Personal Finance Tracker

Project Report

Submitted in partial fulfilment of the requirement for the award of

Degree of

BACHELOR OF COMPUTER APPLICATION

PROJECT GUIDE:
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Head of Department

SUBMITTED BY:
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SCHOOL OF COMPUTER APPLICATION AND TECHNOLOGY

CAREER POINT UNIVERSITY, KOTA

MINOR PROJECT (CAD615)

DECEMBER , 2024

ACKNOWLEDGEMENT

We would like to express our sincere appreciation to everyone who contributed to the development and success of the PERSONAL FINANCE TRACKER project. Their dedication, expertise, and support playeda crucial role.

Project Team OM SINGH CHAUHAN,

User Testing and Feedback

We extend our gratitude to the recruiters, hiring managers, and other users who actively participated in the testing and provided valuable feedback. Your insights were instrumental in refining the features and ensuring a user-friendly experience.

Open Source Community

We would like to acknowledge the open-source community and the developers behind the libraries and frameworks that were instrumental in the development of the PERSONAL FINANCE TRACKER.

Inspirational Support

Special thanks to **DR. GARIMA TYAGI** for their guidance, mentorship, and inspirational support throughout the project's lifecycle.

Users of the Application

Thank you for being part of this exciting journey!

OM SINGH CHAUHAN

Place: Kota, Rajasthan

Date: 27/12/2024

DECLARATION

We hereby declare that this Project Report titled PERSONAL FINANCE TRACKER submitted by us and approved by our project guide,the School of Computer Application and Technology (SOCA), Career Point University, Kota, is a bonafide work undertaken by us and it is not submitted to anyother University or Institution for the award of any degree diploma / certificate or published any time before.

Project Name : PERSONAL FINANCE TRACKER

Student Name: OM SINGH CHAUHAN

Project Guide : DR. GARIMA TYAGI

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1. Project Title

PERSONAL FINANCE TRACKER

2. Problem Statement

The Personal Finance Tracker is a web-based application that allows users to track their personal and business financial transactions. Users can add, edit, and delete transactions, filter records by date, category, or account type, and generate reports for better decision-making.

3. Project Description

The **Personal Finance Tracker** is a web-based application that allows users to track their personal and business financial transactions. Users can add, edit, and delete transactions, filter records by date, category, or account type, and generate reports for better decision-making.

3.1 Scope of the Work

In-Scope:

- Add, edit, delete, and filter transactions.
- Separate dashboards for personal and business accounts.
- Support for multiple financial categories.
- Generate financial summaries.

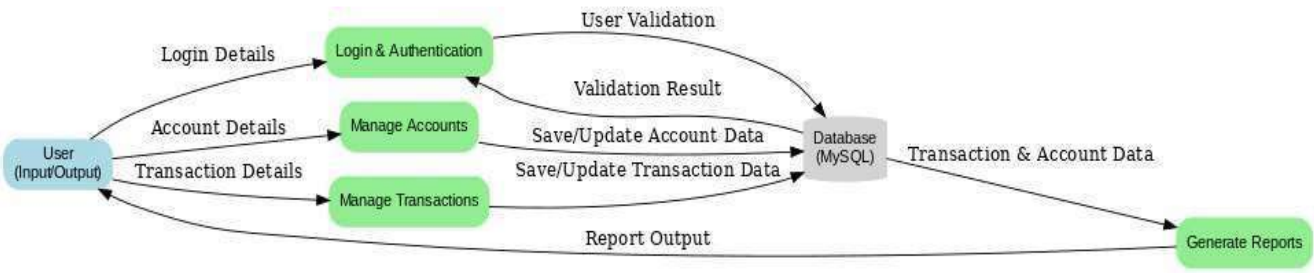
Out-of-Scope:

- Integration with external banking APIs.
- Automatic reconciliation of bank accounts.

3.2 Project Modules

1. **Login Module:**
    - Secure login for users with session handling..
2. **Dashboard Module:**
    - Separate dashboards for personal and business accounts.
3. **Transaction Management Module:**
    - Add, edit, and filter transactions for specific accounts.
4. **Reporting Module:**
    - View financial summaries and generate reports.
5. **User Profile Module:**
    - Manage user details and preferences.

3.3 Context Diagram (High Level)



Implementation Methodology

The Personal Finance Tracker follows the Waterfall Model for development:

1. **Requirements Analysis:**

   Understand user needs and define system specifications.

2. **Database Design:**

   Create ER diagrams, DFDs, and a responsive UI/UX layout.

3. **Frontend Development:**

   Create the user interface for the platform using HTML, CSS, and JavaScript. Implement responsive design for a seamless experience across devices.

4. **Backend Development:**

   Use PHP to build the server-side logic. Implement features such as user authentication and interaction with the database.

5. **User Authentication:**

   Implement a secure user authentication system to manage user accounts and ensure the security of personal information.

6. **Testing:**

   Conduct unit testing, integration testing, and system testing.

7. **Deployment:**

   You Host the application on a local server using XAMPP.

.

8. Monitoring and Maintenance:

Implement monitoring tools to track system performance. Regularly update and maintain the application to address any security vulnerabilities or improve functionality.

4. Technologies to be used

1. Software Platform

a) **Front-end:** The project interface will be developed using **HTML, CSS, and JavaScript**, ensuring a responsive and user-friendly design

- HTML: For structuring the web pages.
- CSS: For styling and improving the visual appearance of the application.
- JavaScript: For adding interactivity and dynamic behavior to the web application.

b) **Back-end:** he server-side functionalities and database operations will be handled using PHP and MySQL

- **PHP**: A server-side scripting language for implementing the application's logic and managing data flow.
- **MySQL**: A relational database management system for securely storing and retrieving project data..

2. Hardware Platform

The project requires a robust hardware setup to ensure smooth development and testing.

Hardware Requirements:
Processor : INTEL CORE i5 RAM : 16 GB
HARD DISK : 512 GB

3. Tools

Development Tools: VS Code , XAMPP
Browser: Google Chrome.

5. Advantages of this Project

- Simplifies financial management by organizing income and expenses efficiently.
- Provides clear financial insights with graphical reports and analytics.
- Separate dashboards for personal and business accounts streamline account management.
- Mobile-friendly responsive design ensures accessibility across devices.
- Enables tracking of expenses by category for better budget management.
- Reduces time spent on manual financial calculations with automated summaries.
- Offers user-friendly navigation with a clean and modern UI/UX design.
- Allows for secure data storage using role-based access and encryption.
- Facilitates exporting of financial data for tax and accounting purposes.
- Adaptable to small businesses and personal use, increasing its versatility.

6. Assumptions

1. Users have basic knowledge of using web applications.
2. All input data will be manually entered by users.
3. Users will categorize expenses accurately for reliable insights.
4. The system will be used in a secure environment to avoid unauthorized access.
5. Internet access is required for full functionality (if hosted online).
6. Users will regularly update transactions for accurate tracking.

