

RECEIPT AND INVOICE DIGITIZER

Milestone 3 – Dashboard & Reporting

TEAM - A

TEAM MEMBERS:

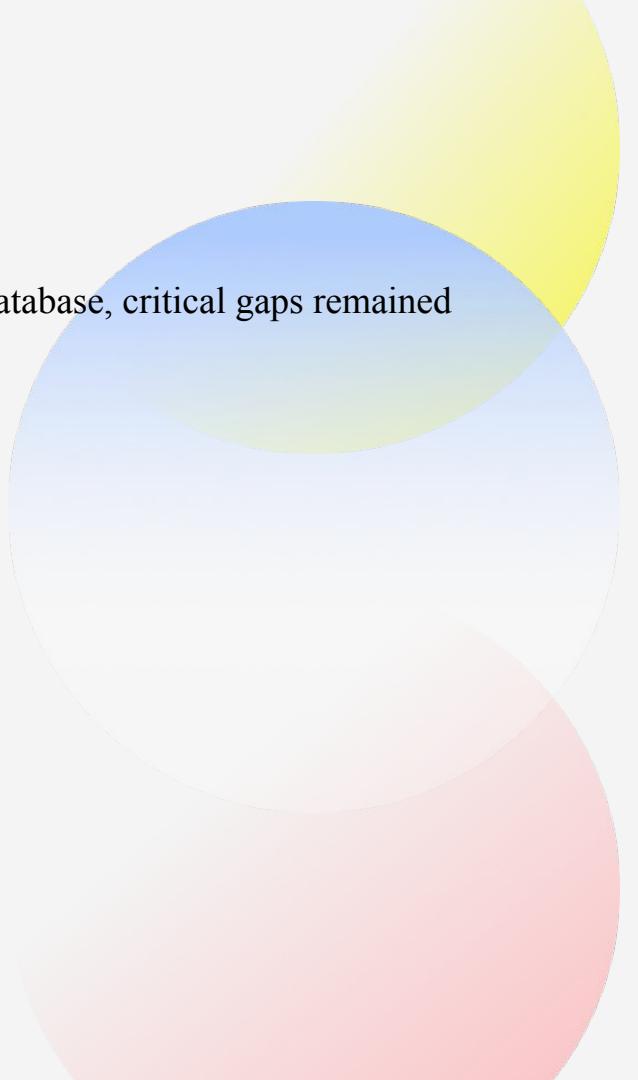
Abhay Maurya

Harini Kaveti

Pattem Dharmika

Vaibhavi Vernekar

Problem Statement :



Although invoice data was successfully extracted and stored in the database, critical gaps remained in data presentation and business insights.

No Centralized Dashboard

Users lacked a unified view to review uploaded bills and invoices

Missing Visualizations

Spending patterns and trends could not be visualized effectively.

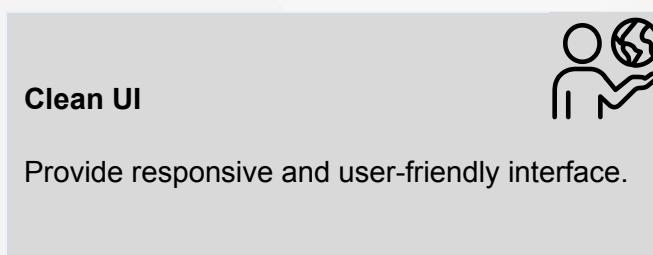
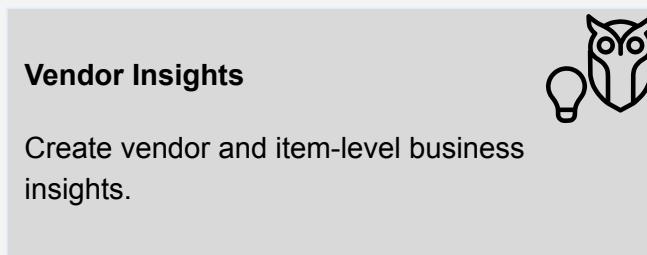
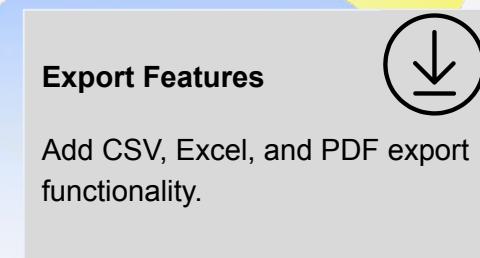
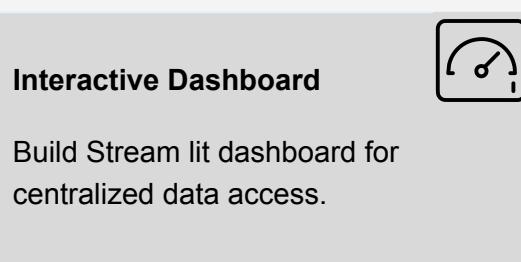
No Monthly Summaries

Structured monthly spending summaries were unavailable for analysis.

