PERSONAL EXPENSE TRACKER

PROJECT REPORT

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in partial fulfillment of the requirements for the award of the degree

of

BACHELOR OF ENGINEERING

in

COMPUTER SCIENCE AND ENGINEERING

SRI KRISHNA COLLEGE OF ENGINEERING AND TECHNOLOGY COIMBATORE

(An Autonomous Institution)



ANNA UNIVERSITY: CHENNAI MAY 2022

SRI KRISHNA COLLEGE OF ENGINEERING AND TECHNOLOGY

(An Autonomous Institution)

(Approved by AICTE and Affiliated to Anna University, Chennai)
ACCREDITED BY NAAC WITH "A" GRADE

BONAFIDE CERTIFICATE

Certified that this project report titled **Personal Expense Tracker**" is the bonafide work of **PRANESH S** (19EUCS107), **RAJEEV CHANDRAN S** (19EUCS107), **POOVARASAN K** (19EUCS106), **PRAVEEN KUMAR S P** (19EUCS110) who carried out the project work under my supervision.

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INTERNAL EXAMINER

EXTERNAL EXAMINER

ACKNOWLEDGEMENT

We express our sincere thanks to the management and **Dr.J.JANET**, **M.E.,Ph.D.**, Principal, Sri Krishna College of Engineering and Technology, Coimbatore for providing us the facilities to carry out this project work.

We are highly indebt to **Dr.K. SASIKALA RANI**, **M.E.,Ph.D.**, Head of Computer Science and Engineering for her continuous evaluation, valuable suggestions and comments given during the course of the project work.

We are thankful to **MS. POORANAM N, M.E.,** Project Co-ordinator, Department of Computer Science and Engineering for her continuous evaluation, valuable suggestions and comments given during the course of the project work.

We express our deep sense of gratitude to our guide, **Dr. SUJARITHA M, M.E.,Ph.D.,** Professor in the department of Computer science and Engineering for her valuable advice, guidance and support during the course of our project work.

By this, we express our heartfelt sense of gratitude and thanks to our beloved parents, family and friends who have all helped in collecting the resources and materials needed for this project and for their support during the study and implementation this project.

TABLE OF CONTENTS

CHAPTER NO	TITLE ABSTRACT	PAGE NO
1	INTRODUCTION	
	1.1 Project Overview	
	1.2 Purpose	
2	LITERATURE SURVEY	
	2.1 Existing problems	
	2.2 References	
	2.3 Problem Statement Definition	
3	IDEATION & PROPOSED SOLUTION	N
	3.1 Empathy Map Canvas	
	3.2 Ideation & Brainstorming	
	3.3 Proposed Solution	
	3.4 Problem Solution fit	
4	REQUIREMENT ANALYSIS	
	4.1 Functional requirement	
	4.2 Non-Functional requirements	
5	PROJECT DESIGN	
	5.1 Data Flow Diagrams	
	5.2 Solution & Technical Architecture	
	5.3 User Stories	
6	PROJECT PLANNING & SCHEDULI	NG
	6.1 Sprint Planning & Estimation	
	6.2 Sprint Delivery Schedule	

6.3 Reports from JIRA

7 CODING & SOLUTIONING

7.1 Feature 1 : Register Page

7.2 Feature 2 : Login Page

7.3 Feature 3 : Dashboard

7.4 Feature 4 : Stats Page

8 TESTING

8.2 Test Cases

8.3 User Acceptance Testing

9 RESULTS

9.1 Performance Metrics

10 ADVANTAGES & DISADVANTAGES

- 11 CONCLUSION
- 12 FUTURE SCOPE
- 13 APPENDIX

1. INTRODUCTION:

In today's busy and expensive lives we are in a great rush to make money. But at the end of the day we broke off. As we are unknowingly spending money on little and unwanted things. So, we have come over with the idea to track our earnings. Daily Expense Tracker (DET) aims to help everyone who are planning to know their expenses and save from it. DTE is a website in which user can add expenses on daily basis and its table will get generated and at the end based on user expenses report will be generated. User can select date range to calculate his/her expenses come over with the idea to track our earnings. Personal Expense Tracker aims to help everyone who are planning to know their expenses and save from it. Personal Expense Tracker is a website in which user can add expenses on daily basis and at the end, based on user expenses report will be generated. User can select date range to calculate his/her expenses.

