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PERSONAL FINANCE TRACKER

LOW-CODE AUTOMATION PROJECT REPORT

1. Project Title

Personal Finance Tracker Using Low-Code Automation Tools

2. Problem Statement

Managing daily expenses manually can lead to poor budgeting and lack of financial visibility. Users often struggle to track spending patterns, monitor monthly budgets, and receive timely alerts when expenses exceed limits. This project aims to design and implement an automated personal finance tracking system that records expenses, categorizes them, monitors monthly budgets, and sends alerts when spending crosses predefined thresholds.

3. Project Objectives

- Create a structured expense logging system
- Categorize expenses for better financial insights
- Track monthly budgets
- Automate budget alerts
- Generate real-time spending trends
- Present a summarized financial overview through video

4. Tools Used

- ChatGPT – Generate budget categories and automation logic
- Notion AI – Organize documentation and user stories
- Jotform – Collect expense data
- Airtable – Store expenses and budget data
- Make – Automate budget alert emails
- n8n – Update financial trends in near real-time
- Gmail – Send automated notifications
- Lumen5 – Create project summary video

5. System Architecture

Jotform → Airtable → Make (Filter + Aggregator + Router) → Gmail



6. System Workflow

Step 1: Users submit expense details through Jotform.

Step 2: Expense data is stored in Airtable (Expenses table).

Step 3: Make calculates total monthly spending and compares it with defined budget thresholds.

Step 4: If spending exceeds the alert percentage, Gmail sends automated budget alert email.

Step 5: n8n workflow updates monthly spending trends in the Trends table.

Step 6: Lumen5 generates a professional summary video explaining the project.

7. Key Features

- Expense categorization
- Monthly budget tracking
- Alert percentage threshold
- Automated email notifications
- Real-time trend updates
- Low-code automation integration
- Dashboard-style data visualization

8. Learning Outcomes

- Low-code workflow automation
- Database integration
- Conditional logic implementation
- API-based automation
- Real-time financial monitoring
- Cross-platform tool integration

