

PROJECT REPORT

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PERSONAL EXPENSE TRACKER

Team ID	PNT2022TMID14458
Project Name	Personal Expense Tracker
Team Members	Sowmya V Shakthi A S Harshini S Vanitha R

1. INTRODUCTION

1.1 Project overview

There are various applications that provide solutions to manage personal and group expenses but not many of them provide a comprehensive view of both cases. In this paper, we develop a web application that keeps record of a user's personal expenses, his/her contribution in group expenditure. The proposed application would eliminate messy sticky notes, spreadsheets confusion and data handling inconsistency problems while offering the best overview of your expenses. With our application we can manage their expenses and decide on their budget more effectively.

1.2 Purpose

It is also known as expense manager and money manager, an expense tracker is a software or application that helps to keep an accurate record of your money inflow and outflow. Many people in India live on a fixed income, and they find that towards the end of the month they don't have sufficient money to meet their needs.

2. LITERATURE SURVEY

Existing problem

The problem of current generation population is that they can't remember where all of the money they earned have gone and ultimately have to live while sustaining the little money they have left for their essential needs. In this time there is no such perfect solution which helps a person to track their daily expenditure easily and efficiently and notify them about the money shortage they have. For doing so they have to maintain long ledger's or computer logs to maintain such data and the calculation is done manually by the user, which may generate error leading to losses. Not having a complete tracking

2.1 Reference

<https://nevonprojects.com/daily-expense-tracker-system/>

<https://data-flair.training/blogs/expense-tracker-python/>

<https://phpgurukul.com/daily-expense-tracker-using-php-and-mysql/>

<https://ijarsct.co.in/Paper391.pdf>

https://kandi.openweaver.com/?landingpage=python_all_projects&utm_source=google&utm_medium

[iium=cpc&utm_campaign=promo_kandi_ie&utm_content=kandi_ie_search&utm_term=python_d
evs&gclid=Cj0KCQiAgribBhDkARIsAASA5bukrZgbI9UZxpoyf0P-ofB1mZNxzc-okUP-
3TchpYMclHTYFYiqP8aAmmwEALw_wcB](http://iium=cpc&utm_campaign=promo_kandi_ie&utm_content=kandi_ie_search&utm_term=python_d
evs&gclid=Cj0KCQiAgribBhDkARIsAASA5bukrZgbI9UZxpoyf0P-ofB1mZNxzc-okUP-
3TchpYMclHTYFYiqP8aAmmwEALw_wcB)

2.2 Problem Statement Definition

Modern education does not focus on finance management. This is primarily due to lack of resources and the Indian value system on giving money to children. Failing to teach this valuable knowledge had left many Indians to recklessly spend their income and fall into vicious cycles of EMI and debt. Many of them are just a month's salary away from bankruptcy.

This issue is tackled by providing a web application for where people can plan their monthly expenses into categories, set alerts and get visual insights from their spending patterns.

1. Who does the problem affect ?

Young adults and earning middle class citizens.

- ## 2. What is the issue ?

Lack of financial literacy among people

3. When does the issue occur ?

Primarily when the person moves from college to job and starts earning their own money.

4. Where is the issue occurring ?

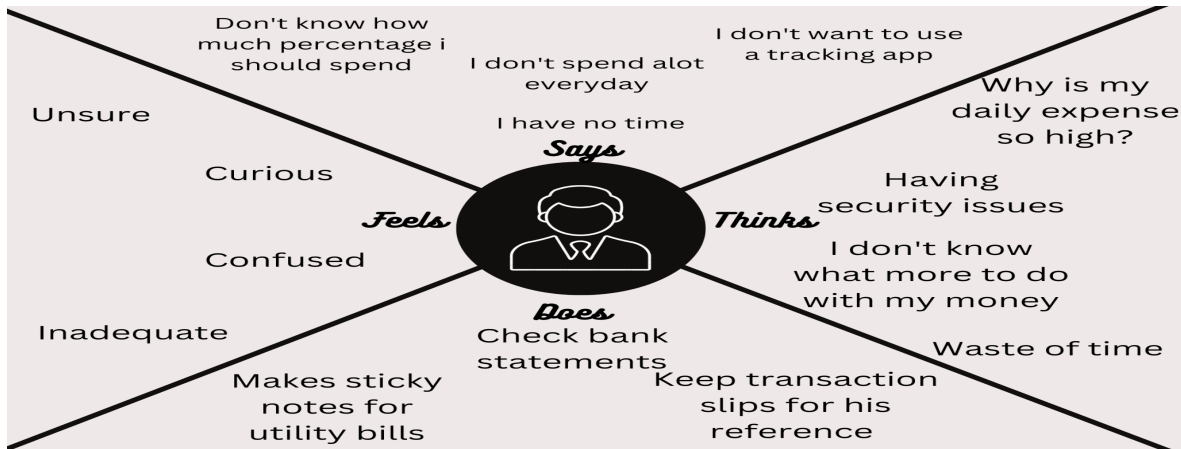
Especially among young engineers who are newly exposed to consumer centric market and services.

