

Help file for expenditure app

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First page- Upload page

STEP 1

Family Finance Tracker

Upload

Family Finance Tracker

Take control of your family finances with smart expense tracking

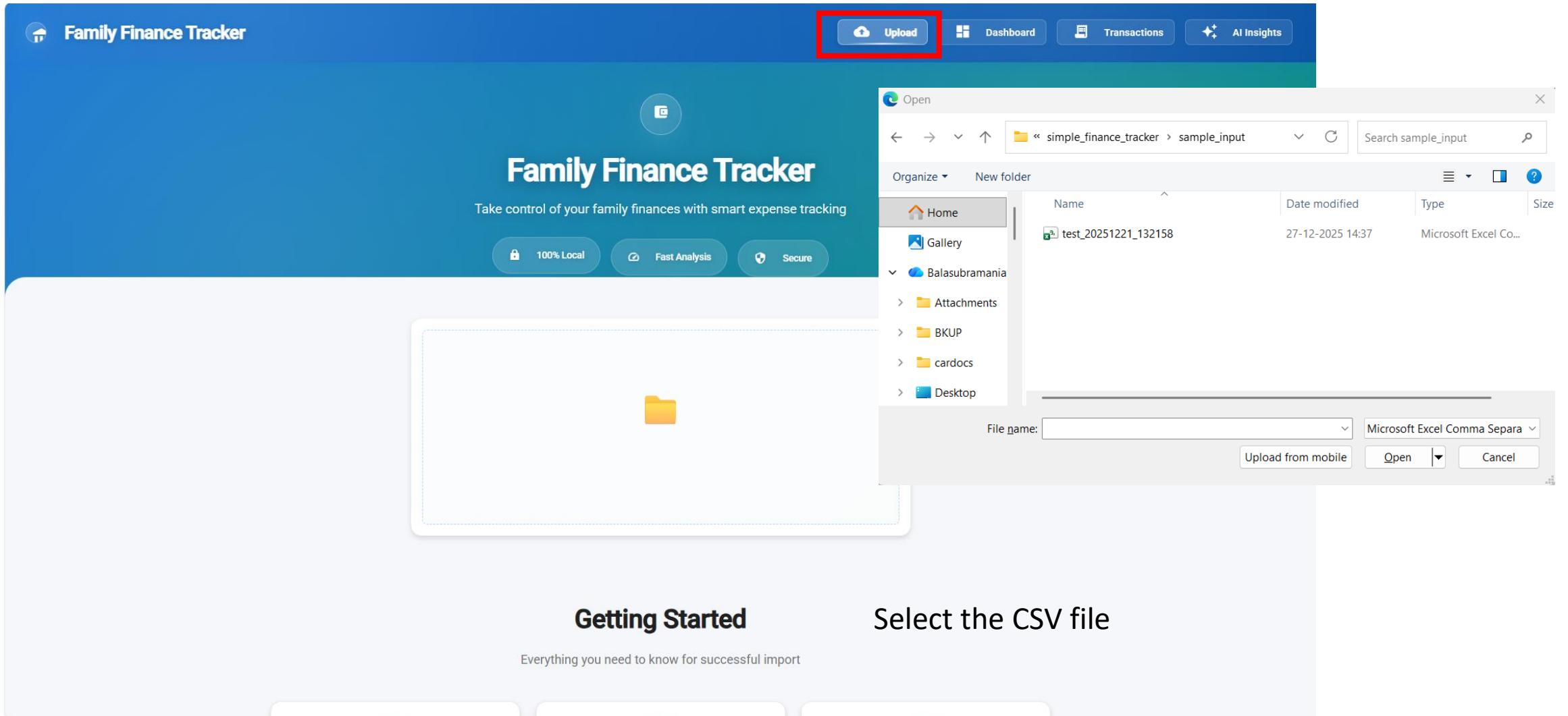
100% Local | Fast Analysis | Secure

Click inside the box/folder icon to select a CSV file

Getting Started

Everything you need to know for successful import

First page- Upload page



The screenshot shows the 'Family Finance Tracker' application interface. At the top, there is a blue header bar with the title 'Family Finance Tracker' and several navigation buttons: 'Upload' (highlighted with a red box), 'Dashboard', 'Transactions', and 'AI Insights'. Below the header, the main content area features the 'Family Finance Tracker' logo and the tagline 'Take control of your family finances with smart expense tracking'. There are three circular buttons labeled '100% Local', 'Fast Analysis', and 'Secure'. On the left side, there is a large, empty rectangular input field with a dashed border and a small folder icon in the center. On the right side, there is a 'Getting Started' section with the text 'Everything you need to know for successful import'. A modal window titled 'Open' is displayed over the main content, showing a file selection dialog. The dialog shows a file named 'test_20251221_132158' located in the 'simple_finance_tracker > sample_input' folder. The