



FINACIAL BUDGET GUIDE

FINACIAL DASHBOARD / PRO

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iStreamToFly



SETUP GUIDE

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BUDGET GUIDE INTRODUCTION

Important Information on Digital Products

We appreciate your interest in our digital products, particularly those in Excel file format (XLSM/XLSB). To ensure a smooth experience, we'd like to provide you with important information, expectations, and requirements for using these files:

File Format Compatibility:

- Our Excel files are available in the [XLSM](#) (Macro-Enabled Workbook) and XLSB (Binary Workbook) formats.
- Before purchasing, please ensure that your version of Microsoft Excel or other compatible software supports these file formats.

Macro Functionality:

- XLSM files may contain macros for enhanced functionality. Ensure that your security settings in Excel allow for the execution of macros if present.
- XLSB files are binary files that can store macros as well.

System Requirements:

- Verify that your operating system and Excel version meet the system requirements for opening XLSM/XLSB files.
- Compatibility may vary between Excel versions (e.g., Excel 2007, 2010, 2013, 2016, [2019](#), [Microsoft 365](#)).
- A minimum of 3.2GHz 6 Multi-Threaded Core CPU processor with 8GB RAM. Below this standard is NOT recommended.

File Modification:

- [XLSM](#)/[XLSB](#) files are designed for use as-is. Any modification of the file may affect functionality, especially if it involves altering macros or binary data.

Support and Assistance:

- If you encounter any issues or have questions about the file after purchase, please contact our support team for assistance.
- We recommend reaching out before making any significant modifications to the file.

Backups:

- It's advisable to create a backup of the original file before making any changes to ensure data preservation.

License and Usage:

- Review the terms of the license agreement associated with the purchase to understand the allowed usage, distribution, and modification rights.

By adhering to these guidelines and view the [View Product Policy Agreement](#), you'll optimize your experience with our digital products. If you have any specific questions or concerns, please feel free to reach out to our support team.

Thank you for choosing our digital products. We look forward to serving you. Please contact our Chat Support Services from our [home page](#) for more immediate response.

Best regards,
iStreamtofly



Target Goals

Automatically obtain focus on financial goals and maintain objective target



Documentation

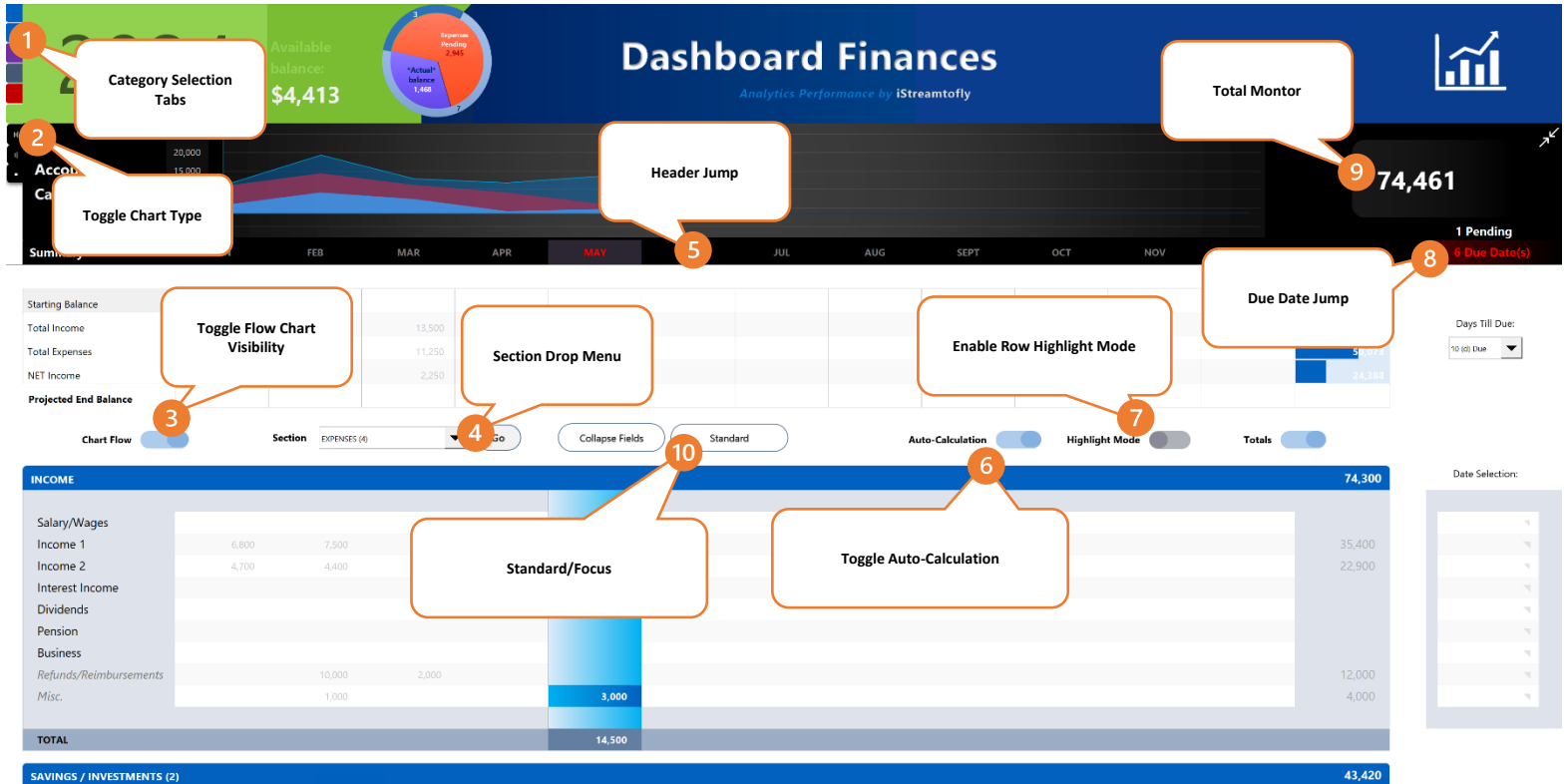
Keep records from previous years, ledger planner and maintain scheduling



