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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

↓
n8n → Trends Update

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

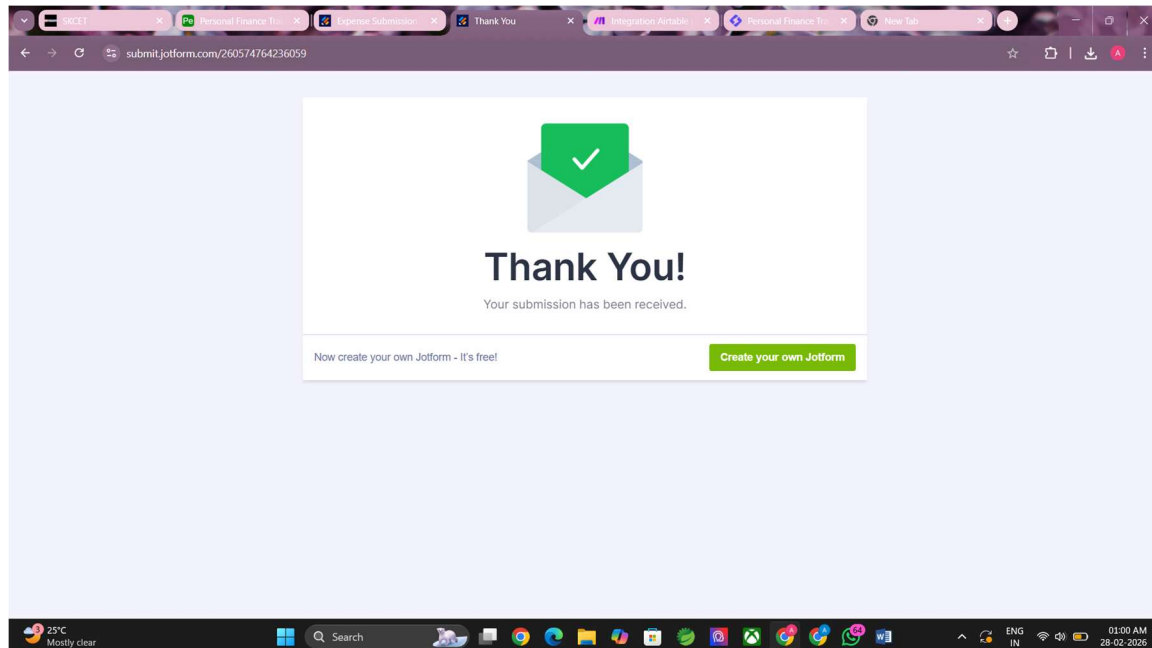
- Expense Submission Form
- Form fields visible (Date, Amount, Category, Notes)

Purpose:
Proof of expense input system.

The screenshot shows a web browser window with the URL `form.jotform.com/260574764236059`. The page title is "Expense Submission Form" with the subtitle "Submit your personal expenses to track your spending efficiently." The form contains the following fields:

- Date of Expense ***: A date picker showing "02-28-2026".
- Amount Spent ***: A text input field containing "5500".
- Expense Category ***: A dropdown menu with "Transport" selected.
- Notes (optional)**: A text area containing "too much".

A green "Submit Expense" button is located at the bottom of the form. The Jotform logo is in the bottom left, and a banner in the bottom right says "Now create your own Jotform - It's free! Create your own Jotform". The Windows taskbar at the bottom shows the date as 28-02-2026 and time as 12:59 AM.



2. Airtable – Expenses Table

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

Purpose:

Proof of data storage.

Personal Finance Tracker Database ...

some key features:

- **Budget Month** is linked to associate the expense with a specific budget month.
- **Expenses** is linked to relate to multiple expense entries allowing comprehensive budget tracking.
- **Alert Triggered** calculates whether spending exceeds the defined alert threshold.

2 tables

Show thinking >

How do the changes look?

Undo Hide

Unnamed record - Amount

Ask or build anything...