7. Future Scope of the Project

- Integration with banking APIs for automated syncing of transactions.
- Adding features for investment tracking, such as stocks, mutual funds, and savings accounts.
- Support for multiple currencies to cater to international users.
- Advanced reporting tools, including custom report generation and forecasting.
- Implementation of AI-based financial advice for better budgeting.
- A mobile app version for improved accessibility and offline functionality.
- Integration with payment gateways for easy bill payments.
- Option to set reminders for upcoming payments or due dates.
- Enhanced security features, such as two-factor authentication (2FA).
- Collaboration tools for families or businesses to manage shared expenses.
- AI-based anomaly detection to identify unusual or fraudulent transactions.
- Inclusion of a chatbot for instant user assistance.

S#	Project Artifacts (softcopy)	Location (Folder Name etc.)	Verified by Project Guide	Verified by HOD
1.	Project Synopsis Report (Final Version)	https://github.com/OmChauhan1111/Minor-Project-Report.git	Dr. Garima Tyagi	Dr. Garima Tyagi
2.	Project Report (Final Version)	https://github.com/OmChauhan1111/Minor-Project-Report.git	Dr. Garima Tyagi	Dr. Garima Tyagi
3.	Project Source Code (final version) with executable	https://github.com/OmChauhan1111/Personal-Finance-Tracker.git	Dr. Garima Tyagi	Dr. Garima Tyagi

8. Definitions, Acronyms, and Abbreviations

Sure, here are some concise definitions, acronyms, and abbreviations for a **PERSONAL FINANCE TRACKER** Project in PHP:

1. PFT:

- Personal Finance Tracker. Refers to the application designed for managing personal and business finances.

2. PHP:

-Hypertext Preprocessor. A server-side scripting language used to build the backend of the Personal Finance Tracker.

3. DBMS:

-Database Management System. Used to manage, organize, and retrieve data within the application.

4. UI:

- User Interface. The design and layout that users interact with in the Personal Finance Tracker.

5. API:

- Application Programming Interface. Enables communication between the finance tracker and external services like payment gateways or banking APIs.

6. CSV:

- Comma-Separated Values. A file format used for exporting or importing financial data such as transaction records.

7. SSL:

- Secure Sockets Layer. Provides secure data transmission, essential for protecting user data and transaction information.

8. CRUD:

- Create, Read, Update, Delete. Refers to the basic database operations implemented in the project.

9. CMS:

- Content Management System. Manages and updates specific content on the finance tracker platform.

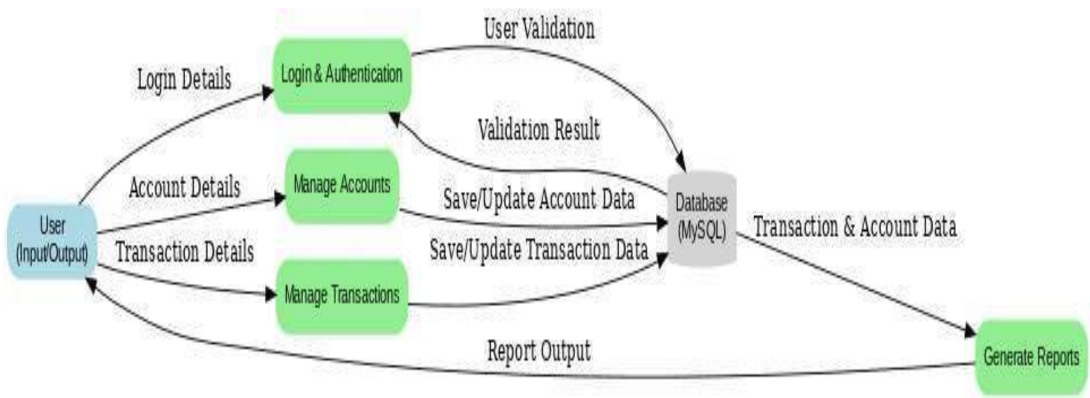
10. UX:

- User Experience. Focuses on improving usability and satisfaction for users interacting with the application.

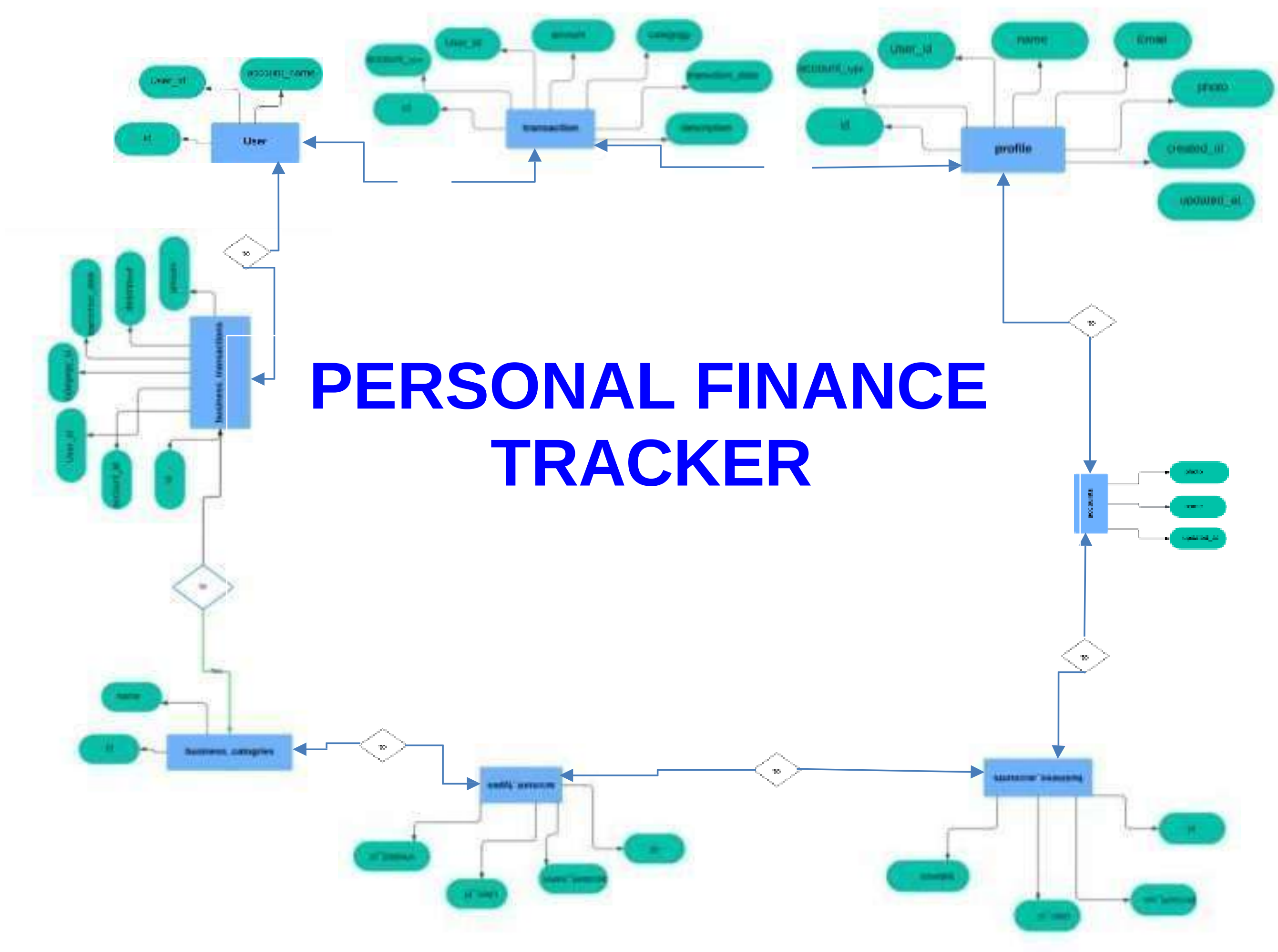
11. URL:

- Uniform Resource Locator. The web address where the Personal Finance Tracker application is hosted and accessed.

