



Your business. One clear guide.

A quick start, then the full reference.

Calendar, Transactions, Reports and your account.

Local Phase 2 review · emulated data [Reset sample records](#) [Read-only account](#) [Active account](#) [Fail next save](#)

[Calendar](#) [Transactions](#) [Reports](#) [Account](#) ▼

YOUR RECORDS [Track now](#) [Refresh](#)

Transactions

Add, find, and correct income and expenses across all dates.

Search descriptions From

Through Currency

Type [Search](#)

[Clear filters](#)

Appointments are in [Calendar](#). Records in Trash are excluded. Currencies are kept separate.

Design consultation 2026-09-23 · Income	€55.00 EUR
Supplies 2026-09-23 · Expense	-\$45.00 USD
Consulting session 2026-09-23 · Income	\$240.00 USD

All 3 matching entries shown.

REAL SCREENS. FICTIONAL EXAMPLE RECORDS.

Customer edition 2.0 | September 23, 2026

For the current Profit Tracker workspace.

Find what you need

Start with page 3, then jump to the task you need. Topic names are clickable.

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About the examples

Screenshots show the actual September 23 app components with fictional records in an isolated local preview. The preview banner and example account are not part of your own account. Some images show only the relevant part of a screen.

This is a customer guide. Administrator tools are outside its scope. Account options vary with your access and billing history. Device-specific installation and notification availability can differ.

Your first entry to first report

Use your real activity. These amounts are examples, not records you need to create.

1. Save money received

Open **Track now**, choose **Income**, enter a positive amount and the currency, and check the **Payment date**. Add a description if useful. Select **Add entry** and wait for confirmation.

2. Add a cost, when relevant

Choose **Expense** and enter a positive amount. Record the date you paid it. Skip this step if you have no expense to record.

3. Check your net total

Close the editor and read Calendar's net totals. For example, USD 240 income minus USD 45 expenses gives USD 195 net profit. EUR 55 remains a separate total. An appointment's expected USD 150 price adds no income.

4. Find the record

Open **Transactions** in the header. Search part of your description, select the matching entry, and check its date, amount and currency.

5. Generate a report

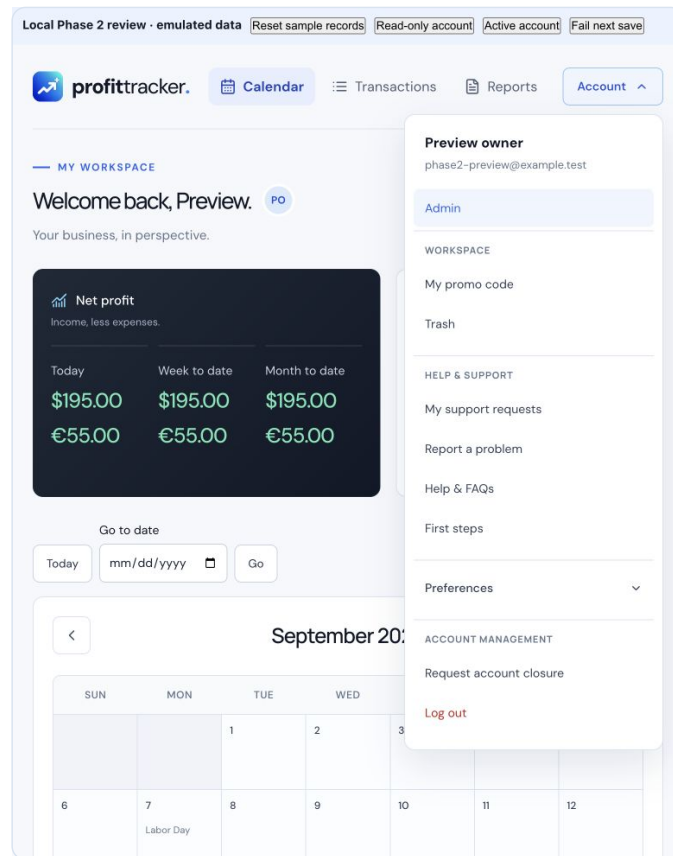
Open **Reports**, choose a period and select **Generate report**. Check the dates and currency sections before downloading a PDF. Generate again after correcting records.

Make it your own

First steps can be hidden or reopened from Account. You do not need to complete every step or create sample transactions.

Find your way around

Calendar stays your starting screen, with your totals and monthly Summary.



Account menu in the fictional preview. Admin and billing controls depend on the account.

Header destinations

Calendar combines the daily workflow, Today / Week to date / Month to date net totals, appointments, and monthly Summary. **Transactions** searches financial entries across dates. **Reports** opens the report controls directly. **Account** contains secondary tools and settings.

Choose a day

Use the month arrows, **Today**, or **Go to date** and **Go**. Select a calendar date to open its records. **Track now** opens today's editor, including from Transactions.

Account groups

Workspace contains My promo code and Trash. Help & support contains My support requests, Report a problem, Help & FAQs, and First steps. Expand Preferences for timezone, notifications and installation. Billing options appear when applicable; account closure and Log out are under Account management.

Record income and expenses

Select Income or Expense; enter a positive number for either type.

YOUR RECORDS

Wednesday, September 23, 2026

Add a record

☒ Income
 ☐ Expense
 ☐ Appointment

Amount

USD \$ 0.00

Enter a positive amount. Up to two decimal places; no thousands separators.

Description (optional)

Payment date

09/23/2026

Dates and totals use America/Los Angeles.

☐ Repeat

Add entry

Records for this day 4

Scheduled

Evening appointment

11:30 PM

America/Los_Angeles · 30 min · Reminder off

Expected price: \$150.00

Unpaid **Mark paid**

\$240.00

Consulting session

-\$45.00

Supplies

€55.00

Design consultation

Actual app screen with fictional example records.

Enter and save

Choose **USD** or **EUR**. Use up to two decimal places without thousands separators. Add an optional description, check **Payment date**, then select **Add entry**. Wait for acknowledged success before closing.

Choose the right record type

Use **Appointment** for scheduling, not for money already received. Use **Repeat** for a planned recurring income or expense; each occurrence still needs confirmation. New financial records require a valid nonzero amount.

Dates, currencies and totals

A financial record belongs to the day money was received or paid.

Payment date versus appointment date

A September 21 appointment paid on September 23 has a September 23 financial entry. Changing the appointment's date or status does not change its payment. Correct the linked financial entry if its payment date is wrong.

Reporting timezone

Open **Account > Preferences** to review the reporting timezone. It defines today and the boundaries used for daily totals. New financial payments cannot be dated in the future; use appointments or recurring schedules to plan ahead.

Separate currencies

USD and EUR are reported separately. The app does not apply an exchange rate. A USD 195 net total and EUR 55 net total are two figures, not USD 250.

What counts

Net profit is recorded income minus recorded expenses. Expected appointment prices and unconfirmed repeats do not count. Trashed financial records are excluded. A legacy zero-value entry counts as neither income nor expense unless you change its value.

Read the Summary

Calendar's Summary shows the selected month's reporting period, income, expenses, net profit and entry count. Check the displayed period, especially for the current month. Missing expenses or days with no records can make a report incomplete.

Find any financial entry

Search is not limited to the current calendar month.

The screenshot shows the 'Transactions' page in the Profit Tracker app. At the top, there's a status bar with 'Local Phase 2 review · emulated data' and buttons for 'Reset sample records', 'Read-only account', 'Active account', and 'Fail next save'. Below this is a navigation bar with the 'profittracker.' logo, a 'Calendar' icon, and tabs for 'Transactions' (selected), 'Reports', and 'Account'. The main content area is titled 'YOUR RECORDS' and 'Transactions'. It includes a 'Track now' button and a 'Refresh' button. Below these are search filters: 'Search descriptions' (text input), 'From' (date input 'mm/dd/yyyy'), 'Through' (date input 'mm/dd/yyyy'), 'Currency' (dropdown menu 'All currencies'), and 'Type' (dropdown menu 'All entries'). A 'Search' button is to the right of the 'Type' dropdown. A 'Clear filters' button is below the search filters. A note states: 'Appointments are in [Calendar](#). Records in Trash are excluded. Currencies are kept separate.' Below this is a table of transactions:

Design consultation 2026-09-23 · Income	€55.00 EUR
Supplies 2026-09-23 · Expense	-\$45.00 USD
Consulting session 2026-09-23 · Income	\$240.00 USD

At the bottom, it says 'All 3 matching entries shown.'

Actual app screen with fictional example records.

Search and filters

Open **Transactions**. Search part of a description, regardless of capitalization. Use **From**, **Through**, **Currency** and **Type**, then **Search**. **Clear filters** returns to all entries, newest first. Filters remain in the URL when you open and close a record.

Finish the search

If **Continue searching older records** appears, the search is not finished. Continue until the page confirms all matches are shown. Loading or failed loading is not the same as no matches. Appointments and Trash are separate destinations; legacy zero-value entries have their own filter.

Correct a saved record

Use the existing editor from Calendar or select a record in Transactions.

YOUR RECORDS

Wednesday, September 23, 2026

Edit record

☒ Income ☐ Expense

Amount

USD \$ 240

Enter a positive amount. Up to two decimal places; no thousands separators.

Description (optional)

Consulting session

Payment date

09/23/2026

Dates and totals use America/Los Angeles.

Save changes **Cancel**

Records for this day 4

Scheduled

Evening appointment
11:30 PM
America/Los_Angeles · 30 min ·
Reminder off
Expected price: \$150.00

Unpaid **Mark paid**

\$240.00
Consulting session

-\$45.00
Supplies

€55.00
Design consultation

Actual app screen with fictional example records.

