

AI POWERED PERSONAL FINANCE MANAGEMENT SYSTEM

User Manual

A photograph showing two people in professional attire (suits) engaged in a discussion. One person is holding a tablet that displays various financial charts and graphs, while the other person is gesturing with their hand, possibly explaining something. They are also holding coffee cups. The overall theme is professional finance and technology.

AI POWERED PERSONAL FINANCE MANAGEMENT SYSTEM

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Acknowledgements

I would like to convey my heartfelt thanks to my Parents and all my Clevered teachers, my mentor Shivani Srivastava, Dr. Ken Kahn who always gave valuable suggestions, invaluable support, encouragement and supervision for completion of my project. They helped me to understand and remember important details of the project and their moral support and continuous guidance enabled me to complete my work successfully.



About Me..

My name is Shaivi Mehul Shah. I just finished with my 12th grade board exams and subsequently my school. I am a very active person and love playing sports. I am famously known as SMS standing indeed for Shaivi Mehul Shah.



Clevered

Internship Journey so Far..



- I enjoyed the opportunity of getting to do a crash course on python and AI as AI over the years has become the most demanded skill for employers. Also I enjoyed my journey with CLEVERED and all its mentors and teachers. I have also enjoyed the opportunity
- Badges Earned include rockstar badge for timely submission.



About the App



The AI powered personal finance app helps you to manage your finances effectively so that you don't end up overspending, and have enough to save for a rainy day!!

