# Personal Finance Management Application – User Manual

Command-Line Based **Personal Finance Management Application**

Author : Pulkit Upreti

Date of Submission : May 27, 2025

Table of Contents

1. Introduction

2. System Requirements

1. Installation Instructions
2. Folder Structure
3. Getting Started
4. Using the Finance Menu
5. Backup and Restore
6. Sample Use Case
7. Error Handling / Troubleshooting
8. FAQs
9. Future Enhancements
10. Conclusion

## Introduction

This application allows users to manage their income and expenses, set budgets, and generate financial reports using a simple command-line interface.

## System Requirements

- Operating System: Windows 10/11, macOS, Linux

- Python 3.7 or above

- SQLite3 (included with Python)

- Command Prompt / Terminal

## Installation Instructions

1. Download or clone the project folder `Personal\_Finance\_System` to your Desktop.

2. Ensure Python is installed. Download from <https://www.python.org/downloads/>

3. Open Command Prompt and navigate to the project folder:

cd Desktop\Personal\_Finance\_System

4. Run the application:

python main.py

## Folder Structure

Personal\_Finance\_System/

├── main.py # Launches the application

├── auth.py # Handles login and registration

├── db.py # Manages database connection

├── finance.py # Core finance features (add/view/update/delete)

├── report.py # Financial reports

├── budget.py # Budget setting and notifications

├── backup.py # Backup and restore features

└── finance\_app.db # SQLite database file (auto-created)

## Getting Started

1. Run `main.py` to launch the app.

2. Choose option 1 to Register.

- Username : Pulkit Upreti

- Password : 123

3. After registration, login using option 2.

4. Use the finance menu to manage your transactions.

## Using the Finance Menu

Finance Menu:

1. Add Transaction

2. View Transactions

3. Update Transaction

4. Delete Transaction

5. Logout

6. Generate Monthly Report

7. Generate Yearly Report

8. Set Budget

## Backup and Restore

Use options 4 and 5 in the main menu:

- Backup Data : Saves `finance\_app.db.backup`

- Restore Data : Restores from `.backup` file

## Sample Use Case

1. Register with username : Pulkit Upreti, password : 123

2. Add income transaction : Type=income, Category=Salary, Amount=5000

3. Add expense transaction : Type=expense, Category=Food, Amount=1000

4. Set budget for Food = 2000

5. Generate Monthly Report

## Error Handling / Troubleshooting

- NameError : Function not imported

- sqlite3.OperationalError : Quote SQL keywords like `limit`

- Command not recognized : Ensure proper `cd` and `python` usage

## FAQs

- Where is my data stored? → In `finance\_app.db`

- Can I reset my password? → Not currently supported

- Will this work offline? → Yes, it’s fully local

## Future Enhancements

- Export reports to CSV

- Add a graphical user interface (GUI)- Cloud data syncConclusion

This command-line application helps users easily manage personal finances in a structured, local, and secure way.