Tools

Personal Finance Tracker

Data Automations Interfaces Forms

Expenses Budget + Add or import

Grid view

Hide fields Filter Group IT Sort Color Share and sync

	Expense Name	Date	Amount	Category	Note
4	Internet Bill	2024-05-28	\$120.00	Utilities	Monthly internet service pa...
5	Software Subscription	2024-06-04	\$29.99	Software	Monthly subscription for d...
6	Flight to NYC	2024-05-30	\$350.00	Travel	Business trip to attend conf...
7	Hotel Stay	2024-05-31	\$420.00	Travel	3 nights at Midtown Hotel ...
8	Client Dinner	2024-06-05	\$110.25	Meals & Entertainment	Dinner with prospective cl...
9	Stationery	2024-06-06	\$15.80	Office	Purchased pens, notebooks...
10	Taxi to Airport	2024-05-29	\$38.00	Transportation	Taxi fare for business trip d...
11	Electricity Bill	2024-06-01	\$210.60	Utilities	Monthly office electricity p...
12	Team Coffee	2024-06-07	\$18.40	Meals & Entertainment	Coffee for morning team m...
13	Cloud Storage	2024-06-02	\$12.99	Software	Monthly cloud storage sub...
14	Office Cleaning	2024-06-03	\$75.00	Office	Weekly professional clean...
15	Parking Fee	2024-06-04	\$9.00	Transportation	Parking at client site.
16		2026-02-27	\$1,000.00	Groceries	test
17		2026-02-27	\$5,000.00	Entertainment	not worth
18		2026-02-28	\$6,000.00	Groceries	worth
		2026-02-28	\$5,500.00	Transport	too much
			Sum	\$5,500.00	

1 record selected

25°C Monthly clear 01:03 AM 28-02-2026

3. Airtable – Budget Table

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

Purpose:

Proof of budget logic setup.

Personal Finance Tracker Database

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.

2 tables

Show thinking >

How do the changes look?

Unnamed record - Amount

Ask or build anything...

	A Month	S Monthly Budget	# Alert Percentage	Email	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.garcia@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.martin@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.patel@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	72724eu#501@skcet.ac.in	Parking Fee

16 records

Sum \$105,300.00

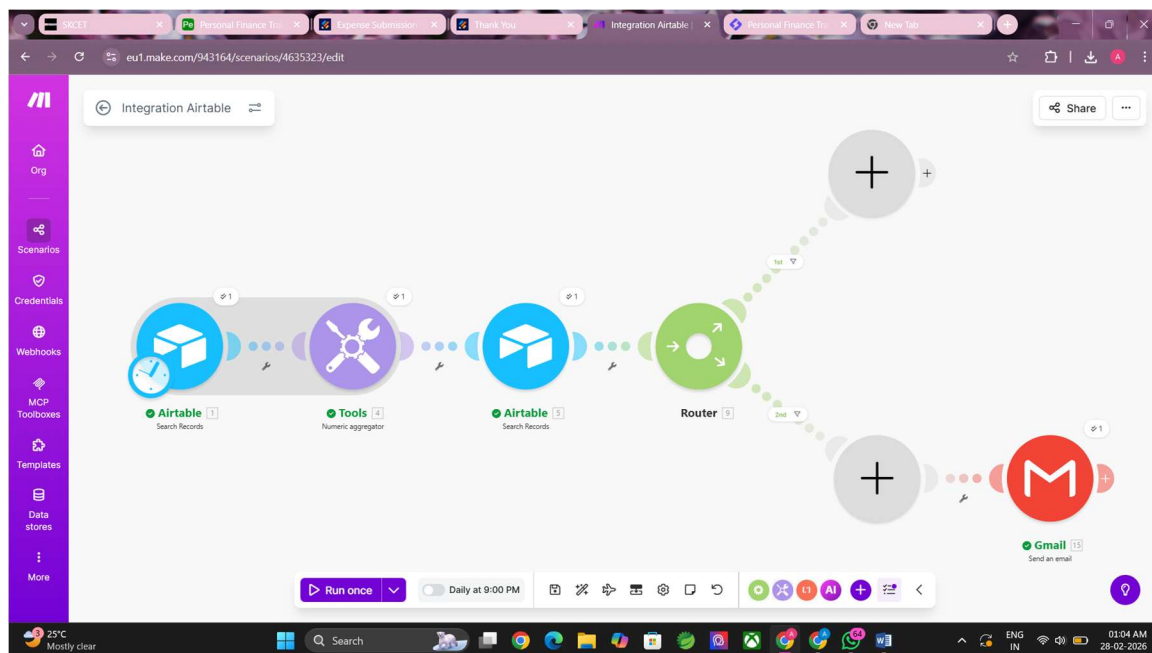
Sum 1275

4. Make Scenario

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

Purpose:

Proof of automation workflow.