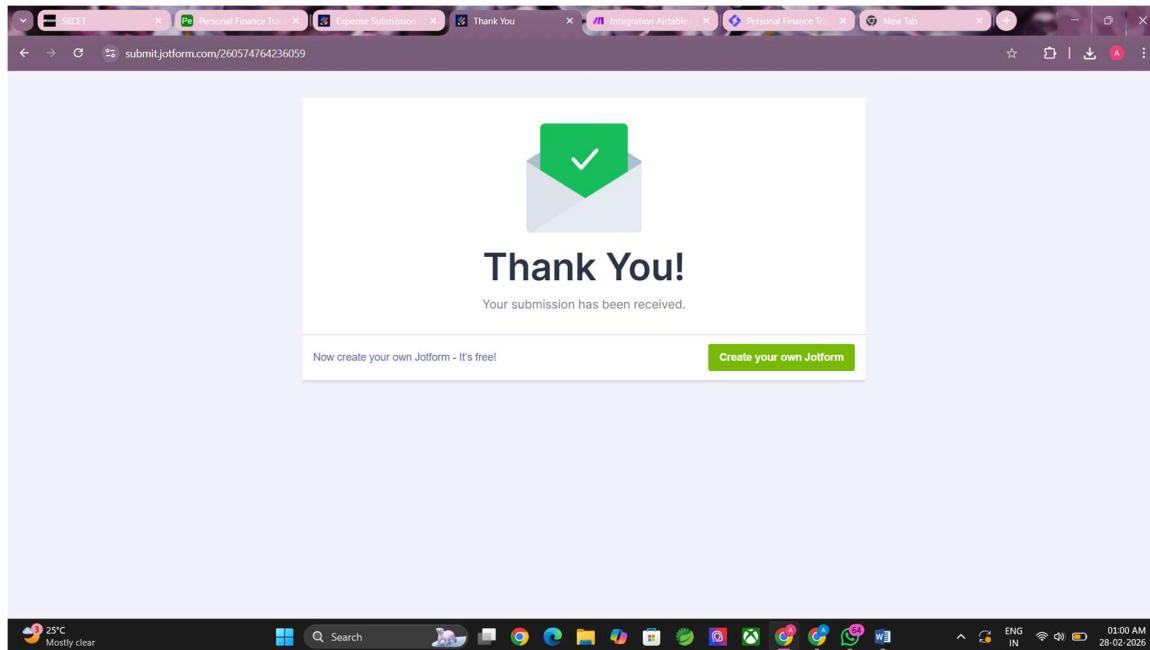
9. Screenshots & Implementation Proof

1. Jotform Screenshot

- Expense Submission Form
- Form fields visible (Date, Amount, Category, Notes)

Purpose:
Proof of expense input system.

The screenshot shows a Microsoft Edge browser window with multiple tabs open. The active tab is titled "Expense Submission" and displays an "Expense Submission Form". The form fields include "Date of Expense" (02-28-2026), "Amount Spent" (\$500), "Expense Category" (Transport), and a "Notes (optional)" field containing "too much". A green "Submit Expense" button is at the bottom. The browser's status bar shows the URL "form.jotform.com/260574764236059".



2. Airtable – Expenses Table

- Expenses table
- A few records visible
- Category + Amount columns visible

Purpose:

Proof of data storage.

The screenshot shows the Airtable interface for the 'Personal Finance Tracker' database. The 'Expenses' table is selected, displaying a grid view of expense records. The columns are labeled: A. Expense Name, Date, \$ Amount, Category, and Note. The data includes various expenses like Internet Bill, Software Subscription, Flight to NYC, Hotel Stay, Client Dinner, Stationery, Taxi to Airport, Electricity Bill, Team Coffee, Cloud Storage, Office Cleaning, Parking Fee, and several entries for February 2026. The 'Category' column uses color coding for different expense types. The 'Note' column contains descriptive text for each entry. On the left sidebar, there are notes about budgeting and alert triggers. The bottom status bar shows the date as 28-02-2026 and the time as 09:01 AM.

A. Expense Name	Date	\$ Amount	Category	Note
Internet Bill	2024-05-28	\$120.00	Utilities	Monthly internet service pa...
Software Subscription	2024-06-04	\$29.99	Software	Monthly subscription for d...
Flight to NYC	2024-05-30	\$350.00	Travel	Business trip to attend conf...
Hotel Stay	2024-05-31	\$420.00	Travel	3 nights at Midtown Hotel ...
Client Dinner	2024-06-05	\$110.25	Meals & Entertainment	Dinner with prospective cli...
Stationery	2024-06-06	\$15.80	Office	Purchased pens, notebooks...
Taxi to Airport	2024-05-29	\$38.00	Transportation	Taxi fare for business trip d...
Electricity Bill	2024-06-01	\$210.00	Utilities	Monthly office electricity p...
Team Coffee	2024-06-07	\$18.40	Meals & Entertainment	Coffee for morning team m...
Cloud Storage	2024-06-02	\$12.99	Software	Monthly cloud storage sub...
Office Cleaning	2024-06-03	\$75.00	Office	Weekly professional cleani...
Parking Fee	2024-06-04	\$9.00	Transportation	Parking at client site.
	2026-02-27	\$1,000.00	Groceries	test
	2026-02-27	\$5,000.00	Entertainment	not worth
	2026-02-28	\$6,000.00	Groceries	worth
	2026-02-28	\$5,500.00	Transport	too much

3. Airtable – Budget Table

- Monthly Budget
- Alert Percentage
- Email column
- Alert Triggered formula (if visible)

Purpose:

Proof of budget logic setup.

The screenshot shows the Airtable interface for a "Personal Finance Tracker" database. On the left, a sidebar displays "some key features:":

- Budget Month** is linked to associate the expense with a specific budget month.
- Budget** has been created to manage monthly budgets and track expenses effectively. Here are some key features:
 - Expenses** is linked to relate to multiple expense entries allowing comprehensive budget tracking.
 - Alert Triggered** calculates whether spending exceeds the defined alert threshold.