5. Why is it important that we fix the problem ?

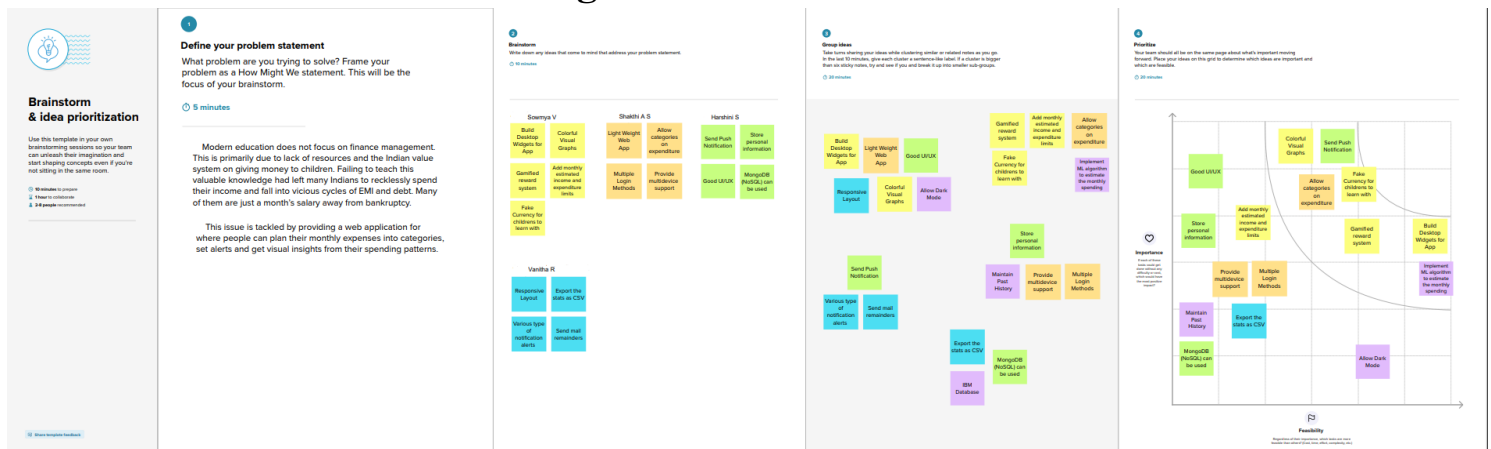
The recent BuyNowPayLater services and Credit apps have made people spend more than what they earn and repay.

3. IDEATION & POPOSED SOLUTION

Empathy Map canvas



3.1 Ideation & Brainstorming



3.2 Proposed Solution

All people in the earning sector need a way to manage their financial resources and track their expenditure, so that they can improve and monitor their spending habits. This makes them understand the importance of financial management and makes them better decisions in the future .They have an option to set a limit for the amount to be used for that particular month if the limit is exceeded the user will be notified with an email alert. The solution to this problem is, the people who get regular payments are able to track their payments and void unwanted expenses. If the limit is exceeded the user will be notified with an email alert.

3.3 Proposed Solution Fit

The solution to this problem is, the people who gets regular payments can able to track their payments and avoid unwanted expenses. If the limit is exceeded the user will be notified with an email alert.

- Novelty / Uniqueness Notification can be receive through email.
- Social Impact / Customer Satisfaction Using this application one can track their personal expenses and frame a monthly/annual budget. If your expense exceeded than specified limit, the application will show you an alert message .This will make a impact on Mobile Banking for Customers' Satisfaction.
- Business Model (Revenue Model) Business people can use subscription/premium feature of this application to gain revenue.
- Scalability of the Solution The scalability of the application depends on security, the working of the application even during when the network gets down etc...

4. REQUIREMENT ANALYSIS

4.1 Functional requirement

Following are the functional requirements of the proposed solution.