Annexure A
Data Flow Diagram (DFD)
(Mandatory)



Annexure B
Entity-Relationship Diagram (ERD)
(Mandatory)



User Table

FIELDS	DATA TYPE	EXTRA
id	Int(11)	Auto_increment
User_id	Int(11)	
account_name	Varchar(30)	

Transaction (transaction)

FIELDS	DATA TYPE	EXTRA
Id	Int(11)	AUTO_INCREMENT
User_id	Int(11)	
amount	decimal(10,2)	
categogy	varchar(50)	
transction_date	date	
description	text	
account_type	varchar(20)	

Profile (profile)

Fields	Data type	Extra
id	Int(11)	AUTO_INCREMENT
User_id	Int(11)	
name	varchar(255)	
Email	varchar(255)	
account_type	varchar(50)	
photo	Varchar(255)	
created_at	timestamp	
updated_at	timestamp	ON UPDATE CURRENT_TIMESTAMP()

Business_Transactions (business_transactions)

Fields	Data type	Extra
Id	Int(11)	AUTO_INCREMENT
User_id	Int(11)	
account_id	Int(11)	
categogy_id	Int(11)	
transction_date	Date	
description	Text	
amount	Decimal(10,2)	

business_categories (business_catogries)

FIELDS	DATA TYPE	EXTRA
id	Int(11)	AUTO_INCREMENT
name	Varchar(255)	

Business_accounts (business_accounts)

FIELDS	DATA TYPE	EXTRA
id	Int(11)	Auto_increment
User_id	Int(11)	
account_type	Decimal(10,2)	

Account_types(account_types)

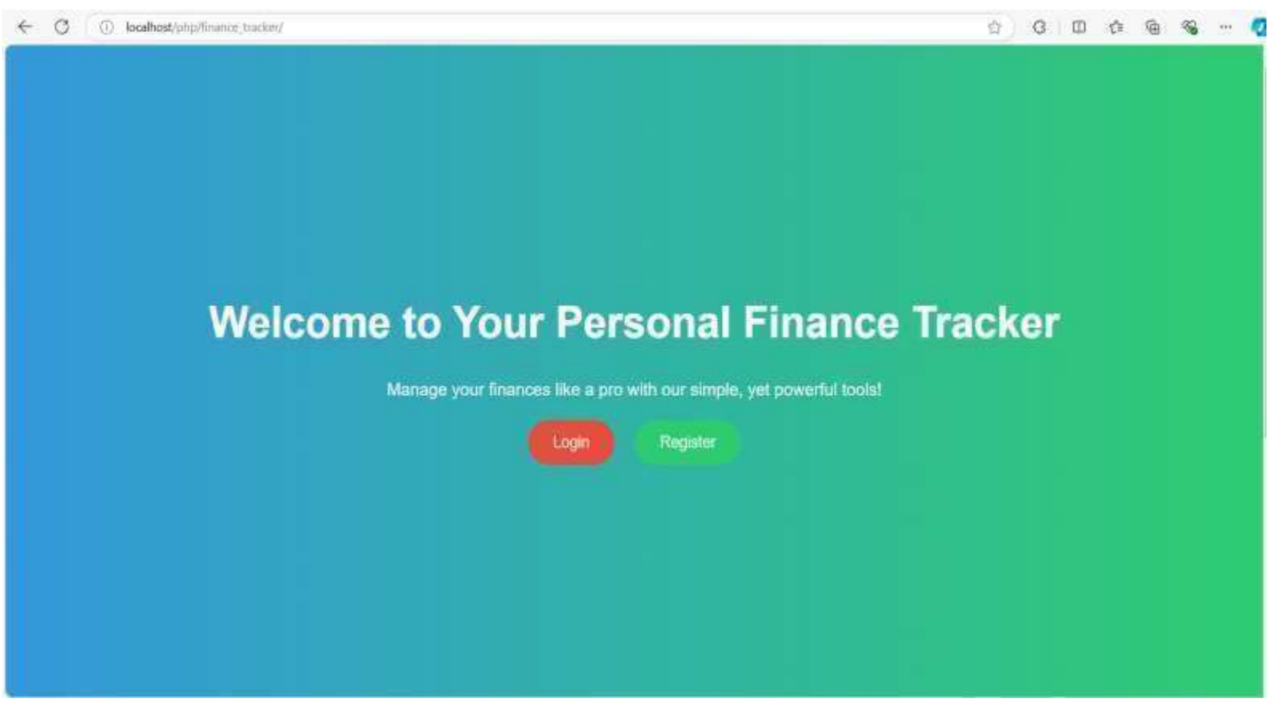
FIELDS	DATA TYPE	EXTRA
id	Int(11)	Auto_increment
User_id	Int(11)	
account_name	Varchar(255)	
created_at	timestamp	