1.1 Project Overview:

This website is used to track expenses and control spending beyond limits. while input data of expenses in website, we must select category which spent on and additionally notes can be used to note the details of expenses. By entering those record we can track our expenses. we can generate reports in graphical, pie chat. We can also set limits to particular category which alerts in email when the limits exceed.

1.2 Purpose:

At end of certain period, users does not know where they spent their money and they spend more on needless expenses beyond budgets which leads to financial crisis. To avoid this people needs to track their expenses. While calculating in diary requires lot of manual calculation and lot of time. This is the purpose to go for website application to track expenses.

LITERATURE SURVEY

2.1 Existing problem:

People can't able to track their expenses and spending more on unnecessary expenses which leads to money crisis. Without tracking people can't know whether they exceed the limit of their budget. Diary notes requires lots of manual calculation and It reduces the interest to track expenses. User frustrated about they can't remember where their money goes and can't handle their cash flow. There is no alerting system about exceeding limits.

There can be many disadvantages of using a manual accounting system. Accounting, for any business, can be a complex undertaking. A manual accounting system requires you to understand the accounting process in a way that may be unnecessary with a computerized accounting system. This can be an advantage or a disadvantage, depending on the person doing the bookkeeping; often, a specially trained professional is needed to ensure that accounting is done properly. Unrevealing the complexity of your financial records by hand may be time consuming. Since it takes time to generate reports.

2.2 References:

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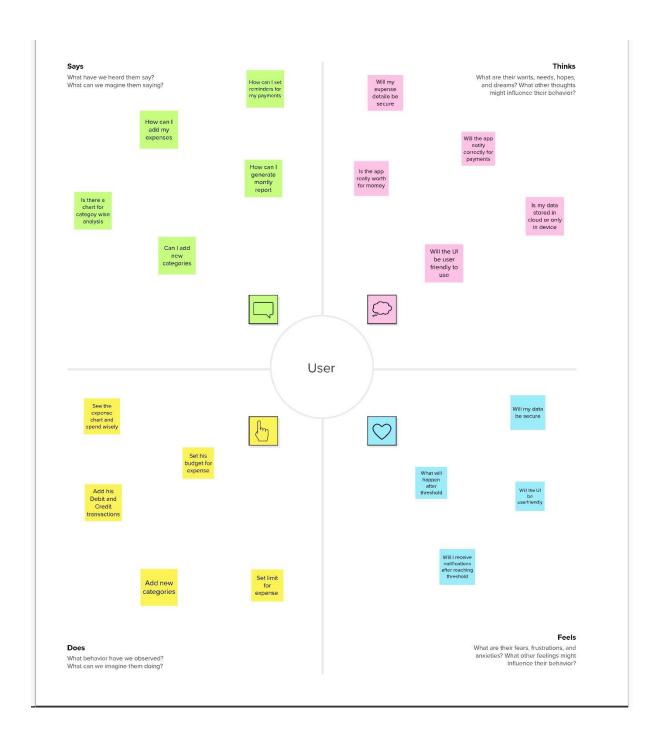
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- 11. Drew, J. H., Mani, D. R., Betz, A. L., & Datta, P. (2001). Targeting customers with statistical and data-mining techniques. *Journal of Service Research*, *3*, 205–220.
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- 14. Fu, H. P., & Chang, T. S. (2016). An analysis of the factors affecting the adoption of cloud consumer relationship management in the machinery industry in Taiwan. *Information Development*, 32(5), 1741–1756.
- 15. Ngai, E. W. (2005). Customer relationship management research (1992–2002) An academic literature review and classification. *Marketing Intelligence & Planning*, 23(6), 582–605.