Limited Reporting

Export functionality and structured reporting features did not exist.

Milestone 3 Objectives:



Team Roles & Responsibilities:



Harini Kaveti

Analytics Module

- Designing analytics logic
- Monthly spending calculations
- Vendor and item statistics
- Data aggregation and trends



Abhay Maurya

Visualization Module

- Designing and implementing charts
- Creating Plotly visualizations
- Ensuring clarity and readability



Vaibhavi Vernekar

Dashboard & UI

- Structuring dashboard layout
- Implementing filters
- Ensuring responsive UI



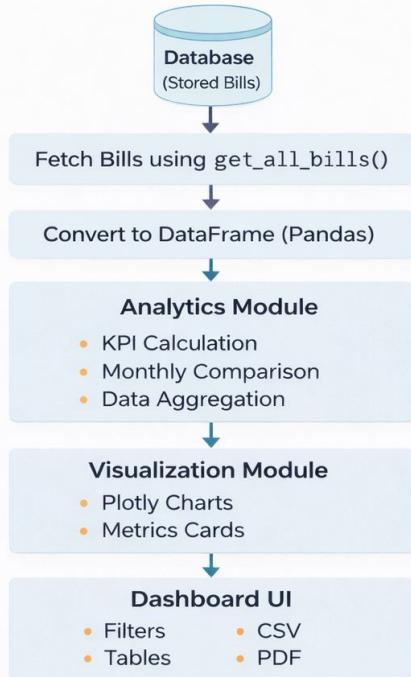
Pattem Dharmika

Reporting & Export

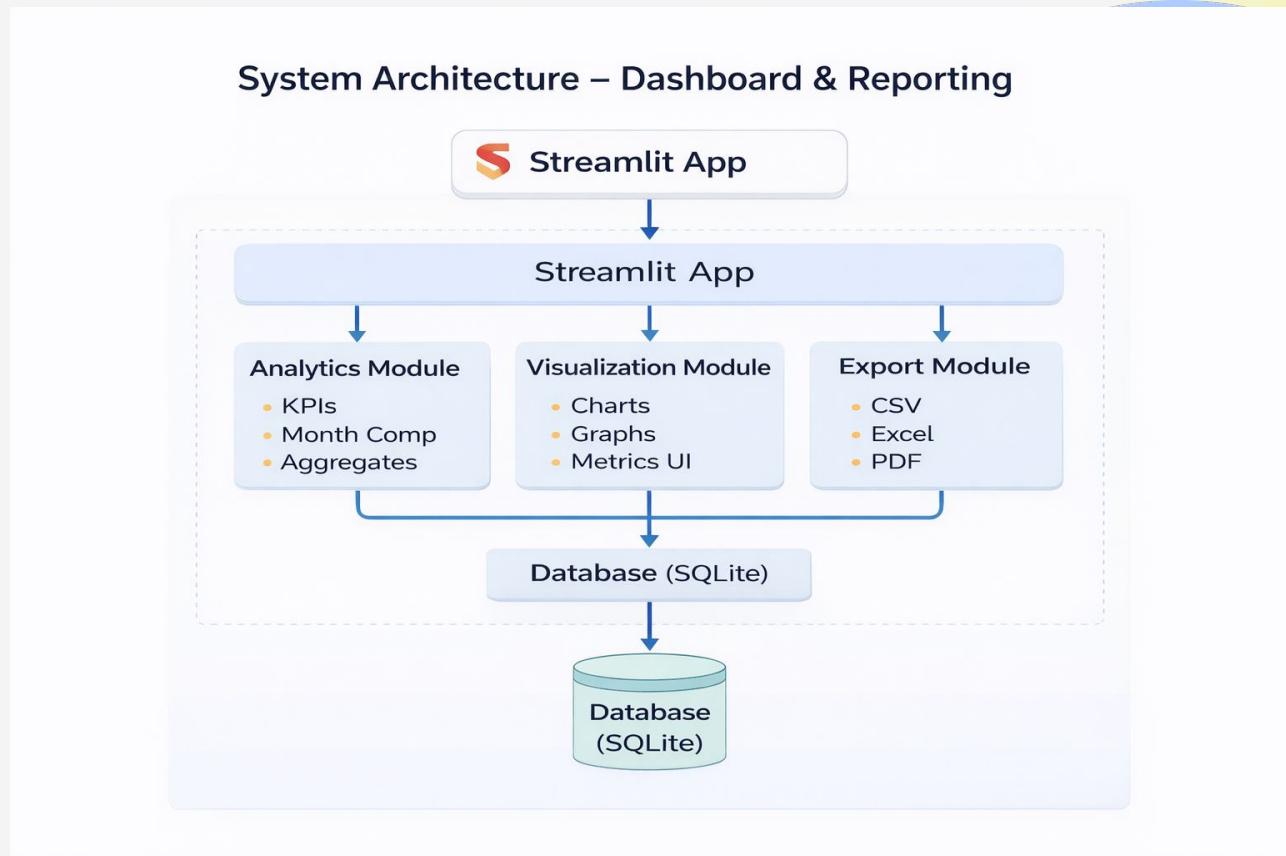
- Implementing CSV/Excel/PDF exports
- Structuring reports
- Ensuring export accuracy

