

SMART BUDGET

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PROJECT OVERVIEW

SmartBudget is a web-based budget tracking system designed to allow individuals in managing their personal finances with clarity and confidence. By combining intuitive interfaces with AI-driven insights, SmartBudget helps users make informed financial decisions and build healthier spending habits.



🎯 TARGET USERS

- 🎓 Students tracking their monthly allowance
- 💼 Working adults managing salary and expenses
- 💰 Anyone wanting help with personal finance and savings

👤 STAKEHOLDERS

- End Users
- System Developers
- AI Recommendation Providers

⚙️ CORE FUNCTIONALITY

- 🔒 Secure login Authentication
- 💰 Income & Expense Management: Add, edit, and delete financial records with ease.
- 💳 Spending Limits: Set monthly budgets to avoid overspending.
- 📊 Visual Reports: Analyze financial behavior through dynamic pie charts and bar graphs.
- 🤖 AI Recommendations: Receive personalized financial advice based on spending patterns.
- 💰 Savings Goals: Define savings targets and monitor progress over time.

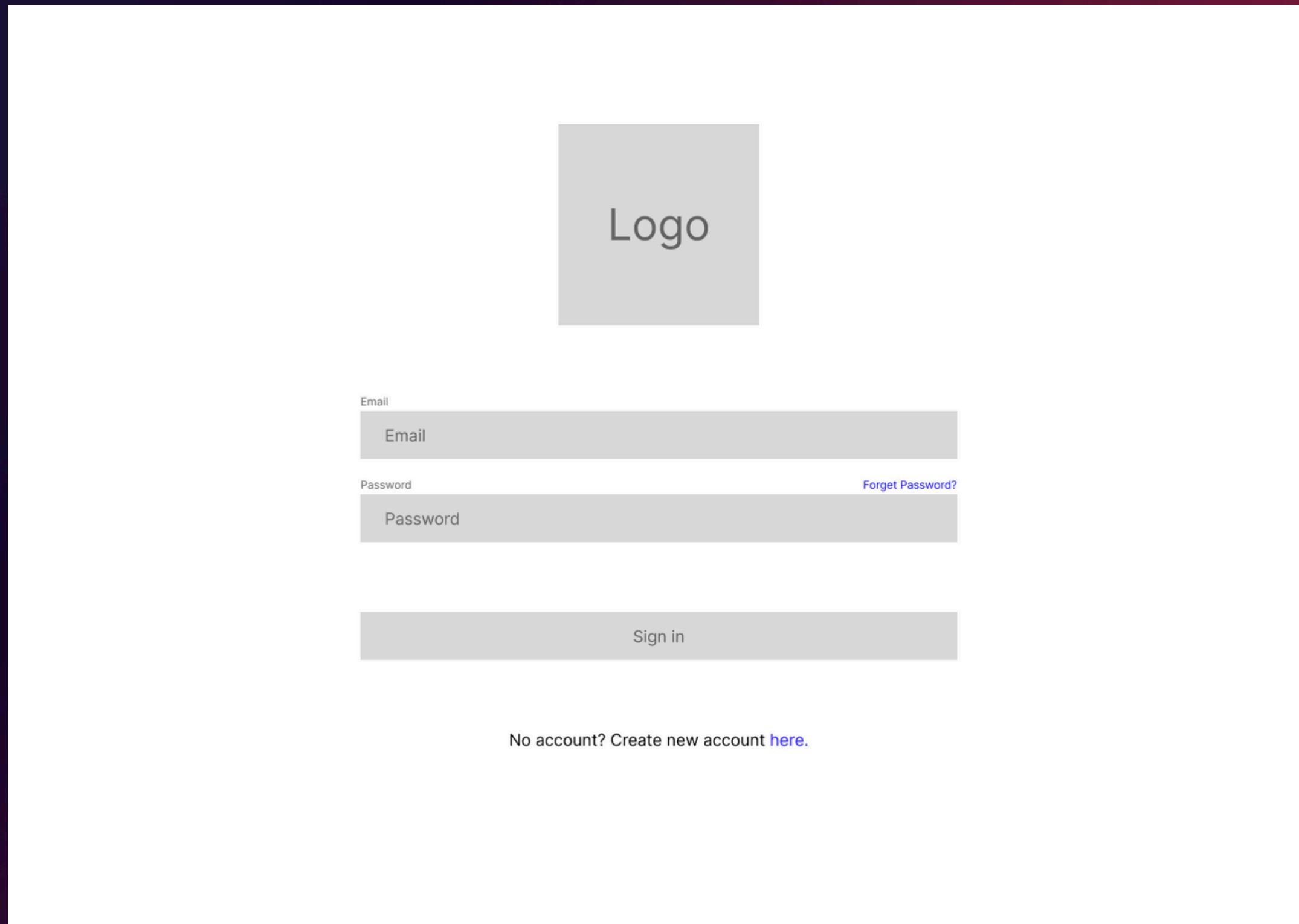
LOW-FIDELITY PROTOTYPE



The image displays a low-fidelity prototype wireframe for a financial management application. The interface includes:

- Sign in Page:** Features fields for Email and Password, and a "Forgot Password?" link.
- Forget Password Page:** Shows a "Reset Password" button and a "No account? Create one now!" link.
- Personal information settings:** A page with fields for First Name, Last Name, and Email.
- Dashboard:** Displays a "Welcome, User" message, "Expenditure Overview" (with categories like Rent, Food, Entertainment), and "Goals" (with categories like Retirement, Education, Emergency Fund).
- Transactions:** A list of transactions with columns for Date, Description, Category, Amount, and Type.
- New Transaction:** A modal for adding a new transaction, including fields for Description, Category, Amount, and Type, along with a Calendar and "Add" button.
- Manage Categories:** A screen for managing categories, showing a list of items and a "Manage Categories" button.
- Footer:** Includes a "2694 x 1634" dimension indicator and two notes:
 - "Change if made at home."
