PERSONAL EXPENSE TRACKER APPLICATION PROJECT PHASE I REPORT

Submitted by

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Project Report Format

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PROJECT REPORT

1. INTRODUCTION

With the launch and increase in sales of smartphones over the last few years, people are using mobile applications to get their work done, which makes their lives easier. Mobile applications comprise various different categories such as Entertainment, Sports, Lifestyle, Education, Games, Food and Drink, Health and Fitness, Finance, etc. This Expense Tracker application falls in the Finance Category and serves the important purpose of managing finances which is a very important part of one's life. The software product went through the design, development, and the testing phase as a part of the Software Development Lifecycle

a. Project Overview

In today's busy and expensive life we are in a great rush to make money. But at the end of the month, 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. The daily expense tracker aims to help everyone who is planning to know their expenses and save from it. An Personal expense tracker is a app that the user's can update their daily expenses so that they are well known for their expenses. Here users can choose categories for expense types like food, clothing, rent, and bills where they have to enter the money that has been spent and also can add some information in additional information to specify the expense. Users will be able to see graphs of expenses. Users can save those graphs for their own reference.

b. Purpose

In proposed system user has more number of added features to the existing features like

- Weekly Budget Planner
- Automated message Alert
- UPI linkup

- Weekly and Monthly Analysis
- App Authentication
- Wish list
- Rewards

Weekly Budget Planner to track their expenses. Automated message Alert is generated when they cross their budget. UPI linkup to track their online transactions. Weekly and Monthly Analysis are generated in the form of pie chart. App Authentication for security of the user. Income, Expenses, and Wish List are the three data entry choices available to the use

2. LITERATURE SURVEY

| S.No | Title | Author | Journal | Year | Methodology |
|------|--------------------|-----------------|--------------|------|-----------------|
| 1. | Security and | Muhammad | Journal of | 2017 | Computational |
| | privacy challenges | Baqer Mollah et | Network and | | offloading, |
| | in mobile cloud | al | Computer | | Virtualization |
| | computing : survey | | Applications | | |
| | and way ahead | | | | |
| 2. | Exploring | Hai Nguyen et | Journal of | 2017 | Virtualization, |
| | infrastructure | al | Cloud | | Introspection |
| | support for app | | Computing | | and Security |
| | based services on | | Advances | | |
| | cloud platforms | | Systems and | | |
| | | | Applications | | |

| 3. | Mobile Financial | Kurniawan Dwi | International | 2019 | Google Vision |
|----|-------------------|------------------|---------------|------|----------------|
| | Management | Saputra et al | Conference on | | Cloud API, |
| | Application using | | Computer | | Optical |
| | Google Cloud | | Science and | | Character |
| | Vision AP | | Computaional | | Recognition |
| | | | Intelligence | | |
| 4. | Cloud Based | Sukhpal Singh, | International | 2020 | A Methodical |
| | Development | Inderveer Chana | Journal of | | Analysis |
| | Issues | | Cloud | | |
| | | | Computing and | | |
| | | | Services | | |
| | | | Science | | |
| 5. | Expense Tracker | Prof Miriam | International | 2020 | Least Square |
| | | Thomas, | Journal of | | Algorithm |
| | | Lekshmi P, and | Advanced | | |
| | | Dr.Mahaleksh | Research in | | |
| | | mi T | Science, | | |
| | | | Communicati | | |
| | | | on and | | |
| | | | Technology | | |
| 6. | Cloud based | Asthha Wahal | International | 2021 | Clustering, |
| | Expense Tracker | and Muskan | Journal of | | Apriori |
| | | Aggarwal | Innovative | | algorithm, |
| | | | Research in | | Virtualization |
| | | | Technology | | |
| 7. | A Novel Expense | Muskaan | International | 2021 | Statistical |
| | Tracker | Sharma, Ayush | Journal of | | Analysis, Data |
| | | Bansal, Dr. Raju | Innovative | | Mining |
| | | Ranjan, Shivam | Research in | | |
| | | Sethi | Technology | | |

