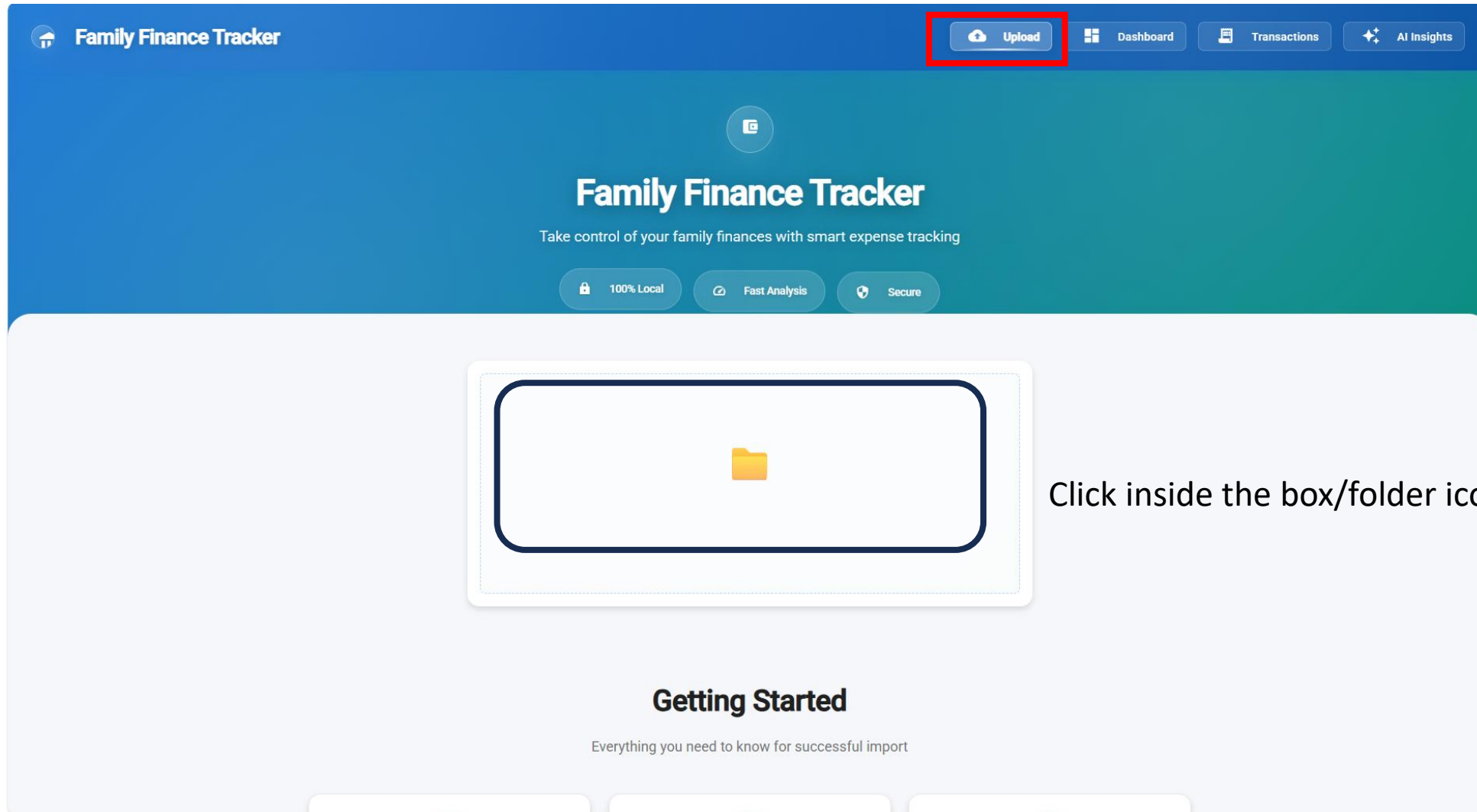


Help file for expenditure app

Developed by Balasubramaniam V

First page- Upload page

STEP 1



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

First page- Upload page

STEP 2

The screenshot shows the 'Family Finance Tracker' web application interface. The top navigation bar is blue and contains the app name, an 'Upload' button (highlighted with a red box), and other menu items like 'Dashboard', 'Transactions', and 'AI Insights'. The main content area has a blue header with the app name and a tagline 'Take control of your family finances with smart expense tracking'. Below this are three buttons: '100% Local', 'Fast Analysis', and 'Secure'. A large dashed box indicates the upload area. A file explorer window is open over the upload area, showing the path 'simple_finance_tracker > sample_input'. It lists a file 'test_20251221_132158' of type 'Microsoft Excel Co...'. The file explorer also shows a sidebar with locations like Home, Gallery, and Desktop, and a bottom section with 'File name' and 'File type' dropdowns, and 'Upload from mobile', 'Open', and 'Cancel' buttons.