Description

Observe your financial progress and algorithm projections

Budget Overview



1 Category Selection Tabs:
Effortlessly navigate to each table section with intuitive category selection tabs, streamlining access to specific data sets.

2 Toggle Chart Type:
Switch between viewing a transparent line graph area or a 3D signal bar chart for Income, Expense, and Savings categories. This feature offers visual flexibility to cater to different data presentation preferences.

3 Toggle Flow Chart Visibility:
Quickly show or minimize the flow chart to achieve a compact display view, optimizing screen real estate and enhancing user experience.

4 Section Drop Menu:
Access table sections and view due items count with ease using the Section Drop Menu, facilitating efficient navigation and data retrieval.

5 Header Jump:
Effortlessly navigate to the top of the page with the Header Jump feature, ensuring swift access to key information and enhanced usability.

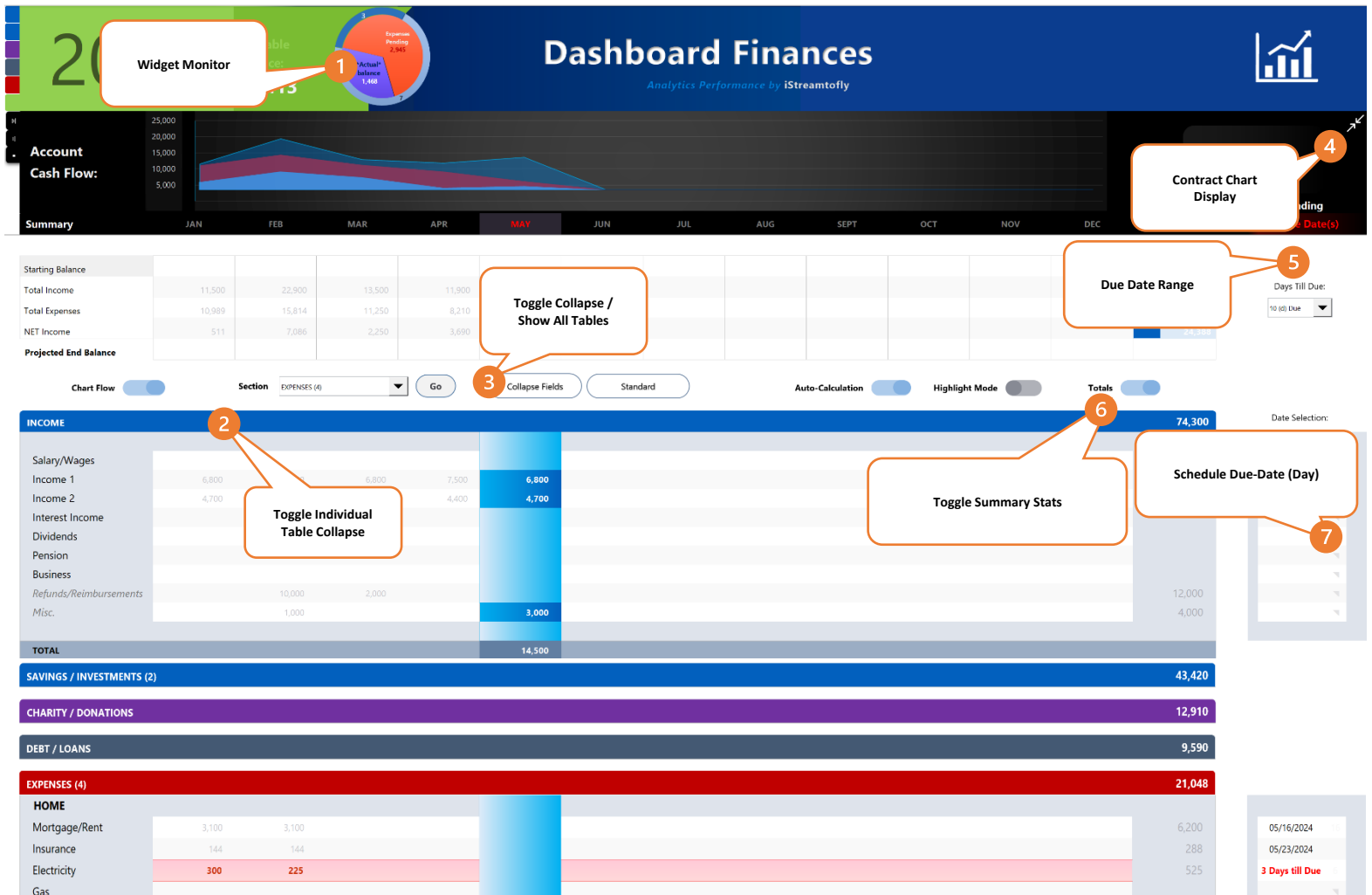
6 Toggle Auto-Calculation:
Choose to enable real-time calculation for dynamic updates or disable to perform periodic calculations, providing flexibility in managing computational processes based on user preferences and system requirements.

7 Enable Row Highlight Mode:
Activate the blue highlighter on selected rows with the Enable Row Highlight Mode option, facilitating clear visibility and easier tracking of important data points within tables.

8 Due Date Jump:
Efficiently locate the next urgent due date item with the Due Date Jump feature, ensuring timely attention to priority tasks and deadlines.

9 Total Monitor:
Utilize the 6-way toggle view of Income, Expenses, Year-to-Date (YTD), and Dual perspectives with the Total Monitor, enabling comprehensive analysis and comparison of financial data for informed decision-making.

10 Standard/Focus:
Switch between Standard and Focus modes to adjust attention span across the entire budget form, bringing current events to an obvious view state. This feature enhances usability and facilitates focused engagement with key data points.



1 Widget Monitor:
Efficiently track pending and completed items while gaining insights into upcoming expenses and actual net balance. The Widget Monitor provides a clear overview of financial activities, empowering users to stay organized and informed about their financial status.

2 Toggle Individual Table Collapse:
Easily collapse or hide specific tables by clicking the header beam, while retaining the total sum of the table on the right side. This feature allows users to customize their display view for enhanced readability and focus on pertinent information.

3 Toggle Collapse / Show All Tables:
Toggle between showing or minimizing all tables to achieve a compact display view. This functionality provides flexibility in managing screen real estate, enabling users to tailor the interface according to their preferences and workflow.

