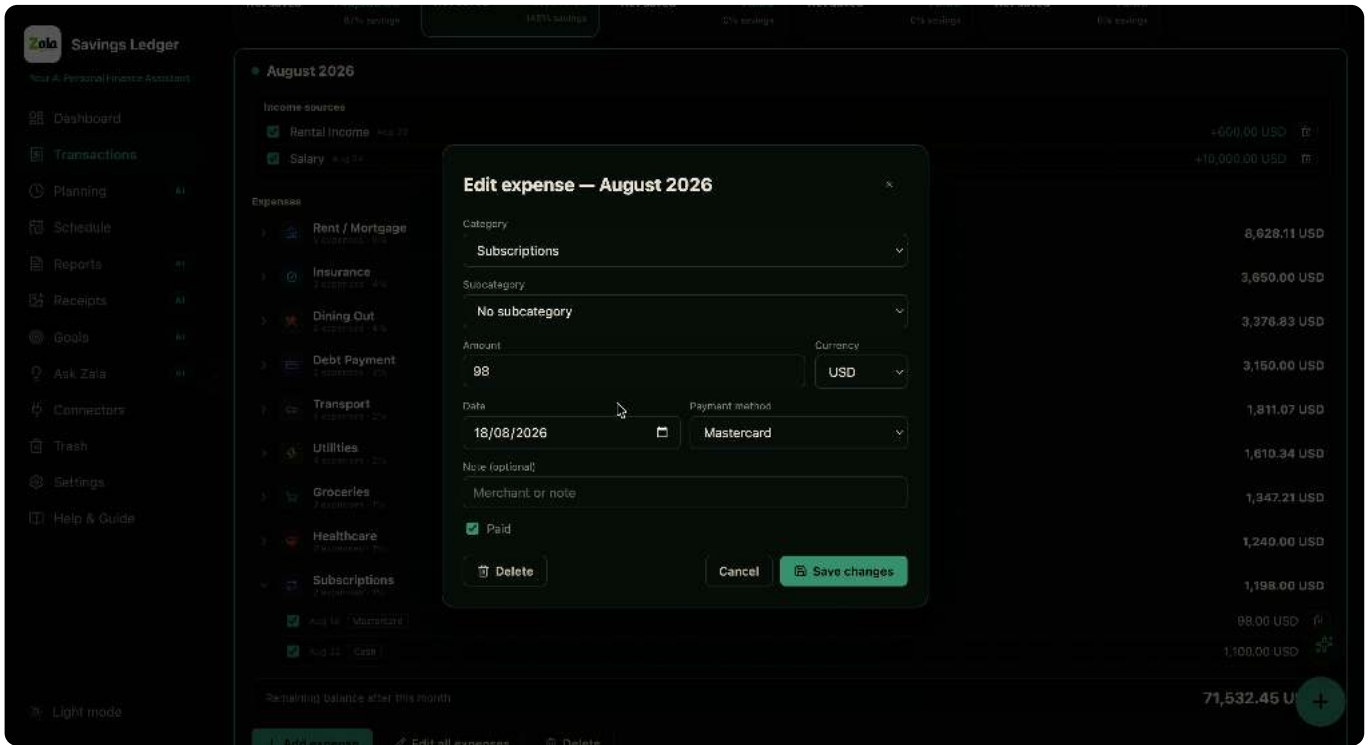


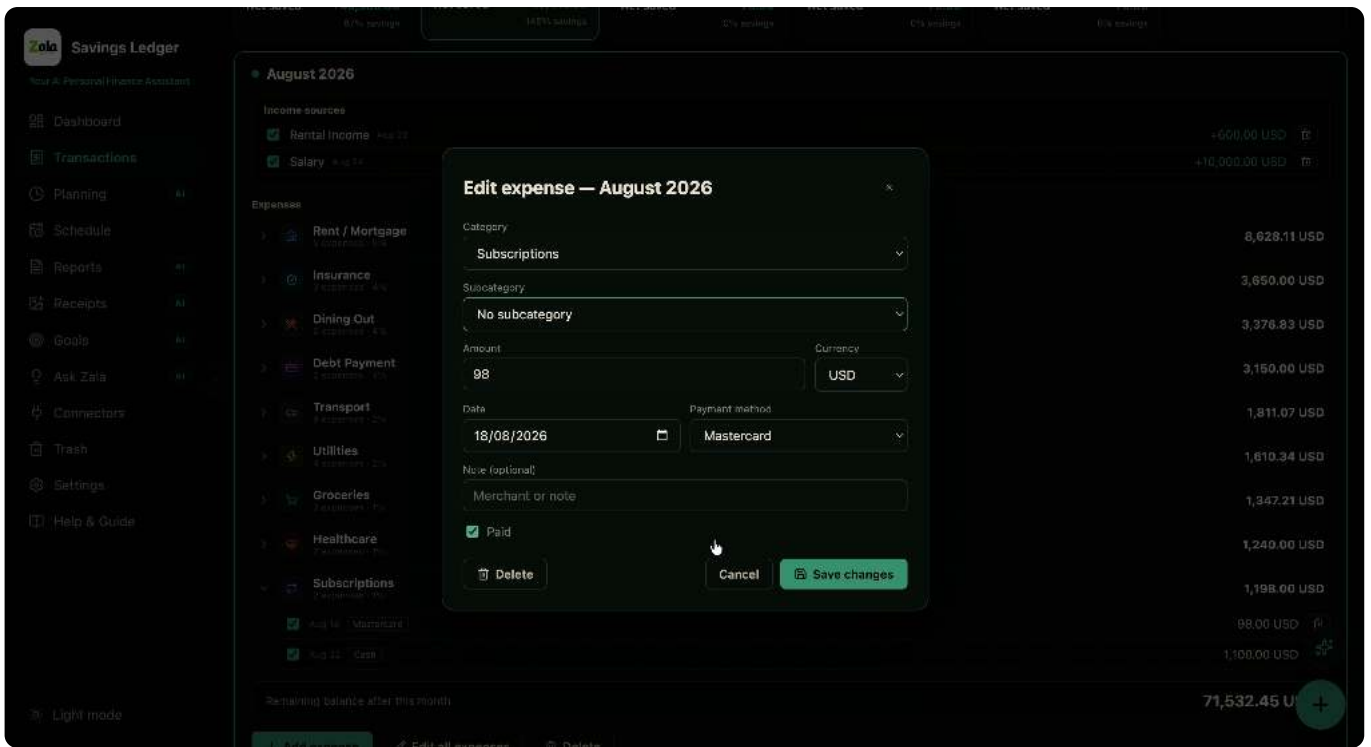
Step 3: View and Edit Individual Transactions

Click on any listed transaction (for example, a specific expense) to open its details.