2.3 Problem Statement Definition:

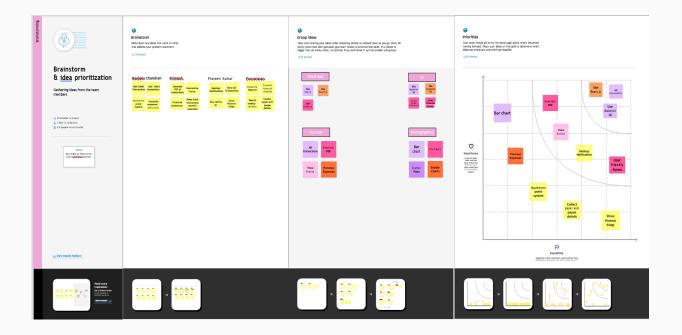
Our project helps the user to keep track their expenses and determine whether they are spending as per their set budget. Potential users need to input the required data such as the expense amount, merchant, category, and date when the expense was made. Which allows users to track their expenses daily, weekly, monthly, and yearly in terms of summary, bar graphs, and pie-charts. It is like automated diary which requires no burden of manual calculation and enables the user to not just keep the control on the expenses but also to generate and save reports. Users can insert and delete transactions. We can compare with past expenses. Customized email alerts are used alerts user when limit exceeds.

IDEATION & PROPOSED SOLUTION

3.1Empathy Map Canvas



3.2 IDEATION & BRAINSTORMING:



3.3 PROPOSED SOLUTION:

S.No.	Parameter	Description
1.	Problem Statement (Problem to be	People can't able to track their expenses and
	solved)	spending more on unnecessary expenses
		which leads to money crisis. People forget to
		pay dues on time, sometimes this leads to
		fine. Diary notes requires lots of manual
		calculation and It reduces the interest to track
		expenses.
2.	Idea / Solution description	Our project helps the user to keep track their
		expenses and determine whether they are
		spending as per their set budget. Potential
		users need to input the required data such as
		the expense amount, merchant, category, and
		date when the expense was made. Which
		allows users to track their expenses daily,
		weekly, monthly, and yearly in terms of
		summary, bar graphs, and pie-charts. User
		forgotten to input records can be avoided by
		remainders and alerts are helps to pay dues
		on time. It is like automated diary which

		requires no burden of manual calculation and enables the user to not just keep the control on the expenses but also to generate and
		save reports. Users can insert and delete transactions. We can compare with past expenses.
3.	Novelty / Uniqueness	We can set budgets for particular category to track unwanted expenses. we can generate reports as pdf for specific category. Budget setting feature leads people to overconsume some goods, under consume others and control over spending beyond limits.
4.	Social Impact / Customer Satisfaction	This solution controls users on overspending and reduces money crisis due to unwanted expenses. As this tracking expense becomes a habit, people can get a good picture of how much money they need to maintain their lifestyle. Tracking helps people to feel confidence on finance.
5.	Business Model (Revenue Model)	Revenue can be generated by placing advertisement.
6.	Scalability of the Solution	A Future update shall have payment option were we can pay dues and subscription. Linking Bank accounts and also tracking shares. It can be scaled for all types of people from any type of field.

3.4 Problem Solution fit:

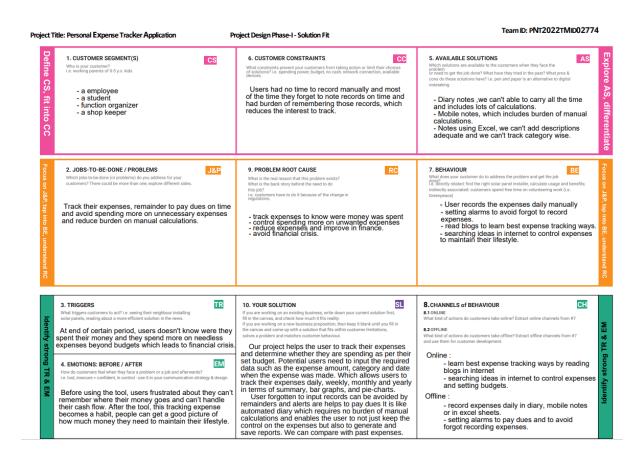
The Problem-Solution Fit simply means that you have found a problem with your customer and that the solution you have realized for it actually solves the customer's problem. It helps entrepreneurs, marketers and corporate innovators identify behavioral patterns and recognize what would work and why

Purpose:

Solve complex problems in a way that fits the state of your customers.
Succeed faster and increase your solution adoption by tapping into existing mediums
and channels of behavior.