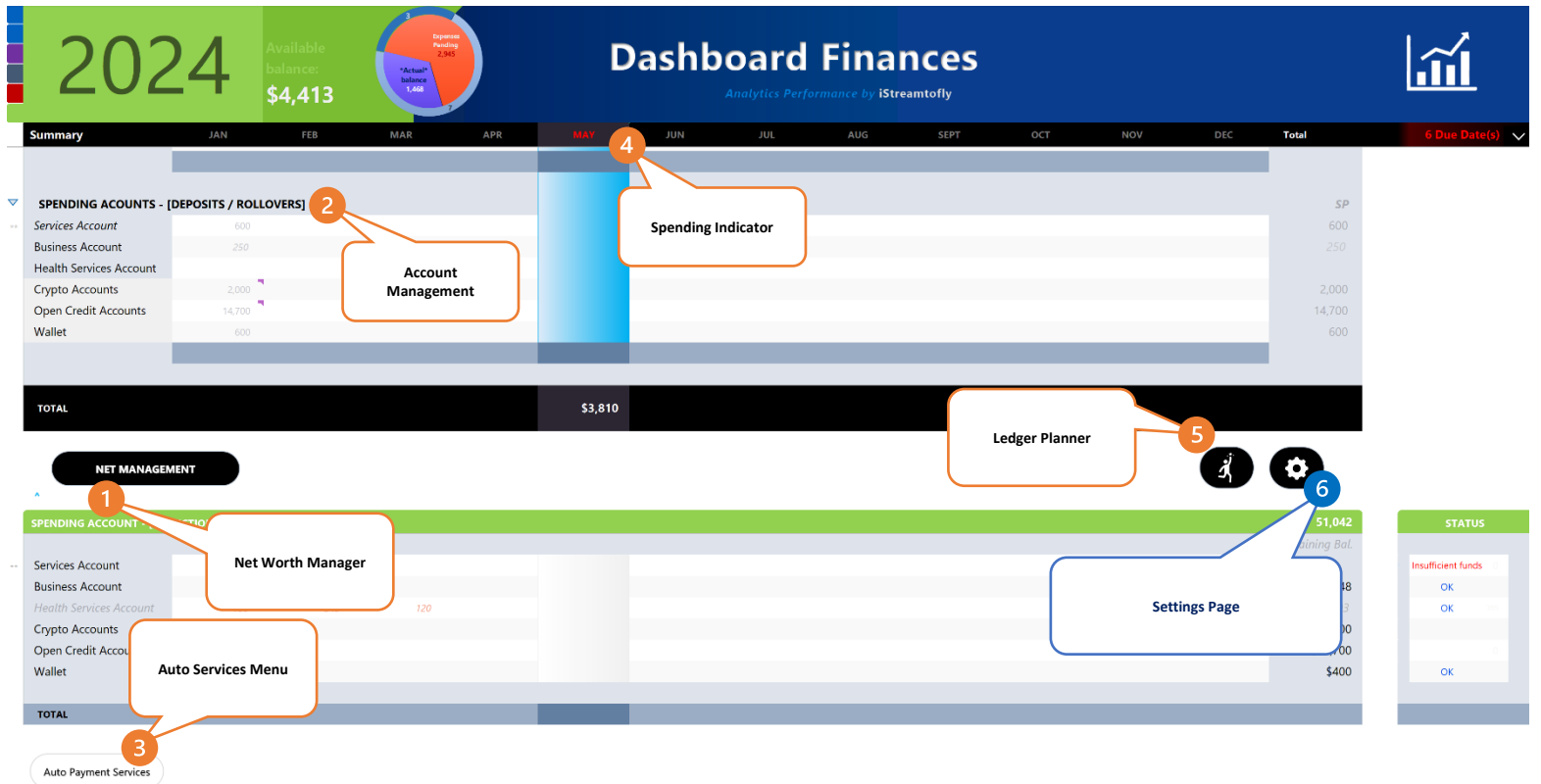
4 Contract Chart Display:
Effortlessly collapse or expand the chart view as needed for convenient data visualization and analysis.

5 Due Date Range:
Select a date number to specify the target scope for upcoming items due, enabling precise scheduling and planning.

6 Toggle Summary Stats:
Activate to display total values on each table and enable a mini bar chart for the main summary header table. This feature enhances the comprehensiveness of data monitoring and analysis.

7 Schedule Due-Date (Day):
Click on the triangle symbol (▼) to set a due date for row items, facilitating efficient organization and task management.

Budget Management Controls



1 Net Worth Manager:
Efficiently track assets and liabilities by registering any specified items as available resources. This feature allows users to maintain a comprehensive overview of their financial standing, empowering informed decision-making and strategic planning.