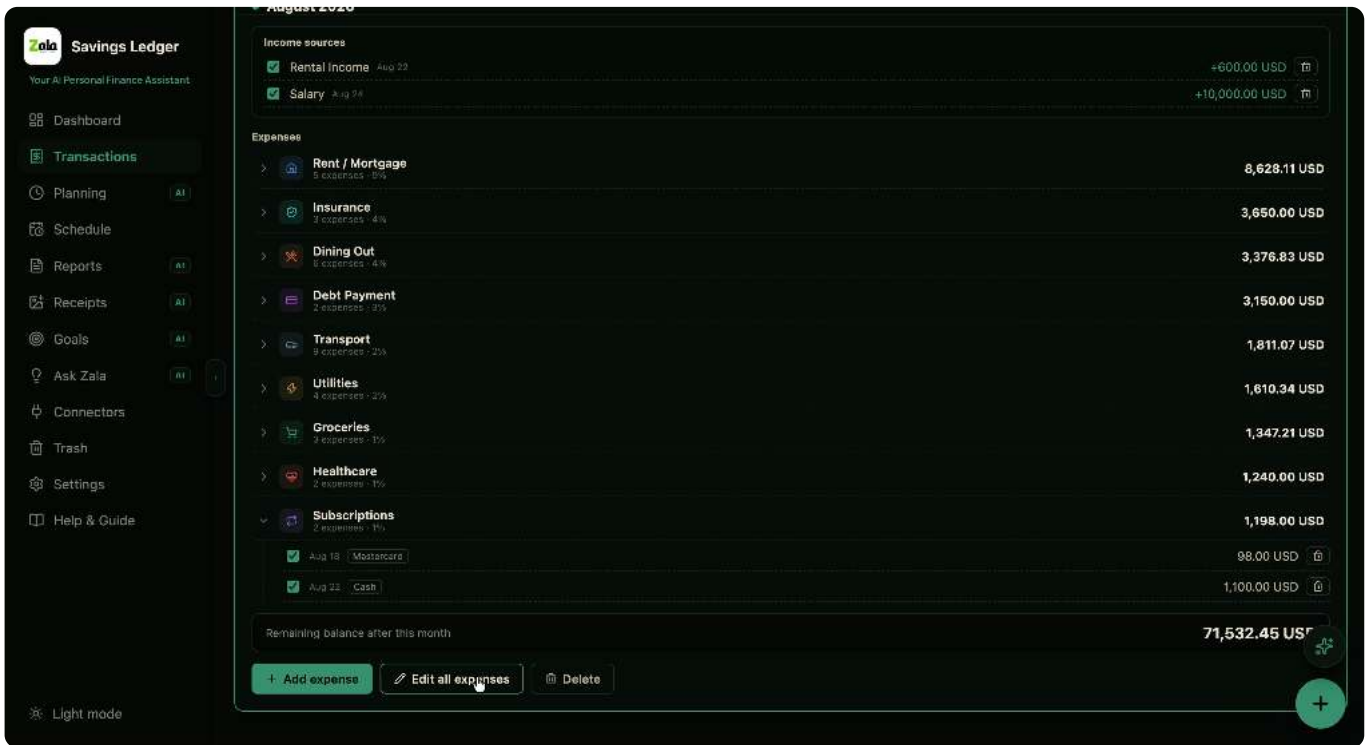


From the transaction details, you can edit the entry, add or modify a subcategory, and include your own notes to better describe the transaction.

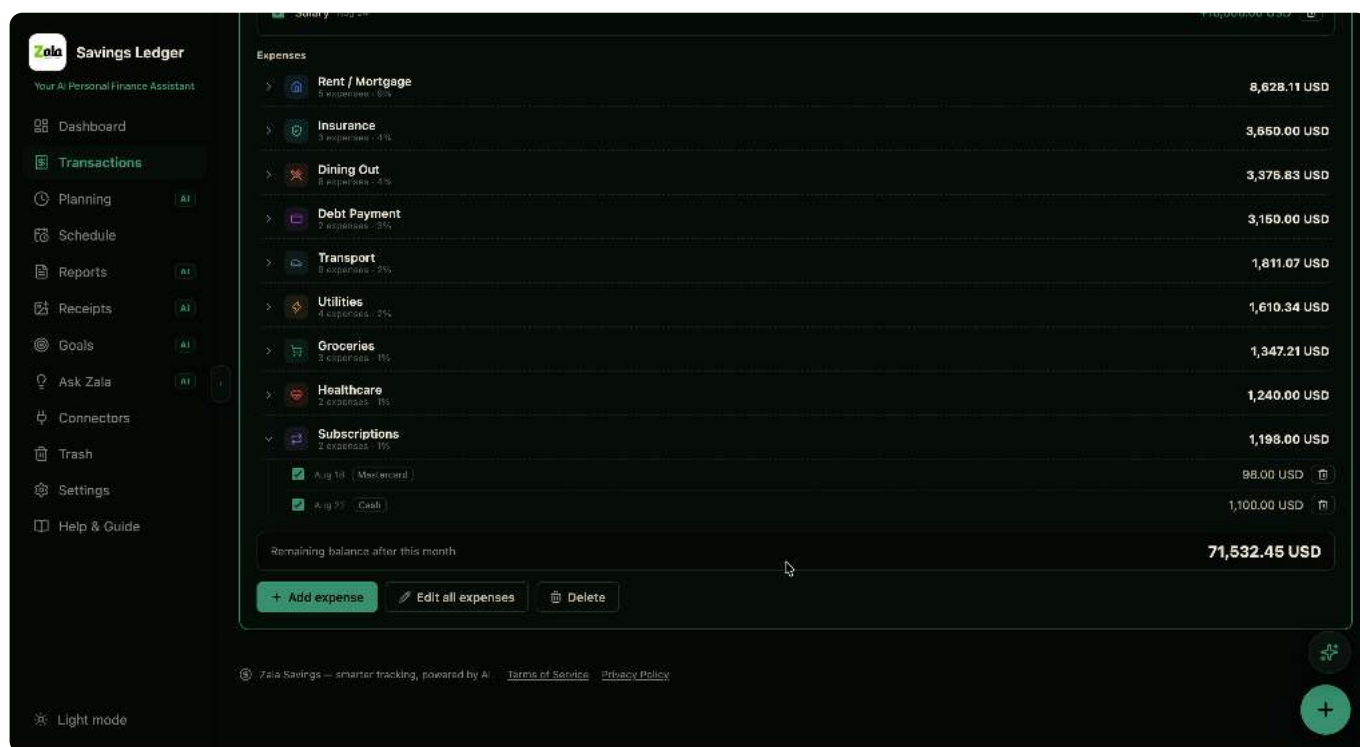
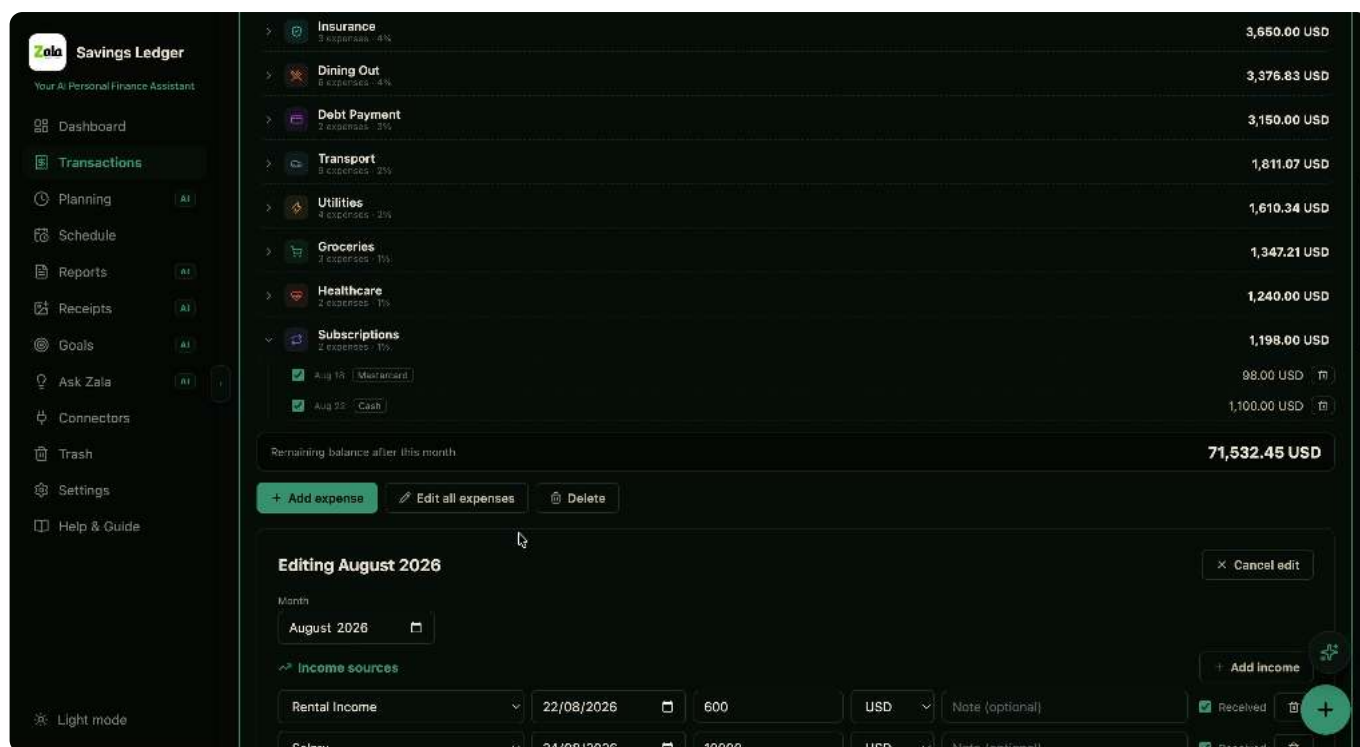