Understand the existing situation in order to improve it for your target group.
and building trust by solving frequent annoyances, or urgent or costly problems.
Increase touch-points with your company by finding the right problem-behavior fit
messaging.
Sharpen your communication and marketing strategy with the right triggers and

Template:



REQUIREMENT ANALYSIS

4.1Functional Requirements:

Following are the functional requirements of the proposed solution.

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	Be aware of daily expenditures	Enter amount spent
FR-2	Generate visually appealing charts	Notify users periodically to update their expenses
FR-3	Categorize credit and debit transactions	Always looks for credit/debit threshold
FR-4	Prompt to not exceed the threshold amount	Send email alerts if the user is on the verge of exceeding the threshold
FR-5	Show ways to minimize expense in the most spent area	Constantly look for patterns from previous expenses to improve accuracy

4.2 Non-functional Requirements:

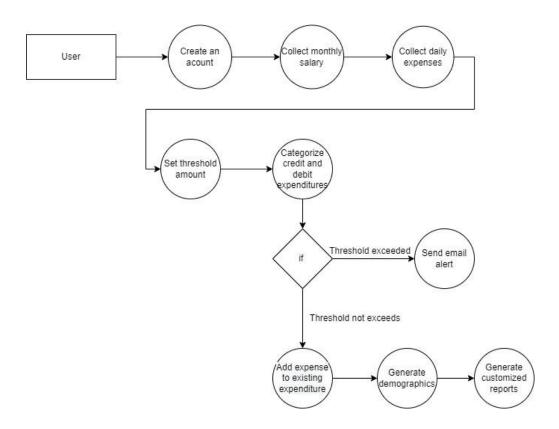
Following are the non-functional requirements of the proposed solution.

FR No.	Non-Functional Requirement	Description				
NFR-1	Usability	The UI/UX must be visually appealing and				
		pleasing to the senses with proper placements of primitive elements.				
NFR-2	Security	Completely safe and private as user's data				
		is neither shared nor utilized for any other				
		secondary purposes.				
NFR-3	Reliability The application is guaranteed to give non-					
		erroneous results at most instances.				
NFR-4	Performance	The application is entirely robust to handle the				
		incoming traffic even if there occurs an				
		unexpected surge.				
NFR-5	Availability	The application does not fail to keep track of the				
		expenses that have been entered				

PROJECT DESIGN:

5.1 Data Flow Diagrams:

A Data Flow Diagram (DFD) is a traditional visual representation of the informationflows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



5.2 Solution Architecture and Technical Architecture:

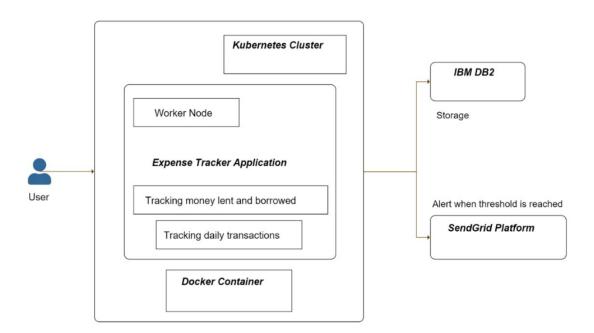
Solution Architecture:

Solution architecture is a complex process – with many sub-processes – that bridges the gap between business problems and technology solutions. Its goals are to:

• Find the best tech solution to solve existing business problems.

- Describe the structure, characteristics, behavior, and other aspects of the software to project stakeholders.
- Define features, development phases, and solution requirements.
- Provide specifications according to which the solution is defined, managed, and delivered.

