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# <u>Finance Tracker</u>

## User Manual:

This application is designed to help one take control of personal finances by providing an easy and intuitive way to track income and expenses. Whether one is managing a monthly budget, planning for future expenses, or simply keeping an eye on spending habits, the Finance Tracker is here to simplify the process. With features like transaction tracking, analytics, and customizable filters, one can gain valuable insights into financial health and make informed decisions.

### 1. Homepage Overview

When one visits the website, they'll land on the homepage. Here's what one will see:

- A clean and intuitive interface.
- Navigation options to access different features.
- Quick access to add transactions and view analytics.

### 2. Key Features

### a. Track Income and Expenses

- **How to Use**:
    1. Click on the **"Add Transaction"** button (or similar option).
    2. Fill in the details:
        - **Type**: Select "Income" or "Expense."
        - **Amount**: Enter the amount.
        - **Category**: Choose a category (e.g., Salary, Food, Rent).
        - **Date**: Select the date of the transaction.
    3. Click **Save** to add the transaction.

- **What It Does**:
  - The transaction will be added to one's financial records.
  - One can view it in the analytics section or the transaction data bar.

**b. Analytics Section**

- **How to Use**:
  1. Navigate to the **Analytics** section.
  2. View the following details:
     - **Total Turnover**: The combined total of all income and expenses, displayed as a percentage.
     - **Total Transactions**: The total number of transactions, displayed as a percentage.
     - **Category-wise Income and Expense**: A breakdown of income and expenses by category (e.g., Salary, Food, Rent), organized as percentages.
  3. Explore the **Category-wise Data** to see how income and expenses are distributed across different categories.
- **What It Does**:
  - Provides a detailed breakdown of one's financial activity.
  - Helps one understand how much is being earned and spent in each category.
  - Allows one to identify areas where costs can be cut or resources allocated more effectively.

**c. Transaction Data Bar**

- **How to Use**:
    1. Navigate to the **Transaction Data Bar** (or similar section).
    2. View a summary of transactions, organized by:
        - **Type**: Income or Expense.
    3. Use the **Filters** to customize the view:
        - **Date**: Filter transactions by:
        - **Last Week**: View transactions from the past 7 days
        - **Last Month**: View transactions from the past 30 days.
        - **Last Year**: View transactions from the past 12 months.
        - **Custom**: Select a specific date range to view transactions.
        - **Type**: Filter transactions by "Income" or "Expense."
    4. Apply the filters to see the relevant transactions.
- **What It Does**:
    - Provides a quick overview of one's financial activity.
    - Helps one review transactions based on specific timeframes or types.
    - Makes it easy to analyze financial habits over different periods.

**3. User Account Features**

**a. Sign Up**

- **How to Use**:
    1. Click on the **Sign Up** button.
    2. Enter one's details (e.g., name, email, password).
    3. Verify one's email (if required).
- **What It Does**:
    - Creates a personalized account for the user.
    - Saves one's data for future access.

**b. Log In**

- **How to Use**:
  1. Click on the **Log In** button.
  2. Enter one’s email and password.
  3. Access one’s dashboard and financial data.
- **What It Does**:
  - Securely logs one into their account.
  - Restores one’s saved data.

**c. Log Out**

- **How to Use**:
  1. Click on one’s profile icon or name.
  2. Select **Log Out**.
- **What It Does**:
  - Securely logs one out of their account.
  - Protects one’s data from unauthorized access.

**4. Tips for Effective Use**

- **Regular Updates**: Add transactions as soon as they occur to keep one’s records accurate.
- **Review Analytics**: Check the category-wise income and expense percentages regularly to identify spending trends.
- **Use Filters**: Use the date and type filters in the transaction data bar to analyze finances over specific periods.
- **Categorize Transactions**: Use specific categories (e.g., Food, Rent, Entertainment) to get a clearer picture of one’s financial habits.

**Conclusion**

The Finance Tracker is designed to simplify financial management. By using its features effectively, one can gain better control over income and expenses. Start tracking today and take the first step toward financial awareness!

Also  please visit the project repository on github:https://github.com/Deya824/Finance_Tracker

You can find the project live on  :https://finance-tracker-9.onrender.com/