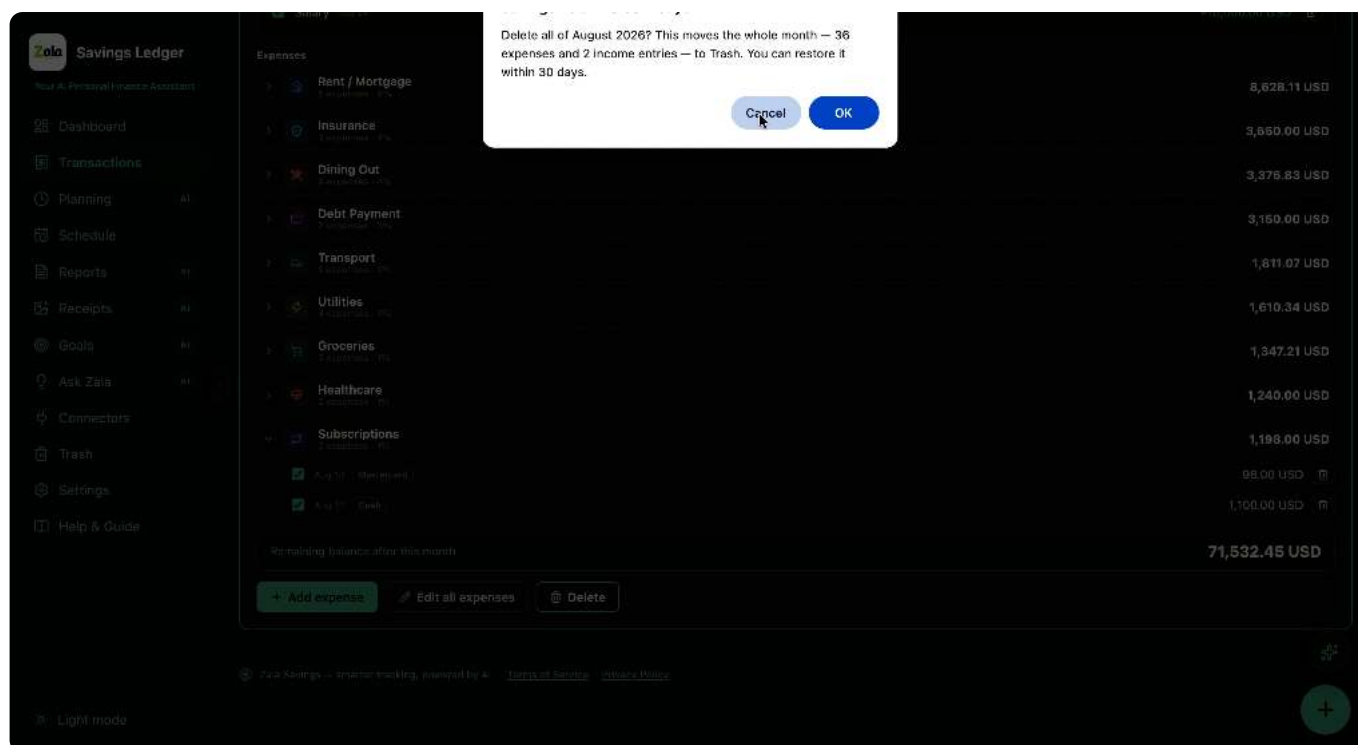
You can also perform bulk edits on expenses so that you do not need to update them one by one.



If necessary, you can delete all transactions for an entire month in a single action.