Process Flow:

Process Flow – Dashboard & Reporting (Milestone 3)



System Architecture:



Dashboard Features:



Key Metrics Display

Essential spending indicators at a glance



Smart Filters

Filter by date, vendor, amount, and payment method



Monthly Trends

Visualize spending patterns over time



Vendor Distribution

Understand vendor spending breakdown



High-Value Detection

Identify unusually large bills automatically

Reporting and Export:

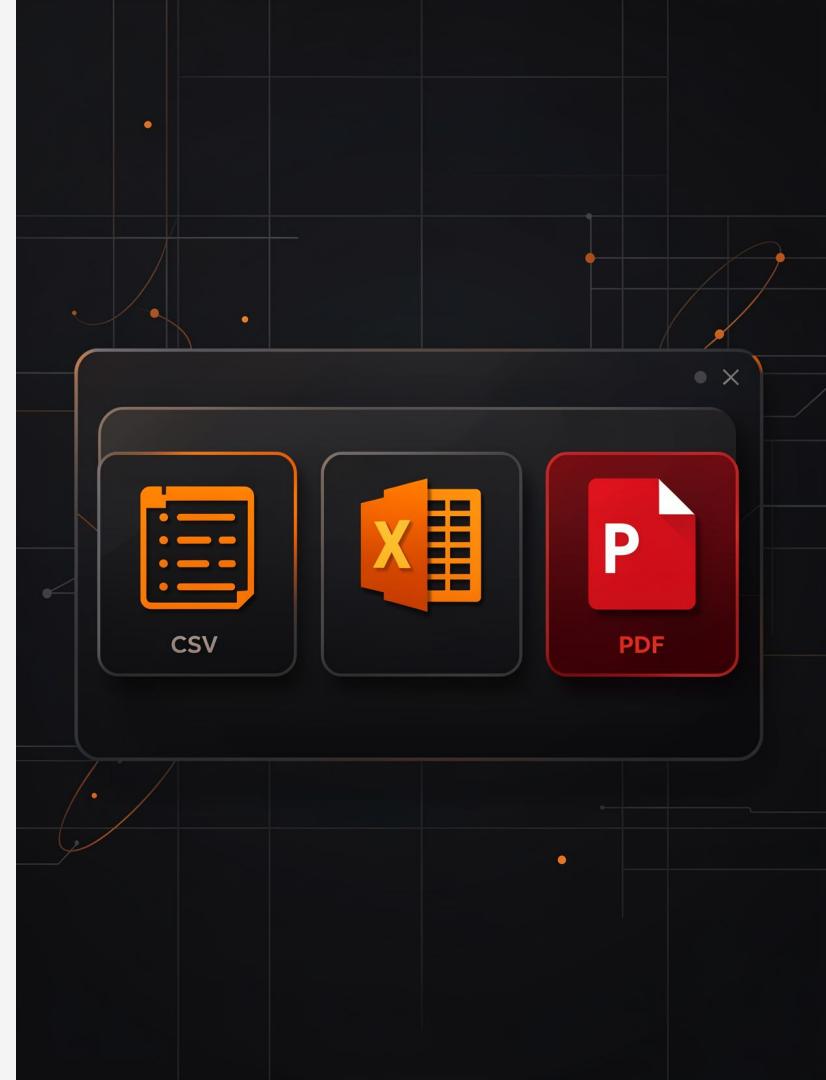
Users can export data in multiple formats, making it easy to share insights with stakeholders and integrate with other systems.