| 8. | Student | Expense | Saumya | Dubey, | Internationa | al | 2022 | Clustering, |
|----|------------|---------|---------|---------|--------------|-----|------|-----------------|
| | Tracking | | Pragya | Dubey, | Journal | of | | Classification |
| | Applicatio | n | Rigved | Rishabh | Advance | | | and Association |
| | | | Kumar, | Aaisha | Research | and | | |
| | | | Khatoon | l | Innovative | | | |
| | | | | | Ideas | in | | |
| | | | | | Education | | | |
| | | | | | | | | |

a. Existing problem

an expense tracker to prevent having to calculate income and expenses, as well as to remind someone to keep their expenses in track and also to add some details on how much money comes from other people and what expenses or payments the user have to make on a given date or month, User have categories in the expenditure tracker such as add expense, monthly expenses, add new expense, see categories of spending, export expenses in a date range, remove export files, and view expenses by category

b. References

- [1] D. GRAZIANO, Gartner: Apple leads smartphone sales to new heights. BGR Media, http://bgr.com/2012/02/15/gartner-apple-leads-smartphone-sales-to-new-heights/, accessed October 2012, February 2012.
- [2] M. BROWNLOW, Smartphone statistics and market share. Email-Marketing-Reports, http://www.email-marketing-reports.com/wireless-mobile/smartphone-statistics.htm, accessed October 2012, October 2012.
- [3] C. HEATH AND J. B. SOLL, Mental budgeting and consumer decisions, J. Consumer Res., 23 (1996), pp. 40-52.
- [4] J. HASTINGS AND J. M. SHAPIRO, Mental accounting and consumer choice: Evidence from commodity price shocks. Unpublished report, 2012.

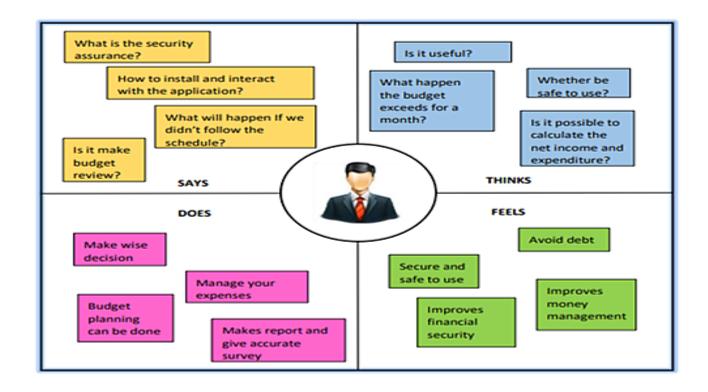
- [5] MINT, Homepage. Mint, https://www.mint.com, accessed October 2012, n.d
- .[6] APPLE, iOS technology overview. Apple, http://developer.apple.com/library/ios/#documentation/Miscellaneous/Conceptual/iPhoneOSTechOverview/Introduction/Int roduction.html, accessed October 2012, n.d.
- [7] APPLE, Key objects of an iOS app. Apple, http://developer.apple.com/library/IOs/# documentation/iPhone/Conceptual/iPhoneOSProgrammingGuide/AppArchitecture/A ppArchitecture.html#//apple_ref/doc/uid/TP40007072-CH3-SW2, accessed October 2012, n.d.

c. Problem Statement Definition

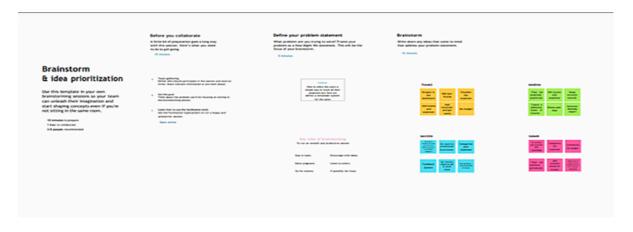
- At the end of the month we start to have money crisis.
- Lack of proper planning of our income.
- Person has to keep a log in a diary or in a computer.
- All the calculations need to be done by the user.
- Overload to rely on the daily entry of the expenditure.