Below the sidebar, there are sections for "How do the changes look?" and an "Unnamed record - Amount" dialog. The main area shows a "Budget" table with 16 records:

	A. Month	S. Monthly Budget	# Alert Percentage	E. Expenses
1	2024-01	\$3,500.00	80	alice.smith@email.com Office Supplies
2	2024-02	\$3,600.00	75	bob.jones@email.com Lunch Meeting
3	2024-03	\$3,400.00	85	carol.lee@email.com Uber Ride
4	2024-04	\$3,550.00	90	daniel.kim@email.com Internet Bill
5	2024-05	\$3,700.00	80	emily.wang@email.com Software Subscription
6	2024-06	\$3,650.00	70	frank.parcia@email.com Flight to NYC
7	2024-07	\$3,800.00	85	grace.chen@email.com Hotel Stay
8	2024-08	\$3,900.00	75	henry.liu@email.com Client Dinner
9	2024-09	\$4,000.00	80	isabel.martinez@email.com Stationery
10	2024-10	\$4,100.00	90	jackson.tan@email.com Taxi to Airport
11	2024-11	\$4,200.00	85	karen.choi@email.com Electricity Bill
12	2024-12	\$4,300.00	80	leo.perez@email.com Team Coffee
13	2023-11	\$3,200.00	75	mia.santos@email.com Cloud Storage
14	2023-12	\$3,300.00	70	nathan.ross@email.com Office Cleaning
15	2023-10	\$3,100.00	80	olivia.hall@email.com Parking Fee
16	2026-02	\$50,000.00	75	727724eu1501@skcet.ac.in Parking Fee

At the bottom, the status bar shows "25°C Mostly clear" and the date "28-02-2026".

4. Make Scenario

- Full scenario view
- Airtable → Tools → Airtable → Router → Gmail

Purpose:
Proof of automation workflow.

The screenshot shows a scenario flow on the Make (Integromat) platform:

```

graph LR
    A[Airtable] --> B[Tools]
    B --> C[Airtable]
    C --> D[Router]
    D --> E[Gmail]
  
```

The flow starts with an "Airtable" step (Search Records), followed by a "Tools" step (Numeric aggregator), then another "Airtable" step (Search Records), a "Router" step, and finally a "Gmail" step (Send an email).

On the left, the sidebar includes "Org", "Scenarios", "Credentials", "Webhooks", "MCP Toolboxes", "Templates", "Data stores", and "More".

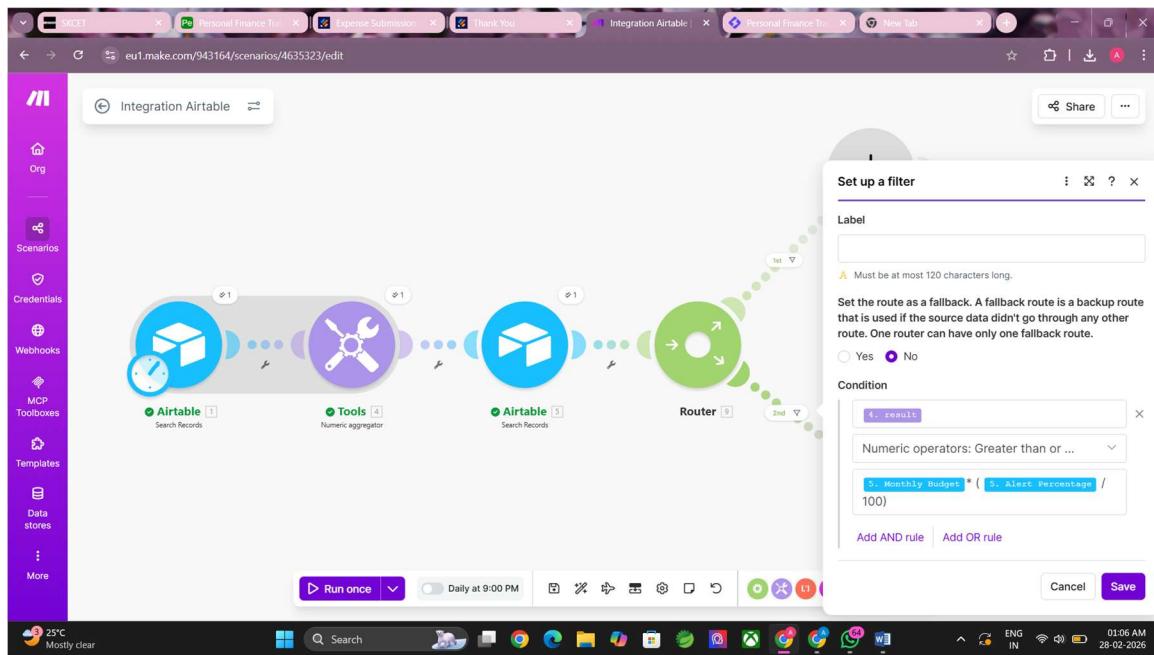
At the bottom, the status bar shows "25°C Mostly clear" and the date "28-02-2026".