Export Formats

- CSV format for spreadsheet analysis
- Excel format with structured data
- PDF format for professional sharing

Report Types

- Summary export with key metrics
- Detailed export including line items



Timeline: Weeks 5–6

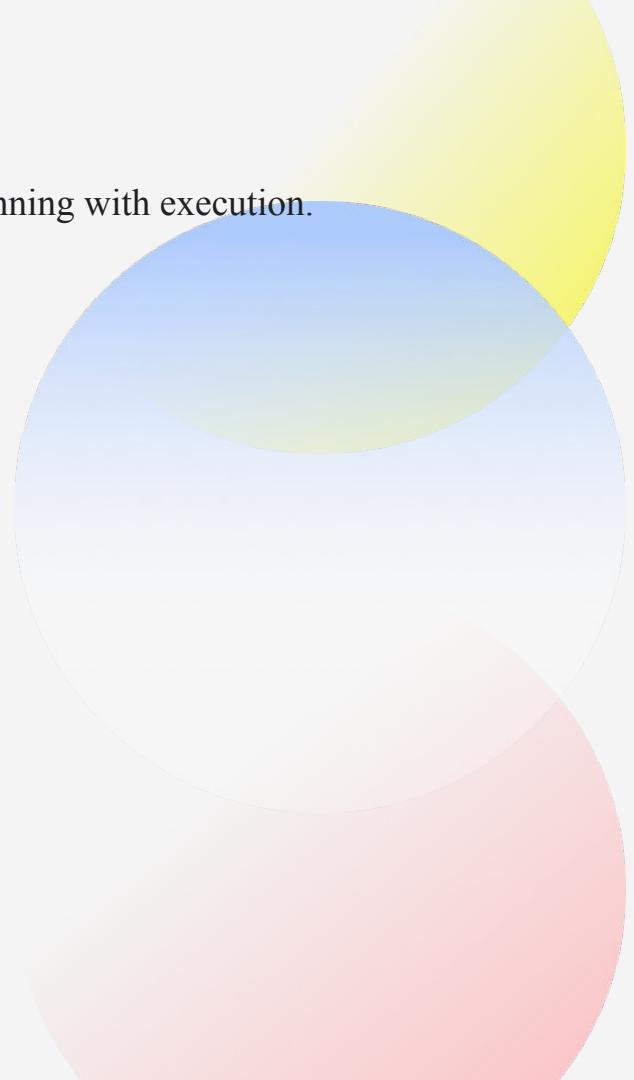
Our development followed a structured two-week timeline, balancing planning with execution.

Week 5: Planning & Structure

- Designed the dashboard layout and structure
- Decided how data will be displayed (charts, tables, KPIs)
- Created analytics logic for calculations
- Defined data flow and processing steps

Week 6: Development & Testing

- Implemented KPIs (Key Performance Indicators)
- Added export functionality (Excel/CSV download)
- Integrated frontend and backend components
- Performed testing and fixed bugs
- Final integration and validation



Final Output:

Financial Dashboard

Comprehensive insights into your spending patterns

Key Metrics

- Total Spend: \$463.56 (+\$0.00 vs last month)
- Total Bills: 35 (+0 vs last month)
- Avg Bill Value: \$13.24 (+\$0.00 vs last month)
- Unique Vendors: 30 (+0 vs last month)
- Monthly Avg: \$35.66

Smart Filters

Quick Select: Custom Range

Navigation: Dashboard, Upload & Process, History, Admin

System: Repo, v1.0.0-beta

Smart Filters

Showing all 35 bills | Total: \$463.56

Custom Range: 2017/01/09 - 2019/04/27, Vendor: All Vendors, Amount Range (\$): 83.00 - 157.50, Payment Method: All Methods

Navigation: Dashboard, Upload & Process, History, Admin

System: Repo, v1.0.0-beta

Insights & Trends

Overview, Vendors & Payments, Spending Patterns, Item Insights

Monthly Spending Trend

Amount (\$)

Jan 2017, Jul 2017, Jan 2018, Jul 2018, Jan 2019

Number of Bills per Month

Bills

Jan 2017, Jul 2017, Jan 2018, Jul 2018, Jan 2019

How many bills you had each month.

Insight: Highest spending month: 2018-01 at \$187.96. Last month is up 194.9% prior month.

Insight: Busiest month: 2018-01 with 6 bills. Average volume is 2.7 bills per month.

Navigation: Dashboard, Upload & Process, History, Admin

System: Repo, v1.0.0-beta