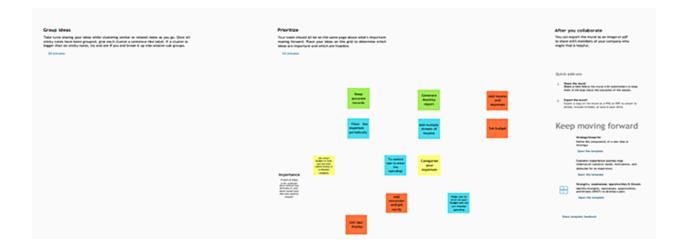
3. IDEATION & PROPOSED SOLUTION

a. Empathy Map Canvas



b. Ideation & Brainstorming





c. Proposed Solution

| Parameter | Description |
|--|--|
| Problem Statement (Problem to be solved) | Tracking expenses is one of the key factors in making budget work. At the instant, there is no as such complete solution present easily which enables a person to keep a track of its daily expenditure easily. To do so a person has to keep a log in a diary or in a computer, also all the calculations need to be done by the user which may sometimes results in errors leading to losses. Due to lack of a complete tracking system, there is a constant overload to rely on the daily entry of the expenditure. |
| 1 | Problem Statement (Problem to be |

| 2. | Idea / | In this project, we developed a cloud-based web application |
|----|-------------|--|
| | Solution | which keeps track of user's personal expenses. |
| | description | This system attempts to free the user with as much as possible the burden of manual calculation and to keep the track of the expenditure. This system also eliminates sticky notes, bills. |

| 3 | Novelty / Uniqueness | This personal expense tracker Application has features that enables the user to have an option to set a limit for the amount to be used. If the limit is exceeded the user will be notified with an Email and SMS alert. Thistracker doesn't have annoying ads. |
|---|---------------------------------------|--|
| 4 | Social Impact / Customer Satisfaction | The user will be able to Stick to their Spending Limits. They can able to scan their bills anytime thus data loss is avoided. Users can also able to get an analysis of their expenditure in graphical forms. |
| 5 | Business Model (Revenue Model) | This application will generate revenue by offering premium features to the user. Advertising through app is the easy way to earn money. Users may pay to remove the app advertisements. |

| | | Through subscription the users can able to connect their bank account. |
|---|--------------------------------|--|
| 6 | Scalability of the Solution | Since this application is deployed on IBM Cloud, it can handle multiple users at a time. |
| | | With our application, the users can be able to manage their expenses more effectively and know about their budget Vs income. |

Explore AS, differentiate

cus on J&P, tap into BE, understand

a. Problem Solution fit

Project Design Phase-I - Solution Fit Template

Project Title: Personal Expense Tracker Application

ine CS, fit into

1. CUSTOMER SEGMENT(S)

- Working peoples
- Organizations
- · Students and families
- Common people with all ages can able to track their expenses.

2. JOBS-TO-BE-DONE / PROBLEMS

- People have to track their expenses regularly.
- They need to keep their receipts and bills which shows their amount they spent.
- Also they need to manually add or remove the desired categories.

5.CUSTOMER CONSTRAINTS

- Network Issues
- Data Privacy
- Spending power
- Available devices

6.PROBLEM ROOT CAUSE

- The root cause for this problem is the delay in the budget.
- There may be a chance of getting errors in human calculations.
- No one alerts if their spending exceeds particular limit.
- They do not have enough time for calculating their expenditure.

8.AVAILABLE SOLUTIONS

People makes use of sticky notes or diary for calculating their expenditure.

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Pros:

 Didn't need any devices for calculations.

Cons

- 1. Time consuming.
- 2. Manual errors occur sometimes.

9.BEHAVIOUR

- People should know their budget for each month and set appropriate saving goals.
- Collect receipts regularly without fail.

3. TRIGGERS

- Realizing that excessive spending leading to lack of money in case of emergencies.
- Lack of Budgeting knowledge.

7.YOUR SOLUTION

- A cloud-based web application which keeps track of user's personal expenses. This system attempts to free the user with as much as possible the burden of manual calculation and to keep the track of the expenditure.
- User just need to enter their day-to-day expenses. They also have an option to set the limit. If their expenditure exceeds that limit, notification will be sent through mail.
- This system also eliminates sticky notes, bills.