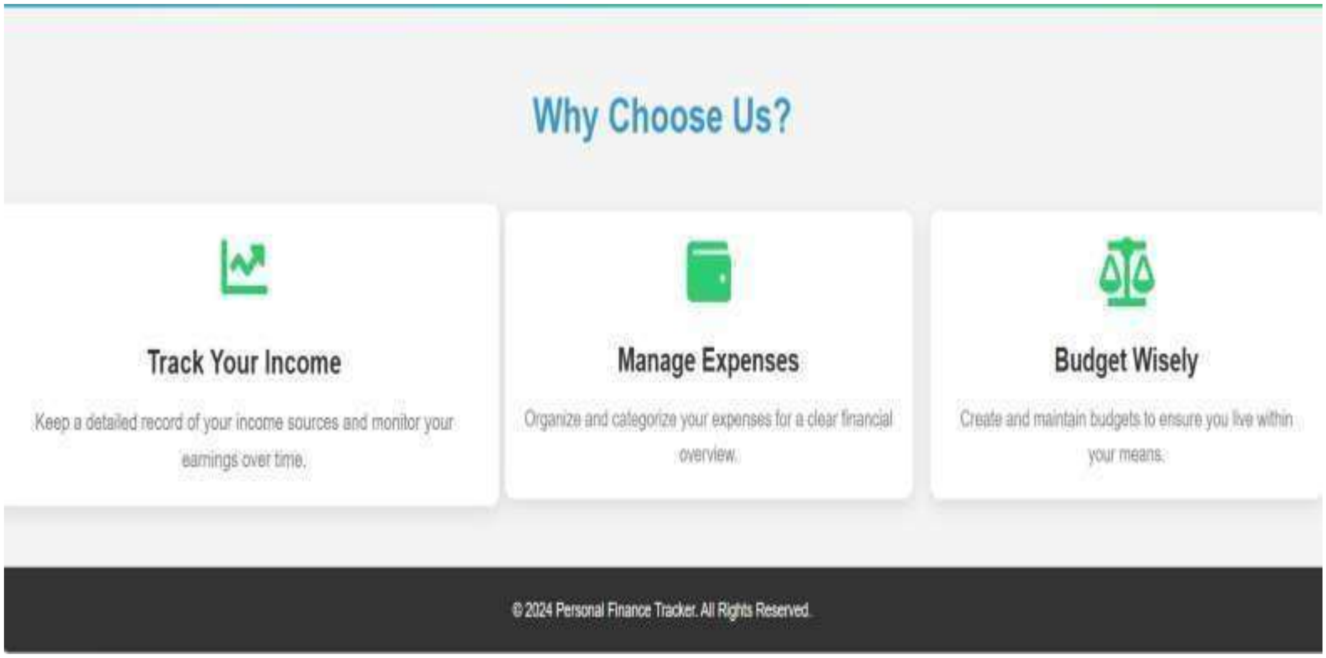
Accounts (accounts)

FIELDS	DATA TYPE	EXTRA
id	Int(11)	Auto_increment
User_id	Int(11)	
account_name	Varchar(255)	