Correct and confirm

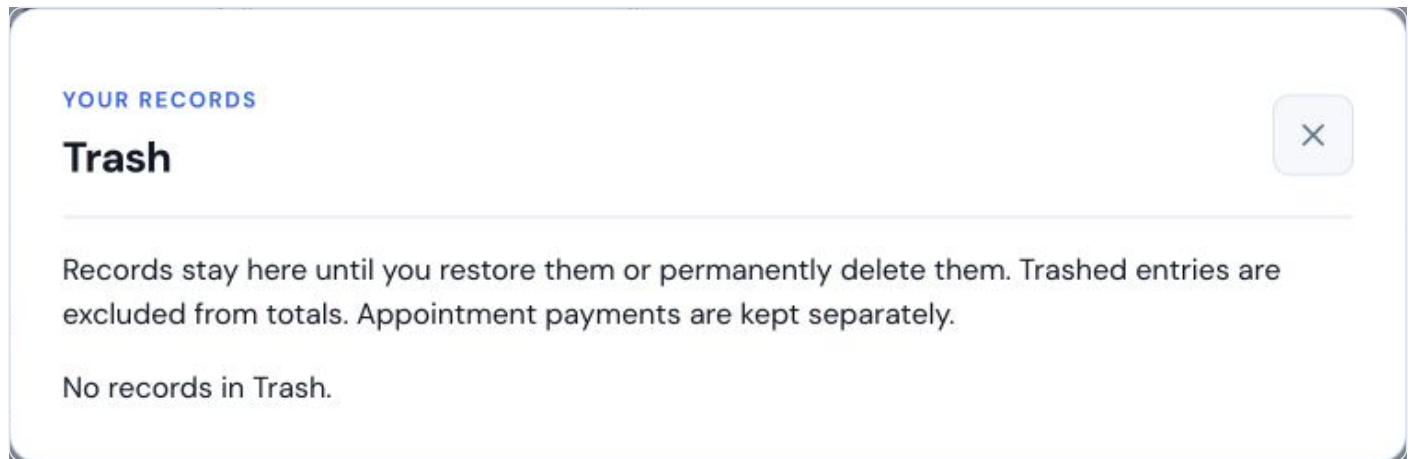
Update the amount, currency, description or **Payment date** and select **Save changes**. Use the date money actually changed hands. A changed date may move the record to a different day, month or year.

Check the result

Review the saved record and Calendar totals, then generate the affected report again. Previously downloaded PDFs do not change. If another edit conflicts with yours, review the latest saved record before retrying; see page 15.

Remove and restore records

Use Trash when a record should no longer contribute to your totals.



Actual app screen with fictional example records.

Remove and recover

Use the record's delete control. Select **Undo** while the confirmation is visible, or open **Account > Trash** and select **Restore**. Confirm that the record and totals have returned.

Understand the separate records

Trashing an appointment keeps its recorded payment. Trashing a financial entry removes that amount from totals. Trashing or permanently deleting a confirmed recurring payment does not make its occurrence pending again.

Permanent deletion

Records stay in Trash until restored or permanently deleted. **Delete permanently** requires confirmation and cannot be undone. Read-only accounts cannot restore or delete records.

Schedule an appointment

Planning an appointment does not record income.

YOUR RECORDS

Wednesday, September 23, 2026

Add a record

☐ Income
 ☐ Expense
 ☒ Appointment

Expected price (optional)

USD \$

Planning a price does not record income. Record payment when money is received.

Description (optional)

Appointment date

Appointment status

Appointment time

Save appointment

Records for this day 4

Scheduled

Evening appointment
11:30 PM
America/Los_Angeles · 30 min ·
Reminder off
Expected price: \$150.00
Unpaid **Mark paid**

\$240.00
Consulting session

-\$45.00
Supplies

€55.00
Design consultation

Actual app screen with fictional example records.

Schedule it

Select a date, choose **Appointment**, and add a description. An **Expected price** is optional. Check the appointment date and time. Expand **Timezone, duration & reminder** to check these settings, then select **Save appointment**.

Status is not a payment

Scheduled, Completed, Canceled and No-show describe the appointment. Marking it Completed does not add income; canceling it does not remove a payment already recorded. Use the payment workflow on page 11.

Record an appointment payment

Record the payment when money is actually received.

The screenshot shows a mobile app interface for recording payments. At the top, it says 'YOUR RECORDS' and 'Wednesday, September 23, 2026'. The main section is titled 'Record payment'. It has two input fields: 'Amount' with a dropdown for 'USD \$' and a text box containing '150', and 'Payment date' with a date picker showing '09/23/2026'. Below these is a blue 'Record payment' button and a grey 'Cancel' button. To the right, there's a panel titled 'Records for this day' with a count of '4'. It lists three items: 'Scheduled' (Evening appointment, 11:30 PM, America/Los_Angeles, 30 min, Reminder off, Expected price: \$150.00, Unpaid, Mark paid), '\$240.00' (Consulting session), and '-\$45.00' (Supplies). At the bottom of the list is '€55.00' (Design consultation). Each item has edit and delete icons.

Actual app screen with fictional example records.