file is identified as a Microsoft Excel Comma Separated Values (CSV) file. At the bottom of the modal, there are buttons for 'File name:', 'Microsoft Excel Comma Separated Values', 'Upload from mobile', 'Open', and 'Cancel'.

Family Finance Tracker

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Getting Started

Everything you need to know for successful import

STEP 2

Upload

Dashboard

Transactions

AI Insights

Open

simple_finance_tracker > sample_input

Name Date modified Type

test_20251221_132158 27-12-2025 14:37 Microsoft Excel Co...

File name: Microsoft Excel Comma Separated Values

Upload from mobile Open Cancel

Select the CSV file

First page- Upload page

STEP 3

The screenshot shows a file upload interface. At the top, there is a large dashed box with a yellow folder icon and the text "Drag and drop CSV files here". Below it is a smaller box with a "Browse Files" button. A tooltip says "Click anywhere in this box to select your bank statement CSV files". A note at the bottom states "Supported: CSV files up to 50MB each".

Below this, a summary section shows "Selected Files (1)" and "49 transactions ready for upload". It lists a single file: "test_20251221_132158.csv" (6.23 KB). Below the file list are filters: "49 Transactions", "1 Months", "Nov 2024 - Nov 2024 Date Range", and "7 Columns".

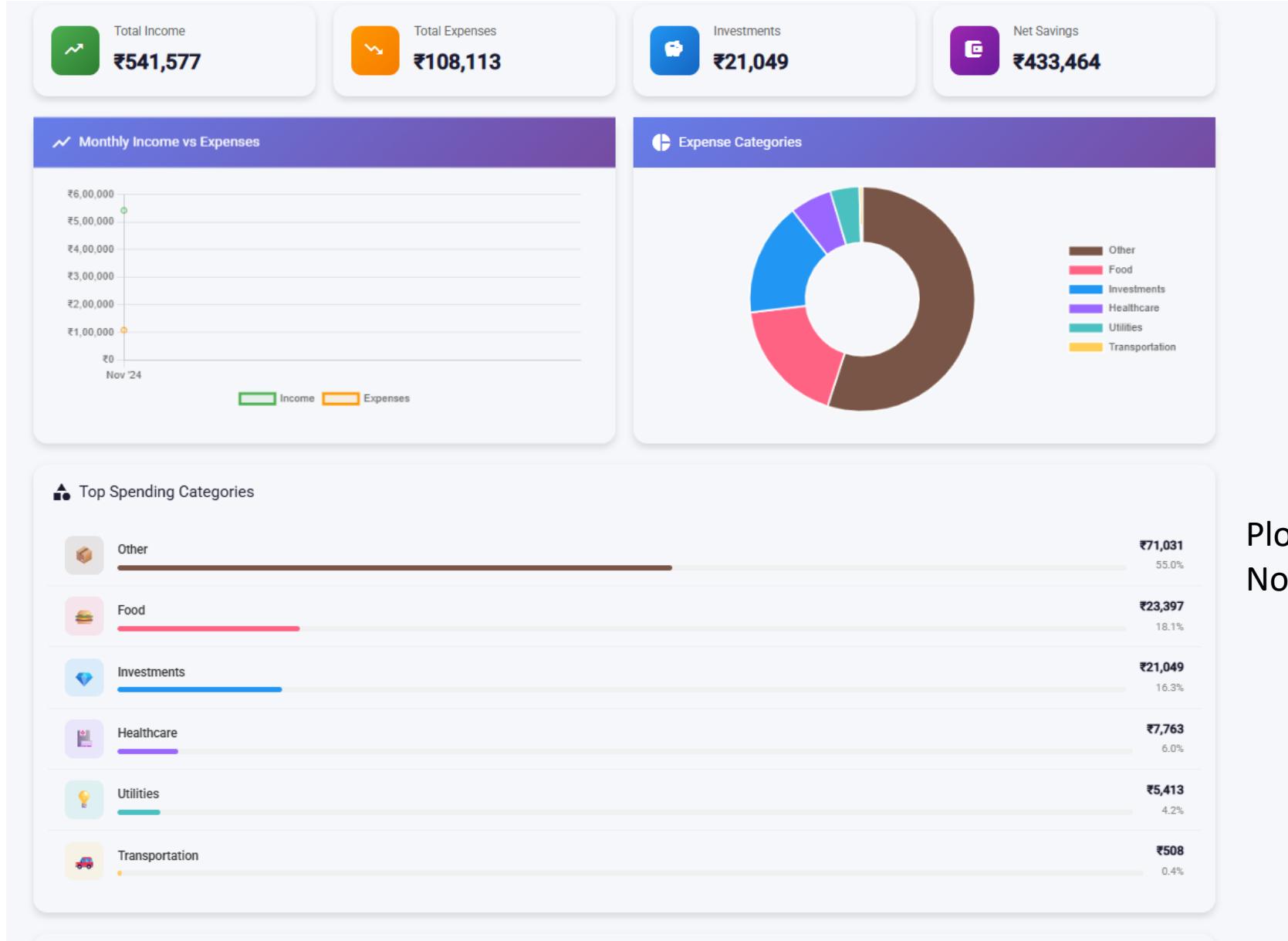
At the bottom, there is a summary of the upload details:

Total Transactions:	49
Date Range:	Nov 1, 2024 - Nov 30, 2024
Total Months:	1

At the very bottom are two buttons: "Upload 1 File" and "Clear All".

Now click on upload 1 file to upload

Dashboard Menu



Transactions menu

Family Finance Tracker

Upload Dashboard Transactions AI Insights

Financial Overview

Total Metrics

Transactions	Income
49	₹5,41,576.64

Expenses	Net Savings
₹1,29,161.65	₹4,12,414.99

Monthly Breakdown
Averaged over 1 month(s)

Transactions	Income
49.0	₹5,41,576.64

Expenses	Savings
₹1,29,161.65	₹4,12,414.99

Annual Overview
Averaged over 1 year(s)

Transactions	Income
49	₹5,41,576.64

Expenses	Savings
₹1,29,161.65	₹4,12,414.99

STEP 4

Summary of transactions
Total, Annual, Monthly

Smart Filters

Search Q

From Date To Date

Categories: All Categories Account: All Accounts

₹ Min Amount ₹ Max Amount

Menu for search and Filter(Date)
Search: User can search like “pharmacy”, “education” etc to understand the categorical expenses.
App updates all the info in this page based on the filter

Transactions menu



STEP 5



Scatter plot of all the transactions with **income** in Green colour and **expenses** in red colour

AI insights menu- Chat with the Data

Family Finance Tracker

Upload Dashboard Transactions **AI Insights**

AI Model: Gemini 2.5 FlashLatest and fastest

AI Insights
Your intelligent financial assistant

Welcome to AI Insights!

Ask me anything about your financial data. I can help you with:

Spending Patterns Find Transactions

Compare Periods Financial Summaries

Try asking:

What did I spend on food this month? Show my top 5 expenses

What's my monthly average spending? Compare income vs expenses

Which category am I overspending on? Any unusual transactions?

What's my savings rate? Summarize my financial health

Prepopulated questions

What did I spend on food this month? Show my top 5 expenses What's my monthly average spending? Compare income vs expenses

Which category am I overspending on? Any unusual transactions? What's my savings rate? Summarize my financial health

Ask about your finances... >

Powered by LangChain · Your data stays private

Select the AI model, Gemini is free with Token limitations

Questions Section

Summary

- For more details about this App refer to README.md
- Quick start guide - QUICKSTART.md
 - How to start the app , installation, python virtual env etc..
 - Download latest Anaconda
- Input preparation - CSV_FORMAT.md
- Currently this application is Phase I, many enhancements are planned for future release
- Contact information of the developer: bala1.venkat@gmail.com