Annexure E

Screen Shots




Why Choose Us?
Track Your Income
Keep a detailed record of your income sources and monitor your earnings over time.
Manage Expenses
Organize and categorize your expenses for a clear financial overview.
Budget Wisely
Create and maintain budgets to ensure you live within your means.
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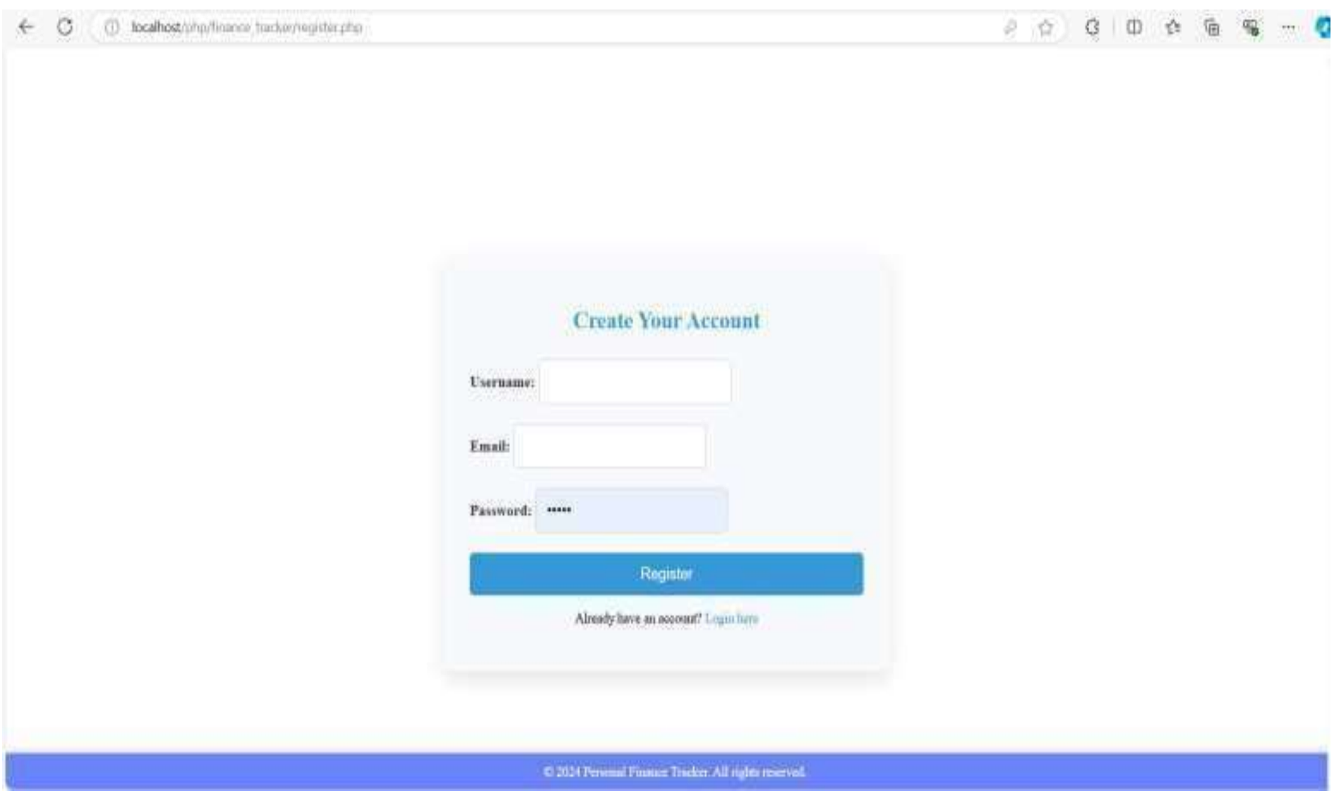
Create Your Account
Username:
Email:
Password:
Register
Already have an account? Login here
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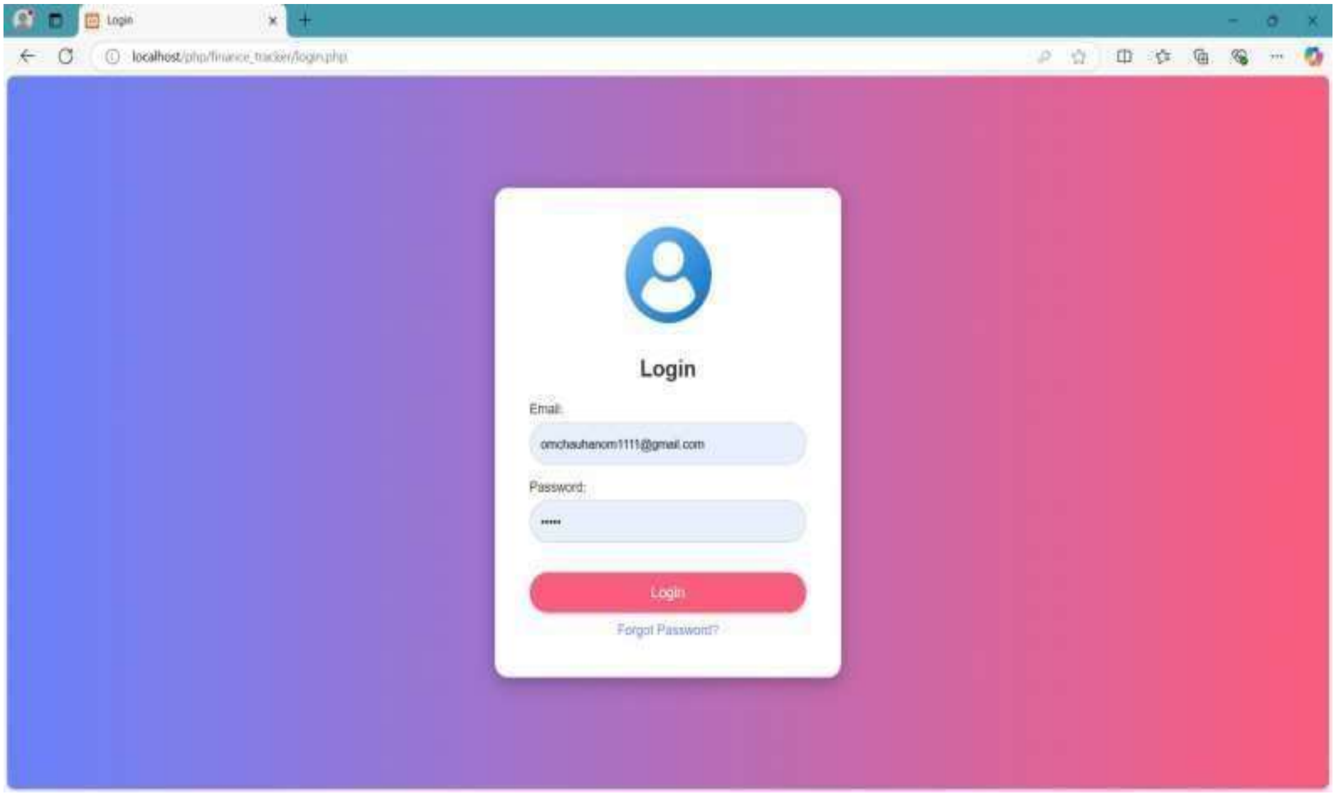
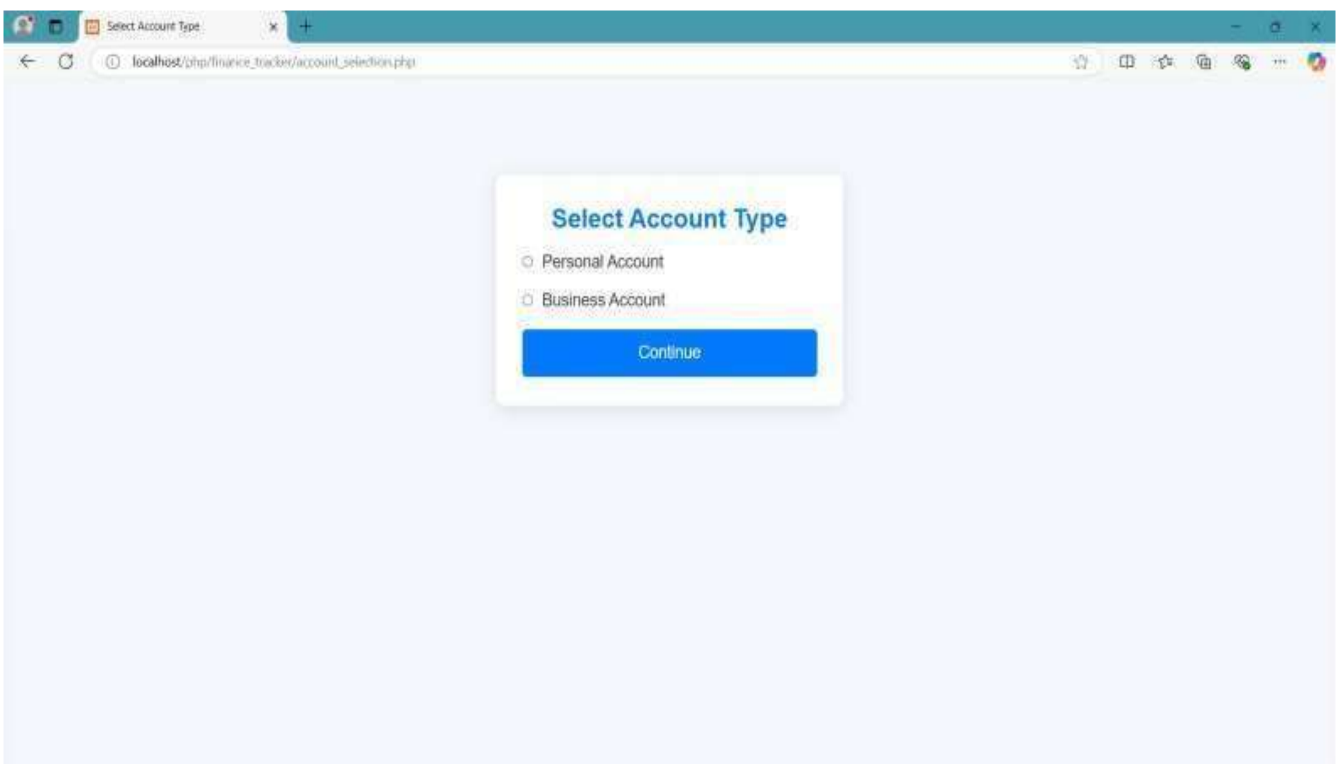
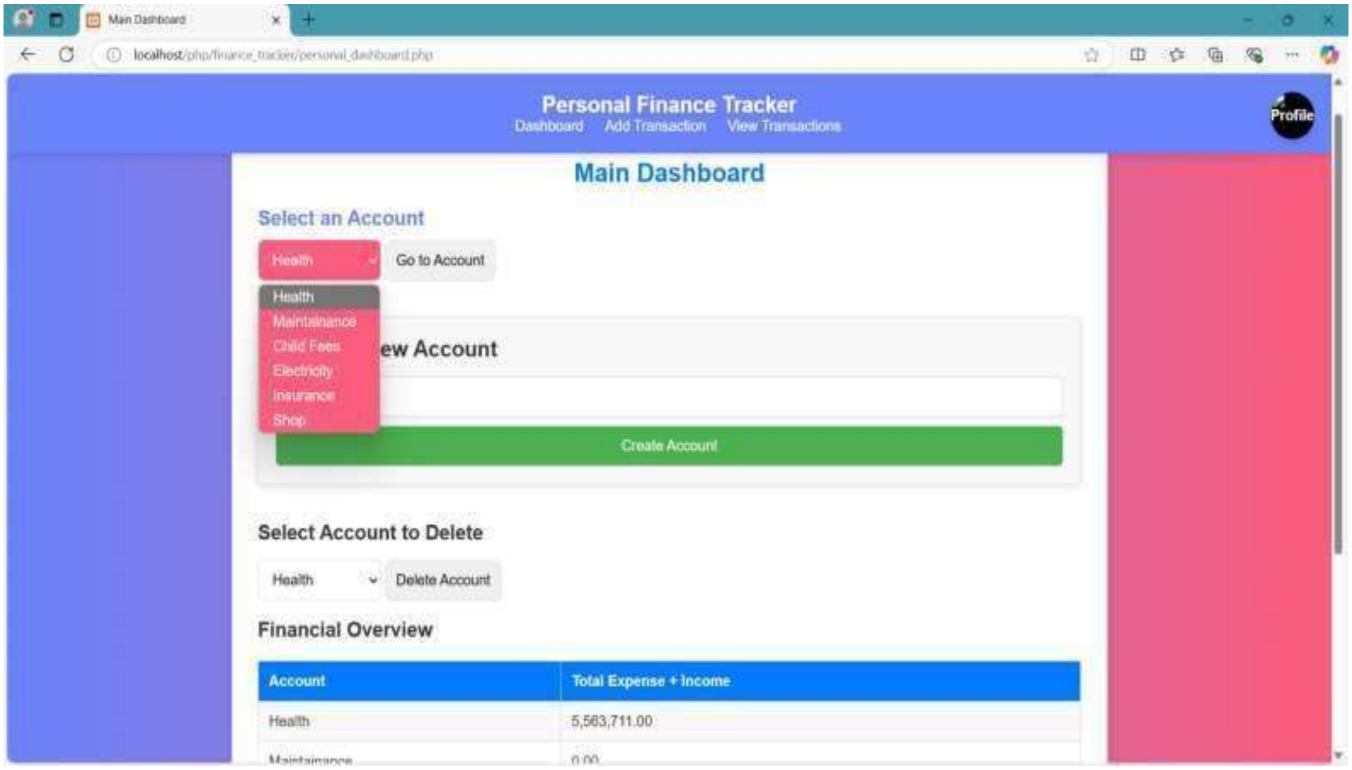
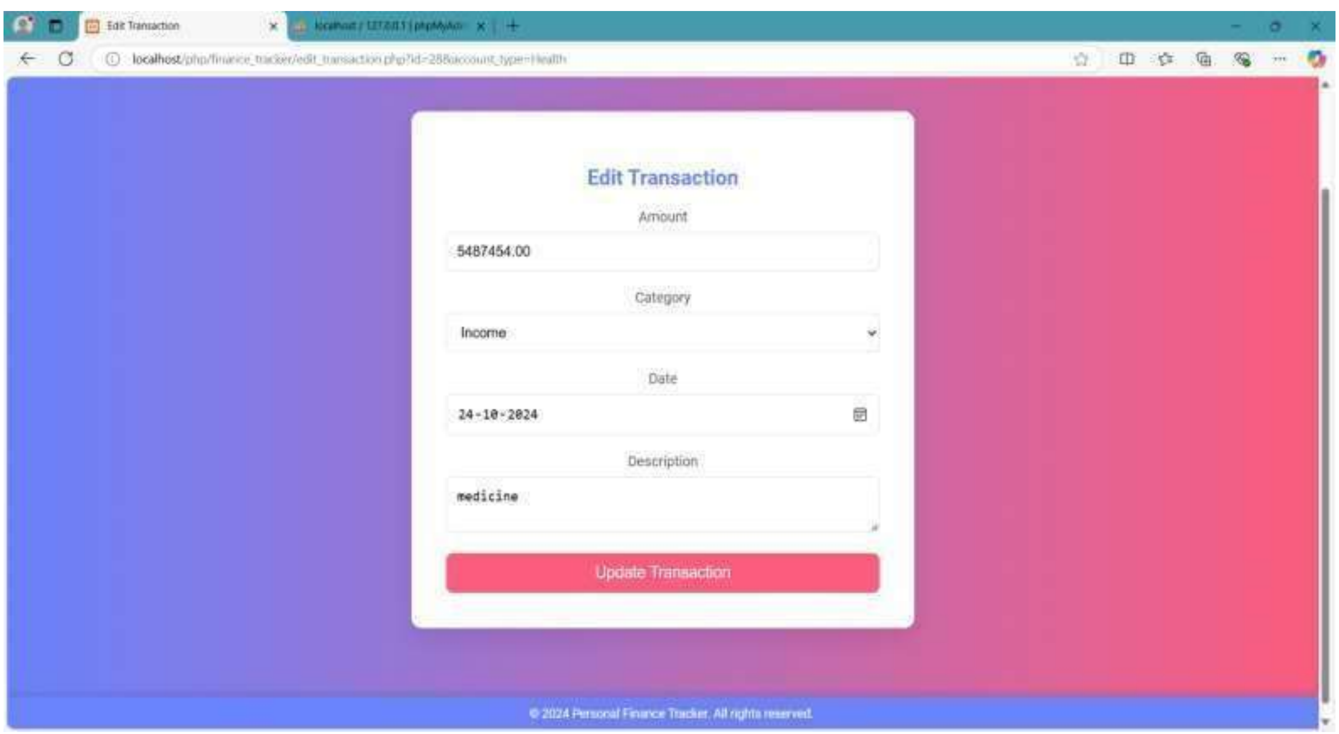