 - "Use previously defined file transmission but change if again."
- 3. Expense Forecasting:** A section with the following bullet points:
 - Predict future spending trends based on historical data.
 - Forecast upcoming bills, subscription renewals, and variable expenses.
 - Highlight months with potential overspending risk.

PROTOTYPE: SIGN IN SCREEN



A wireframe prototype of a sign-in screen. At the top center is a gray square placeholder labeled "Logo". Below it is a horizontal input field labeled "Email" with the placeholder "Email". To the right of the input field is a small blue link "Forgot Password?". Below the email field is another horizontal input field labeled "Password" with the placeholder "Password". At the bottom is a large, long, thin rectangular button labeled "Sign in". At the very bottom of the screen, centered, is the text "No account? Create new account [here](#).

PROTOTYPE: DASHBOARD



Logo

Dashboard

Transaction

Goals

Settings

Log out

search

Welcome, User

Analytic Overview

€ 100,000 Income

€ 50,000 Expenses

€ 50,000 Balance

€ 30,000 Savings

Expenditure Overview

Food

Health

Shopping

Utilities

Transport

Entertainment

this month

previous month

Deadline	Date	Service	Price
Due in 3 days	Fri, Oct 12	Spotify	€ 5.99
Oversize	Mon, Oct 5	Laundromat	€ 1.50
Due in 5 days	Sun, Oct 14	Internet	€ 24.99

Goals

Buy a car

Goal: € 8000

Upcoming bills

see all

PROTOTYPE: NEW TRANSACTION



Logo

Transactions

Dashboard

Goals

New Transaction

Transaction Name

Amount

Category

Type

Food

Expense

Calendar

Cancel

Add

▲ +15%

▲ +10%

▼ -5%

AI Suggestions

Luxury 5.00%

Lifestyle 15.00%

search

+ Add Transaction

Export to csv

Category

Food

✓ Food €300

Shopping €200

Manage Categories

Type

Expenses

✓ Expenses

Income

PROTOTYPE: TRANSACTIONS



Logo

Dashboard

Transaction

Goals

search

Transactions

+ Add Transaction Export to csv ↓

30 Sep 2025	Bolt	Transport	- € 3.20	...
04 Oct 2025	Expresso House Coffee	Food	- € 5.20	...
10 Oct 2025	Salary	Income	+ € 3000	...
12 Oct 2025	Freelancing Project	Income	+ € 650	...
14 Oct 2025	Electricity Bill	Utilities	- € 15.00	...
14 Oct 2025	Lindex	Shopping	- € 21.40	...
15 Oct 2025	Adobe Effects	Entertainment	- € 18.00	...
17 Oct 2025	FSHS healthcare	Health	- € 12.00	...