2 Account Management:
Register unique account(s) as available resource containers and manage transactions seamlessly. Users can easily balance deposits and withdrawals, ensuring accurate accounting and effective financial management.

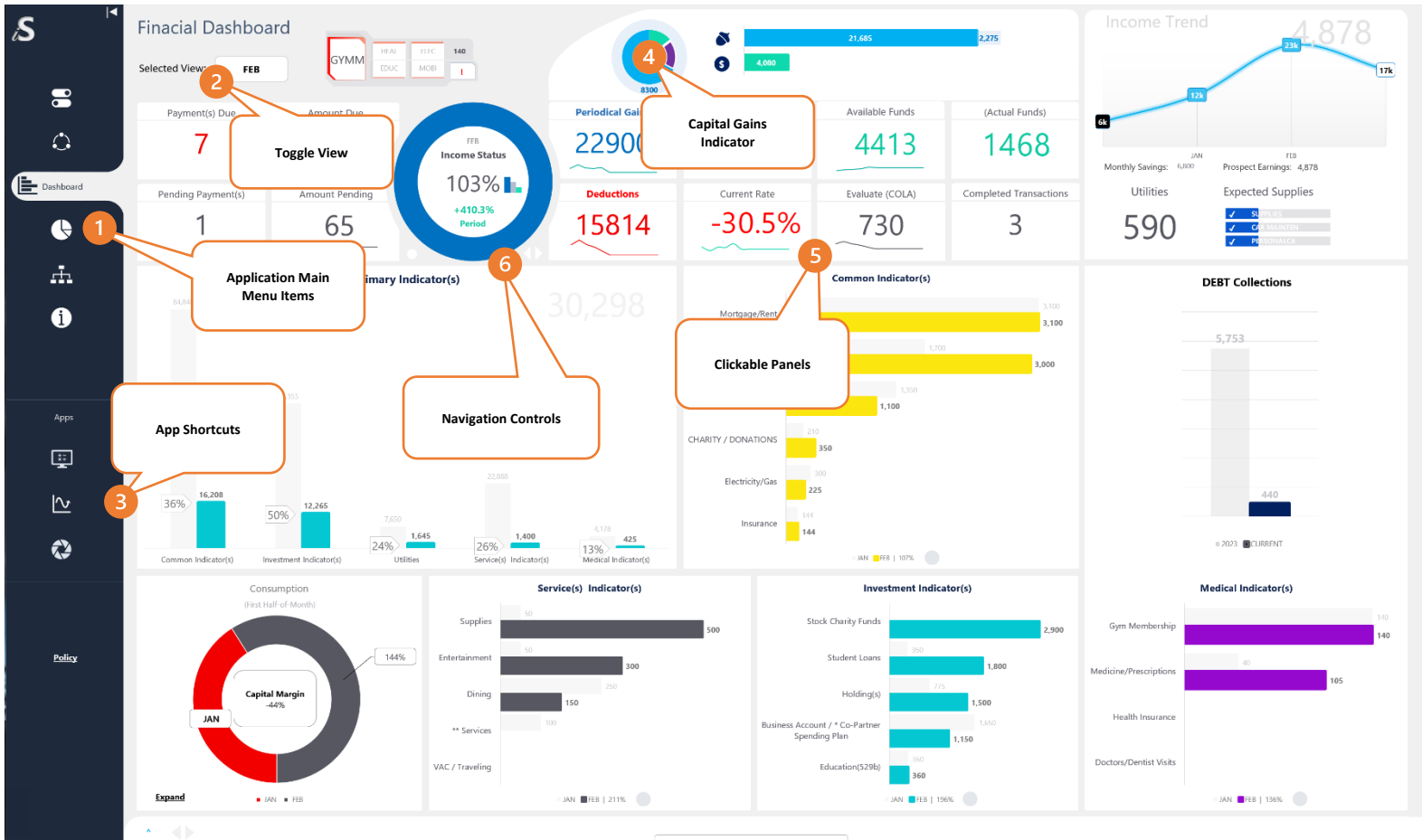
3 Auto Services Menu:
Access detailed descriptions for automatic payment services using the Auto Services Menu. By providing (*) or (**) definitions next to items, users gain insights into specific expenditure delivery options, enhancing control and customization of automatic payments compared to traditional budget balance methods.

4 Spending Indicator(s):
Dynamic color-coded formats on various labels to signify approaching account limitations or exceeding average maxims. This feature provides visual cues to users, alerting them to potential financial constraints and encouraging prudent spending habits.

5 Ledger Planner:
Direct the trajectory of your finances by documenting any inventory or funded accounts to be planned during or before a monetary disbursement or refund. With the Ledger Planner, users can proactively allocate funds, effectively managing their money and ensuring it aligns with their

6 Settings Page:
Access a comprehensive control center where users can manage various features, observe configurations, initiate document data wipe, or generate new fields. The Settings Page offers versatile functionality, allowing users to customize their experience, maintain data integrity, and optimize system performance with ease.

Dashboard Overview



1

Application Main Menu Items:

The main menu offers convenient access to various pages, including Settings, Metrics System, Dashboard Interface, Prospects Viewer, Asset Risk Management (ARM), and About Us. This intuitive navigation structure ensures easy exploration and utilization of key features.

2

Toggle View:

Users can seamlessly switch between the Dashboard's monthly and year-to-date (YTD) views using the toggle view feature. This functionality provides flexibility in analyzing data and monitoring performance over different time frames.

3

App Shortcuts:

Access main workbook applications and tools, such as snapshots, with ease through the app shortcuts. These shortcuts streamline workflow and enhance productivity by providing quick access to essential functions and resources.

4

Capital Gains Indicator:

The Investor graph will dynamically appear when the overall contributions, including savings, investments, and cash, reach a positive gain for the current monthly period. This visual indicator offers users immediate insight into their financial progress and achievements.

5

Clickable Panels:

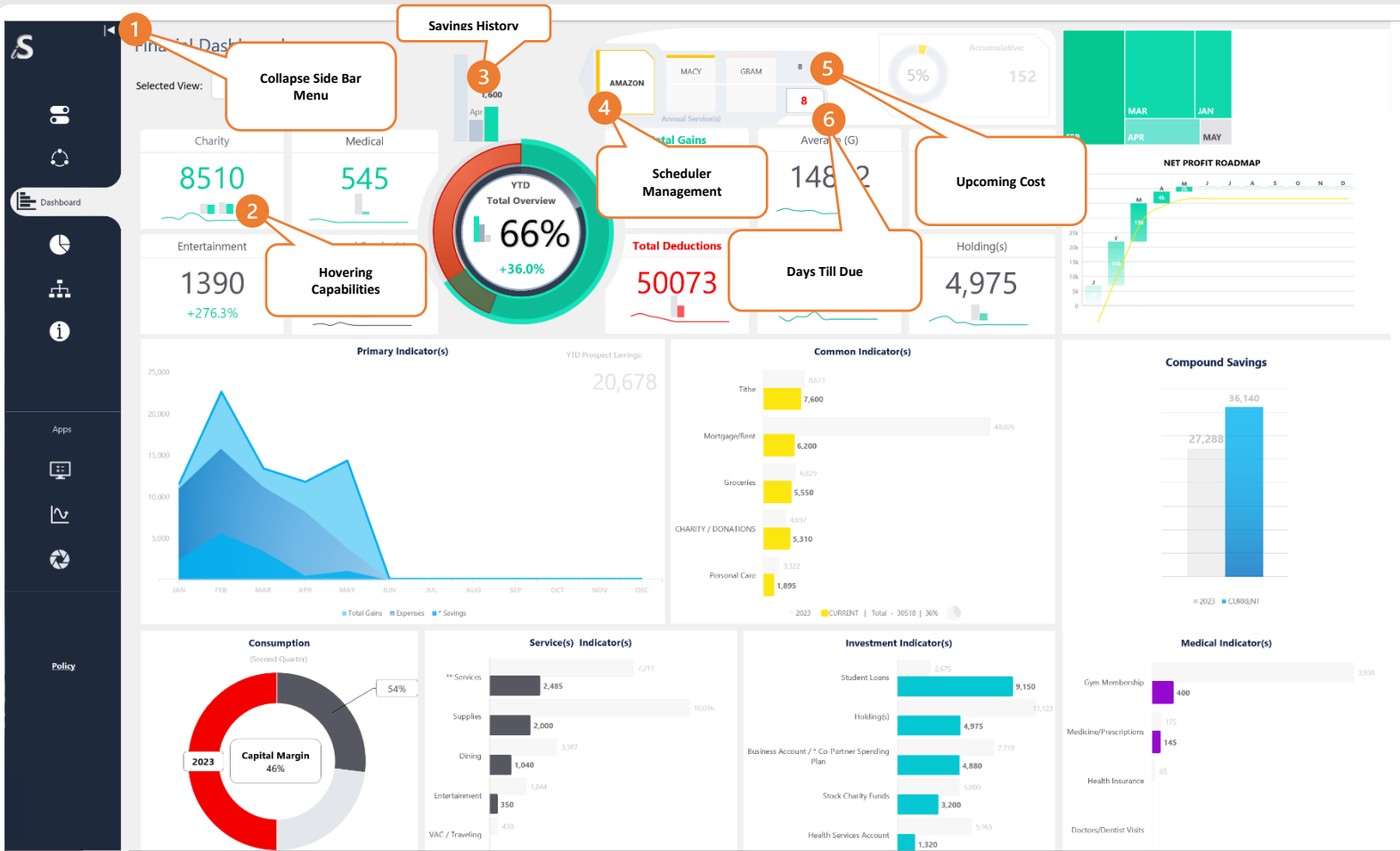
Enjoy enhanced interactivity with clickable objects throughout the interface, offering access to detailed information. From predictive charts to averaging, median values, percentage rates, due dates, scheduling, alerts, and more, users can explore comprehensive data and make informed decisions with ease.

