**Personal finance tracker**

**Project Abstract**

**Version 1.0**



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# Purpose of this document

This document provides an overview about the business need and the solution that can be provided to fulfil the objective.

The Personal Finance Tracker is a web application that helps people manage their money better. It allows users to enter their earnings (like salary) and expenses (like bills and shopping) into the app. Based on this information, the app creates reports that show how much money is coming in and going out each month and year.

It also calculates the percentage of money saved from the total earnings. The app can even predict how much money can be saved in the future based on past data. Additionally, it lets users set financial goals, like saving a certain amount of money by a specific date. The app shows how close they are to reaching that goal. Overall, this app provides useful information about finances, so people can make smarter choices and have better control over their money.

# Business Case

CRUD operations

* Log In: Allows the user to log in to the system using their username and password.
* Sign Up: Allows the user to create a new account by providing their name, email address, username, and password.
* Add Income: Allows the user to add a new income transaction by specifying the amount, date, category and description of the income.
* Add Expense: Allows the user to add a new expense transaction by specifying the amount, date, category, and description of the expense.
* View Transactions: Allows the user to view their income and expense transactions in a table or list view, with filters and search options.
* Export Data: Allows the user to export their income and expense data in a CSV or PDF format.

Non-CRUD operations

* Calculate Savings: Calculate monthly and yearly percentage of savings based on income and expenditure entered.
* Budget Forecasting: Predict savings for the next month, based on average income and expenditure from current year.
* Set Financial Goals: Allow user to set a certain savings amount for a month for vacation or an event. The tracker would calculate percentage completion towards that target, and display highest expenditure categories, so that expenses can be reduced.

# Appendices

## Glossary

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| **Acronyms** | **Definitions** |
|  |  |

## Other

# Terms & Conditions

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# Change Log

*Please note that this table needs to be maintained even if a Configuration Management tool is used.*

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| Version Number | Changes made | | | |
| V<n.n> | *<If the change details are not explicitly documented in the table below, reference should be provided here>* | | | |
| Page no | Changed by | Effective date | Changes effected |
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