Example - Solution Architecture Diagram:



TECHNICAL ARCHITECTURE:

The Deliverable shall include the architectural diagram as below and the information as per the table 1 & table 2

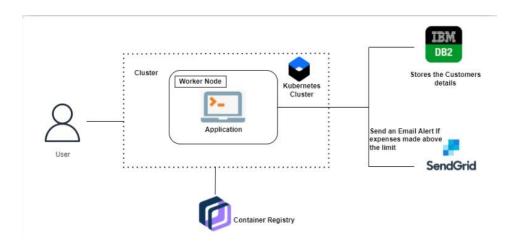


Table-1: Components & Technologies:

S.No	Component	Technology
1.	User Interface	HTML
2.	Application Logic-1	Python
3.	Application Logic-2	IBM DB2
4.	Microservice	SendGrid

Table-2: Application Characteristics:

S.No	Characteristics	Technology
1.	Open-Source Frameworks	Flask
2.	Performance	It can handle about 100 requests per second

5.3 User Stories :

Use the below template to list all the user stories for the product.

User Type	Functional Requirement (Epic)	User Story Number	User Story / Task	Acceptance criteria	Priority	Release
Customer	Registration	USN-1	As a user, I can register for the application by entering my email, password, mobile number, weekly expense, montly salary	I can access my account / dashboard	High	Sprint-1
	Login	USN-2	As a user, I can log into the application by entering email & password	I can access my account / dashboard	High	Sprint-1
	Landing page		As a user, I can view my entire expenses throughout a particular period of time	I can view my expenses	High	Sprint-1
			As a user, I can generate reports based on my previous expenditures.	Report is successfully generated	Medium	Sprint-2
			As a user, I can logout	Successfully logout	High	Sprint-1
			As a user, I can create expense	Expense is successfully added	High	Sprint-1
			As a user, I can edit ,delete, update expense	The corresponding action is made to the expense	High	Sprint-1
			As a user, I can view credit and	The expenses are filtered accordingly	Medium	Sprint-2

User Type	Functional Requiremen t (Epic)	User Stor y Numbe r	User Story /Task	Acceptanc ecriteria	Priority	Release
			debit expense			
			S			
			separately.			
			As a user, I can set a minimum	Minimum threshold is set	High	Sprint-1
			threshold for	successfully		
			my total	,		
			expenditure			
			either each			
			week or			
			month.			
			As a user, I can view	Demographics of the	High	Sprint-1
			graphically	expenses are		
			interpreted	generated		
			insights of			
			my expenditures.			
			As a user, I	Know my	Low	Sprint-3
			can be aware	weak points		Spriit
			of the	that prevents		
			expense that	user from		
			I spend the	saving more		
			most on			

PROJECT PLANNING & SCHEDULING

6.1 Sprint Planning & Estimation:

Product Backlog, Sprint Schedule, and Estimation

Use the below template to create product backlog and sprint schedule

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-	Registration	USN-1	As a user, I can register for the application by entering my email, password, mobile number, weekly expense, montly salary	5	High	Poovarasan
Sprint- 1	Login	USN-2	As a user, I can log into the application by entering email & password	2	High	Praveen Kumar
Sprint- 1	Landing page	USN-3	As a user, I can view my entire expenses throughout a particular period of time	13	High	Pranesh
Sprint- 2		USN-4	As a user, I can generate reports based on my previous expenditures	2	Medium	Pranesh
Sprint- 4	Logout	USN-5	As a user, I can logout	2	High	Praveen Kuamr
Sprint- 2	Dashboard	USN-6	As a user, I can create expense	5	Medium	Rajeev Chandran
Sprint-		USN-7	As a user, I can	13	High	Rajeev

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
2			edit ,delete, update expense			Chandran
Sprint-		USN-8	As a user, I can view credit and debit expenses separately.	13	High	Pranesh
Sprint-		USN-9	As a user, I can set a minimum threshold for my total expenditure either each week or month.	2	Low	Rajeev Chandran
Sprint-		USN-10	As a user, I can view graphically interpreted insights of my expenditures	5	High	Poovarasan
Sprint- 4		USN-11	As a user, I can be aware of the expense that I spend the most on	8	High	Poovarasan
Sprint- 4		USN-12	As a user, I can be able to update my set monthly limit	5		
Sprint- 4		USN-13	As a user, I can able to view my profile	5		

6.2 Sprint Delivery Schedule :

Project Tracker, Velocity & Burndown Chart:

Sprint	Total Story Points	Duration	Sprint Start Date	Sprint End Date (Planned)	Story Points Completed (as on Planned End Date)	Sprint Release Date (Actual)
Sprint-1	20	6 Days	24 Oct 2022	29 Oct 2022	20	29 Oct 2022
Sprint-2	20	6 Days	31 Oct 2022	05 Nov 2022	20	05 Nov 2022
Sprint-3	20	6 Days	07 Nov 2022	12 Nov 2022	20	12 Nov 2022
Sprint-4	20	6 Days	14 Nov 2022	19 Nov 2022	20	19 Nov 2022

Velocity:

Velocity is a metric that predicts how much work an Agile software development team can successfully complete within a two-week sprint (or similar time-boxed period). Velocity is a useful planning tool for estimating how fast work can be completed and how long it will take to complete a project

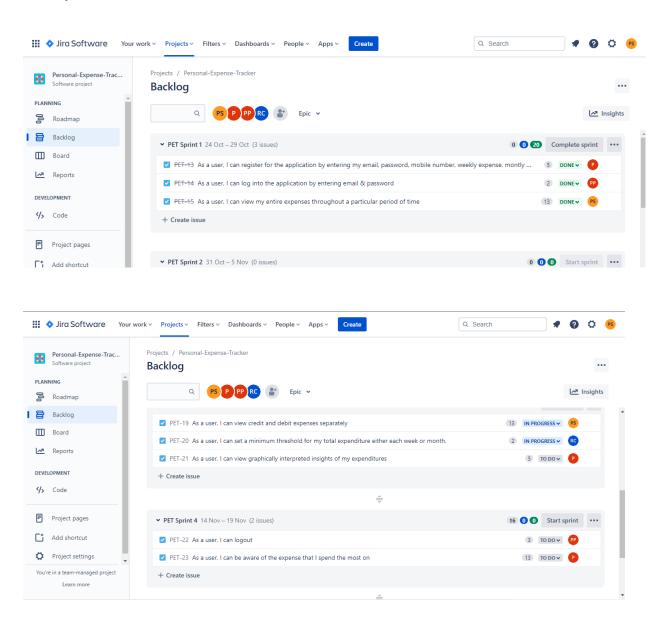
Average velocity = Total story points/ No. of iterations = 80/4 = 20

Burndown Chart:

A burn down chart is a graphical representation of work left to do versus time. It is often used in agile software development methodologies such as Scrum. However, burn down charts can be applied to any project containing measurable progress over time.