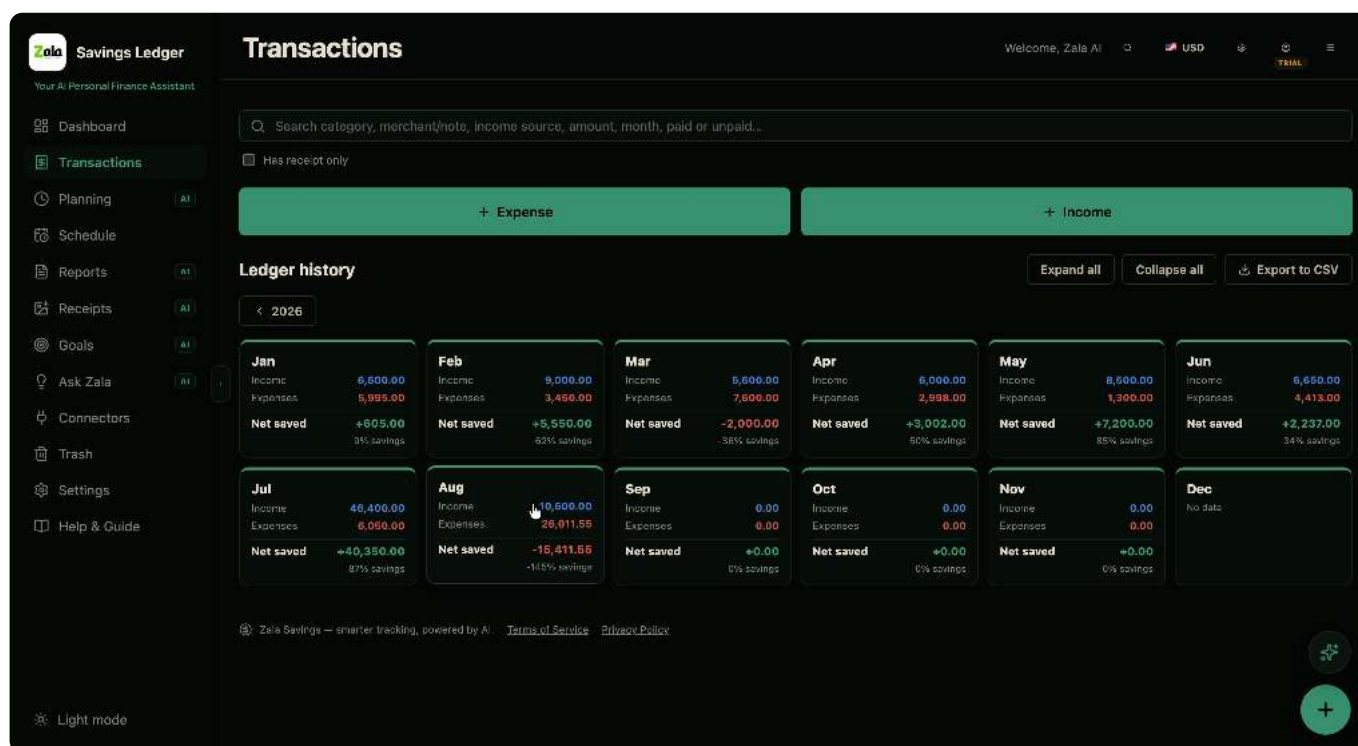


All these options are available to streamline your workflow and improve your overall experience in managing transactions.

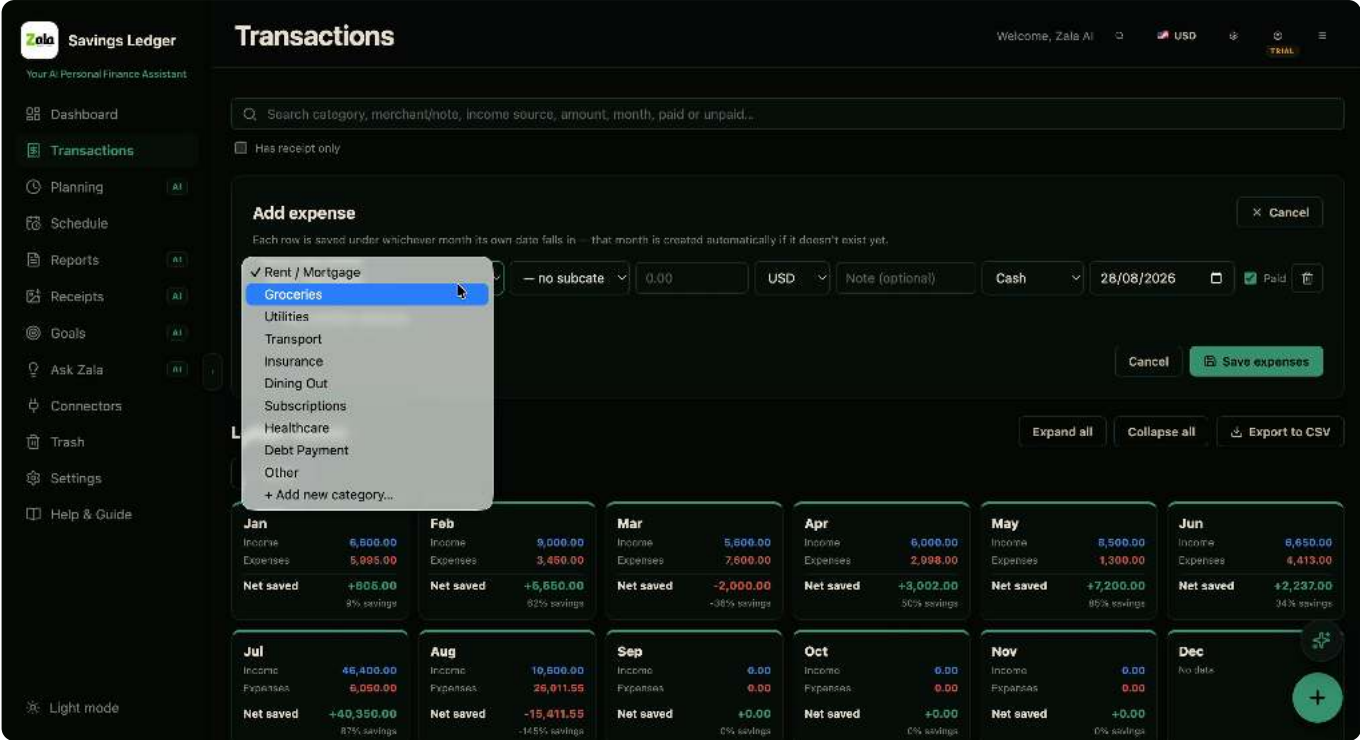


Step 4: Add a New Expense or Income

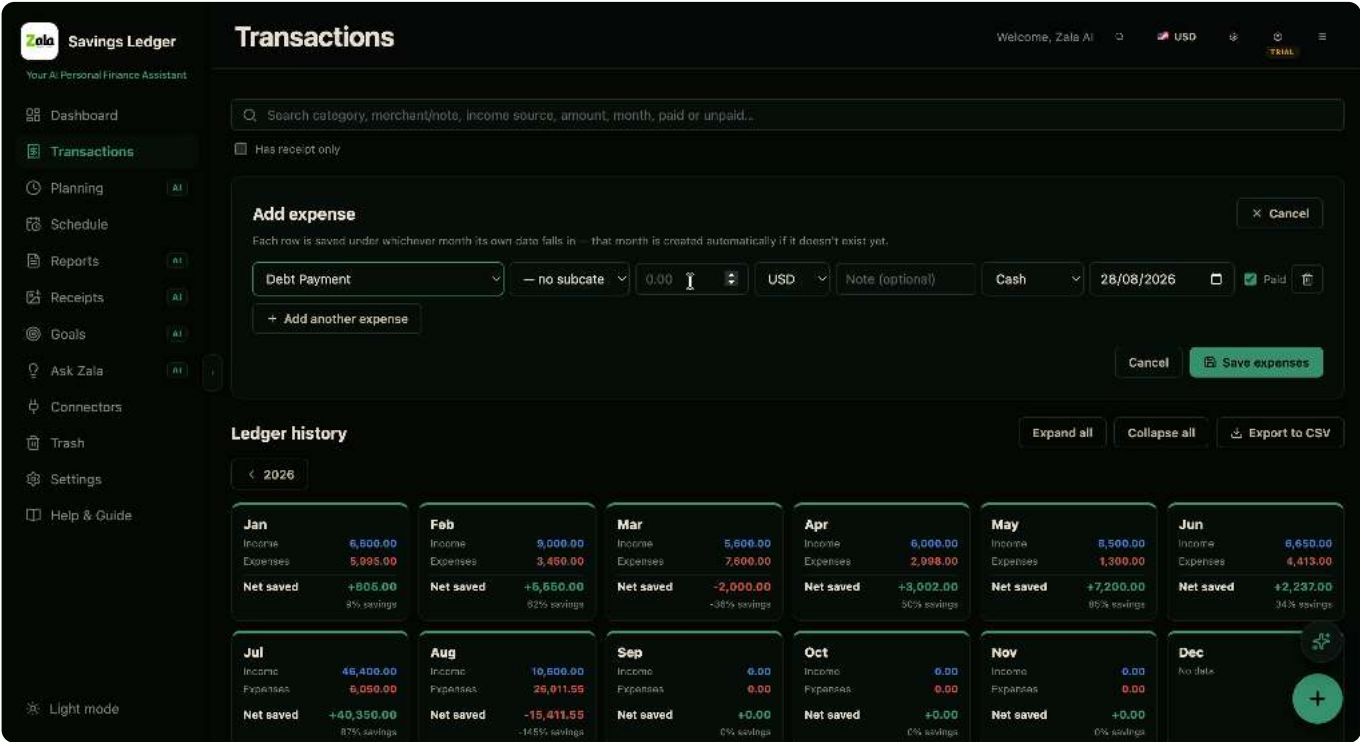
To correctly add a new expense or income, start from the dedicated "Add transaction" area.