5. Make Filter Condition

- Filter logic:
result > Monthly Budget × (Alert % / 100)

Purpose:

Proof of conditional logic.

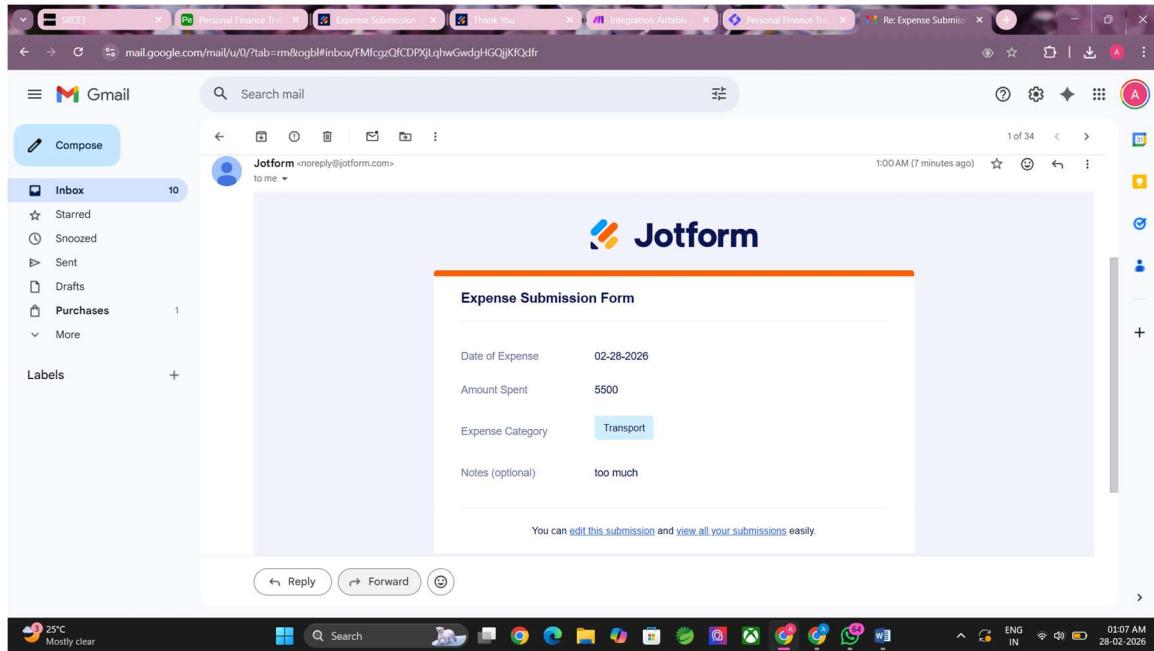


6. Gmail Alert Email

- Budget Alert email received
- Subject visible

Purpose:

Proof of automation working.