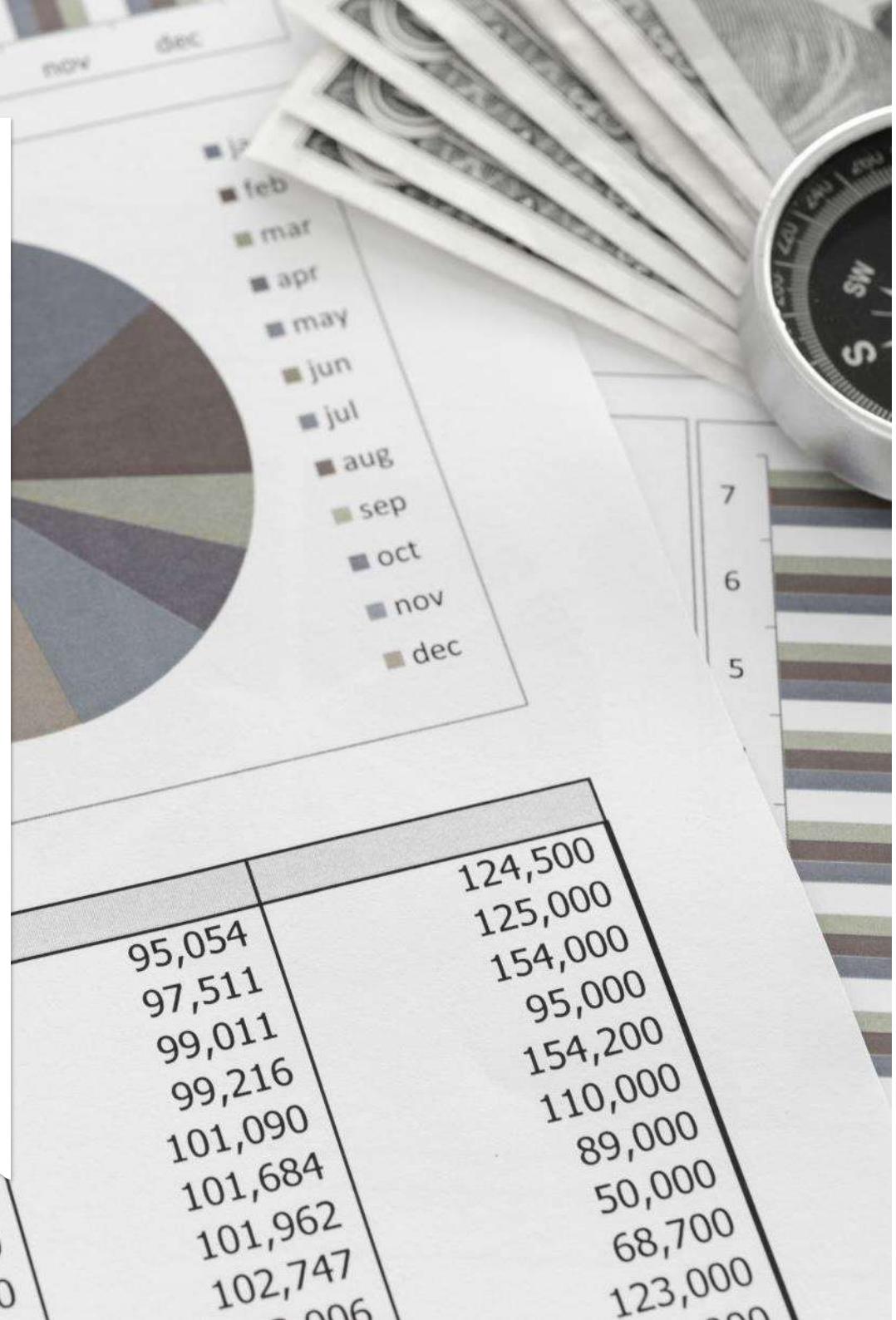


Managing your money isn't the easiest thing to do. A personal finance app can help track your spending, saving, investing, and bill payments while keeping you updated on credit score changes.



How do I use the App?

- All you have to do is upload an excel that contains the budget of different expenses that you consider important and upon your interest and input your monthly earnings, accordingly the app will analyse and let you know the extent of your spendings and whether it is favourable or adverse.



AI POWERED PERSONAL FINANCE

upload your monthly expenses excel



submit and see your expenses break down

- **Step 1:** Click on the pink button as indicated below so as to upload an excel that contains the budget of different expenses that you consider important and upon your interest and input your monthly earnings.

AI POWERED PERSONAL FINANCE

upload your monthly expenses excel

submit and see your expenses break down



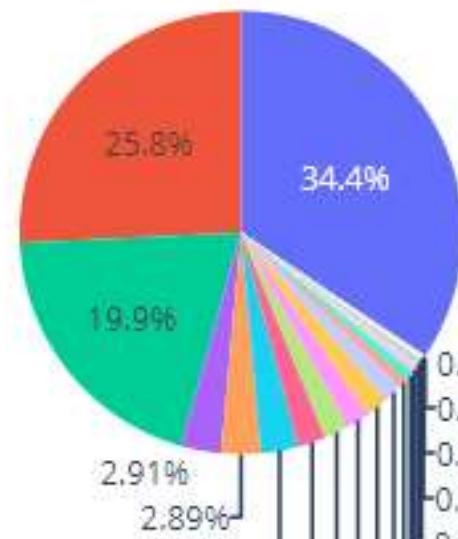
Step 2: Click on the blue button as shown in order to see a detailed analysis of your income, expenditure including all your debit as well as credit transactions

Output |

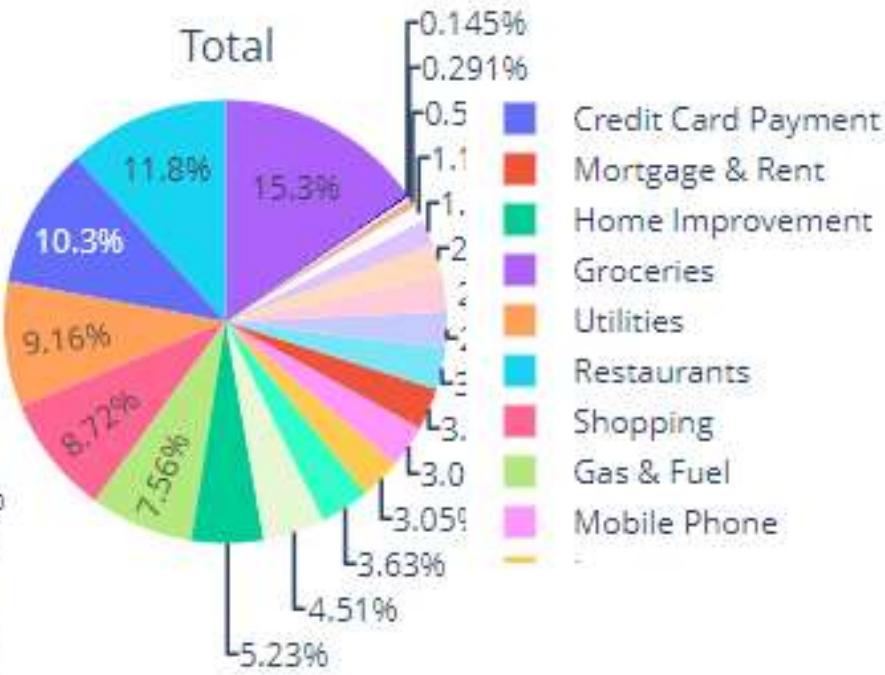
	Date	Description	Amount	Transaction Type	Category	Account Name
0	2018-01-01	Amazon	11.11	debit	Shopping	Platinum Card
1	2018-01-02	Mortgage Payment	1247.44	debit	Mortgage & Rent	Checking
2	2018-01-02	Thai Restaurant	24.22	debit	Restaurants	Silver Card
3	2018-01-03	Credit Card Payment	2298.09	credit	Credit Card Payment	Platinum Card
4	2018-01-04	Netflix	11.76	debit	Movies & DVDs	Platinum Card