- FR-1 User Registration ,Registration through Form Registration through Gmail Registration through LinkedIN
- FR-2 User Confirmation ,Confirmation via Email Confirmation via OTP
- FR-3 Tracking Expense Helpful insights about money management
- FR-4 Alert Message Give alert mail if the amount exceeds the budget limit
- FR-5 Category This application shall allow users to add categories of their expenses

4.2 Non Functional requirement

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

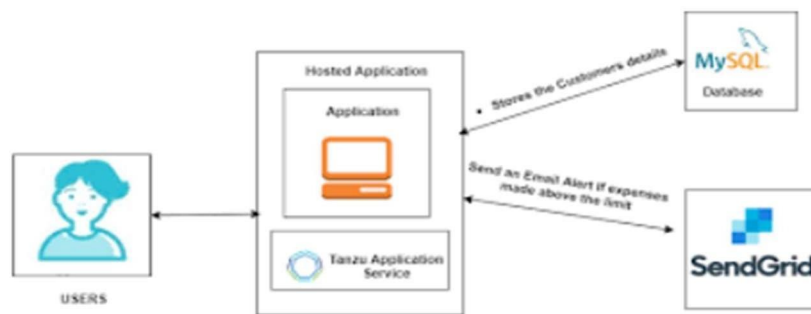
- NFR-1 Usability You will able to allocate money to different priorities and also help you to cut down on unnecessary spending
- NFR-2 Security More security of the customer data and bank account details.
- NFR-3 Reliability Used to manage his/her expense so that the user is the path of financial stability. It is categorized by week, month, and year and also helps to see more expenses made. Helps to define their own categories.
- NFR-4 Performance The types of expense are categories along with an option .Throughput of the system is increased due to light weight database support.
- NFR-5 Availability Able to track business expense and monitor important for maintaining healthy cash flow.
- NFR-6 Scalability The ability to appropriately handle increasing demands.

5. PROJECT DESIGN

5.1 Data Flow Diagrams

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows 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 store

5.2 Solution & Technical Architecture



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 (Mobile user)	Registration	USN-1	As a user, I can register for the application by entering my email, password,	I can access my account / dashboard	High	Sprint 1

			and confirming my password.			
		USN-2	As a user, I will receive confirmation email once I have registered for the application	I can receive confirmation email & click confirm	High	Sprint-1
		USN-3	As a user, I can register for the application through Facebook	I can register & access the dashboard with Facebook Login	Low	Sprint-2
		USN-4	As a user, I can register for the application through Gmail	I can register by entering the details	Medium	Sprint 1
	Login	USN-5	As a user, I can log into the application by entering email & password	I can access my dashboard	High	Sprint 1
	Dashboard	USN-6	As a user ,I can log into the dashboard and manage income	I can access my account / dashboard	High	Sprint 1
Customer (Web user)		USN-7	As a user, I can register for the application by Bank account.	I can access my account / dashboard	High	Sprint 1

Customer Care Executive		USN-8	As a user, I can get a report is	I can manage my money by	Medium	Sprint 1
			based on the details	viewing this report		
		USN-9	As a user, I can get an email if the money level is above the limit	I can receive alert email	High	Sprint 1
Administrative	Responsibility	USN-10	As a system administrator ,track the user expenses anytime	I can track expense	High	Sprint 1

6. PROJECT PLANNING & SCHEDULING

6.1 Sprint Planning & Estimation

Sprint	Functional Requirement(Epic)	User Story Number	User Story/Task	Story Points	Priority	Team Members
Sprint-1	Registration	USN-1	As user ,I can register for the application by entering my email, password ,and confirming my password.	2	High	Sowmya V
Sprint-1		USN-2	As a user ,I will receive confirmation email once I have registered for the application	1	Medium	Harshini S
Sprint-	Login	USN-3	As a user ,I can register for the	2	Medium	Shakthi A S

2			application through Facebook			
Sprint-1	Dashboard	USN-4	As a user, I can register for the application through Gmail	2	High	Vanitha R

6.2 Sprint Delivery Schedule

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	6Days	24Oct2022	29Oct2022	20	29Oct2022
Sprint-2	20	6Days	31Oct2022	05Nov2022	18	06Nov2022
Sprint-3	20	6Days	07Nov2022	12Nov2022	15	14Nov2022
Sprint-4	20	6Days	14Nov2022	19Nov2022	19	21Nov2022

7. Coding And Solutioning:

7.1. Features

Feature 1: Add Expense

Feature 2: Delete Expense

Feature 3: Set Limit

Feature 4: Show warning to user

7.2. Other Features:

Track your expenses anywhere, anytime. Seamlessly manage your money and budget without any financial paperwork. Just click and submit your invoices and expenditures. Access, submit, and approve invoices irrespective of time and location. Quick settlement of claims and reduced human errors with an automated and streamlined billing process.