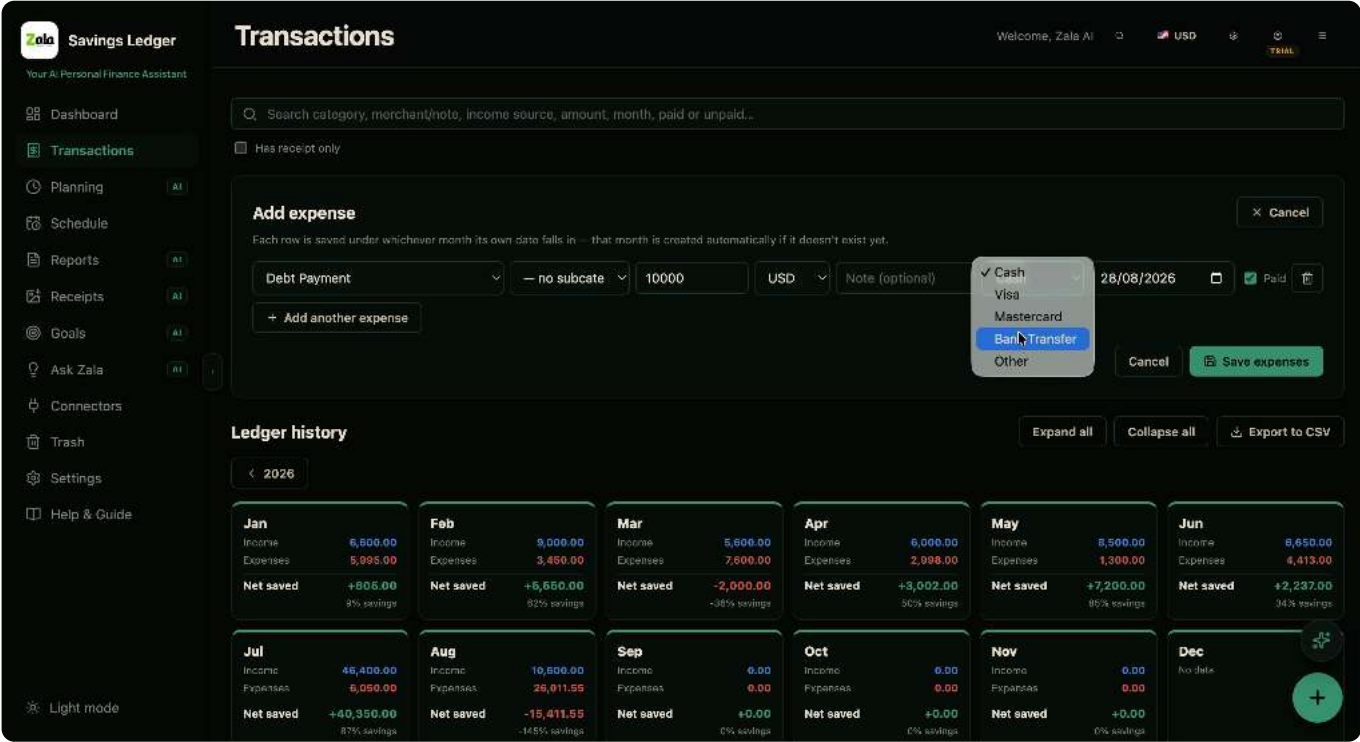
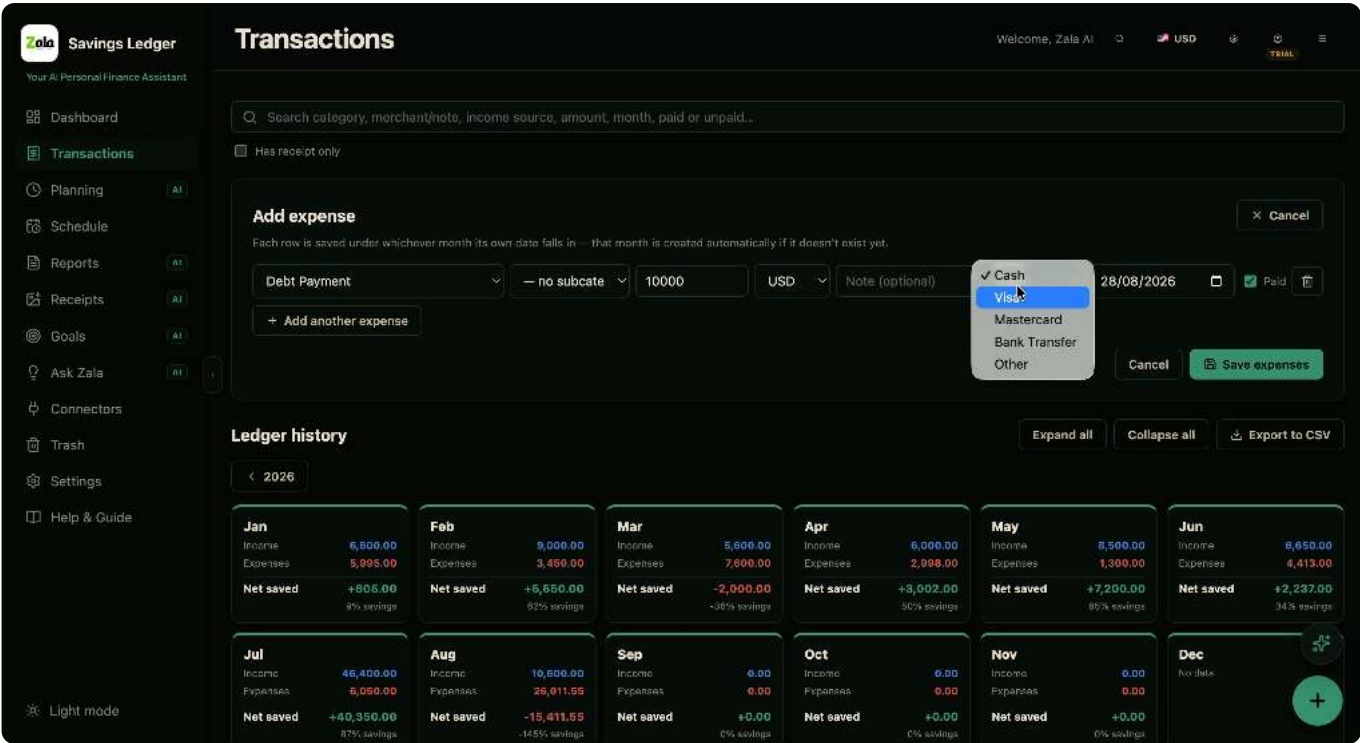
Enter the transaction details. For example, add a debt payment for this month.