Family Finance Tracker

Take control of your family finances with smart expense tracking

100% Local Fast Analysis Secure


Getting Started

Everything you need to know for successful import

Select the CSV file


First page- Upload page

STEP 3




Drag and drop CSV files here



or click to browse

 **Browse Files**


[Click anywhere in this box](#) to select your bank statement CSV files


Supported: CSV files up to 50MB each


 Selected Files (1)
49 transactions ready for upload


 **test_20251221_132158.csv** 

6.23 KB

 **49 Transactions**

 **1 Months**

 **Nov 2024 - Nov 2024 Date Range**

 **7 Columns**

Total Transactions:


49


Date Range:

Nov 1, 2024 - Nov 30, 2024

Total Months:

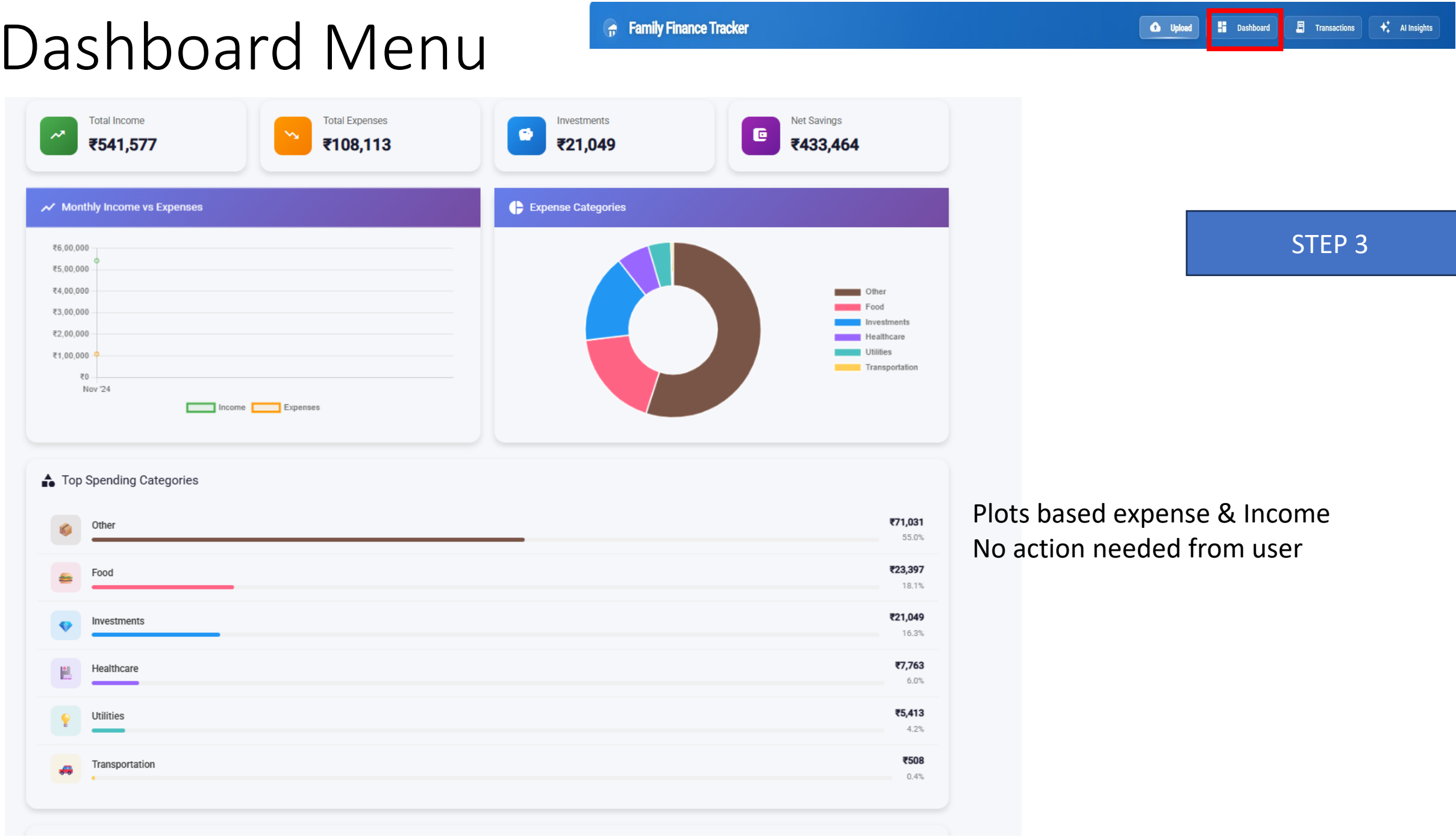