10.CHANNELS OF BEHAVIOUR

ONLINE

- · Provide the details of day-to-day expenses.
- Select the area where customers use.
- Maintain the expenses for budgeting.

OFFLINE

- Maintain the required documents regularly.
- Inspect the expenses for budgeting.

4. EMOTIONS: BEFORE / AFTER

Before

- Excessive expenditure
- Afraid of spending

After

- · Being aware of what they are spending.
- Satisfied and happy with their budget expenditure.
- There will not be any frustrations any more since the process is quick and flexible.

5. **REQUIREMENT ANALYSIS**

a. Functional requirement

| FR | Functional Requirement | Sub Requirement (Story / Sub-Task) |
|------|-------------------------|--|
| No. | (Epic) | |
| FR-1 | User Registration | Registration through Form Registration through |
| FR-2 | User Confirmation | Confirmation via Email Confirmation via OTP |
| FR-3 | User Financial Accounts | Account Details Verification of Details |
| FR-4 | User Dashboard | Expense Data Data Records |
| FR-5 | User Notifications | System Access Real time Alerting |
| FR-6 | Security of User Data | Secured Database Data Security Algorithms |

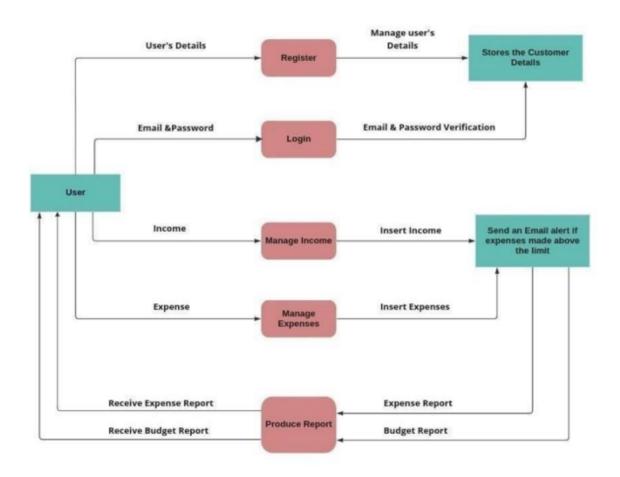
b. Non-Functional requirements

| FR No. | Non-Functional Requirement | Description |
|--------|----------------------------|--|
| NFR-1 | Usability | By using this application, the user can keep |
| | | track of their expenses and can ensure that user's |
| | | money is used wisely. |
| NFR-2 | Security | Maintain user personal details in a encrypted |
| | | manner by using data security algorithms . |
| NFR-3 | Reliability | It will maintain a proper tracking of day-to-day |
| | | expenses in an efficient manner. |

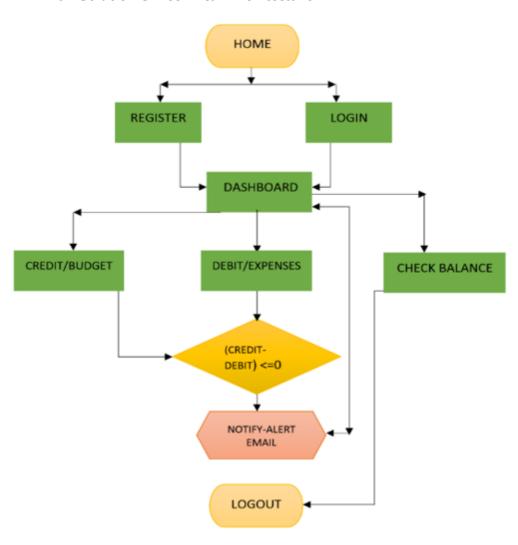
| NFR-4 | Performance | By enter our incoming and departing cash, and |
|-------|--------------|---|
| | | the software can help you keep and monitor it |
| | | with at-most quality and security with high |
| | | performance. |
| NFR-5 | Availability | Using charts and graphs may help you monitor |
| | | your budgeting and assets. |
| NFR-6 | Scalability | Rely on your budgeting app to track, |
| | | streamline, and automate all the recurrent |
| | | expenses and remind you on a timely basis. |

