

Developer Guide – Personal Expense Tracker

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The Personal Expense Tracker is a simple and interactive tool built with Streamlit to help you manage your personal finances. It allows you to track expenses, customize categories, and see visual summaries of your spending.

Features

1. Log Expenses – Using Date, Amount and Category
2. Category – Add and Delete Categories
3. Expenses summary by category

Installation

Requirements - Python 3.11, Streamlit, Pandas, Plotly and Openpxyl

Install using PIP

Ensure the following are present Categories.csv and expenses.xlsx are present in directory

Run the application - <https://ayoolaproject-gijs6ig4tbxgumbmk4evc7.streamlit.app/>

File Structure

Main App – *budget_app_Final.py*

Expense Category Storage – *categories (1).csv*

Logged expense data – *expenses_Final.xlsx*

Code Walkthrough

1. Initialization

The app uses Streamlit to create an interactive UI. It sets up the page layout and title

2. Category Management

- **Loading and Saving Categories:** Categories are stored in categories (1).csv. Default categories are loaded if the file is missing.
- **Add/Delete Categories:** Users can add or delete categories via the sidebar UI.

Manage Categories

Current Categories:

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0 : "Food"

1 : "Housing"

2 : "Transportation"

3 : "Utilities"

4 : "Personal Care"

5 : "Education"

6 : "Savings and Investments"

7 : "Entertainment"

8 : "Healthcare"

9 : "Other"

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Add New Category

Add Category

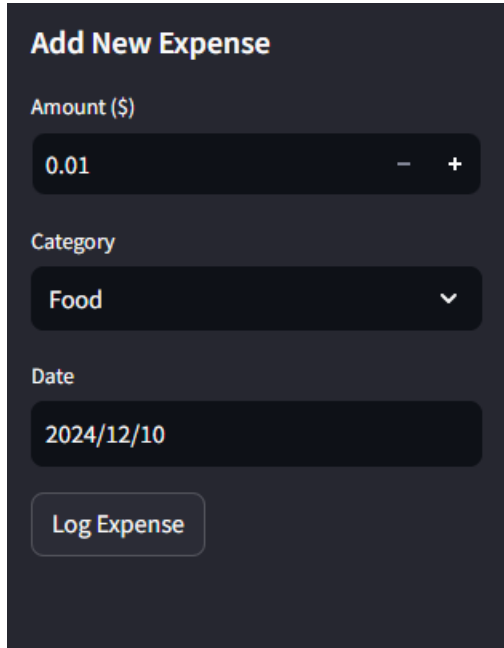
Delete Category

Food ▼

Delete Category

3. Expense Management

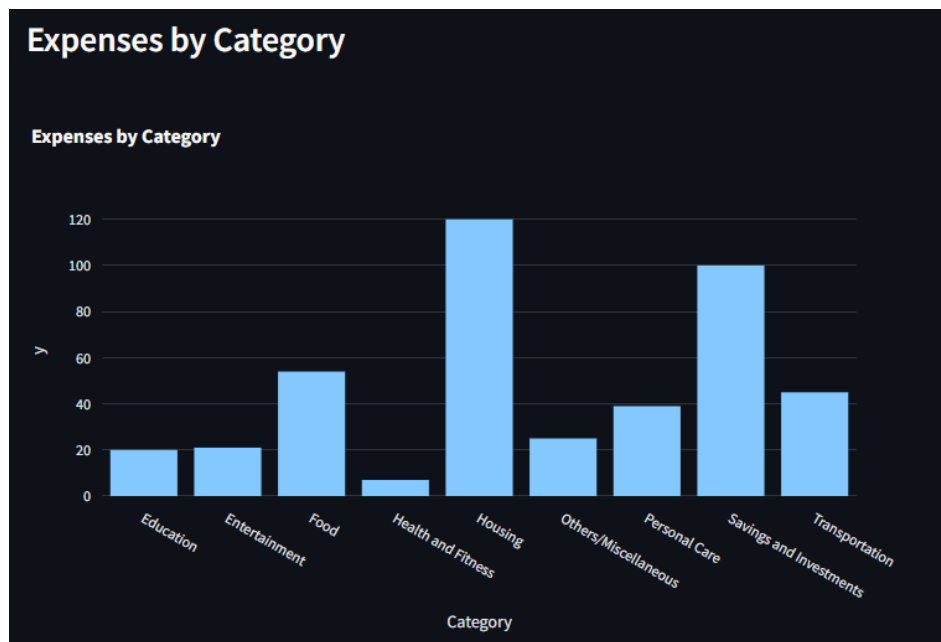
- **Loading and Saving Expenses:** Expenses are stored in budget_CH_Final.xlsx. If the file does not exist, an empty DataFrame is initialized.
- **Logging Expenses:** Users can log new expenses with a date, amount, and category.



A dark-themed form titled "Add New Expense". It contains three input fields: "Amount (\$)" with a value of "0.01" and minus/plus buttons, "Category" with a dropdown menu showing "Food", and "Date" with a value of "2024/12/10". A "Log Expense" button is at the bottom.

4. Visualization

- **Expenses by Category:** A bar chart is generated using Plotly to display expenses grouped by category.



Future Work

1. Better storage for large volume of data
2. Improve User Interface with better graph etc
3. ***Trying to add the expenses summary and filtering and export CSV from budget_CH.py to the final .py***