Mark paid

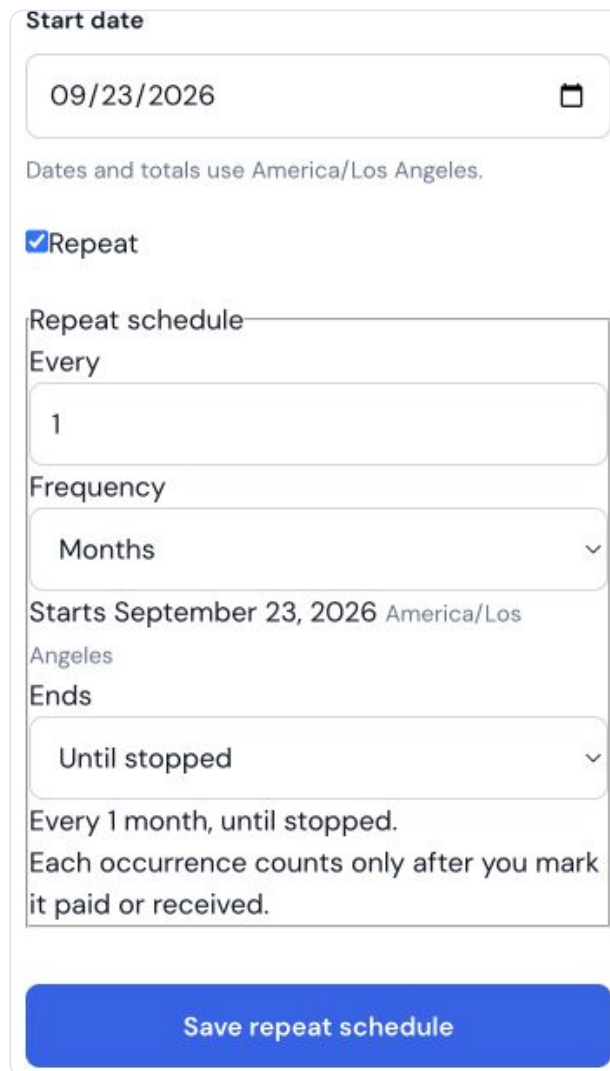
Open the appointment and select **Mark paid**. Review the amount, currency and **Payment date**, then select **Record payment**. Wait for confirmation. This creates a separate financial entry linked to the appointment.

Avoid counting it twice

If the payment is already recorded, inspect its linked financial entry rather than adding another income entry. Older records may be labeled **Already recorded**. Correct the financial entry when payment details are wrong; changing the appointment does not correct the payment.

Repeat without counting twice

Expected recurring amounts count only after you confirm them.



The screenshot shows a mobile app interface for setting a recurring schedule. At the top, there's a 'Start date' field with a calendar icon, showing '09/23/2026'. Below this, a note says 'Dates and totals use America/Los Angeles.' A checkbox labeled 'Repeat' is checked. Under 'Repeat schedule', there's a section for 'Every' with a field containing '1'. Below that, a 'Frequency' dropdown menu is set to 'Months'. The start date is confirmed as 'Starts September 23, 2026 America/Los Angeles'. An 'Ends' dropdown menu is set to 'Until stopped'. A summary line reads 'Every 1 month, until stopped.' Below that, a note states 'Each occurrence counts only after you mark it paid or received.' At the bottom is a blue button labeled 'Save repeat schedule'.

Actual app screen with fictional example records.

Create the schedule

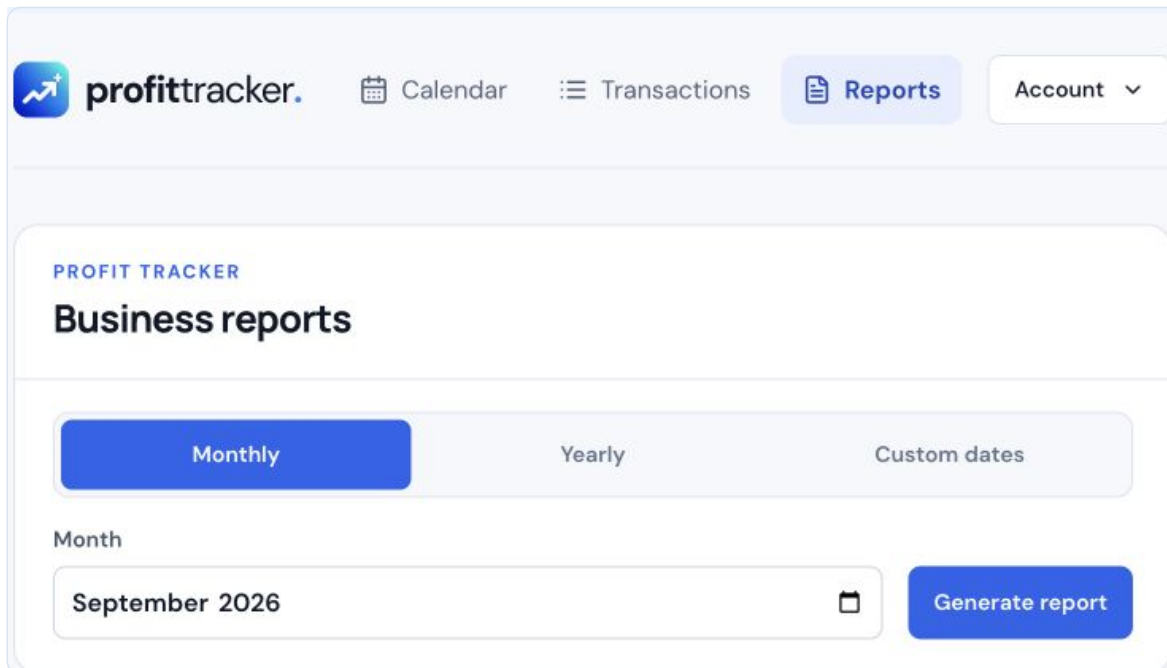
Choose Income or Expense, enter the positive amount and currency, and enable **Repeat**. Check the start date, interval, frequency and end condition. Select **Save repeat schedule**.

