

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

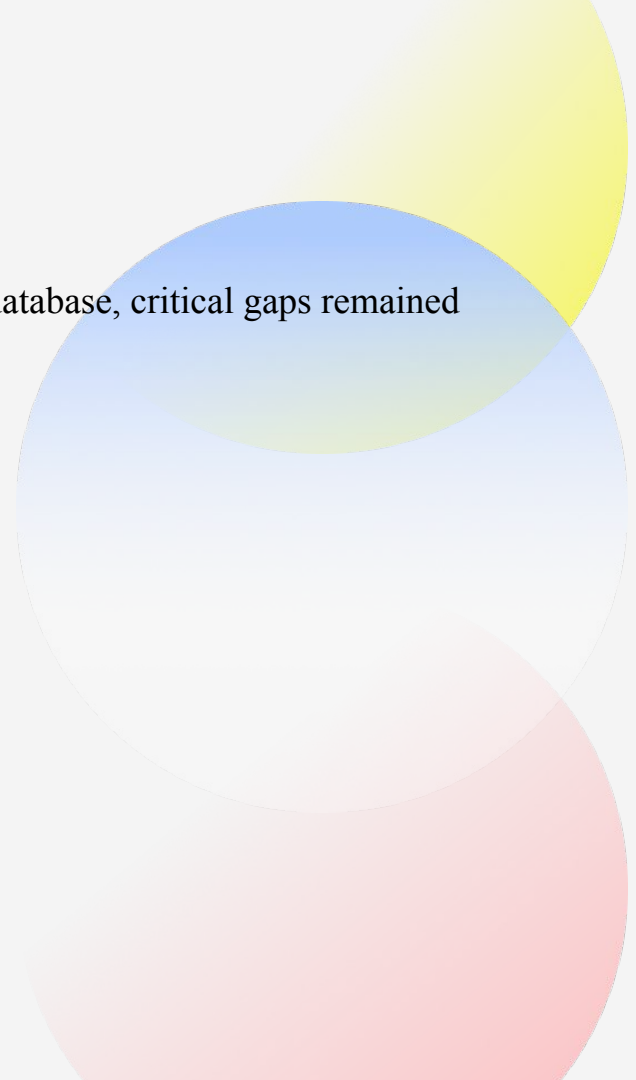
Spending patterns and trends could not be visualized effectively.

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:

Interactive Dashboard



Build Stream lit dashboard for centralized data access.

Monthly Analytics



Implement spending analytics and trend calculations.

Export Features



Add CSV, Excel, and PDF export functionality.

Vendor Insights



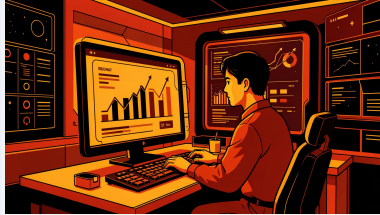
Create vendor and item-level business insights.

Clean UI



Provide responsive and user-friendly interface.

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

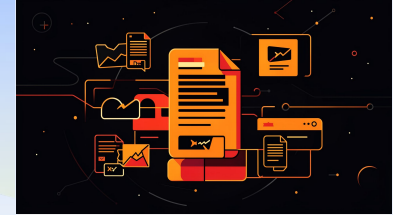
- Designing and implementing charts
- Creating Plotly visualizations
- Ensuring clarity and readability



Vaibhavi Vernekar

Dashboard & UI

- Structuring dashboard layout
- Implementing filters
- Ensuring responsive UI



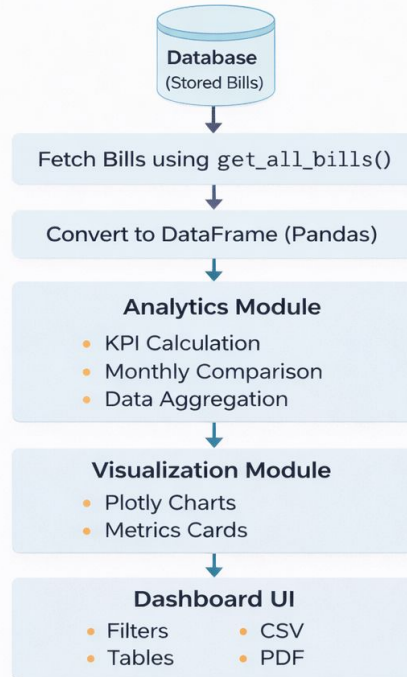
Pattem Dharmika

Reporting & Export

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

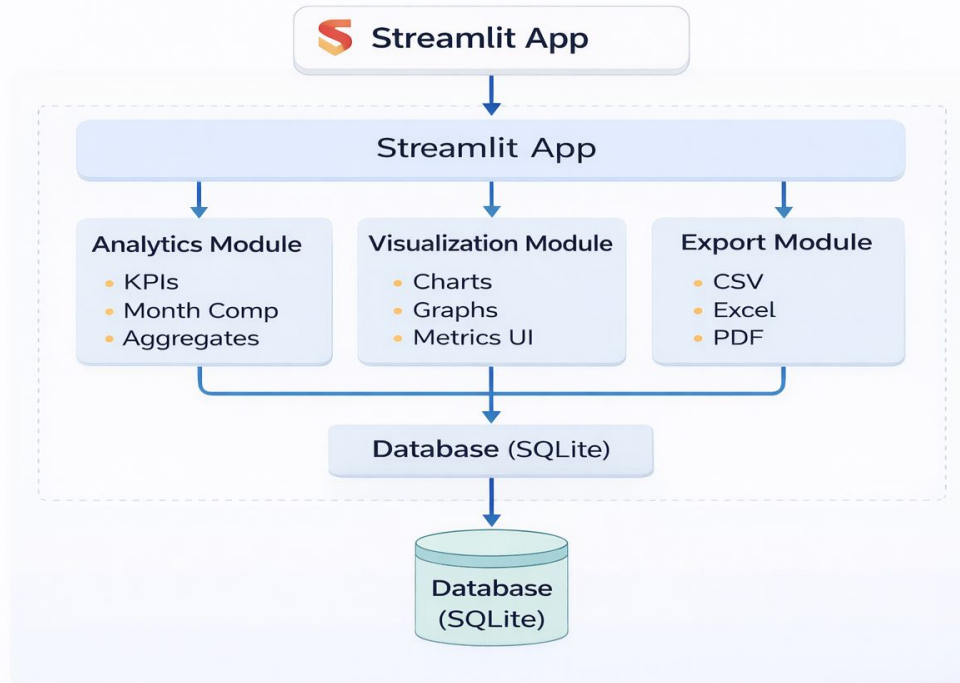
Process Flow:

Process Flow – Dashboard & Reporting (Milestone 3)



System Architecture:

System Architecture – Dashboard & Reporting



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:

