

Personal planner

Personal / Core workflow guide

Bring goals, tasks and spending into one workspace.

BUILD STATUS

Development preview 0.1.0. These diagrams describe the shipped core records and state actions. They are not interface screenshots. Full UI walkthrough and live Hostinger acceptance are pending.

The record sequence

1

Goals

Create this reference data first.

2

Tasks

References: goals

3

Expenses

Create this reference data first.

Follow the workflow

Create goals, complete their tasks and record spending against your own plans.

BEFORE YOU BEGIN

Sign in, select your workspace and open this system. Create referenced records first. Use fictional data for testing and protect any personal or confidential information.

Know your records

Data reference / Inputs and computed values

Goals

Field	Input type	How to use it
Name	text	Plain text, up to 200 characters.
Target date	date	Calendar date (YYYY-MM-DD).
Description	longtext	Plain text, up to 12,000 characters.

Tasks

Field	Input type	How to use it
Goal id	ref	Select a workspace record from goals.
Name	text	Plain text, up to 200 characters.
Due on	date	Calendar date (YYYY-MM-DD).

Expenses

Field	Input type	How to use it
Name	text	Plain text, up to 200 characters.
Date	date	Calendar date (YYYY-MM-DD).
Amount	money	Non-negative amount; at most two decimal places.
Category	text	Plain text, up to 200 characters.

Every record also has a workspace identifier, state, version and timestamps. Reference selection and server checks prevent a record from linking to another workspace.

Operate with confidence

Actions, permissions and safe recovery

Available state actions

Record	States	Actions
Goals	active > completed	complete to completed
Tasks	todo > in_progress > completed	start to in progress, complete to completed
Expenses	recorded	Reference data; no state action.

Progress and personal records

- Tasks reference a goal from the same workspace. Record due dates and expenses consistently.
- Task and goal states are recorded separately; completing one does not automatically close the other.
- Bank feeds, recurring calendar sync and personal financial advice are not part of this core workflow.

Roles and subscription access

Owners, managers and staff can create records while the subscription is active. Viewers can read. Approval, verification, publishing, payroll settlement and journal posting require an owner or manager. Entitlements and record quotas are enforced on the server. Expired subscriptions become read only.

Documents and recovery

- Use the record PDF action for a private document. CSV export requires an eligible plan. Attachments accept PDF/JPG/PNG up to 5 MB per file; demos cannot upload.
- A stale version or repeated action is rejected. Refresh, inspect the saved state and retry only when appropriate. Processed records cannot be edited as drafts.
- A PDF is a snapshot of recorded information. Ordinary business records do not receive the CEO signature, stamp or company seal automatically.