6. PROJECT DESIGN

a. Data Flow Diagrams



b. Solution & Technical Architecture



c. User Stories

| user Type | Functional Requirement (Epic) | User Story Numb er | User Story / Task | Acceptance criteria | Priori ty |
|-------------------------------|-------------------------------|-----------------------------|---|--|--------------|
| Customer (Mobile user) | Registrati on | USN-1 | As a user, I can register for the application by entering my email, password, and confirming my password. | I can access my account /dashboard | High |
| | Login | USN-2 | As a user, I can log into the application by entering email & password | I can access theapplication | High |
| | Dashboard | USN-3 | As a user I can enter my income andexpenditure details. | I can view my dailyexpenses | High |
| Customer Care Executive | | USN-4 | As a customer care executive, I can solvethe log in issues and other issues of the application. | I can provide support or solution at any time 24*7 | Medi um |

| Administrat | Application | USN-5 | As an | I can fix the | Medi | |
|-------------|-------------|-------|--------------|----------------|------|--|
| or | | | administrat | bug which | um | |
| | | | or I can | arises for the | | |
| | | | upgrade or | customersa | | |
| | | | update the | nd users of | | |
| | | | application. | the | | |
| | | | | application | | |

7. PROJECT PLANNING & SCHEDULING

a. Sprint Planning & Estimation

| 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 | 23 Oct 2022 | 28 Oct 2022 | 20 | 29 Oct 2022 |
| Sprint-2 | 20 | 6 Days | 30 Oct 2022 | 04 Nov 2022 | 20 | 05 Nov 2022 |
| Sprint-3 | 20 | 6 Days | 06 Nov 2022 | 11 Nov 2022 | 20 | 12 Nov 2022 |
| Sprint-4 | 20 | 6 Days | 13 Nov 2022 | 18 Nov 2022 | 20 | 19 Nov 2022 |

b. Sprint Delivery Schedule

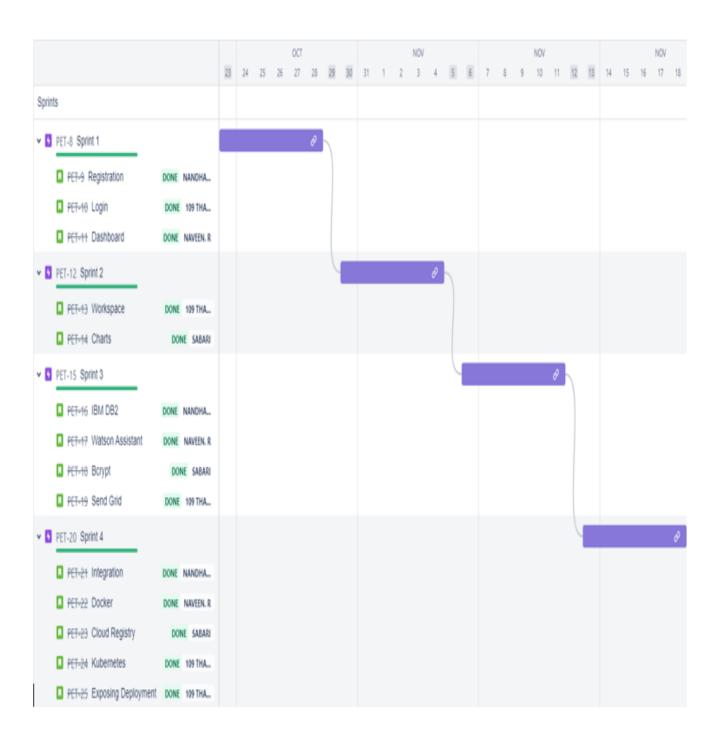
| Sprint | Functional | User | User Story / Task | Story | Priority | Team Members |
|------------|--------------|--------|--|--------|----------|---|
| | Requireme | Story | | Points | | |
| | nt | Number | | | | |
| | (Epic) | | | | | |
| Sprint - 1 | Registration | USN -1 | As a user, I can register for the application by entering my email, new password and confirming the same password. | 2 | High | Thamodharan S Nandha Kumar M Naveen R Sabari K |
| | | USN -2 | As a user , I will receive confirmation email once I have registered for the application. | 1 | Low | |
| | Login | USN -3 | As a user , I can log into the application by entering email and password / Google OAuth. | 2 | High | Thamodharan S Nandha Kumar M Naveen R |
| | Dashboard | USN -4 | Logging in takes the user to their dashboard. | 1 | Low | Sabari K |