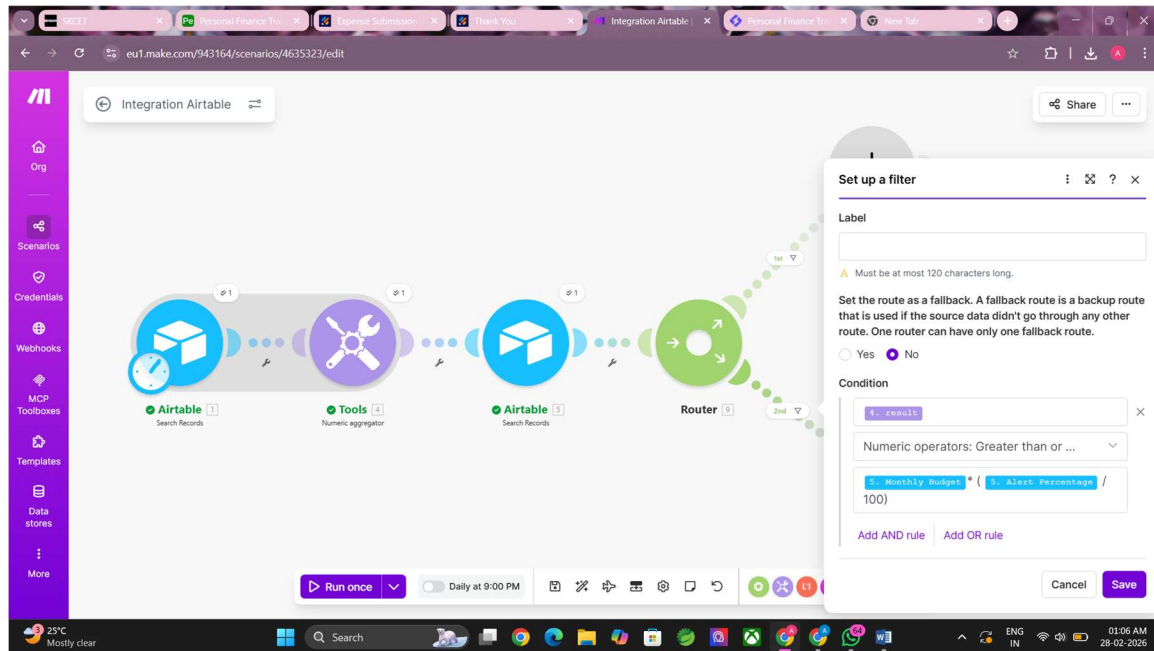


5. Make Filter Condition

- Filter logic:
$$\text{result} > \text{Monthly Budget} \times (\text{Alert \%} / 100)$$

Purpose:

Proof of conditional logic.

