

MODERN DIGITAL BANKING DASHBOARD



Presented by : Team 2
Under the guidance of : Priya mam



INFOSYS SPRINGBOARD



WHY WE BUILT THE DASHBOARD

1

Provide users with a **unified view** of their accounts and transactions.

2

Enable **real-time insights** and transaction monitoring.

3

Ensure **secure and efficient management** of banking data.

4

Improve **user experience** through a clean, responsive, and interactive interface.

5

Support **integration** with APIs, webhooks, and banking services for modern operations.





MODERN TECH STACK OVERVIEW



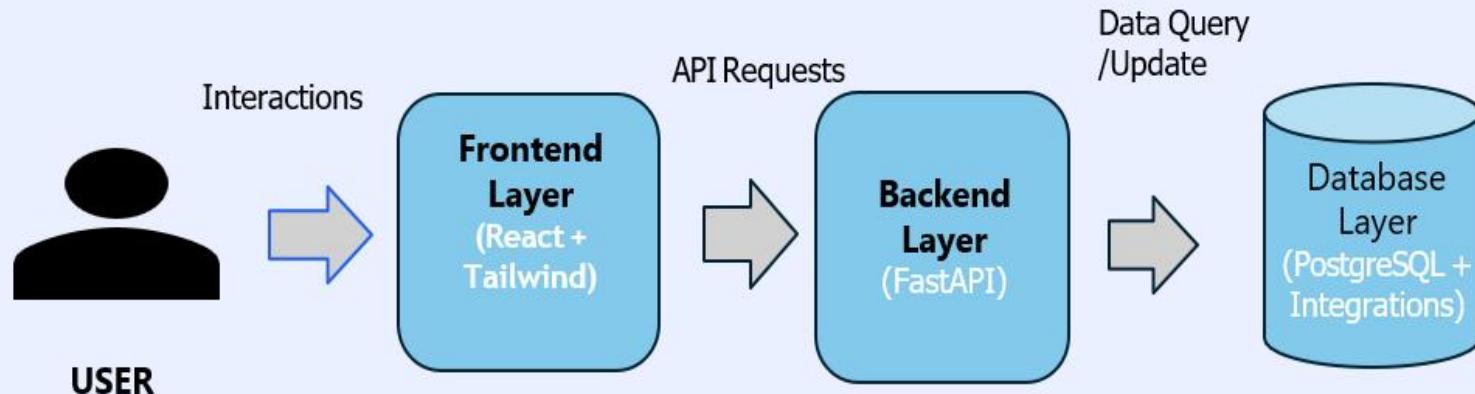
Frontend:
React.js +
Tailwind CSS →
Interactive &
responsive UI

Backend:
FastAPI →
High-
performance,
scalable APIs

Database:
PostgreSQL →
Reliable relational
database

Authenticaton: JWT
(access +refresh
tokens) →Secure
user sessions

SCALABLE & MODULAR SYSTEM ARCHITECTURE





A DESIGN FOR A MAINTAINABLE CODEBASE

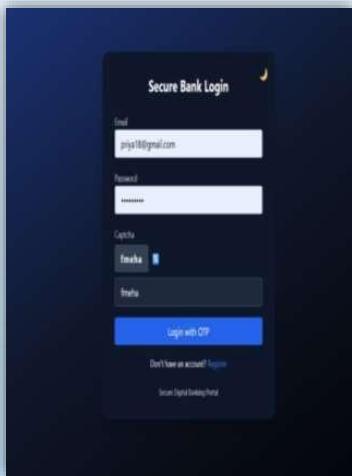
-MODULAR ARCHITECTURE

Modern Digital Banking Frontend

- User opens app (**index.html**)
- React initialized (**main.jsx**)
- Routing to pages (**App.jsx**)
- UI built using **components**/
- API call from **services / utils**
- Data stored using **state (hooks)**
- Dashboard updated
- (**pages/Dashboard.jsx**)

Modern Digital Banking Backend

- Request received (**main.py**)
- Routed to API (**routers**)
- Auth check (**auth.py**)
- Data validation (**schemas.py**)
- DB operation (**models +database.py**)
- Response returned
- JSON response sent



Create Account

Full Name: priya

Email Address: priya18@gmail.com

Phone Number: 0987654321

Password: #Priya123

Confirm Password:

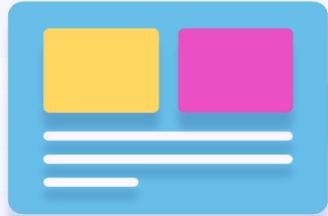
I agree to the Terms of Service and Privacy Policy

Create Account

Already registered? [Login](#)

Secure authentication that enables registered users to access their personalized digital banking dashboard. Secure login with OTP

Quick and validated user registration that provisions a new profile for seamless access to banking services. Validated user registration. Strong password policy. And Email & phone validation.