Codes:

Home.html

```
<!DOCTYPE html>
<html lang="en">

<head>
  <meta charset="UTF-8">
  <meta http-equiv="X-UA-Compatible" content="IE=edge">
  <meta name="viewport" content="width=device-width, initial-scale=1.0">
  <title>Expense Tracker</title>
  <link rel="stylesheet" href="style.css">
  <script src="https://kit.fontawesome.com/1aee831684.js" crossorigin="anonymous"></script>
</head>

<body>

  <!-- navbar -->
  <header class="navbar_cus">
    <a href="/">
      <span>Expense Tracker</h1>
    </a>
  </header>

  <main class="main_section">
    <div class="left_side main_container">
      <div class="incomeExpen">
        <div class="show_table">
          <div class="income_div">
            <form action="index.html" class="signup-form">
              <div class="input_div">
                <label for="email">Email Address*</label>
                <input type="text" class="input_box" name="text_label" id="text_label" placeholder="Enter
email" required="">
              </div>
              <br>
              <div class="input_div">
                <label class="label" for="password">Password*</label>
                <input type="password" class="input_box" name="text_label" id="text_label" placeholder="Enter
password" required="">
              </div>
              <br>
              <div class="butn_div2">
                <button id="addIn_trans" type="submit" class="green_btn">Submit</button>
              </div>
            </form>
          </div>
        </div>
      </div>
    </main>
  </body>
</html>
```

```
</div>
</form>
</div>
</div>
</div>
</div>
</main>
```

```
</body>
</html>
```

index.html

```
<!DOCTYPE html>
<html lang="en">

<head>
  <meta charset="UTF-8">
  <meta http-equiv="X-UA-Compatible" content="IE=edge">
  <meta name="viewport" content="width=device-width, initial-scale=1.0">
  <title>Expense Tracker</title>
  <link rel="stylesheet" href="style.css">
  <script src="https://kit.fontawesome.com/1aee831684.js" crossorigin="anonymous"></script>
</script>
</head>

<body>

  <!-- navbar -->
  <header class="navbar_cus">
    <a href="/">
      <span>Expense Tracker</h1>
    </a>
    <div class="main_balance">
      <h2>Your Balance</h2>
      <span id="balance">
        <!-- Here is the Balance -->
      </span>
    </div>
  </header>

  <main class="main_section">

    <div class="left_side main_container">
      <div class="incomeExpen">
        <div class="show_table">
          <div class="income_div">
            <h4>INCOME</h4>
            <div id="income">
              <!-- Here is the Income -->
            </div>
          </div>
        </div>
      </div>
    </div>
  </main>
</body>
</html>
```

```

        </div>
    </div>

    <div class="expen_div">
        <h4>EXPENSE</h4>
        <div id="expense">
            <!-- Here is the Enpense -->
        </div>
    </div>
</div>

<div class="trans_hist">
    <h4>HISTORY</h4>
    <ul id="trans_list">
        <!-- Here is all transaction -->

        </ul>
    </div>
</div>
<div class="right_side main_container">

    <form onsubmit="return false;">
        <h4>ADD A TRANSACTION</h4>
        <div class="input_div">
            <label for="text_label">Add a label</label><br />
            <input type="text" class="input_box" name="text_label" id="text_label" placeholder="Add a
label">
        </div>
        <div class="input_div">
            <label for="input_trans">Add Transaction</label><br />
            <input type="number" class="input_box" name="input_trans" id="input_trans"
placeholder="Enter Value ">
        </div>
        <div class="btn_div">
            <button id="addIn_trans" class="green_btn">Add Income</button>
            <button id="addEx_trans" class="red_btn">Add Expense</button>
        </div>
    </form>
</div>
</main>
<script src="./script.js"></script>
</body>

</html>

```

8. TESTING:

8.1. TESTING:

- Login Page (Funcional)
- Login Page (UI)
- Add Expense Page (Functional)

User Acceptance Testing:

1. Purpose of Document

The purpose of this document is to briefly explain the test coverage and open issues of the [ProductName] project at the time of the release to User Acceptance Testing (UAT).

