

## BudgetMasters

A web-based personal finance tracker that helps users manage budgets, track expenses, and compete with others through a savings leaderboard.

### Features

- **Simple Authentication:** Quick access with just a username
- **Budget Management:** Create and manage multiple budgets with customized categories
- **Expense Tracking:** Log and monitor expenses with detailed filtering options
- **Visual Analytics:** Interactive D3.js charts showing spending patterns and trends
- **Savings Leaderboard:** Compete with other users based on savings efficiency
- **Responsive Design:** Works seamlessly on both desktop and mobile devices
- **Help Center:** Built-in documentation and FAQs

### Live Demo

<http://164.90.152.241>

### Tech Stack

- **Frontend:** HTML, CSS, JavaScript, D3.js
- **Backend:** Node.js, Express
- **Database:** MongoDB with Mongoose
- **Development:** dotenv

## How to Use BudgetMasters

### Getting Started

1. Visit the application URL
2. On the login page, simply enter a username
  - If it's your first time, a new account will be created
  - If you've used it before, you'll be logged into your existing account

### Dashboard Navigation

- Access different sections using the sidebar menu:
  - Dashboard: Overview of your budgets
  - Expenses: Detailed expense tracking
  - Charts: Visual spending analysis
  - Leaderboard: Community savings rankings
  - Help: Documentation and FAQs

### Managing Budgets

1. Create a New Budget:
  - Click "Create New Budget" on the dashboard

- Enter the budget name
  - Set the total budget limit
  - Add categories (e.g., Food, Rent, Entertainment)
  - Click "Create Budget" to save
- 2. View Existing Budgets:
  - All your budgets appear as cards on the dashboard
  - Each card shows:
    - Total budget amount
    - Amount spent
    - Progress bar for each category
    - Recent expenses
- 3. Delete a Budget:
  - Click the "Delete Budget" button on any budget card
  - Confirm deletion when prompted

## **Tracking Expenses**

- 1. Add New Expense:
  - Click "Add Expense" on any budget card
  - Fill in the details:
    - Amount
    - Category
    - Description
    - Date
  - Click "Add Expense" to save
- 2. View and Filter Expenses:
  - Go to the Expenses page
  - Use filters to sort by:
    - Budget
    - Category
    - Time period (Today, This Week, This Month, All Time)
- 3. Edit or Delete Expenses:
  - Click "Edit" on any expense to modify details
  - Click "Delete" to remove an expense
  - Confirm any deletion when prompted

## **Using Charts**

- 1. Access Visual Analytics:
  - Navigate to the Charts page
  - View two main visualizations:
    - Spending by Category (Pie Chart)
    - Spending Trends Over Time (Bar Chart)
- 2. Filter Chart Data:
  - Select specific budget or "All Budgets"
  - Choose time range:

- This Month
- This Year
- All Time
- Charts update automatically when filters change

## **Leaderboard**

1. View Rankings:
  - Navigate to the Leaderboard page
  - See your current rank and stats at the top
  - View top 3 savers in highlighted section
  - Scroll to see other users' rankings
2. Filter Leaderboard:
  - Select different time periods to view rankings
  - Your stats update automatically

## **Help and Support**

1. Access Help:
  - Click on the Help section in the sidebar
  - Browse help topics
  - Use the search bar to find specific help articles
2. Navigate Help Topics:
  - Getting Started
  - Managing Budgets
  - Tracking Expenses
  - Using Charts
  - Leaderboard Info
  - FAQs

## **Troubleshooting**

Common issues and solutions:

1. Charts Not Updating:
  - Refresh the page
  - Clear browser cache
  - Check if expenses are properly logged
2. Expenses Not Showing:
  - Verify correct budget selection
  - Check filter settings
  - Ensure expense was saved successfully
3. Budget Totals Incorrect:
  - Verify all expenses are properly categorized
  - Check for duplicate entries
  - Refresh the page to update calculations