

AI Budget Tracker – User Walkthrough

Welcome to your personal budget insights dashboard — designed to help you visualize monthly patterns, identify category drivers, and forecast cost changes, without digging through spreadsheets.





This tool is optimized for freelancers, spreadsheet enthusiasts, and anyone who wants fast, visual insights with flexible data input.

Getting Started






You can use this dashboard in three ways:

1. **Upload your own CSV or Excel budget file**
2. **Connect a Google Sheet** using the credentials shown in the app
3. **Click “Try Sample Budget”** to explore features instantly

Once your data is loaded, the app will auto-detect common columns (like income, expenses, category, and date) and reveal:

-  Monthly spending trends
-  Category-level breakdowns
-  Top spend areas and shifting patterns
-  Estimated changes based on market pressure

What You'll See

-  **Financial Overview** with income, expenses, and balance
-  **Category Breakdown** of spending habits
-  **Monthly Expense Trend Line**
-  **Driver Insights** using collapsible panels and emoji annotations
-  **Forecast Panel** for estimating next month's changes

You can download the market forecast as a CSV file for later reference.

About the Forecasts

The dashboard includes a **Market Trends section** that estimates future costs in areas like:

- Groceries 🛒
- Transportation 🚗
- Utilities ⚡

These forecasts are **not based on official government or economic data**.

They use **example rates** to simulate how external pressure *could* affect common expenses.

They're designed to help you *think ahead*, not predict reality — a useful tool for proactive budgeters.

🧠 No Setup Required (Aside from Python)

To run the dashboard, you'll need:

- **Python installed** on your device ([Download here](#))

During install, check ☒ "Add Python to PATH"

- **Streamlit installed**

Open your command prompt and run:

```
pip install streamlit
```

To launch the app, type:

```
streamlit run ai_budget_tracker.py
```

If you're unfamiliar with Python, check the included setup instructions or ask for help — setup takes about 5 minutes and works on most Windows or Mac machines.

📁 What's Included

Your purchase includes:

- `ai_budget_tracker.py` — the dashboard file
- `walkthrough.pdf` — this setup guide
- *(optional)* `market_forecast.csv` — sample output
- *(optional)* dashboard screenshot — for reference

This app is made for users who want insights, not headaches. Use the sample budget to preview features, or connect your own file and start seeing your money more clearly.

Let me know if you want a shortened version for the Gumroad description or a Canva layout template. We're in shipping mode now 