2. Defect Analysis

This report shows the number of resolved or closed bugs at each severity level, and how they were resolved

Resolution	Severity 1	Severity 2	Severity 3	Severity 4	Subtotal
By Design	10	4	2	8	15
Duplicate	1	0	3	0	4
External	2	3	0	1	6
Fixed	9	2	4	11	20
Not Reproduced	0	0	1	0	1
Skipped	0	0	1	1	2
Won't Fix	0	5	0	1	8
Totals	22	14	11	22	51

3. Test Case Analysis

This report shows the number of test cases that have passed, failed, and untested

Section	Total Cases	Not Tested	Failed	Pass
Interface	7	0	0	7
Login	43	0	0	43
Logout	2	0	0	2

9. RESULTS

9.1: Login Page:

Expense Tracker

Email Address*

Enter email

Password*

Enter password

Submit

9.2: Landing page

Expense Tracker

Your Balance
₹0

INCOME
₹0

EXPENSE
₹0

HISTORY

ADD A TRANSACTION

Add a label

Add a label

Add Transaction

Enter Value

Add Income

Add Expense

9.3: Income and Expenditure:

Expense Tracker

Your Balance
₹100

INCOME

₹500

EXPENSE

₹400

HISTORY

food	- ₹100	X
shopping	- ₹300	X
income	+ ₹500	X

ADD A TRANSACTION

Add a label

travel

Add Transaction

150

Add Income

Add Expense

9.4: Show warning to user:

Expense Tracker

Your Balance
₹100

This page says
Your balance is in Negative!!!
OK

INCOME

₹500

EXPENSE

₹400

HISTORY

food	- ₹100	X
shopping	- ₹300	X
income	+ ₹500	X

ADD A TRANSACTION

Add a label

travel

Add Transaction

150

Add Income

Add Expense

10. ADVANTAGES AND DISADVANTAGES

10.1. ADVANTAGES:

One of the major pros of tracking spending is always being aware of the state of one's personal finances. Tracking what you spend can help you stick to your budget, not just in a general way, but in each category such as housing, food, transportation and gifts. While a con is that manually tracking all cash that is spent can be irritating as well as time consuming, a pro is that doing this automatically can be quick and simple.

Another pro is that many automatic spending tracking software programs are available for free. Another pro is that for those who just wish to keep tracking spending by hand with a paper and pen or by entering data onto a computer spreadsheet, these options are also available. Some people like to keep a file folder or box to store receipts and record the cash spent each day. A pro of this simple daily tracking system is that it can make one more aware of where the money is going before the end of a pay period or month.

10.2. DISADVANTAGES:

A con with any system used to track spending is that one may start doing it then taper off until it's forgotten about all together. If a person first makes a budget plan, then places money in savings before spending any new pay period or month, the tracking goal can help. In this way, tracking spending and making sure all receipts are accounted for only needs to be done once or twice a month.

Even with constant tracking of one's spending habits, there is no guarantee that financial goals will be met. Although this can be considered to be a con of tracking spending, it could be changed into a pro if one makes up his or her mind to keep trying to properly manage all finances. Another con that may occur when spending is being tracked is an error, but this may also be able to be changed into a pro if the person does regular tracking. Frequent tracking of cash spending can allow one to catch and correct errors so that the budget plan is still able to be adhered to despite the mistake.

11. CONCLUSION:

A comprehensive money management strategy requires clarity and conviction for decision-making. You will need a defined goal and a clear vision for grasping the business and personal finances. That's when an expense tracking app comes into the picture. An expense tracking application is an exclusive suite of services for people who seek to handle their earnings and plan their expenses and savings efficiently. It helps you track all transactions like bills, refunds, payrolls, receipts, taxes, etc., on a daily, weekly, and monthly basis.

12. FUTURE SCOPE:

- Scale-up at the pace your business is growing.
- Deliver an outstanding customer experience through additional control over the app.
- Control the security of your business and customer data.
- Open direct marketing channels with no extra costs with methods such as push notifications.

- Boost the productivity of all the processes within the organization.
- Increase efficiency and customer satisfaction with an app aligned to their needs.

- Ability to provide valuable insights.
- Optimize sales processes to generate more revenue through enhanced data collection.
- Robo Advisors: Get expert investment advice and solutions with the Robo-advisors feature. This feature will analyze, monitor, optimize, and improve diversification in investments by turning data into actionable insights in real-time.
- Chats: Equip your expense tracking app with a bot that can understand and answer all user queries and address their needs such as account balance, credit score, etc.
- Prediction: With the help of AI, your mobile app can predict your next purchase, according to your spending behavior. Moreover, it can recommend products and provide unique insights on saving money. It brings out the factors causing fluctuations in your expenses.
- Employee Travel Budgeting: Most businesses save money with a travel budgeting app as it helps prepare a budget for an employee's entire business trip. The feature will predict the expenses and allocate resources according to the prediction.

13. APPENDIX:

SOURCE CODE

The source code has been uploaded to github.

Github Link: [Github Repository Link](#)

Video Link : [Demo Video](#)