6.3 Reports from JIRA:



CODING AND SOLUTIONING

7.1. Feature 1:

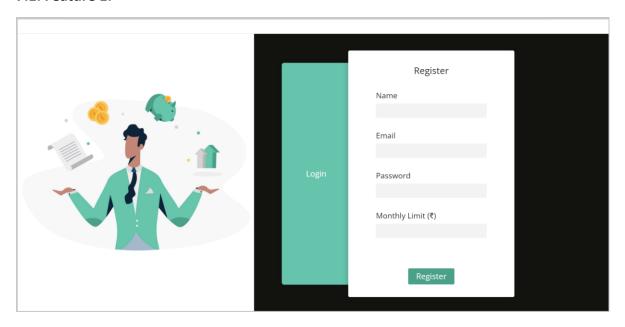


Figure 7.1 – Register page

7.2 Feature 2:

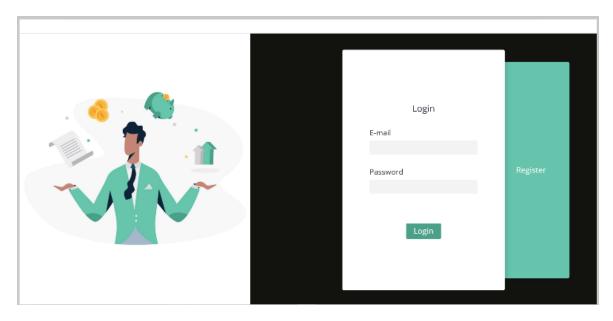


Figure 7.2 – login page

7.1 Feature 3:



Figure 7.3 – Dashboard

7.1 Feature 4:

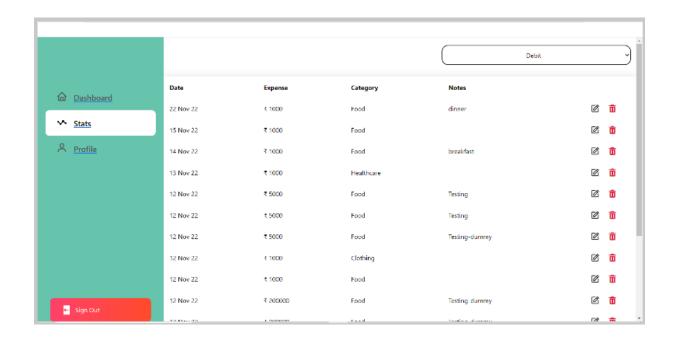


Figure 7.4 – Stats page

TESTING

8.1 TEST CASES:

- 1. Login button click with wrong credentials entered.
- 2. Signup with already registered mail ID.
- 3. Signup with wrong form data entered.
- 4. Entering home page with logged out session.
- 5. delete expense triggers change in graph.
- 6. Add expense without choosing category.

8.2 USER ACCEPTANCE TESTING

s. n o	Test Cas e id	Featur e Type	compone nt	Test description	Input test Data	Actual output	Expected output	remark s
1	TC – RG 01	Func- tional	Register page	register for the application by entering my name, email, password, monthly limit	User1 User1@gmail.co m ***** 10000	Registratio n successful	Registratio n successful	pass
2	TC – SI 01	Func- tional	Login page	log into the application by entering email & password	User1@gmail.co m *****	Login successful	Login sucessfull	pass
3	TC – ST 01	UI	Stats page	view my entire expenses throughout a particular period of time		Expenses are displayed For particular time	Expenses are displayed For particular time	pass

4	TC - DB 01	UI	Dash- board	Display graph in dashboard		Graph is displayed	Graph is displayed	pass
5	TC – ST 02	Func- tional	Stats page	generate reports based on my previous expenditur es		Reports generated in graphical form	Reports generated in graphical form	pass
6	TC – SI 02	Func- tional	Dash- board	can logout		Go to sign page	Sign in page displayed	pass
7	TC – ST 03	Func- tional	Stats page	create expense	14-11-2022 100 Food Debit Night food	Expenses created	Expenses created	pass
8	TC – ST 04	Func- tional	Stats page	can edit ,delete, update expense		Expenses updated	Updated of expenses	pass
9	TC – ST 05	UI	Stats page	can view credit and debit expenses separately.		Expenses are listed separately	Expenses are listed separately	pass
1 0	TC – ST 06	UI	Stats page	aware of the expense that I spend the most on		Expenses are listed for particular category	Expenses are listed for particular category	pass
1 1	TC – PG 01	Func- tional	Profile page	able to update my set monthly limit		Monthly limit updated	Monthly limit updated	pass
1 2	TC – PG 01	UI	Profile page	able to view my profile		Profile details displayed	Profile details displayed	pass

9.1 PERFORMANCE METRICS

Hours worked: 50 hours
 Stick to Timelines: 100%

3. Consistency of the product: 75%4. Efficiency of the product: 80%5. Quality of the product: 85%

CHAPTER 10

ADVANTAGES AND DISADVANTAGES

Advantages:

- ➤ Which allows users to track their expenses daily, weekly, monthly, and yearly in terms of summary, bar graphs, and pie-charts.
- Separate view for credit and debit transactions
- > no burden of manual calculations
- > generate and save reports.
- > You can insert, delete records
- > You can track expenses by categories like food, automobile, entertainment, education etc..
- You can track expenses by time, weekly, month, year etc..
- > Setting monthly limits and we can update it later
- Customized email alerts when limit exceeds.

Disadvantages:

- > User have entry every records manually
- > The category divided may be blunder or messy
- Can't able to customized user defined categories

CONCLUSION:

In this paper, After making this application we assure that this application will help its users to manage the cost of their daily expenditure. It will guide them and make them aware about their daily expenses. It will prove to be helpful for the people who are frustrated with their daily budget management, irritated because of the amount of expenses and wish to manage money and to preserve the record of their daily cost which may be useful to change their way of spending money. In short, this application will help its users to overcome the wastage of money.

