Final Requirements

# Expense Tracker App Requirements

## 1. Main Features

- Transaction Type Dropdown:  
 - Static categories: Income, Savings, Expenses, Loans/EMI's.

## 2. Data Input Section

### a. Income:

- Source of Income: Dropdown with previously entered sources, allowing the addition of new ones.  
- Multiple sources per transaction allowed.  
- Amount (INR): Input field.  
- Recurring Income: Dropdown with Yes or No.  
- Date of Receiving: Date picker with a quick option to select "today."

### b. Expenses:

- Date of Spending: Date picker with today as an option.  
- Amount Spent: Input field.  
- Description of Spending: Dropdown with previously saved descriptions and the ability to add new ones.  
- Is Recurring: Dropdown with Yes or No. Recurring expenses will have an auto-reminder feature.  
- Is Important: Dropdown with Yes or No.

### c. Savings:

- Date (Optional): Date picker (optional field).  
- Amount Saved: Input field.  
- Recurring or Not: Dropdown with Yes or No.  
- Description of Savings: Predefined saving goals with an option to add new goals.  
- Is it for Duration: Dropdown with options Long Term or Short Term.

### d. Loans/EMI’s:

- Amount: Input field.  
- Description: Dropdown with previously entered values, and an option to add new ones.  
- Date of Completion: Automatically taken during the first entry and reused for subsequent entries with the same description.  
- Reminder for EMI payments will be implemented.

## 3. Data Fetching and Reports

- Ability to fetch transaction history based on:  
 - Date range.  
 - Specific categories (Income, Savings, Expenses, Loans/EMI's).  
- Arithmetic Sum for each category and overall totals.  
- Visual Reports:  
 - Use Pie Charts to compare different categories (Income vs. Savings vs. Expenses vs. Loans).  
 - Option to export reports in PDF and Excel formats.

## 4. Backend and Storage

- Data Storage: MongoDB for storing transaction data.  
- Store reusable dropdown values for income sources, expense descriptions, and savings goals.  
- No user login or authentication is required at this stage.

## 5. Frontend Design and User Interface

- The app will be responsive, designed to work on both mobile and desktop platforms.  
- Light/Dark Mode Toggle for theme preferences.

## 6. Additional Features

- Editing and Deleting: Users can edit or delete transactions.  
- Reminders will be included for:  
 - Recurring expenses.  
 - EMI payments.  
- No notifications (email or in-app) for now, only in-app reminders.