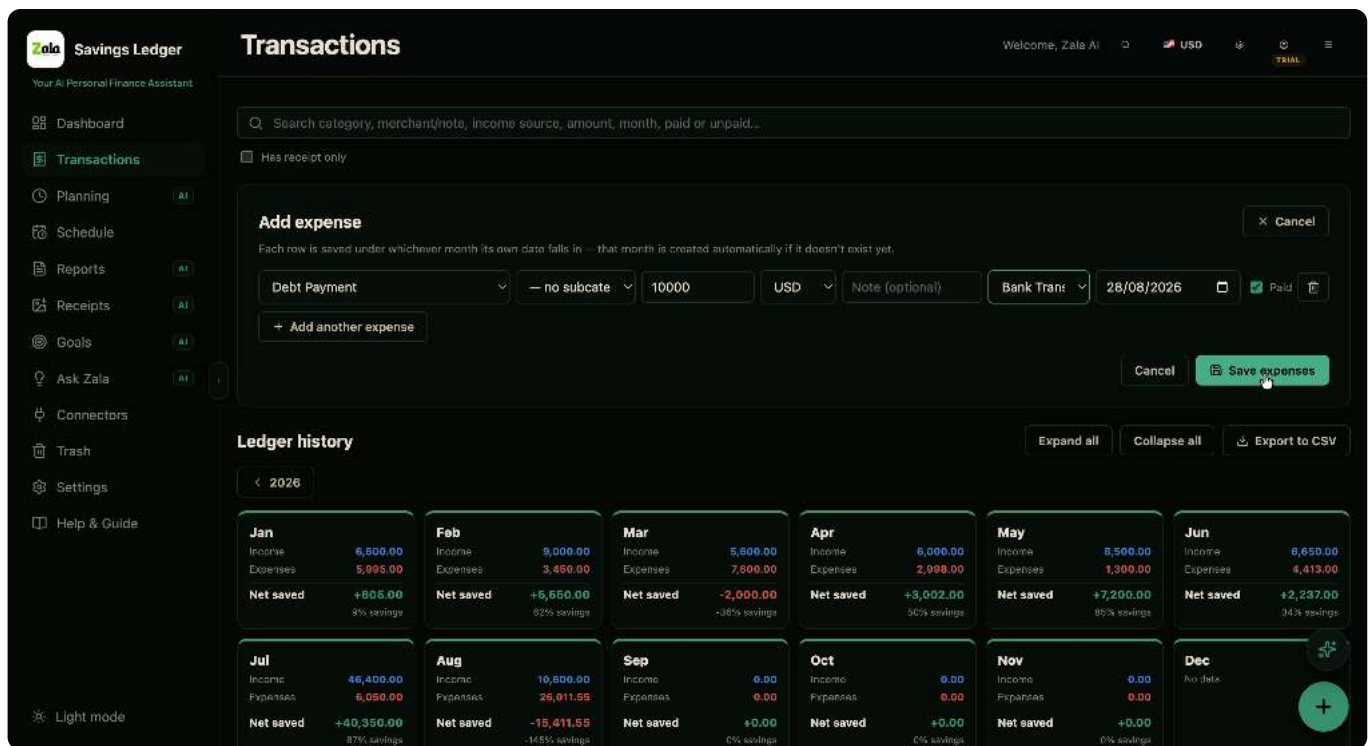
Specify the amount (e.g., 10,000).



Select the payment method (e.g., bank transfer).

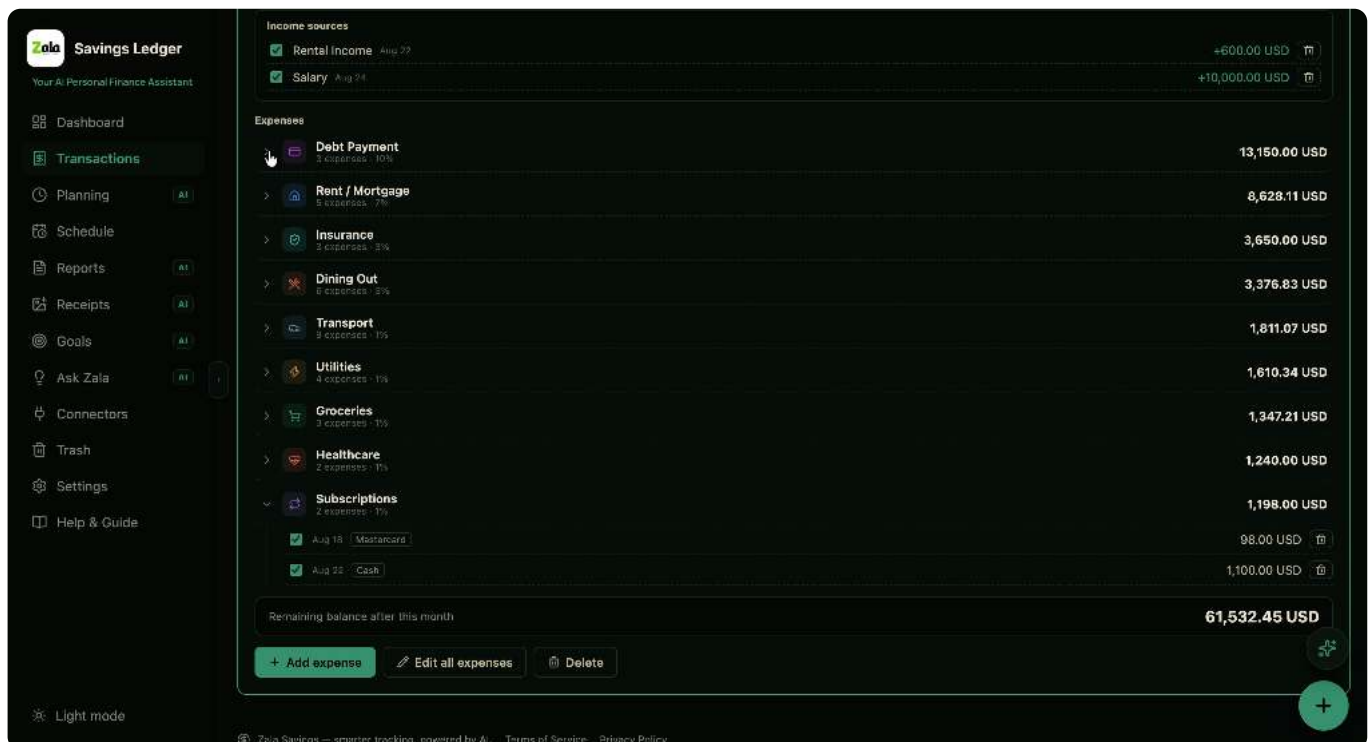


Save the transaction to record the expense or income.