show 10 v of 50

Total Spending
€ 3000
▲ +15%

Duplicates
20%
▲ +10%

Inefficients
15%
▼ -5%

USER STORIES



- As a user, I want to create an account, so I can register and access the app.
- As a user, I want to log in, so I can access my personal dashboard.
- As a user, I want to reset my password, so I can recover my account if I forget it.
- As a user, I want to add income records, so I can track my earnings.
- As a user, I want to add expense records with category and date, so I can track my spending.
- As a user, I want to edit and delete income/expense entries, so I can correct or remove previous records.
- As a user, I want to view my total income, expenses, and balance, so I can see my financial status.
- As a user, I want a simple dashboard screen, so I can navigate and view financial info easily.
- As a user, I want to set my savings goals, so I can plan my budgeting targets.

USER STORIES AND PRODUCT BACKLOG



Trello is used for backlog management and task tracking.
It provided a clear visual workflow and made it easy to assign and track tasks collaboratively.

The screenshot shows a Trello board titled "Smart Budget-Sprint 1". The board is organized into several columns:

- Scrum Roles:** Project Owner (SL), Scrum Master (JK), Front Development Team (SL, CN, JK, PS), Back End Development Team (SL, CN, JK, PS).
- User Stories:** A column listing User - 01 through User - 11, each with a "User Registration" sub-task.
- Product Backlog:** A column listing various tasks: User Login, Reset Password, Add Income Entry, Add Expenses Entry, Edit income/ expense entry, Delete income / expense entry, Dashboard Summary, AI recommendations, and Goal and Savings.
- Sprint 1 task To Do:** A column containing "Presentation Sildes" with due date Nov 6, assigned to SL.
- In Progress:** A column containing "Sprint Ceremony Reflection (May be Read Me)" with due date Nov 6, assigned to CN.
- Review and Testing:** A column containing "Project Deliverables (On ReadMe)" with due date 7/7, assigned to CN.
- Done:** A column containing "User Stories and Product Backlog" (assigned to SL), "UI/UX prototype" (assigned to JK, PS), and "Block Diagram (Full- Stack Architecture)(Figma)" with due date Nov 6, assigned to PS.

A callout box in the bottom right corner provides a summary of the process:

Task Prioritization & Organization: Tasks were selected from the Product Backlog based on Sprint 1 goals and focused on Low-Fidelity Prototype, project description and presentation. They were broken into smaller tasks, divided the task among members and placed in the Sprint To-Do column, then moved through In Progress → Review → Done.

SPRINT CEREMONIES AND INSIGHTS

- What went well: Strong teamwork, clear role division, and consistent communication.
- What could improve: Time management ,a few tasks took longer than expected.
- Next action: For Sprint 2, we'll assign specific deadlines per task and hold mid-week reviews to keep progress steady.





TEAM CONTRIBUTION

Highlights

- Worked remotely through WhatsApp & Zoom and held on-site meetings on Friday
- Collaborated in Figma for real-time prototype design
- Team members reviewed each other's screens and provided constructive feedback.
- The group coordinated well in Trello and completed tasks on time.

SWOSTIKA LAMA

Product Owner

Trello backlog setup, presentation coordination

JIYA KANHIRATHAN POYIL

Scrum Master

Figma (dashboard, transactions, goals), Scrum docs

CHANDINA NILUKSHI

Docs/Dev Team

Documentation

PUNTAWAT SUBHAMANI

UI Designer

Figma prototype (login, registration, AI pages)

THANK YOU