Category Analysis

Sum



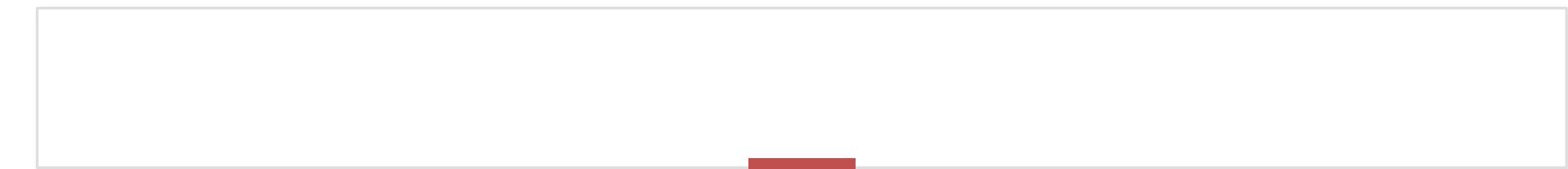
Total



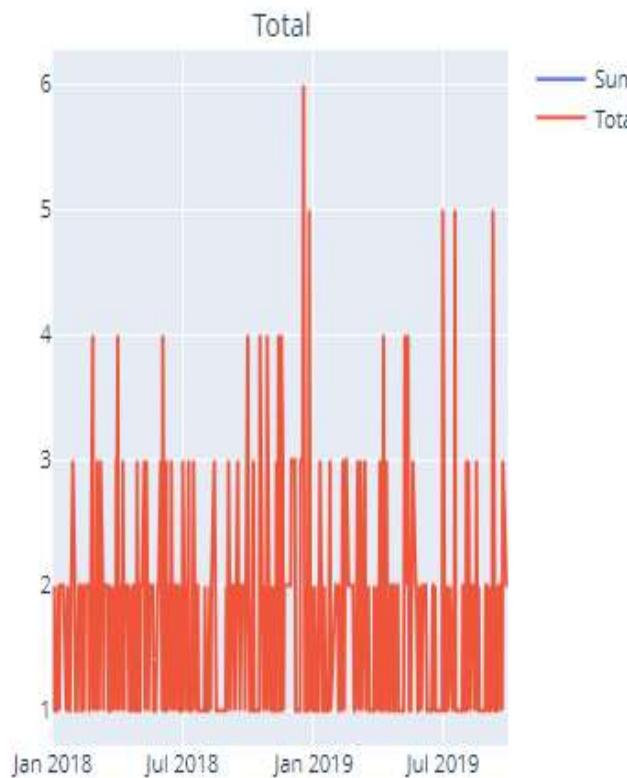
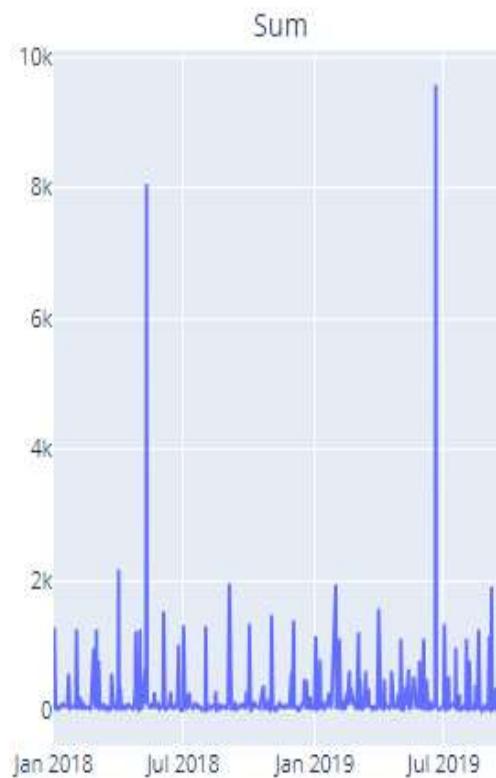
Expenses list