Confirm or change an occurrence

For a pending occurrence, use **Mark received** for income or **Mark paid** for an expense, then confirm the actual amount and payment date. **Skip this occurrence** leaves later repeats scheduled. **Edit this and future occurrences** or **Stop future repeats** changes the schedule, not payments already recorded.

Generate the right report

Reports are available directly in the header.



Actual app screen with fictional example records.

Choose the period

Select **Monthly**, **Yearly**, or **Custom dates**. Set the month, year or date range, then select **Generate report**. Check the title and displayed start/end dates.

Refresh after a correction

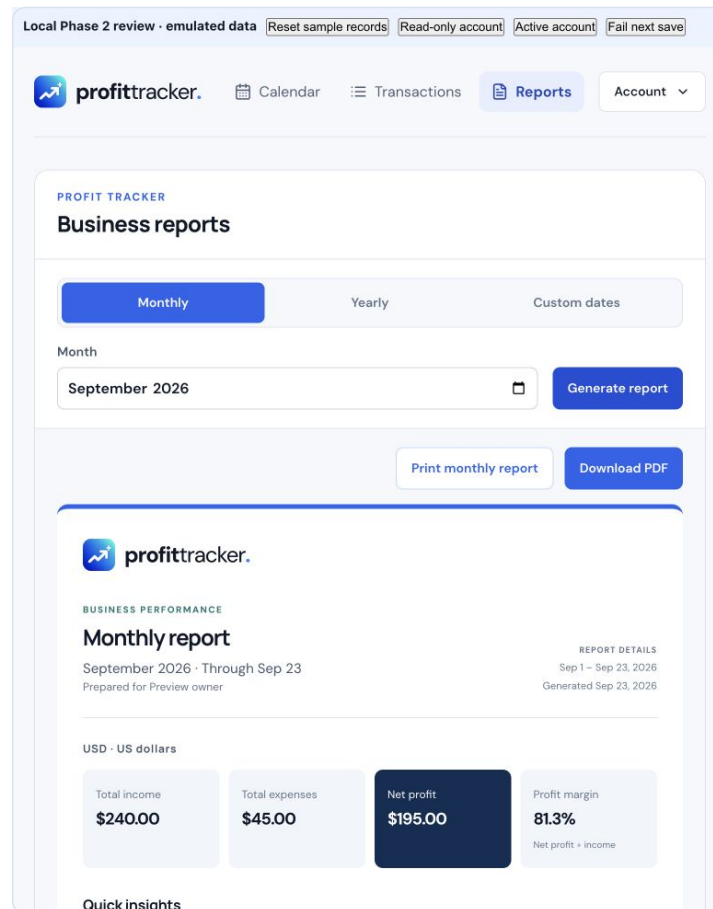
If you change the period controls or correct a record, generate the report again. The payment date determines whether a financial entry falls in the selected period. Appointments and expected repeats are not received income.

If nothing appears

Check the account, currency, date range and whether the payment was actually recorded or moved to Trash. A failed load is not an empty report; retry after checking the connection.

Read, download and print

Review the figures before sharing or printing.



Actual app screen with fictional example records.

Read each currency separately

Reports include income, expenses, net profit, comparisons, breakdowns and transaction details. Insights describe the records present; they cannot discover costs you did not enter. Read any data-quality notes.

Save a copy

Select **Download PDF**, or use the report's **Print** control and your browser's print dialog. Open the resulting file and check the period and totals. Saved copies do not update when records change.

What the report is not

Reports are informational summaries, not tax filings or a full export of your account. CSV and full account-data exports are not provided. For account-data questions, contact support.

Know when a save succeeded

A connection indicator alone does not confirm that a write succeeded.

Saving and saved

While **Saving...** is shown, wait. Treat an entry as saved only after the app acknowledges success and refreshes the record. Avoid submitting the same information again in another tab.

An uncertain save

Keep the form open. If **Retry save** appears, retry that submission. Your original input is retained; fields may be locked until the uncertain request is confirmed. Retrying the same form helps avoid a duplicate create. Reloading can lose an unsaved draft.

Another edit changed the record

For a revision conflict, choose **Review latest saved record**. Compare the saved version with your attempted edits, which stay in the form. Use **Keep my changes and use this revision** only after checking the difference, then save again.

Cached or unavailable information

A freshness warning means the app cannot confirm that cached records are current. Refresh when the connection returns. There is no offline write queue; do not assume reconnecting has submitted an unsaved record.

Other forms

Recurring actions and support forms also retain input after failures. Follow the form's retry message. For a saved support request, use its reference and history instead of submitting another report.

Guidance, installation and reminders

Settings live in Account. Permission is always your choice.

Optional First steps

Open **Account > First steps** to resume guidance. Save real income, record an expense only when relevant, and view the net total. Choose **Hide guidance** when you no longer need it. No sample records are required.

