Personal Finance Management Application - User Manual

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1. Introduction

Welcome to the **Personal Finance Management Application**!
This application helps you manage your income and expenses, track your financial status, and create monthly and yearly reports. Additionally, you can set budgets to control your spending effectively.

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2. System Requirements

To install and run the application, ensure you meet the following system requirements:

- **Operating System**: Windows, macOS, or Linux

- **Python Version**: Python 3.10 or higher

- **Database**: SQLite (included with Python)

- **Dependencies**: Django Framework and required Python packages

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3. Installation Instructions

Follow the steps below to set up the application:

Step 1: Clone or Download the Project

Download the project source code or clone it using git:

bash

Copy code

```
git clone <project-repository-url>
cd personal-finance-management
```

Step 2: Install Dependencies

Install the required Python packages using pip:

bash

Copy code

```
pip install -r requirements.txt
```

Step 3: Run Migrations

Set up the database by running Django migrations:

bash

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```
python manage.py makemigrations
python manage.py migrate
```

Step 4: Create a Superuser (Admin Account)

Create an admin account to access the admin panel:

bash

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```
python manage.py createsuperuser
```

Follow the prompts to set a username, email, and password.

Step 5: Run the Development Server

Start the Django server:

bash

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```
python manage.py runserver
```

Visit http://127.0.0.1:8000 in your browser to access the application.

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4. Application Usage

4.1 User Registration and Login

1. **Registration**:

   o Go to the **Registration Page**.

   o Fill out your username, password, and confirm the password.

   o Click **Register**.

2. **Login**:

   o Go to the **Login Page**.

   o Enter your username and password.

   o Click **Login** to access your dashboard.

4.2 Adding, Updating, and Deleting Transactions

Steps to Manage Transactions:

1. **Add a Transaction**:

   o Go to the **Dashboard**.

   o Click **Add Transaction**.

   o Enter transaction details:

     ▪ **Type**: Income or Expense

     ▪ **Category**: e.g., Food, Rent, Salary

     ▪ **Amount**

     ▪ **Date**

   o Click **Save** to store the transaction.

2. **Update a Transaction**:

   o In the **Transaction List**, click **Edit** next to the transaction you want to modify.

   o Update the details and click **Save**.

3. **Delete a Transaction**:

   o In the **Transaction List**, click **Delete** next to the transaction you want to remove.

   o Confirm the deletion.

4.3 Generating Financial Reports

1. Navigate to the **Reports** section.

2. Select the desired date range:

   o Start Date

   o End Date

3. Click **Generate Report**.

You will see:

- **Total Income** for the selected period.

- **Total Expenses** for the selected period.

- **Category Breakdown**: View income/expense by category.

4.4 Budget Management

1. Go to the **Budgets** section.

2. Set a **Budget** for a specific category:

   o Choose the category (e.g., Food, Rent).

   o Set a monthly budget limit.

3. Save the budget.

The application will notify you when your expenses exceed the set budget.

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5. Data Backup and Restore

Backup

To create a backup of your data:

- Use the db.sqlite3 file located in the project folder.

- Copy and save this file as a backup.

Restore

To restore your data:

- Replace the db.sqlite3 file in your project folder with the backed-up version.

- Run the server again.

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6. Troubleshooting

Issue	Solution
Unable to start the server	Ensure Python is installed and dependencies are installed. Run pip install -r requirements.txt.
Database migration errors	Run python manage.py migrate to apply migrations.
Incorrect login credentials	Ensure your username and password are correct. Reset your password if necessary.
Budget exceedance notifications	Review your transactions to identify excess spending.

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7. Support

For any issues, please contact the project developer:

- **Email: kirananga15@gmail.com**

- **GitHub**: https://github.com/Kirananga/PFM