1

 **Upload 1 File**

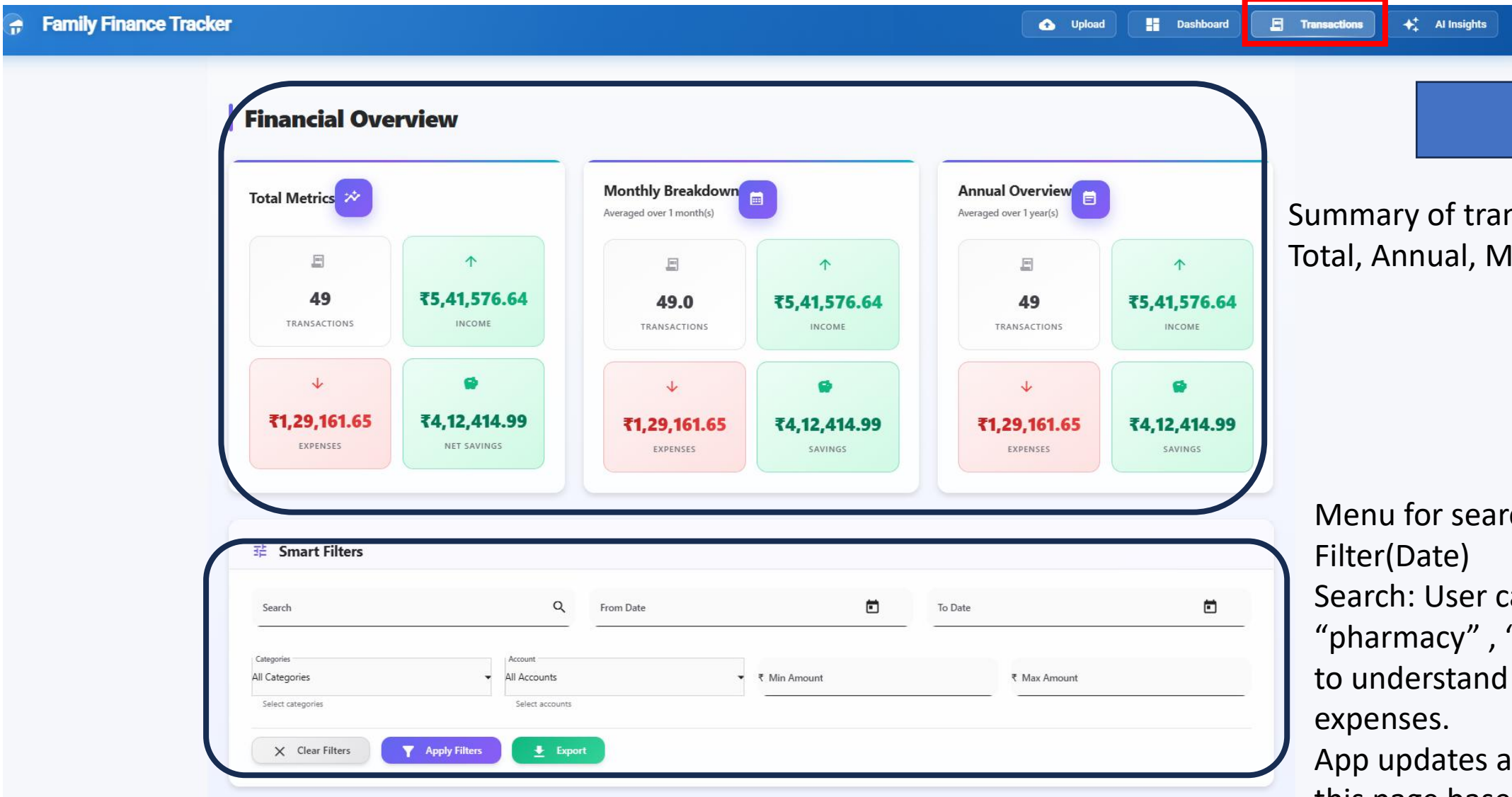
 **Clear All**

Now click on upload 1 file to upload

Dashboard Menu



Transactions menu



STEP 4

Summary of transactions
Total, Annual, Monthly

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

Cash Flow Timeline

Visual analysis of income vs expenses over time



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

UploadDashboardTransactionsAI Insights

AI Insights

Your intelligent financial assistant

AI Model

Gemini 2.5 FlashLatest and fastest

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

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

Prepopulated questions

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