CHAPTER 12

FUTURE SCOPE:

- In further days, there will be mails and payment embedded with the app. Also, backup details will be recorded on cloud.
- Here user can define their own categories for expense type like food, clothing, rent and bills where they have to enter the money that has been spend.
- Alerts for paying dues and remainders to record input at particular user defined time.

APPENDIX:

add_expense_model.jsx:

```
response modaljsx X

response expense tracker > src > components > add_expense_modal > @ add_expense_modaljsx > ...

1 import "./add_expense_modal.css";
2 import React, { useState, useFffect } from "react";
3 import React, { useState, useFffect } from "react toastify";
4 import "react-toastify/dist/ReactToastify.css";
5 import useStore from "././state";
6 const AddExpenseModal = ({ handleclose, show }) => {
7 const showHideclassName = show ? "modal display-block" : "modal display-none";
8 const addExpense = useStore(state => state.addExpense)
10 const fetchExpendItureBreakdown - useStore(state => state.fetchExpendItureBreakdown)
11 const userId = useStore(state => state.userId)
13 const [formData, setFormData] = useState({
    date: "",
16    amount: "",
17    category: "Food",
18    description: "",
19    expenseType: "debit",
19    });
10    let categories = [
18    "Food",
24    "Automobiles",
25    "Entertainment",
26    "Clothing",
27    "Healthcare",
28    "Others",
29    ];
30    let expenseTypes = ["debit", "credit"];
31
```

expenditure_breakdown.jsx

Expense_table.jsx

Expense_charts.jsx

```
expense_charts.jsx ×
oersonal-expense-tracker > src > components > expense_charts > 🥸 expense_charts.jsx > ...
      import React, { PureComponent } from "react";
          Radar,
          RadarChart,
          PolarGrid,
          Legend,
          PolarAngleAxis,
          PolarRadiusAxis,
          ResponsiveContainer,
          PieChart,
      Cell,
} from "recharts";
              subject: "Food",
              A: 120,
               fullMark: 3000,
               subject: "Automobiles",
               fullMark: 3000,
               subject: "Entertainment",
               B: 130.
```

Home.js

```
ersonal-expense-tracker > src > pages > home > JS home.js > 🕪 Home > 🕪 onFabClick
       import React, { useEffect, useRef, useState } from "react";
        import "./home.css";
       import ExpenditureBreakdown from "../../components/expenditure_breakdown/expenditure_breakdown";
       import "font-awesome/css/font-awesome.min.css";
import { useNavigate } from "react-router-dom";
import AddExpenseModal from "../../components/add_expense_modal/add_expense_modal";
import ExpenseCharts from "../../components/expense_charts/expense_charts";
import { useCookies } from 'react-cookie';
       const Home = () => {
  const navigate = useNavigate();
  const [showPopup, setShowPopup] = useState(false);
             const [cookies,setCookie] = useCookies(['userId'])
             const onFabClick = () => {
    setShowPopup(!showPopup);
                   <div className="main-container">
                         <div className="main-area"
                               <h3 className="hello-text">Expenditure Insights</h3>
                               <ExpenditureBreakdown />
                               {/* <h1 className='hello-text'>Most Recent Expenses</h1> */}
{/* <ExpenditureTable/> */}
                               {showPopup ? (
29
30
                                     <AddExpenseModal
                                          show={showPopup}
                                          handleClose={onFabClick}
```

app.py

```
> add
                                                                                                                                               \uparrow \downarrow = \times
import datetime
 from datetime import datetime, timedelta, date
# import os from sendgrid import SendGridAPIClient # from sendgrid.helpers.mail import Mail
app = Flask(__name__)
cors = CORS(app)
     print("Connecting")
     print("Successfully connected")
   print(ibm_db.conn_errormsg())
@app.route(
@cross origin()
 def hello():
     return 'hello'
@app.route('/login', methods = ['POST'])
@cross_origin()
     email = request.form['email']
password = request.form['password']
```

Project Demonstration Link: https://youtu.be/IWXs5q-sPBI

Source code link: https://github.com/IBM-EPBL/IBM-Project-16706-1659620894