Expense Tracker - Project Documentation

# Project Overview

A simple web-based Expense Tracker to help users record and visualize their income and expenses efficiently with filter options and clear insights using visual charts.

# Tech Stack

• HTML

• CSS

• JavaScript

• Bootstrap

• jQuery

• Chart.js

# Flow chart

A black screen with white text

AI-generated content may be incorrect., Picture

# Scope

• User registration/login using localStorage.

• Add Cash-In (income) and Cash-Out (expense).

• Filter & display transactions by day, week, month, year.

• Show income/expenses in charts (category-wise & time-based).

• Budget setting and alerts when expenses exceed budget.

• Upload receipts/documents for expenses (optional feature).

• Field-level and page-level validations with proper alerts.

• Responsive UI with Navbar, Footer, and Pages.

# Navigation Bar

• Home – Dashboard + visualizations.

• Cash-In – Add income popup.

• Cash-Out – Add expense popup.

• Set Budget – set Budget popup.

• Display – Transaction history with filters.

• Login/Register – User authentication.

• Logout – After login, visible to user.

# Footer Links

• Contact us – with email/contact details.

• About.

• © Copyright.

# Pages & Functionalities

## Home Page (Dashboard)

When the user not logged in the visual will be empty and there will be notification showing login to access the feature. After logged in it will be hidden.

Charts:

• Month-wise Income bar chart for past 5 months.

• Monthly Income vs Expenses – Line chart.

• Category-wise spending – Pie chart.

• Budget vs Expenses – Doughnut chart(In the respective tab user can enter there respective monthly budget here the budget will be calculated and update in the respective chart and card) validation added to the date filter .

• Bar chart to visualize the day wise Expenses– using Filter in the userinterface.

The footer will be displayed in the end of the page.

Budget Alert:

• If total expense > budget, show alert box with warning, Also the data will be added.

## 2. Login/Register Page

Register Form Fields: Name, Email, Password

Login Form Fields: Email, Password

In Login field there will be forget password option that still not enabled.

Validations:

• Field level: Email format check, Username and Email must be unique.

• Page level: Email-password match check, Alert if incorrect or blank.

## Cash-In Page

The modal will pop-up and collect the data.

Fields:

• Amount, Source, Description, Date, Upload document, Reference No, Mode of pay , Submit, Clear

• add, edit and delete option added to the mode and category options.

Validations:

• Amount > 0, Source must be selected, Date must be selected.

• Alert on success/failure

## 4. Cash-Out Page

The modal will pop-up and collect the data.

Fields:

• Amount, Category spent, Description, Date, Upload receipt, Reference No, Submit, Clear

• add, edit and delete option added to the mode and category options.

Validations same as Cash-In.

If the expenses cross the budget It will show the alert to the user.

## 5. Display Page

The display page is have the navigation bar table and filter like search filter and others.

Using search filter user can type any field of data that wanted to filter.

Filters: Week/Month/Year, Category, Date range (From – To)

Display Table: Reference| Date | Amount | Type | Category | Description | Receipt | Delete

Category wise Filter and income/expense base Filter and search based filter is available.

Functions: Delete transaction with alert, View/download log.

User can also edit there transaction using edit button.

Changes in transaction show alert or notification.

Using Export button user can export the entire transactions.

# Budget Feature

Set monthly Budget. Alert user if exceeding.

# Storage

All data (users, transactions) stored in IndexDb and LocalStorage of a Browser.

# Additional Notes

• All validations must trigger alert() or Bootstrap modal popups.

• Error handling in each page.

• Always check required fields before form submission.

• Visuals and flow are to be user-friendly and responsive.