| Sprint - 2 | USN -5 | As a user ,I will update my | 1 | Medium | Nandha Kumar |
|------------|--------------|----------------------------------|---|---------|---------------|
| | | salary at the start of each | | | |
| | | month. | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | USN -6 | As a user , I will set a | 1 | Medium | Naveen |
| | 0011 | target/limit to keep track of my | _ | Wicalam | raveen |
| | | | | | |
| | | expenditure. | | | |
| Works | space USN -7 | Workplace for personal | 1 | Medium | Thamodharan S |
| | | expense tracking | | | |
| Charts | S USN -8 | Graphs to show weekly and | 2 | High | Naveen |
| | | everyday expenditure | | | |
| | USN -9 | As a user , I can export raw | 1 | Medium | Nandha Kumar |
| | | data as csv file. | | | |

| Sprint | Functional | User | User Story / Task | Story | Priority | Team Members |
|----------|-------------|---------|---------------------------------|--------|----------|--------------|
| | Requirement | Story | | Points | | |
| | (Epic) | Number | | | | |
| Sprint - | IBM DB2 | USN -10 | Linking database with dashboard | 2 | High | Nandha Kumar |
| 3 | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | | USN -11 | Making dashboard interactive with JS | 2 | High | Thamodharan |
|----------|-------------|---------|--------------------------------------|---|--------|--------------|
| | Watson | USN -12 | Embedding Chatbot to clarify | 1 | Low | Naveen |
| | Assistant | | user's queries. | | | |
| | BCrypt | USN -13 | Using BCrypt to store passwords | 1 | Medium | Sabari |
| | | | securely. | | | |
| | SendGrid | USN -14 | Using SendGrid to send mail to | 1 | Medium | Nandha Kumar |
| | | | the user. (To alert or remind) | | | |
| Sprint - | Integration | USN -15 | Integrating frontend and backend. | 2 | High | Thamodharan |
| 4 | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | Docker | USN -16 | Creating Docker image of web | 2 | High | Naveen |
| | | | арр. | | | |
| | Cloud | USN -17 | Uploading docker image to IBM | 2 | High | Sabari |
| | Registry | | cloud registry. | | | |
| | Kubernetes | USN -18 | Creating container using docker | 2 | High | Naveen |
| | | | and hosting the webapp. | | | |
| | Exposing | USN -19 | Exposing IP/Ports for the site. | 1 | Medium | Nandha Kumar |
| | Deployment | | | | | |