Installation

Use **Account > Preferences > Add to Home Screen** when available. Installation may also be offered after a successful real entry and updated total. Follow the app's instructions for your browser. On iPhone or iPad, use the browser's Share menu and Add to Home Screen; open the installed app to set up supported reminders.

Notification setup

Saving an appointment with a reminder may offer setup. You can also use **Account > Preferences**. Select **Enable notifications** to request permission. Denied or unsupported notifications do not prevent saving an appointment. A permission choice applies to the browser/device you are using.

If a reminder does not arrive

Check the appointment time and timezone, reminder selection, browser permission and device settings. Older appointments may need a timezone confirmed. Delivery depends on support and connectivity; it is not guaranteed. Use another reminder method when needed.

Reporting timezone

Review the reporting timezone in Preferences when daily boundaries look wrong. It is distinct from the timezone attached to a scheduled appointment.

Account access and billing

Sign in with your usual Google account to find your own records.

Trial and subscription

Complete payment setup to begin an eligible signup trial. The standard trial is 15 days; the selected plan renews after the trial unless canceled. Read the actual checkout terms and [billing policy](#) for prices, offers and cancellation details.

Manage or cancel billing

Open **Account > Subscription & billing** when available. **Manage subscription** opens billing settings for payment methods and invoices. **Cancel subscription** stops the next renewal; access continues through the trial or current paid period. Canceling does not erase records.

When tracking access expires

Existing records and reports remain readable. Adding, editing, trashing, restoring or permanently deleting records requires active tracking access. If the access shown seems wrong, check the signed-in account and contact support.

Personal promo codes

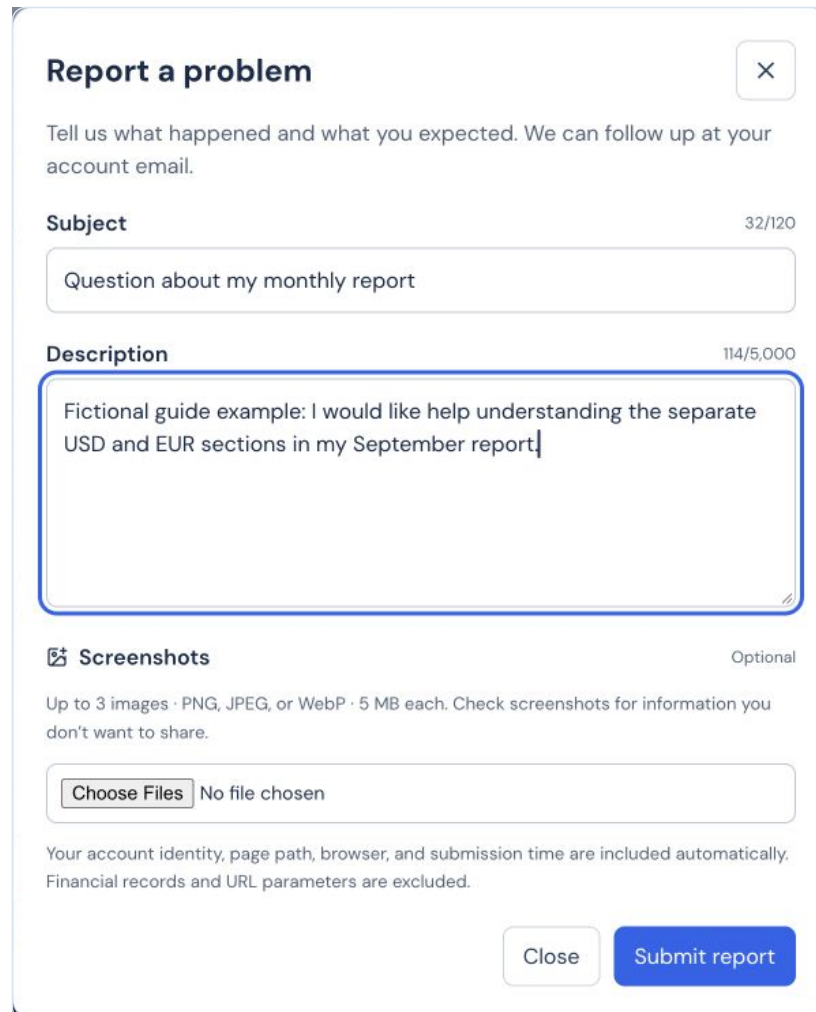
Open **Account > My promo code** to find your code and claim list. An eligible personal invite adds 15 days to a new customer's standard trial when applied before first checkout. The inviter earns 15 free days after the invited customer's first qualifying subscription payment, not just a trial signup. See [invite terms](#).

Account closure is separate

A closure request starts a review. It does not cancel billing or delete records. See page 20 before submitting one.

Report a problem

Use Account > Report a problem, or the button in My support requests.