Login
localhost/php/finance_tracker/login.php
Login
Email:
omchauhanom1111@gmail.com
Password:
Login
Forgot Password?


Select Account Type
localhost/php/finance_tracker/account_selection.php
Select Account Type
Personal Account
Business Account
Continue


Main Dashboard
localhost/php/finance_tracker/personal_dashboard.php
Personal Finance Tracker
Dashboard Add Transaction View Transactions
Profile
Main Dashboard
Select an Account
Health
Go to Account
Health
Maintainance
Child Fees
Electricity
Insurance
Shop
ew Account
Create Account
Select Account to Delete
Health
Delete Account
Financial Overview
Account
Total Expense + Income
Health
5,563,711.00


Edit Transaction
Edit Transaction
Amount
5487454.00
Category
Income
Date
24-10-2024
Description
medicine
Update Transaction
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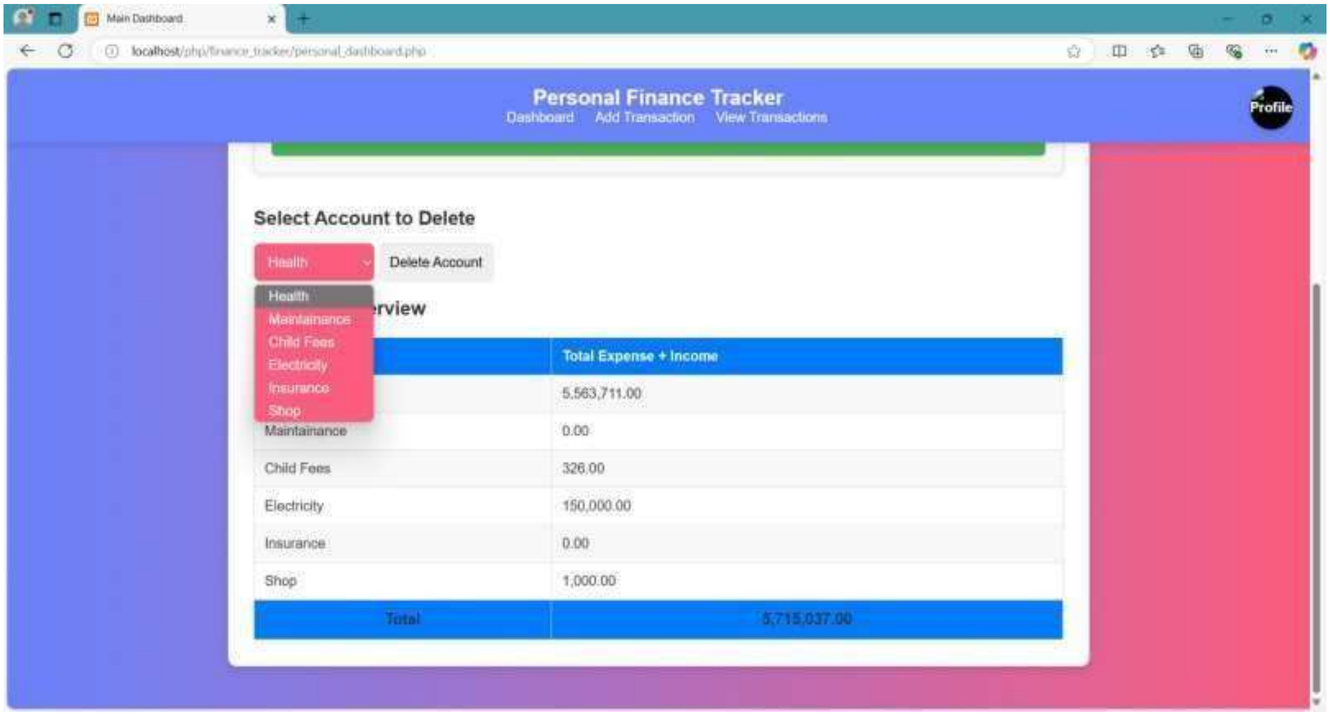
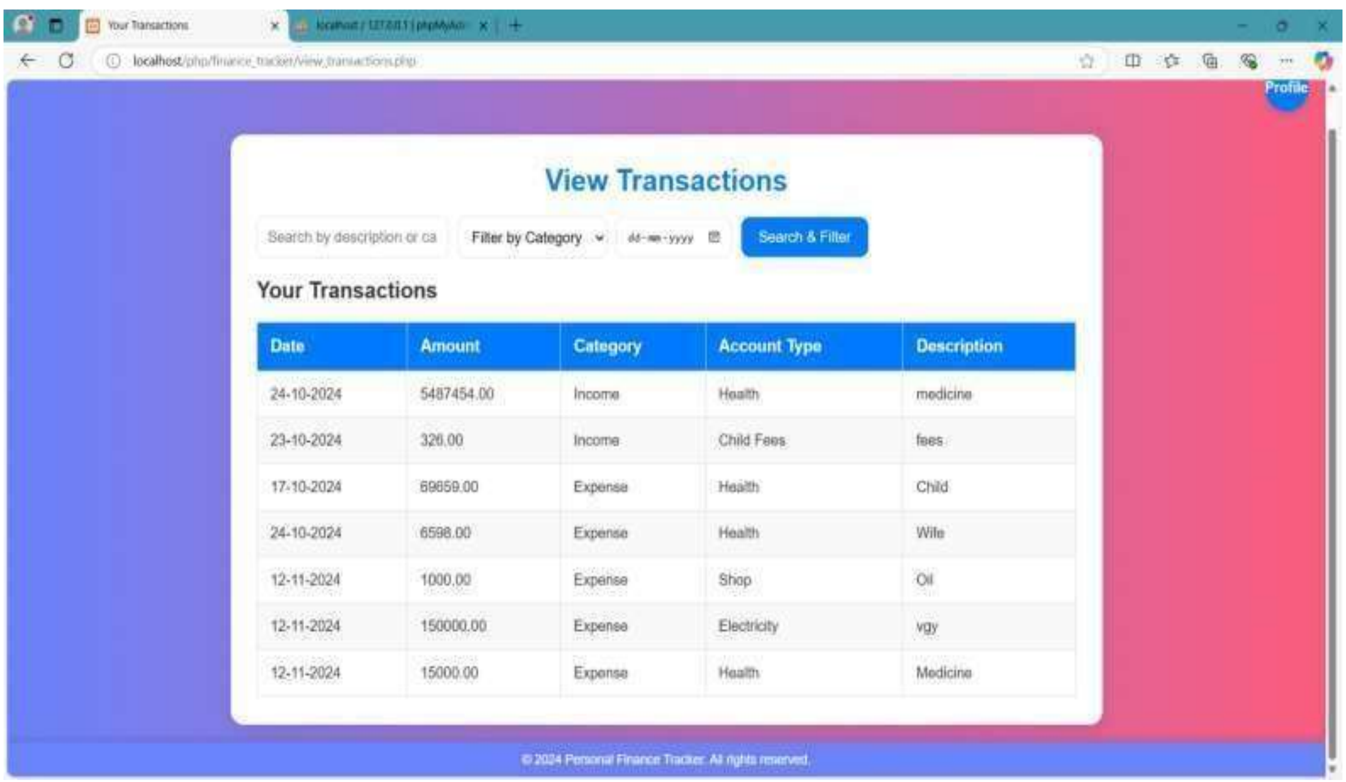

Main Dashboard
localhost/php/finance_tracker/personal_dashboard.php
Personal Finance Tracker
Dashboard Add Transaction View Transactions
Profile
Select Account to Delete
Health
Delete Account
Health
Maintainance
Child Fees
Electricity
Insurance
Shop
rview
Total Expense + Income
5,563,711.00
Maintainance 0.00
Child Fees 326.00
Electricity 150,000.00
Insurance 0.00
Shop 1,000.00
Total 5,715,037.00


