Programming Spec

- This app will allow users to look at their spending, and allow them to see what their current spending is, while also allowing them to set a budget to stay under.
- I envision a graph that shows users how close they are to their maximum spend budget, and a small section underneath to show the exact amount $xxx.yy.
- Within each transaction, users should be able to create a budget, which updates the graph on the landing page with added activity.

I am using a CSV and pandas to get data and add data

- For testing I am using a local host with flask

Vignettes

1. Adding Activity

Jane is logged in and has just bought some baskets from Target. She wants to update her spending so she adds the activity which then updates how much she has spent. She also managed to sell some old baskets on ebay and wants to account for that as well.

2. Viewing her activity

Jane can quickly look at a graph that shows her account activity over time with each account update she has. (If I have time) It will also show her how close she is to her target budget.

3. Viewing the Account Activity

Under the chart and adding activity, Jane can see all the stuff she has spent money on and how much she spent.(If I have time, but probably won't) She can sort by categories to see where she spends the most money.

Ideas For Later

Ideally users would be able to ignore a transaction/delete it from the transaction page if needed.

Having users set the time period their budget starts and ends, would be super helpful when figuring out what transactions to show.

On the individual accounts page, having a “progress bar” would be nice to show how much the user has spent, but specifically show how close it is to their budget.

Review Doc

In essence, my project will end up being a credit card manager application. Assuming that the user has logged in, they can add transactions and look at a chart to see how their spending has changed throughout the month. They can also look at each transaction that they have made so far and see if it was a purchase or refund, what establishment it was purchased from, the amount, and possibly the category of what it falls under. Currently I have the foundation to make this possible. I have added in the field entry form for inputting new activity. I also have it set up locally so I can see all the changes I make in Python.

Obviously the biggest issue I encountered was not being able to use the plaid API, but I think together we did find a easy pivot point to where I could create something using a CSV file and utilizing pandas. For issues that I haven't solved yet, it's more about researching and coming up with code that solves the problems that I need it to. It's not so much as hard to figure out as more tedious to learn how to implement. I think all of my current issues are solvable and are included in my next steps of what I need to do.

For my next steps, I plan on making sure that the transactions added will go back into the CSV and update the budget. And that in turn will plot the data for the user. I also plan on showing what the budget is for the time period allotted. I don't think I'll have enough time to do specific timestamps or filters for looking at specific time periods, but if I do I will implement that. I am very confident in where I am at in my project.

Milestones:

1. Make sure added activity updates the CSV file(I'll need most help on this part)
2. Use the CSV data to show current spending
3. Show spending over time in comparison to what the users budget is
4. Optional, create a warning if the spending exceeds or is very close to the budget

Self Reflection:

I think all my expectations were going to be very difficult but when I started going back to the material we previously learned and I started coding, it was easier than expected. The hardest part so far was just going back to the material we learned and seeing what needed to be implemented. Where and in what order. The part that was most daunting to me was making sure that I could set up my application using a local host. For me I had smaller light bulb moments of coding, then reaching another problem, and then realizing I could reuse bits of code that I had already made. At that point I could just change some words and it worked. It has also forced me to become better at python lol.