The screenshot shows a mobile app interface for reporting a problem. At the top, there's a title bar with 'Report a problem' and a close button (X). Below the title bar, a message says: 'Tell us what happened and what you expected. We can follow up at your account email.' The form has two main sections: 'Subject' and 'Description'. The 'Subject' section has a text input field with the placeholder 'Question about my monthly report' and a character count '32/120'. The 'Description' section has a larger text input field with the placeholder 'Fictional guide example: I would like help understanding the separate USD and EUR sections in my September report' and a character count '114/5,000'. Below the description field, there's a section for 'Screenshots' with a camera icon and the word 'Optional'. It says 'Up to 3 images · PNG, JPEG, or WebP · 5 MB each. Check screenshots for information you don't want to share.' There's a 'Choose Files' button and a 'No file chosen' status. At the bottom, there's a 'Close' button and a blue 'Submit report' button. A small note at the bottom states: 'Your account identity, page path, browser, and submission time are included automatically. Financial records and URL parameters are excluded.'

Actual app screen with fictional example records.

Describe what happened

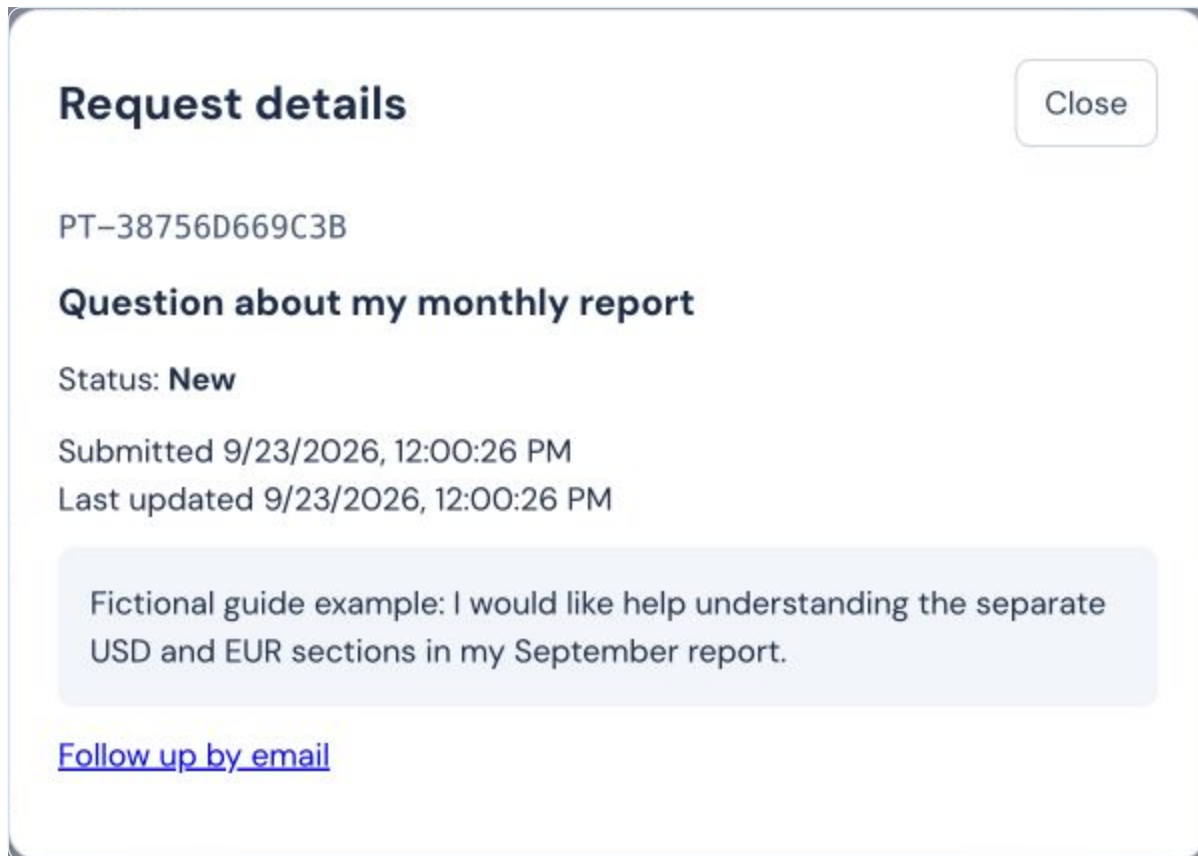
Enter a subject and description. Explain what you expected, the page involved, and the relevant dates. Attach up to three PNG, JPEG or WebP screenshots, each 5 MB or smaller. Remove sensitive information before sharing them.

Submit and keep the reference

Select **Submit report**. After **Report saved**, keep the reference and open **View my support requests**. If submission fails, follow **Retry report**; the original report may be retained for a safe retry. Never send passwords, authentication codes or full card numbers.

Follow your support requests

A status update and an email reply are different things.



Actual app screen with fictional example records.