Your Transactions
localhost/php/finance_tracker/view_transactions.php
Profile
View Transactions
Search by description or ca
Filter by Category
dd-mm-yyyy
Search & Filter
Your Transactions
Date Amount Category Account Type Description
24-10-2024 5487454.00 Income Health medicine
23-10-2024 326.00 Income Child Fees fees
17-10-2024 69659.00 Expense Health Child
24-10-2024 6598.00 Expense Health Wife
12-11-2024 1000.00 Expense Shop Oil
12-11-2024 150000.00 Expense Electricity vgy
12-11-2024 15000.00 Expense Health Medicine
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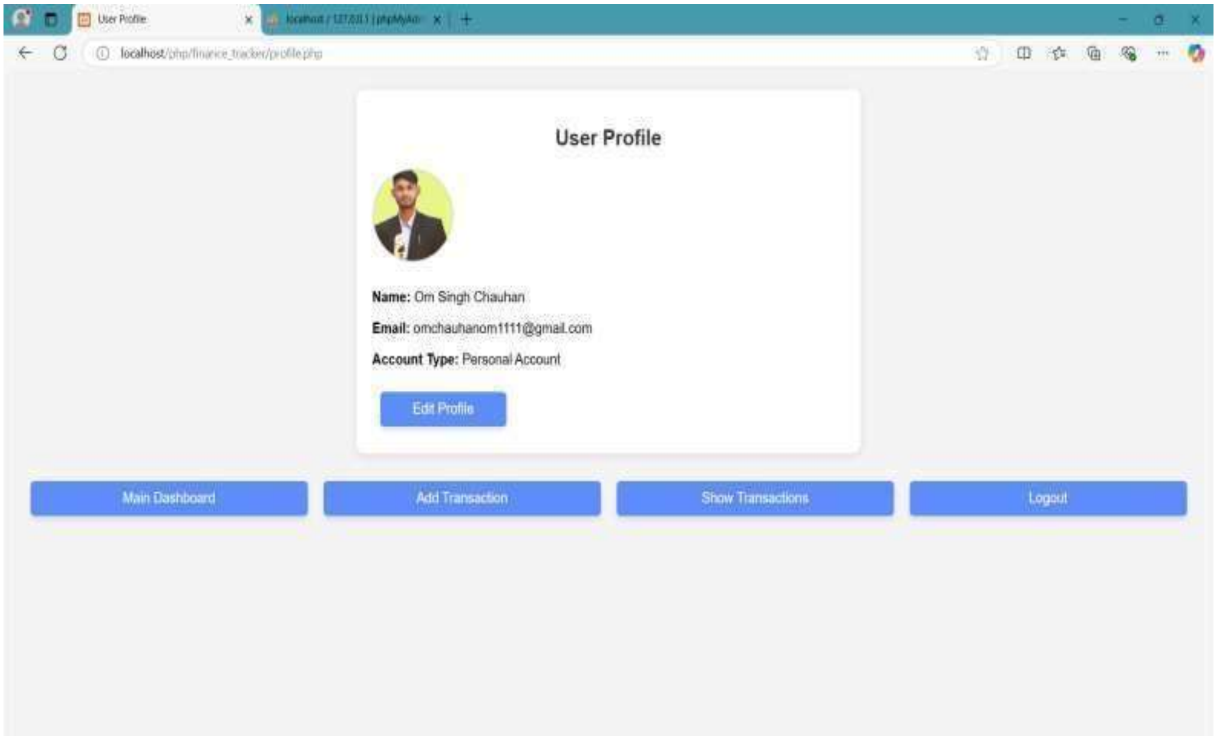
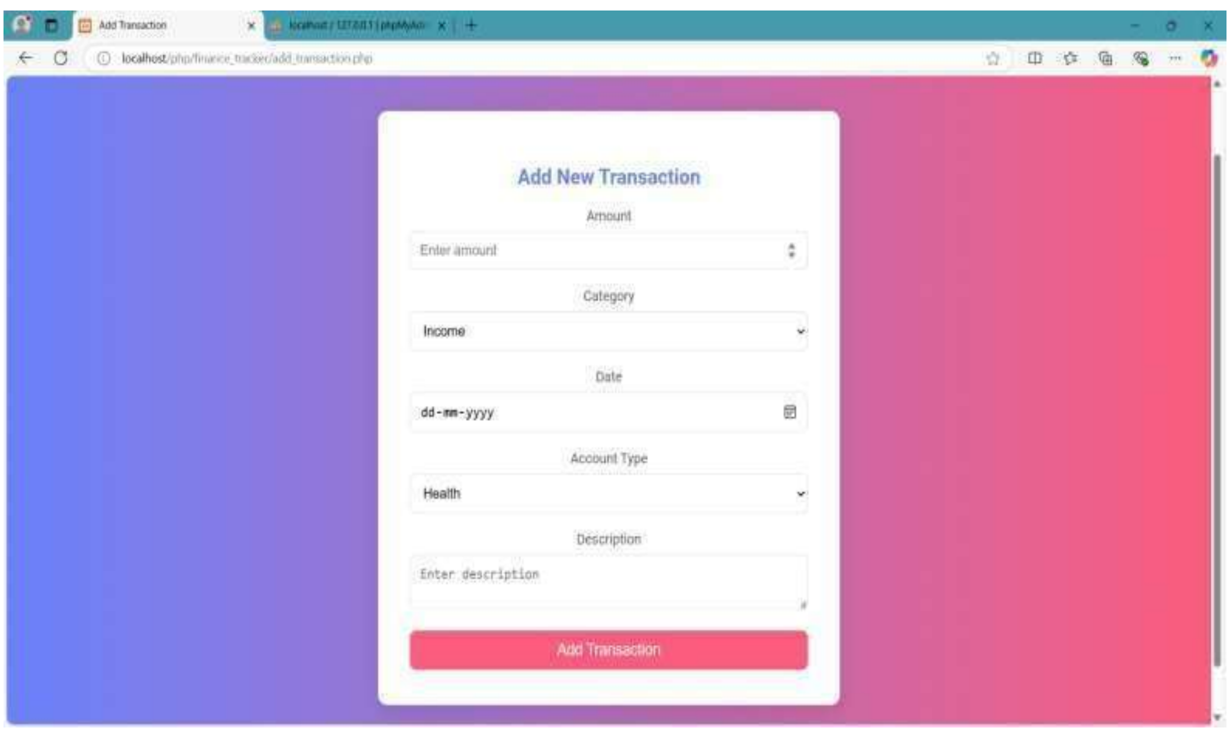

User Profile
localhost/php/finance_tracker/profile.php
User Profile
Name: Om Singh Chauhan
Email: omchauhanom1111@gmail.com
Account Type: Personal Account
Edit Profile
Main Dashboard
Add Transaction
Show Transactions
Logout


Add Transaction
localhost/php/finance_tracker/add_transaction.php
Add New Transaction
Amount
Enter amount
Category
Income
Date
dd-mm-yyyy
Account Type
Health
Description
Enter description
Add Transaction


HEALTH DASHBOARD
Add Transaction
Your Transactions
DATE INCOME EXPENSE DESCRIPTION TOTAL EDIT DELETE
24-10-2024 5,487,454.00 0.00 medicine +5,487,454.00 Edit Delete
17-10-2024 0.00 69,659.00 Child -69,659.00 Edit Delete
24-10-2024 0.00 6,598.00 Wife -6,598.00 Edit Delete
12-11-2024 0.00 15,000.00 Medicine -15,000.00 Edit Delete
Total Summary for Health
Total Income: +5,487,454.00
Total Expense: -91,257.00


Personal Finance Tracker
Dashboard Add Transaction View Transactions
Your Business Accounts
Account Type Balance Actions
Add New Transaction
Account:
Select Account
Category:
Select Category
Amount:
Description:
Add Transaction

10. Conclusion

- The **Personal Finance Tracker** makes managing money simple and easy.
- It helps users track income, expenses, and savings efficiently.
- Separate dashboards for personal and business accounts give clear financial insights.
- The design is mobile-friendly, making it accessible on any device.
- CRUD operations (Create, Read, Update, Delete) ensure smooth data management.
- The database is well-organized for reliable performance.
- It improves financial awareness and decision-making for users.
- Future upgrades can include bank integration, investment tracking, and multi-currency support.
- Overall, it is a helpful and scalable solution for managing finances.

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