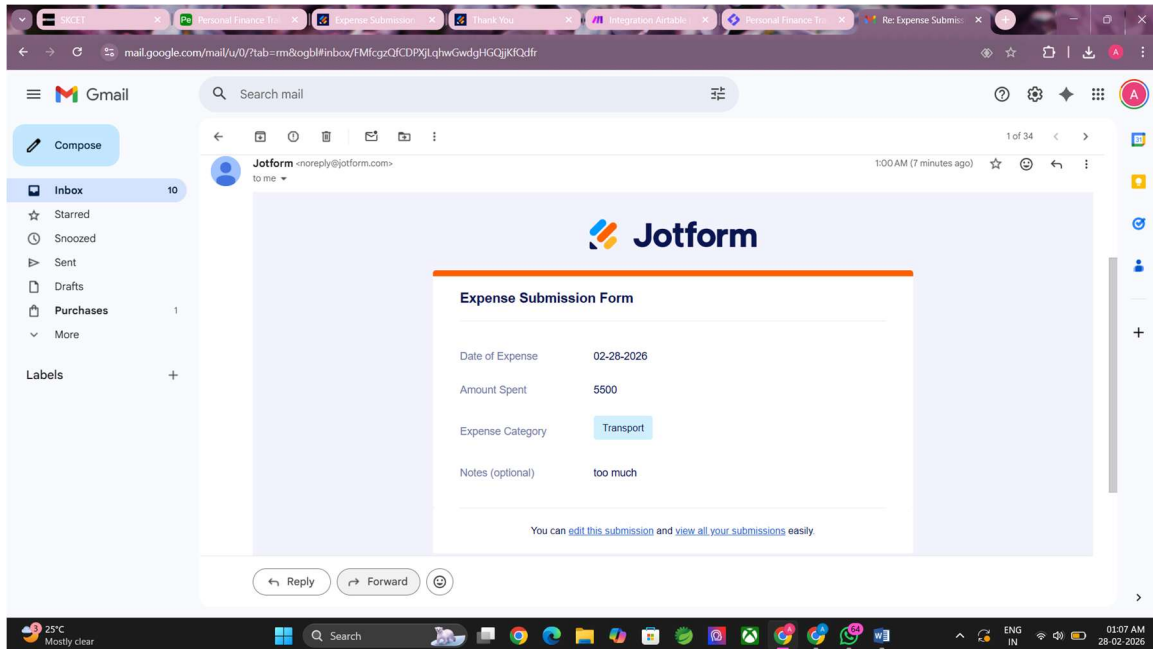


6. Gmail Alert Email

- Budget Alert email received
- Subject visible

Purpose:

Proof of automation working.

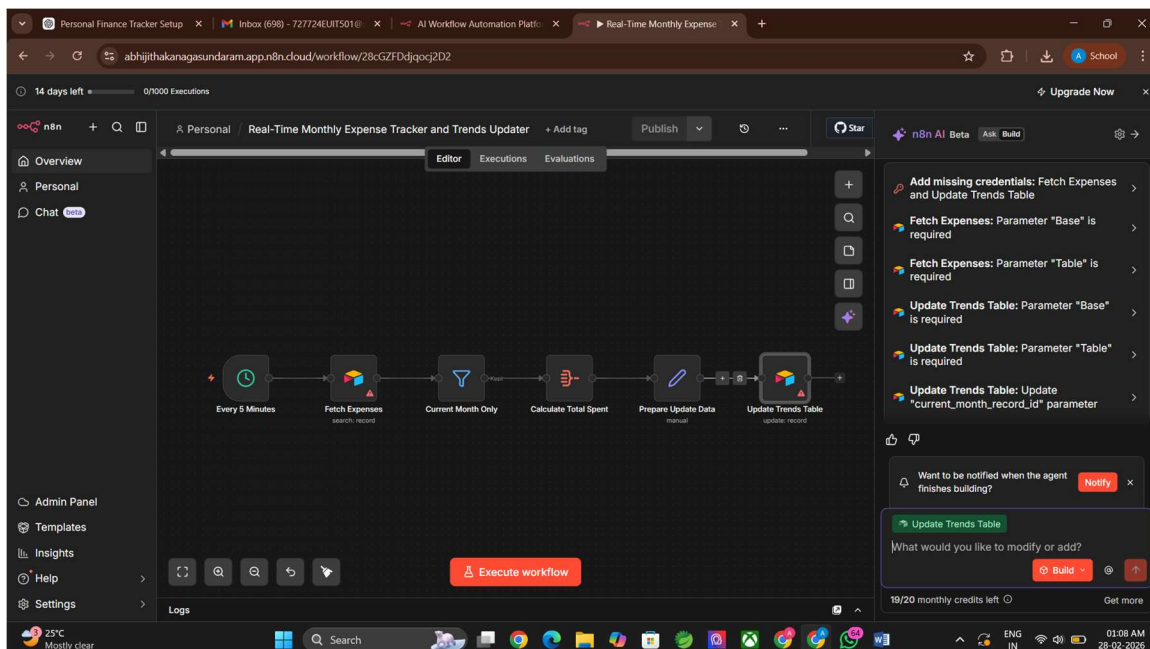


7. n8n Workflow

- 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/1AbpdH68trd48MR5P1qiGoHI9MWZdAMjD/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/1AbpdH68trd48MR5P1qiGoHI9MWZdAMjD/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.