Read the request

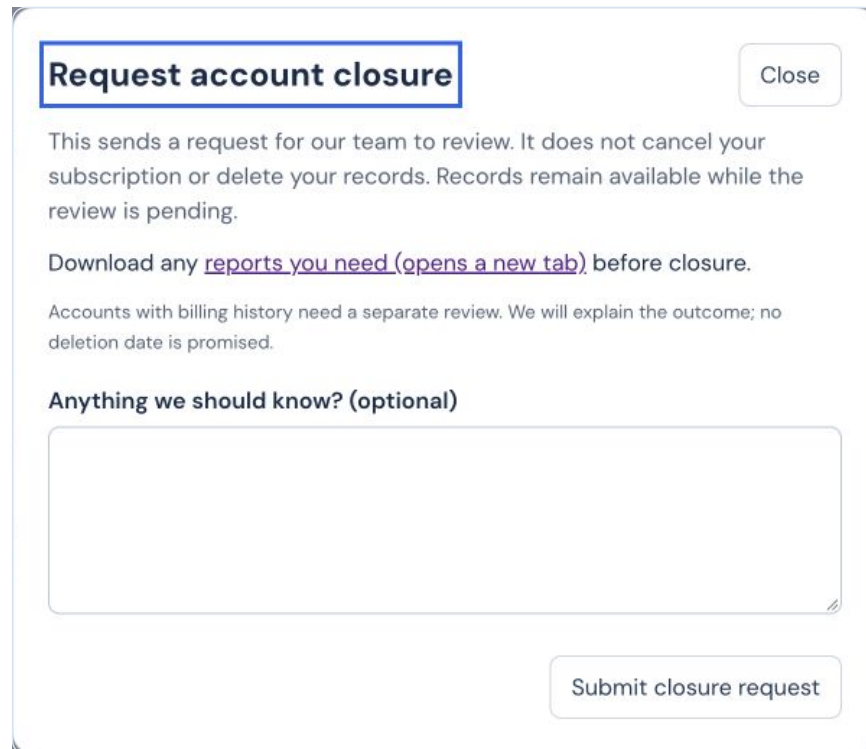
Open **Account > My support requests**. Select a request to see its reference, description, attachments, status, submission and last-update times, and any public review outcome. Use **Refresh status** to check again. Statuses are New, In progress and Resolved; private admin notes are not included.

Follow up manually

Select **Follow up by email** to open a draft addressed to support with the reference in the subject. This does not send it. Review and send from your email app. Follow-up is manual, with no fixed response-time promise. If you cannot sign in, email info@profittracker.net with your account email and reference.

Request account closure

Requesting a review does not cancel billing or delete records.



The screenshot shows a mobile app interface for requesting account closure. At the top, there's a title bar with 'Request account closure' on the left and a 'Close' button on the right. Below the title bar, the text reads: 'This sends a request for our team to review. It does not cancel your subscription or delete your records. Records remain available while the review is pending.' This is followed by a line: 'Download any [reports you need \(opens a new tab\)](#) before closure.' Then, another line: 'Accounts with billing history need a separate review. We will explain the outcome; no deletion date is promised.' Below this is a section titled 'Anything we should know? (optional)' with a large, empty text input area. At the bottom right, there is a 'Submit closure request' button.

Actual app screen with fictional example records.

Before you submit

Open **Account > Request account closure**, or **Request a closure review** in My support requests. Download reports you need and manage your subscription separately. Add any useful explanation, then select **Submit closure request**.

While review is pending

Records are retained while the request is reviewed. One outstanding closure request is allowed per account. Billing-linked accounts need separate review; no deletion date is promised.

Read the outcome

Follow the request in My support requests. **Resolved** describes the review status. It does not itself mean the account has been deleted or the subscription canceled. Read the public outcome and follow up by email if anything is unclear.

Troubleshoot your records

Check the record, date and currency before assuming a calculation is wrong.

An appointment is missing from income

An appointment or expected price is not a payment. Look for its linked financial entry and the actual payment date. Do not add another income entry if payment is already recorded.

A repeat is missing from totals

An expected occurrence counts only after it is marked paid or received. If its confirmed payment is in Trash, restore that payment instead of recording the occurrence again.

An entry seems missing

In Transactions, clear filters and search its description. Continue older searches until complete. Check Trash, the signed-in account and the corrected payment date. Appointments are in Calendar, not Transactions.

The totals or PDF seem outdated

Wait for acknowledged saves and refreshed records. Check timezone, date range and currency. Generate a report again, download a new copy, and check its dates. Previously downloaded files are snapshots.

A form will not save

Read the validation message. Choose a positive amount, a supported currency and a valid payment date; new payments cannot be future-dated. If access is read-only, check subscription access. For uncertain saves, keep the form open and use its retry control.

I need more help

Use the FAQ or submit a support request with the page, expected result and actual result. Include the support reference when following up, without passwords or full payment-card details.

Useful links and daily checklist

Keep this guide nearby; use the live app for your current account state.

Daily checklist

Record money when it is received or paid. Keep appointments separate. Confirm recurring occurrences only when paid or received. Review totals in each currency. Correct mistakes before generating the report you intend to share.

Open a destination

[Calendar](#) | [Transactions](#) | [Reports](#) | [My support requests](#)

[FAQ](#) | [Support](#) | [Billing policy](#) | [Privacy](#)

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About this edition

Edition 2.0, September 23, 2026. Instructions were checked against the current customer app source and local rendered workflows. Screenshots use fictional demonstration records, not customer financial information. The local preview banner identifies the screenshot environment.

Device differences

Layouts and available controls depend on screen size, browser, permissions and account access. This guide does not promise notification delivery or certify a particular phone/browser setup. Follow the prompts on your device.

Keep the latest copy

Download the current guide from the FAQ or Support page. Your downloaded copy will not automatically update when this guide or the app changes.