6

Navigation Controls:

Effortlessly navigate through monthly statistics display with intuitive controls. Users can move forward, go back to previous months, or reset to the current position, providing seamless access to historical data for comprehensive analysis and decision-making.

Dashboard Overview



1 Collapse Side Bar Menu:
This feature enables users to collapse the side bar menu, optimizing screen real estate and allowing more space for diagrams to be displayed. By collapsing the menu, users can focus on visual content without distractions, enhancing the overall viewing experience.

2 Hovering Capabilities:
Our software features miniature-sized bar graphs, line charts, and other displayed panels that offer mouse-hovering abilities. This functionality allows users to effortlessly reveal tagged values by hovering over the respective elements, providing intuitive access to important information.

3 Savings History:
This feature provides a comprehensive overview of cumulative savings efforts by indicating the evolution across three past stages. Users can track their progress and gain insights into their savings journey over time, empowering them to make informed financial decisions.

4 Scheduler Management:
This feature offers convenient access to the scheduler editor through a clickable access point. Additionally, users can navigate seamlessly within the scheduler interface using navigation arrows, enhancing usability and efficiency in managing schedules.

5 Upcoming Cost:
In the scheduler, users can easily identify the cost associated with highlighted focused items. This feature provides clarity on upcoming expenses, helping users to plan and budget effectively.

6 Days Till Due:
The scheduler includes a counter display that indicates the number of days remaining until the due date of scheduled items. This feature enables users to stay informed about upcoming deadlines, ensuring timely completion of tasks and obligations.

Elite Pro Version



- 1 Return to Dashboard:** Easily navigate to the Dashboard sheet with the return arrow feature, ensuring seamless access to the main interface for quick reference and data visualization.
- 2 Refresh:** Update values and graphics for displayed charts with the Refresh function, ensuring accurate and up-to-date information for informed decision-making and analysis. Chart alerting system will update periodically every 10 minutes.
- 3 X-Factor** Access a comprehensive overview of measurements in 1X, 100%, or 1000% formations with the X-Factor feature. This capability offers versatile scaling options to accommodate various data ranges and presentation preferences, enhancing flexibility and usability.

- 4 Navigation Panel:** Effortlessly explore month-to-month cumulative progress insights such as comparison to the previous month for income, profit, and month-to-month expense with the Navigation Panel feature. This provides convenient access to valuable data for comprehensive financial analysis.
- 5 Monitor Status:** View the status of total Net operations and Year-to-Date (YTD) Net or expenses, along with a summary of assets, with the Monitor Status feature. This offers a quick overview of financial performance metrics, enabling users to track key indicators at a glance.
- 6 Magnifier:** Adjust the view to a 4K preview or standard view by zooming in or out with the Magnifier feature. This allows users to customize their viewing experience for enhanced clarity and detail, ensuring optimal usability and visual comfort.

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