Step 5: Verify the New Transaction in Its Category

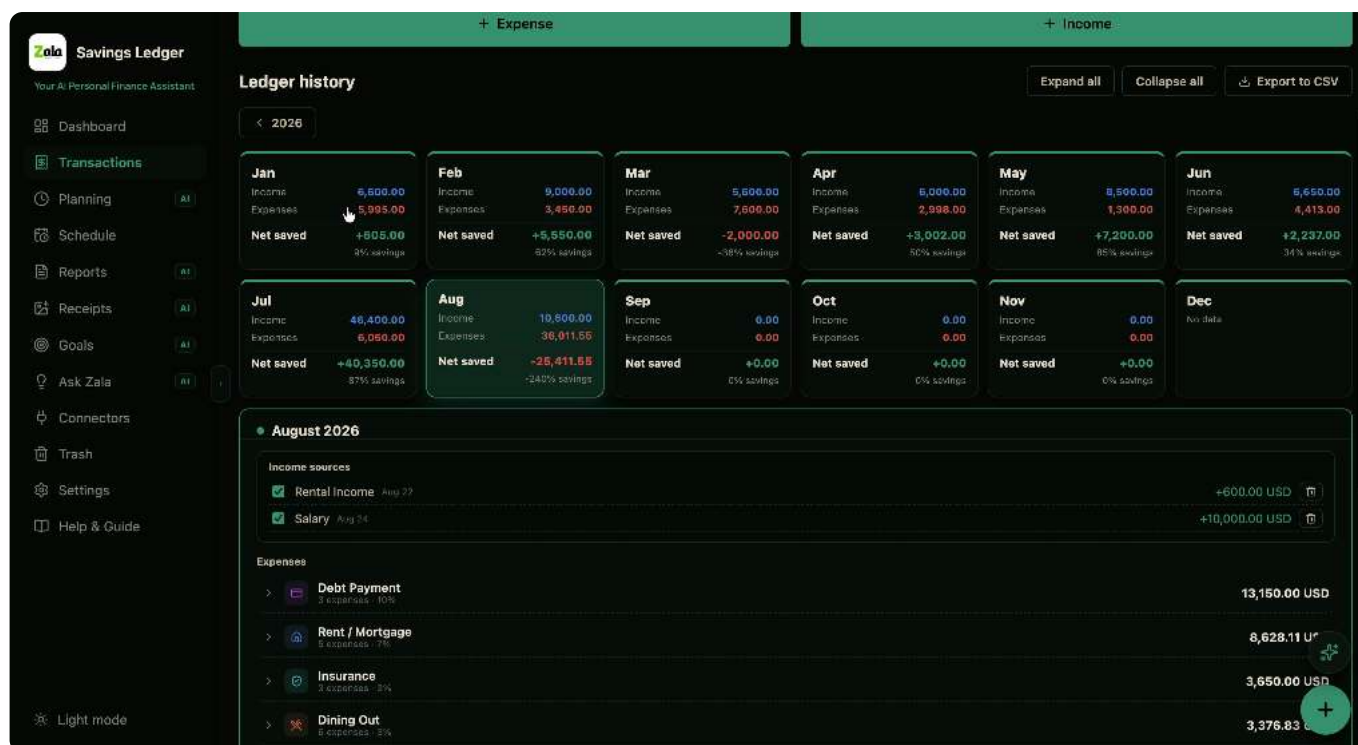
Navigate to the relevant category, such as "Debt payment," and confirm that the new transaction (e.g., 10,000) appears correctly.



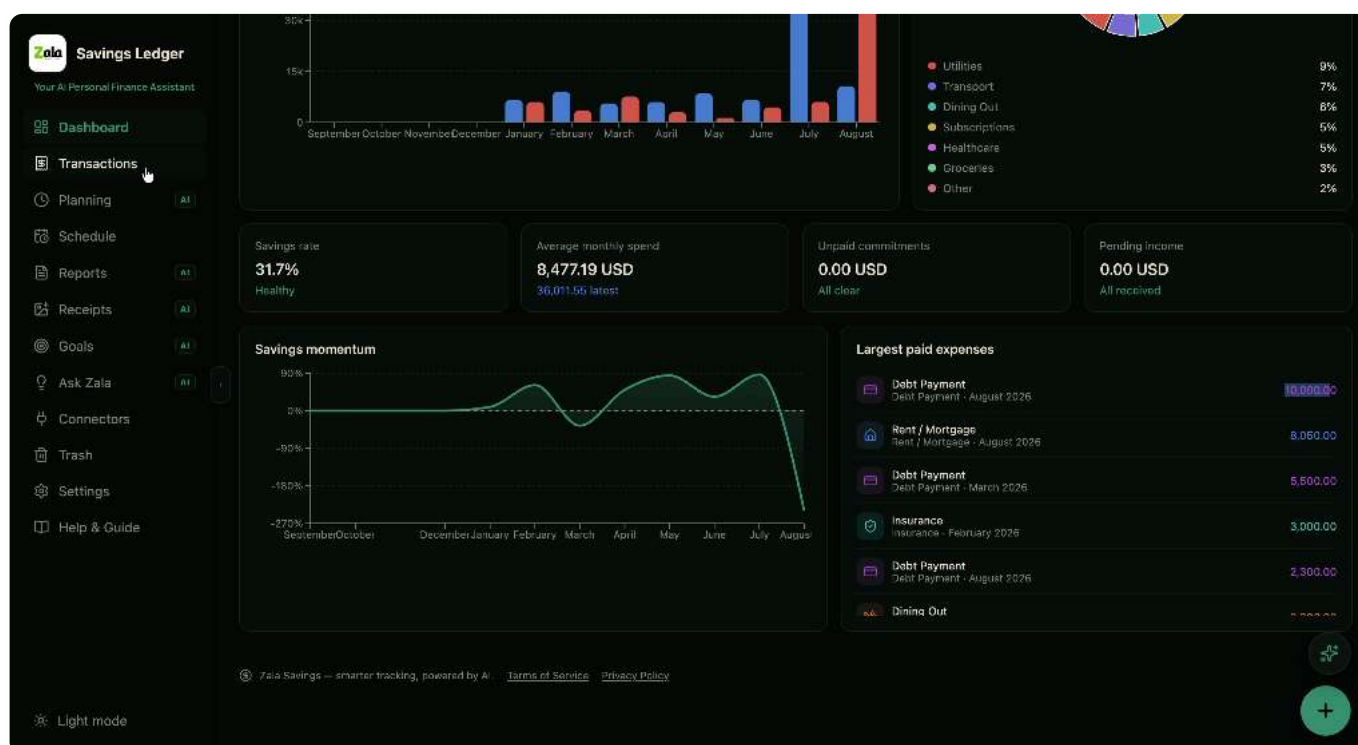
Note that transactions in this view are sorted by the highest amount, allowing you to quickly identify your largest entries.

Step 6: Review Real-Time Updates on the Dashboard

Open the dashboard to see all changes reflected in real time.