	Category	Total	Sum
0	Alcohol & Bars	25	539.13
1	Auto Insurance	18	1350.00
2	Coffee Shops	31	115.54
3	Credit Card Payment	71	33041.36
4	Electronics & Software	4	719.00
5	Entertainment	1	9.62
6	Fast Food	16	330.63
7	Food & Dining	2	77.75
8	Gas & Fuel	52	1715.17
9	Groceries	105	2795.21
10	Haircut	13	378.00
11	Home Improvement	36	19092.87
12	Internet	21	1570.88
13	Mobile Phone	21	1680.40
14	Mortgage & Rent	21	24754.50
15	Movies & DVDs	18	222.19
16	Music	21	224.49
17	Restaurants	81	2613.02
18	Shopping	60	1973.24
19	Television	8	104.78
20	Utilities	63	2776.00

Date wise graph analysis



Date Analysis

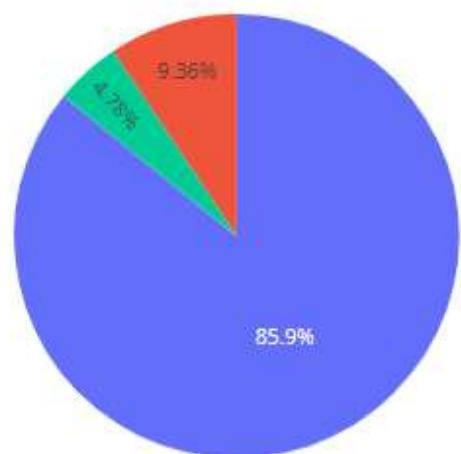


	Date	Total	Sum
0	2018-01-01	1	11.11
1	2018-01-02	2	1271.66
2	2018-01-04	1	11.76
3	2018-01-05	1	25.85
4	2018-01-06	1	18.45
...
404	2019-09-19	2	43.56
405	2019-09-22	1	131.10
406	2019-09-23	3	61.77
407	2019-09-28	2	37.73
408	2019-09-30	2	76.75

