



FinTracker: A financial tracker

CEN4010 SOFTWARE ENGINEERING

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ABOUT

Managing personal and business finances can be challenging without the right tools. FinTracker is a financial tracking web application designed to simplify expense monitoring, budgeting, and financial planning for individuals and businesses alike. The platform offers a user-friendly interface that categorizes expenses, displays visual insights, and provides AI-driven recommendations to help users stay on track with their financial goals. Our project aims to address the widespread need for accessible and intelligent financial management.

OBJECTIVES

- Build a responsive and intuitive web application for tracking personal and business finances
- Enable users to input and categorize income, expenses, and financial goals easily
- Create interactive visualizations to give users a clear overview of their financial status
- Incorporate AI-driven suggestions to help users optimize spending and achieve financial goals
- Implement secure user authentication and encrypted data storage



FEATURES

- Multi-agent system where it makes use of Claude model to analyze data and OpenAI model as the AI assistant chatbot.
- Ability to add budget and notify user if budget is exceeded.
- Utilizes 3rd party APIs to extend AI assistant functionality.
- Users have the ability to sign up and login ensuring personalized service.
- Utilizes JWT tokens to ensure user authentication.
- Utilizes Material-UI components for UI/UX.
- Provides different charts and graphs for data visualizations.

FUTURE DEVELOPMENT

- Make use of 3rd party financial data platform, like Plaid, to extract transactions from a bank account.
- Improve UI/UX to better user experience.
- Provide more AI assistant functions to extend AI functionality even more.

TECHNOLOGIES USED

