

Expense Tracker Application

GROUP MEMBERS:

| ROLL NUMBER | NAME | ROLE |
|------------------|-------------------|--------------------|
| CB.EN.U4CSE19303 | A MANI TEJA | TESTER |
| CB.EN.U4CSE19314 | CH. SRI TEJASWINI | PROJECT MANAGER |
| CB.EN.U4CSE19320 | D VISHNU VARDHAN | DEVELOPER |
| CB.EN.U4CSE19347 | R DUSHYANTH | BUSINESS ANALYST |
| CB.EN.U4CSE19362 | Y LIKHITH KUMAR | BACK END DEVELOPER |

ABOUT:

A refined system to efficiently manage his/her expenses with ease, tracking daily expenses can really help us to save us a lot of money and get reminded if Pre-defined expenses exceed. Able to generate expenses and saving reports as time duration that are selected. Will be able to rely on the daily entry of the expenditure.

STAKEHOLDERS:

Students
Employees

MODULES:

- 1) Authentication
- 2) Setting expense limit
- 3) Adjusting the budget and expenses according to user settings.
- 4) It alerts the user that the expense exceeds the budget.
- 5) Can enter their dues and set the reminder. It will alert the user.
- 6) If the dues are cleared within the deadline, then we can remove them from the dues list.
- 7) If the due is not cleared past the deadline, then it will be moved to pending dues automatically.
- 8) Transaction and expense history will be generated.
- 9) After 15 days of deletion of the account, the account will be permanently deleted along with the data. If the user logs in to his/her account within these 15 days, then it will be restored.

TABLES:

Banks {Account number (Primary key), Name, Phone Number}

User {Name, User id, Phone No (Primary key), Account number (Foreign key)}

Transaction History {Trans_id (Primary key), Account No., User id, Amount, Date}

Expenses {Trans_id, Amount, Date, Category}

Summary {Category, Amount, Budget}

REPORT:

- 1) SRS
- 2) Software Development Progress Report
- 3) Testing Report

ASSUMPTIONS:

- 1) This application will not make transactions. It is only used to track your expenses and set reminders for the dues.
- 2) Users need to add their expenses in the application to calculate their budget.
- 3) Will be used to track day to day expenses
- 4) Alerts the user if he/she crosses the budget set.

REQUIREMENTS:**Employees and Students:**

- 1) Weekly and monthly reports of their expenses
- 2) Remainder for their dues
- 3) Transaction history
- 4) Load all the necessary expenses
- 5) Budget tracker
- 6) Check the balance
- 7) Savings goals
- 8) Link their bank accounts
- 9) Contact us page with contact number and email id

REQUIREMENTS FOR EACH USER:

Students

Authentication, entering the expense, setting the expense limit, viewing the transaction history

Employees

Authentication, entering the expense, setting the expense limit, viewing the transaction history, setting the savings goal, remainder for the dues

USER STORIES:

Students:

- 1) Authentication
 - If new user, need to register else login
 - After login, previous stored data will be continued
- 2) Should set an expense limit
- 3) Expenses for various categories like food, Education, clothes, extras etc should be entered.
- 4) Checking their stats for weekly expense and monthly expense
- 5) Need to check the transaction history for various categories and expenditure
- 6) Contact us page
 - Contains the phone number and email id to make any queries
- 7) Can set the savings goals to and need to send alert if it the expenditure limit exceeded the budget limit

Employees:

- 1) Authentication
 - If new user, need to register else login
- 2) Setting their expense budget
- 3) Expenses according to various categories are entered.
- 4) Checking their stats for weekly expense and monthly expense
- 5) Viewing their transaction history
- 6) Setting up a savings goal and alerts the user if he/she crosses the given budget limit
- 7) Should also be able to enter some dues as reminders so that the application will remind the user accordingly

EPICS:

1) Customer login/register(authentication)

Userstories

- A) Students and Employees
 - 1) Opens a login page. If new user enter register

- 2) When clicked register, then it will be redirected to a register page. Here, the user needs to enter the valid credentials and get registered. Else, the user can also be registered using google/facebook account.
- 3) If the user forgets the password, click on forgot password
- 4) Google and facebook login support
- 5) If entered incorrect credentials, displays an alert box saying Invalid Credentials
- 6) After successful login, enter the home page.

2) Data Collection(entering expense/budget)

UserStories

- 1) Enters the specific budget
- 2) Setting the time limit for the given budget.
- 3) If the expense exceeds the budget, then the user will be alerted.
- 4)

3) Statement Generation(report)

- 1) A statistics will be generated based on the expense update.
- 2) Weekly summary is also generated
- 3) Suggests the user if his expenditure is enough for his mentioned budget.
- 4) Will also keep a track of the money credited and debited.
- 5) History of all the expenditure.

4) Due report

- 1) Users can choose the date and time and name the due and amount.
- 2) User will be sent a reminder according to his preferences.
- 3) If the due is cleared, then the user can check off the due in the dues list.
- 4) If the due is not cleared even after the deadline, it will be moved to the pending dues list.
- 5) Both the dues and pending dues list will be in check box format.

5) Balance display

- 1) Keeping track of expense and Shows the remaining balance after each expense update.
- 2) If the budget amount is exceeded, then it will show the exceeded amount in red. If there is a remaining amount in the budget after all the expenses, then it will be displayed in green.

6) Customer Query Handling(contact us)

- 3) Open after clicking contact us.
- 4) Phone number and email id will be displayed to the user.
- 5) "May i Help You" FAQ's to resolve user problems.

7) Churn(Data removal after deleting the account)

Userstories

- 1) Delete account option will be available.
- 2) After clicking on it, a mail will be sent to confirm.
- 3) After confirming, the account will be deactivated
- 4) Within 15 days of deactivation, if the user logs in to the account, the account will be restored.