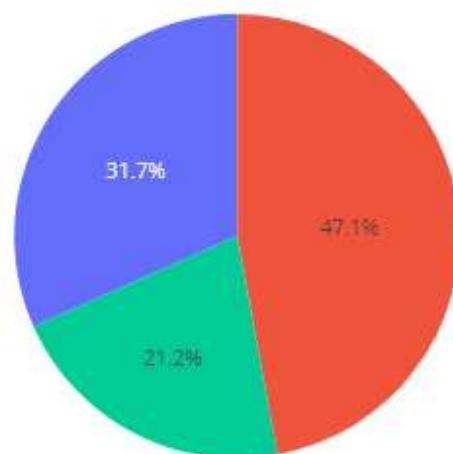
Debit analysis

Account Name Analysis

Sum



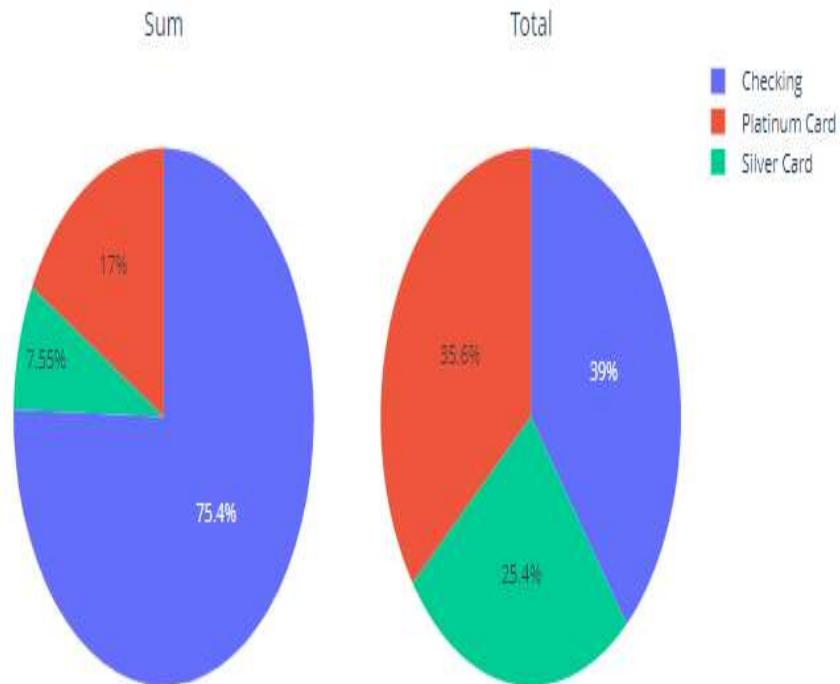
Total



- Checking
- Platinum Card
- Silver Card

	Account Name	Total	Sum
0	Checking	218	82498.14
1	Platinum Card	324	8996.31
2	Silver Card	146	4589.33

Account Name Analysis

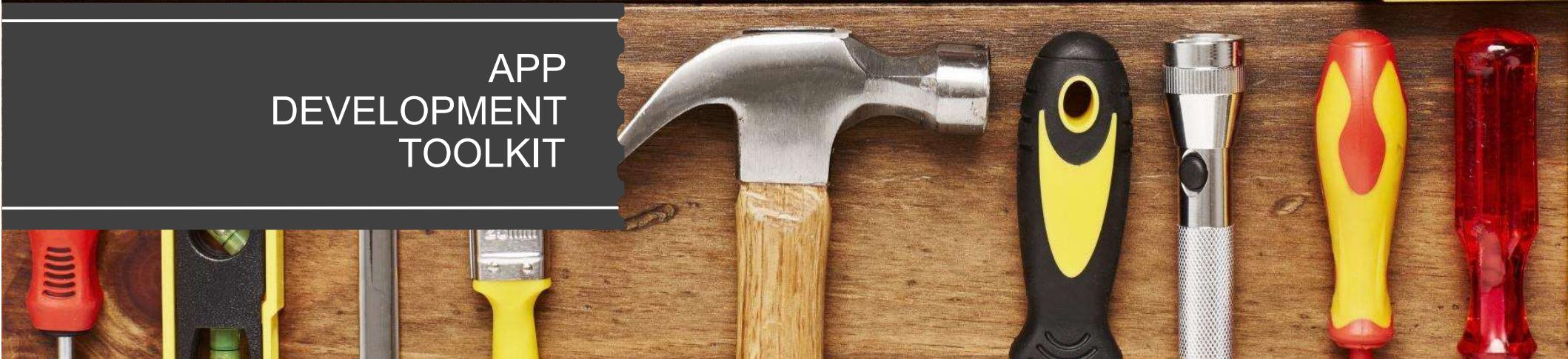


Credit analysis

	Account Name	Total	Sum
0	Checking	46	93750.00
1	Platinum Card	42	21139.93
2	Silver Card	30	9379.83



APP DEVELOPMENT TOOLKIT



Event Handlers Matrix

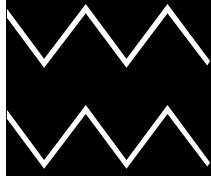
Event Handlers Matrix			
S. No.	Element	Action	What happens?
	current file of expenses	upload	analyses your data into a pie chart, spendings chart break down, monthly comparison of total expenses.
	submit and see your expenses break down	click	presents the data to the user

Project Requirements

S. No.	Requirement/ Feature	Completed
	COLLECTING THE DATA SET	YES
	INSTALLING THE REQUIRED LIBRARIES pandas scikit_learn matplotlib	YES
	DEVELOPING THE BACKEND CODE AND MACHINE LEARNING MODEL	yes
	DEVELOPING THE FRONTEND CODE	yes

Test Plan

S. No.	Element	Action	What happens?	Tested	Results	Pass/ Fail	Corrected
	current file of expenses	upload	analyses your data into a pie chart, spendings chart break down, monthly comparison of total expenses.	yes	takes in data	pass	
	submit and see your expenses break down	click	presents to the user	yes	gives detailed analysis according to users requirement	pass	



USER INTERFACE DESIGN

**AI POWERED PERSONAL
FINANCE**

upload your monthly
expenses excel

submit and see your
expenses break down

Contact Person

Please reach out to me at
my email
pinkalps@gmail.com for
any questions/ concerns/
suggestions on the App



Social Media toolkit

Github Link:

<https://github.com/shaivishah08/finance-management.git>

Youtube link:

Linkedin link:

App Development Toolkit Workbook:

[AI-App Development Toolkit Workbook.xlsx](#)



Thank you!