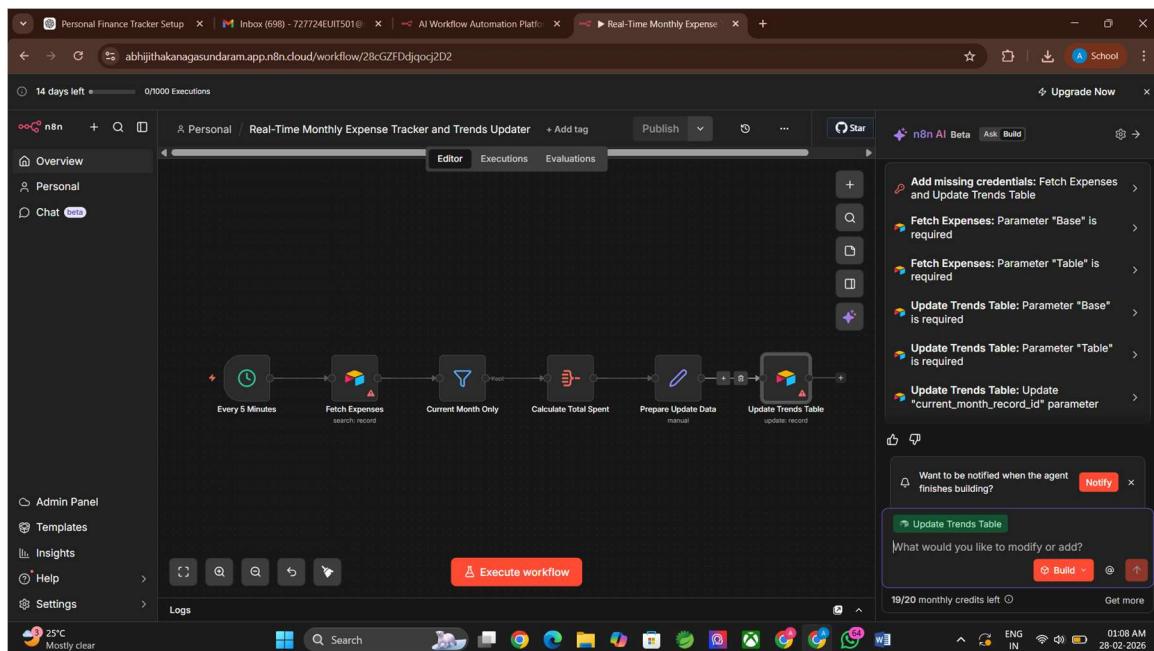


7. n8n Workflow

- Cron trigger
- Airtable fetch
- Function node
- Update Trends table

Purpose:

Proof of real-time update.



8.Lumen5 Video Page

- Project video page
- Title visible

Purpose:

Proof of project presentation.

<https://drive.google.com/file/d/1AbpdH68trd48MR5P1qiGoHl9MWZdAMjD/view?usp=sharing>

9.Project Links :

1.GitHub Repository Link :

<https://github.com/Abhijithakanagsundaram/personal-finance-tracker-automation.git>

2. Lumen5 Video Link :

<https://drive.google.com/file/d/1AbpdH68trd48MR5P1qiGoHl9MWZdAMjD/view?usp=sharing>

3.Jotform Public Form Link :

<https://form.jotform.com/260574764236059>

4. Airtable Link :

<https://airtable.com/appxuopRHNmoVQ842/shrTZiOt7HbURLZzP>

5. Make Link :

<https://eu1.make.com/public/shared-scenario/VIU56zSzn4C/integration-airtable>

10. Conclusion

The Personal Finance Tracker successfully automates expense tracking, budget monitoring, and alert notifications using modern no-code tools. The system improves financial awareness, ensures timely alerts, and provides real-time spending insights. This project highlights the power of integrating automation tools to build scalable financial monitoring systems without extensive coding.