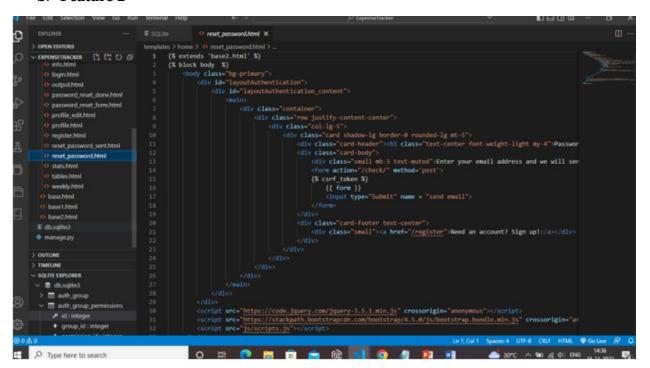
c. Reports from JIRA

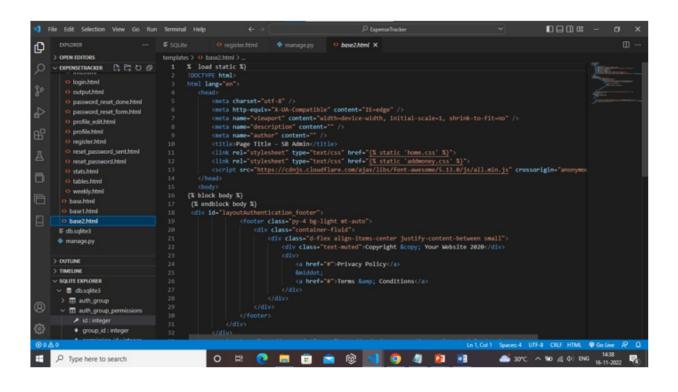


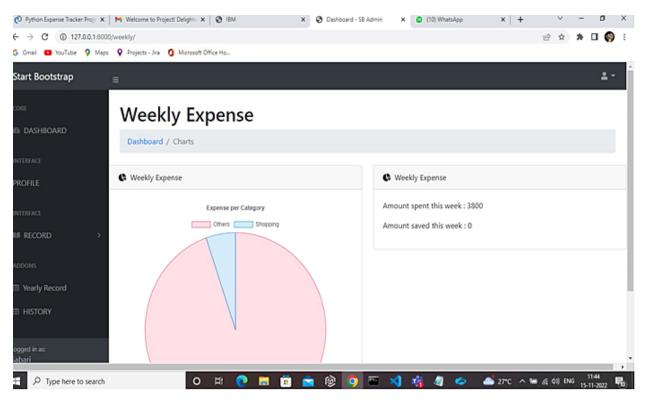
8. CODING & SOLUTIONING (Explain the features added in the project along with code)

a. Feature 1

b. Feature 2

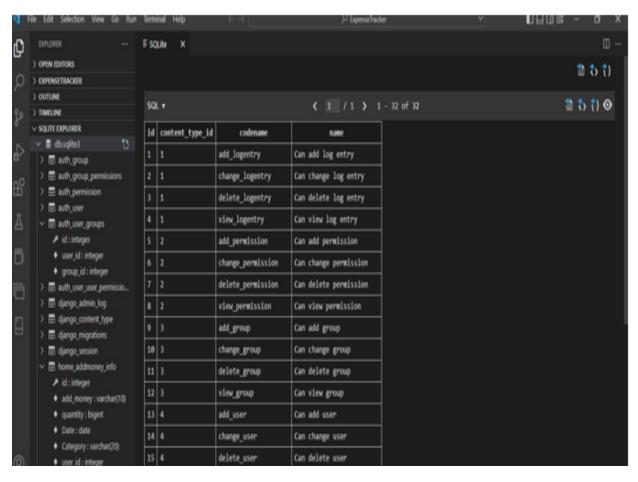


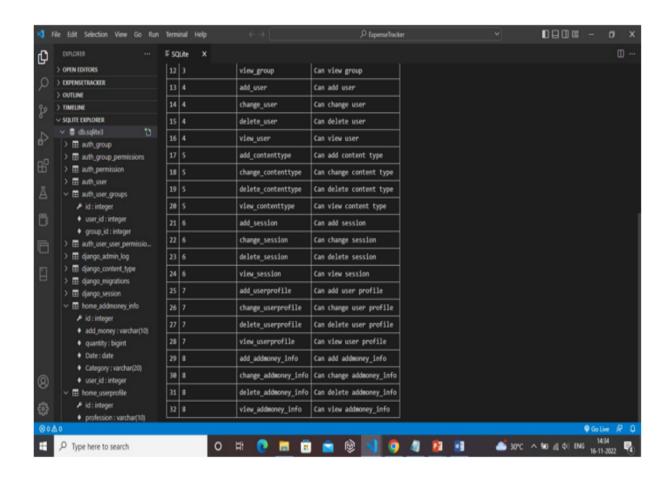




c. Database Schema (if Applicable)

