Personal Finance Application – User Guide

This guide will help you install, run, and use the Personal Finance Application. Each section explains how to navigate the app's features, including login, expense tracking, income management, and budgeting.

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1. Installation & Setup

In PyCharm

1. Open **PyCharm**.
2. Go to **File → New Project from Version Control…**
3. Paste the repository URL (**HTTPS** or **SSH**) → **Clone**.
4. When the project opens, select **Trust Project** if prompted.
5. In the **bottom-right corner** (interpreter settings):
   - Click the interpreter dropdown.
   - Select **Add Local Interpreter → New Virtualenv**.
   - Location: <project>/.venv
   - Base: **Python 3.13**.
6. PyCharm will prompt you to install dependencies:
   - Accept the prompt **OR** open **Terminal** and run:
   - pip install -r requirements.txt
7. Right-click **main.py** → **Run 'main'**.
8. The login window will appear.

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2. Login

The login feature ensures each user's data is private and secure.

For New Users

1. Enter a **username** and **password**.
2. Click **Register**.

For Existing Users

1. Enter your **username** and **password**.
2. Click **Login**.
3. If successful, you will be taken to the **Main Dashboard**.

Behind the Scenes

- User credentials are stored securely in **users.db**.
- Each login attempt is logged (viewable under **Account → Login History**).
- Financial data is stored separately in **finance.db**.

Error Messages & Fixes

- **"Invalid username or password"** → Check spelling, or register a new account.
- **"Incorrect password"** → Ensure Caps Lock is off, re-enter password.
- **Database error** → Delete users.db and restart the program.

Security Notes

- Use a **strong password** (mix of letters, numbers, symbols).
- Logging out or closing the app will end your session.

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3. Expenses

Use the **Expenses** section to add, view, import, or remove expenses. Each action is tied to your username and will not affect other users.

Accessing Expenses

1. Open the **Expenses** tab from the left navigation.
2. Choose from the following options:

a. Manual Entry

- Enter **Amount** (numbers only, e.g., 45.75).
- Enter **Date** (YYYY-MM-DD).
- Select **Category** from dropdown or add a new category.

- Click **Save Expenses**.

b. Import Expense (CSV)

- Click **Browse** to select a CSV file.
- Confirm the file shows as selected.
- Click **Import**.

c. View Expense

- Displays a table with: **ID, Date, Category, Amount, Description**.

d. Remove Expenses

- Select a row.
- Click **Delete Selected Expense**.
- Expenses are deleted **one at a time**.

Navigation

- **Back to Expenses** → Returns to expenses menu.
- **Close Expense Page** → Returns to Main Page.

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4. Income

Use the **Income** section to record and track money you earn.

Accessing Income

Open the **Income** tab from the left navigation. Options available:

- **Income Manual Entry**
- **Import Income (CSV)**
- **View Income**
- **Remove Income**
- **Close Income Page**

a. Manual Entry

- Enter **Description** (e.g., Paycheck, Gift).

- Enter **Amount** (numbers only, e.g., 1250.50).
- Enter **Date** (YYYY-MM-DD).
- Select **Category** from dropdown or add a new category.
- Click **Save Income**.

b. Import Income (CSV)

- Click **Browse** → select file.
- Click **Import**.

c. View Income

- Displays a table with: **ID, Date, Category, Amount, Description**.
- Use **Back to Income** to return.

d. Remove Income

- Select a row.
- Click **Delete Selected Income**.
- Confirm deletion.

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5. Budget

The **Budget** section calculates **Net Savings** based on your income and expenses.

Formula:

Net Savings = Total Income – Total Expenses

Accessing Budget

1. Open the **Budget** tab.
2. Fields available:
    - **Start Date (YYYY-MM-DD)**
    - **End Date (YYYY-MM-DD)**
    - **Total Expenses** (calculated)
    - **Total Income** (calculated)

- **Savings** (calculated net savings)

Steps

1. Enter a **Start Date** and **End Date**.
2. Click **Calculate Budget**.
3. System displays:
    - Total income for the period.
    - Total expenses for the period.
    - Net savings.
4. Click **Back** to return to the main menu.