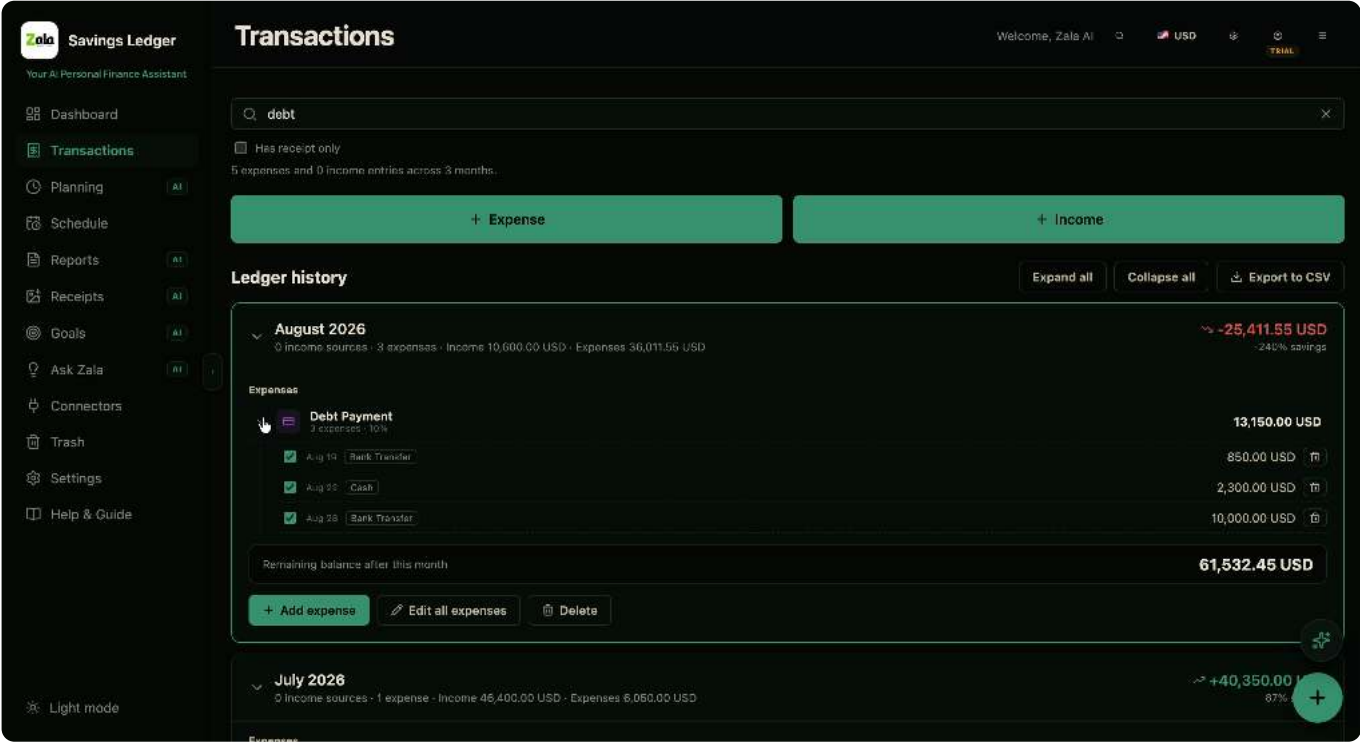
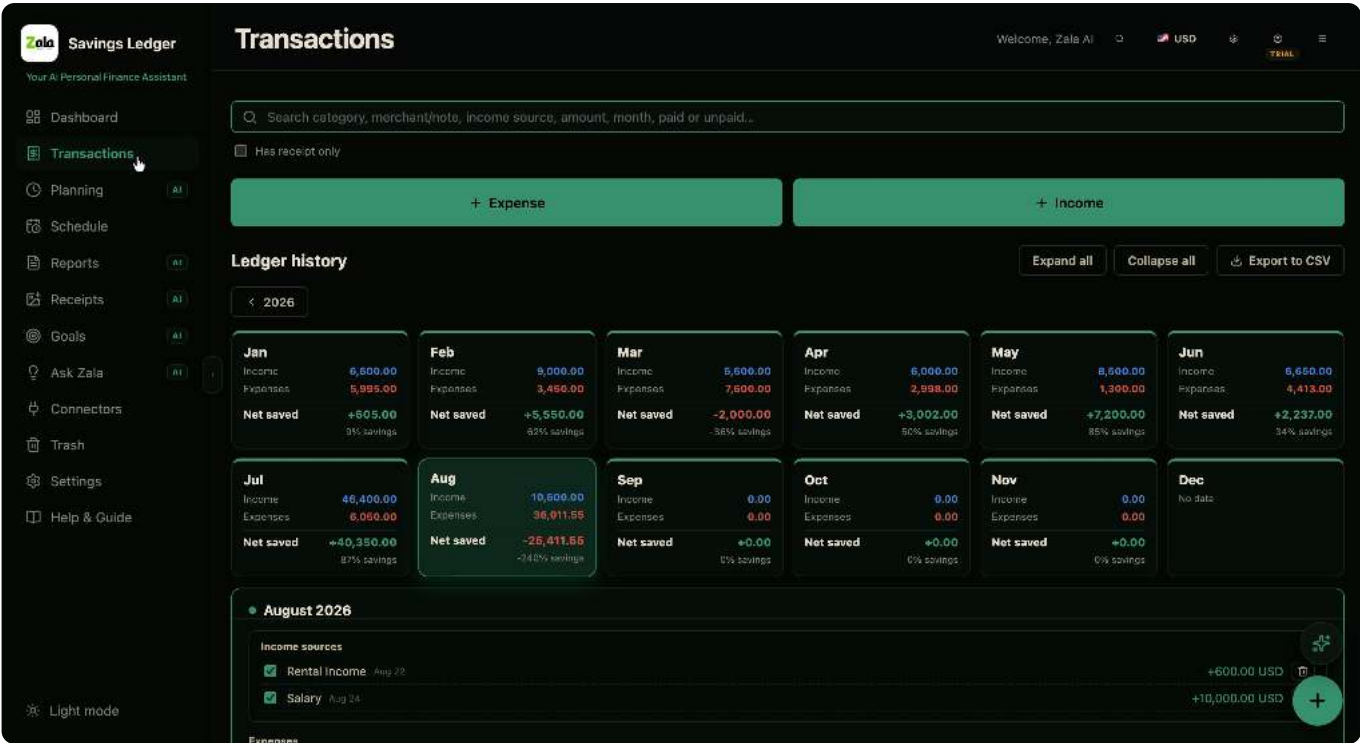


Scroll down to view the largest expenses over the last few months based on your selected filters. You will see the transaction you just entered included in this list, highlighting the importance of the Transactions tab where many key activities occur.



Step 7: Search Transactions Across All Months

Use the search function again within the Transactions tab to locate specific items, such as debts.



When you search for "debts," the system will display all related transactions across every month, not just the current one.



Transactions

Welcome, Zola AI

USD

TRIAL

debt

Has receipt only

5 expenses and 0 income entries across 3 months.

+ Expense

+ Income

Ledger history

Expand all

Collapse all

Export to CSV

August 2026

0 income sources · 3 expenses · Income 10,600.00 USD · Expenses 38,011.55 USD

-25,411.55 USD
-240% savings

Expenses

Debt Payment

3 expenses · 100%

13,150.00 USD

Aug 10 Bank Transfer

850.00 USD

Aug 22 Cash

2,300.00 USD

Aug 28 Bank Transfer

10,000.00 USD

Remaining balance after this month

61,532.45 USD

Add expense

Edit all expenses

Delete

July 2026

0 income sources · 1 expense · Income 46,400.00 USD · Expenses 6,050.00 USD

+40,350.00
87%