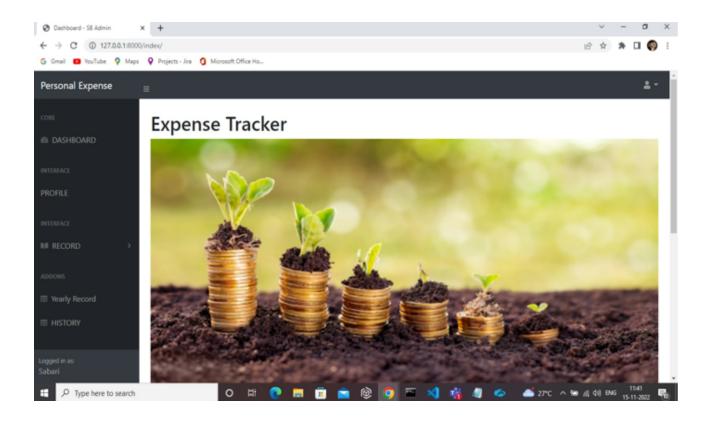
| SQL v | SQL▼ | | | | | | | | t> t} ⊙ |
|---------------|----------------------------|--------------|-----------|------------|-----------------------------|----------|-----------|----------------------------|-----------|
| | last_login | is_superuser | username | first_name | email | is_staff | is_active | date_joined | last_name |
| DXA= | NULL | 1 | ishika | | | 1 | 1 | 2021-07-19 07:49:43.793715 | |
| XM= | 2021-07-19 08:35:56.300129 | 0 | DataFlair | Data | datafliar@gmail.com | 0 | 1 | 2021-07-19 07:53:27.010905 | Flair |
| Mp3wv5sUCz78= | 2022-11-16 08:53:26.471540 | 0 | Sabari3 | | sabarikishore0630@gmail.com | 0 | 1 | 2022-11-15 09:52:10.026341 | |





9. **TESTING**

- a. Test Cases
- b. User Acceptance Testing



10.RESULTS

Daily spending tracking can not only help you save money, but it can also help you set financial objectives for the future. If you know exactly where your money goes each month, you can quickly see where you can make some savings and compromises. We have designed a project that is more efficient than other income and expense trackers. The project succeeds in avoiding manual calculations for estimating monthly revenue and expenses. The modules have been designed to be both efficient and appealing

a. Performance Metrics

Daily spending tracking can not only help you save money, but it can also help you set financial objectives for the future. If you know exactly where your money goes each month, you can quickly see where you can make some savings and compromises. We have designed a project that is more efficient than other income and expense trackers. The project succeeds in avoiding manual calculations for estimating monthly revenue and expenses. The modules have been designed to be both efficient and appealing

11.ADVANTAGES Easy to use and effect

12. CONCLUSION

We now present and discuss the limitations of the new product, issues faced, and the remedies to those limitations. While building this expense tracking software tool, the major focus was to make this tool less user intensive and more user productive. The first version of this application is only applicable to the USA. It could have been used in other countries if I would have used currency converters in the application, which I will improvise in the later version. Certain issues were faced while implementing this tool and various important things were kept in mind. For example, the user interface is designed simple yet creative so that the user doesn't face any difficulty in using the software tool and the expense data is persisted on the device even if the user deletes the application from the memory background.

Core Data was chosen over SQLite to persist the data which is very beneficial even though the

data would reside on the device locally. iCloud functionality is missing. This would allow data to be saved to a Cloud and shared between various devices. The application lacks the feature of PDF by

which the list of expenses and amount could

13.**FUTURE SCOPE**

• In this paper, a rich model's design and implementation are discussed, allowing third-

party cloud apps to access a client's virtual machines (VMs) and carry out privileged

operations. The infrastructure support required to support cloud apps was discussed.

Different design approaches to deploy cloud apps were also addressed. Various examples

were used to demonstrate and assess the practicality of cloud applications.

• In order to address the primary financial issues, this study looked at the potential

usefulness of the mobile application "Manage on Money (MoM)". OCR technology was

created using Google Cloud Vision API. This technique works well for locating a single

precise keyword on a receipt printed in black ink. MoM enables users to arrange their

recurring expenses and sends a push reminder prior to the due date. OneSignal API

serves as the foundation for this notification.

• This application allows the user to enter their income to determine their daily expenses,

and the results are saved for each user. The application has a feature that uses data mining

to predict the manager's income and expenses. The suggested system takes less time to

process, and all the information is updated and processed right away.

14. **APPENDIX** Source Code

GitHub & Project Demo Link

https://github.com/IBM-EPBL/IBM-Project-4914-1658742869