ACCOUNTS

Centralized view of all linked bank accounts with balance tracking and account details. Add/Remove bank accounts. Monitor balances. Multi account support and Secure API integration

Digital Bank

Search transactions, accounts...

prya

+ Add Account

Accounts
Manage all your connected accounts

Total Accounts: 1 Total Balance: ₹13,740.00 Positive Accounts: 1

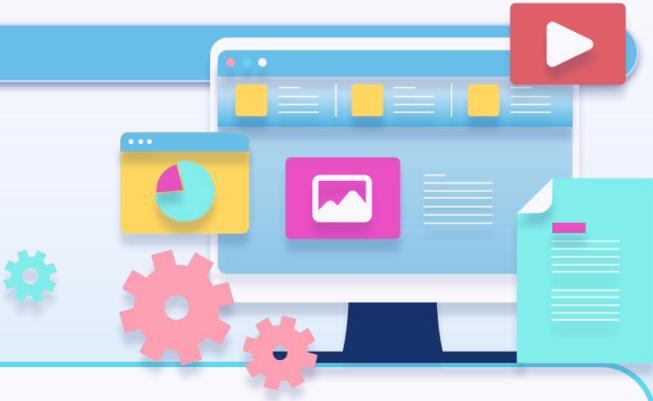
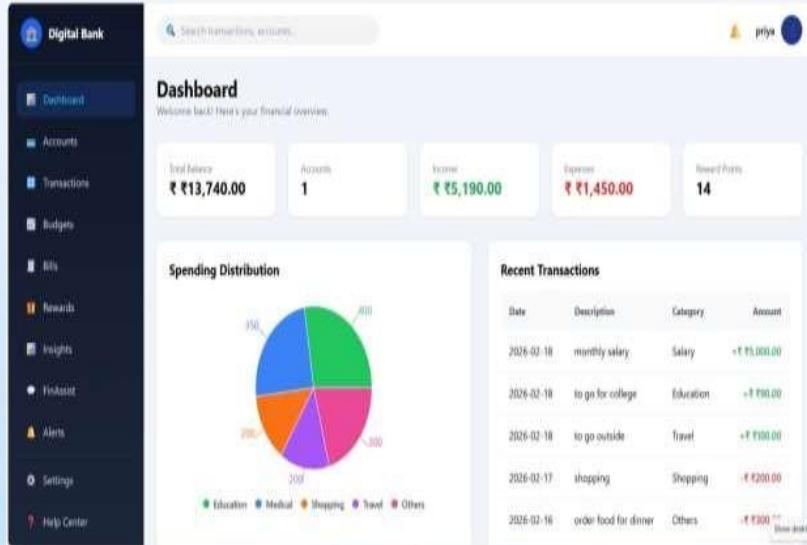
Kotak

Savings
₹13,740.00

Delete Account

- Dashboard
- Transactions
- Budgets
- Bills
- Rewards
- Insights
- Finances
- Alerts
- Settings
- Help Center





DASHBOARD
A unified overview of financial data with
real-time insights, quick actions, and
personalized summaries.

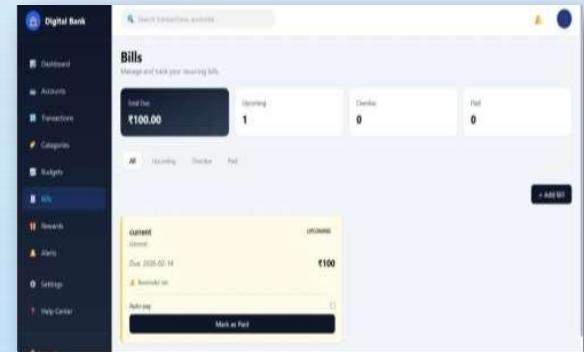


CORE FEATURES: WORKFLOW AND MANAGEMENT



- Set category-wise budgets and track spending in real time.
- Gain visual insights for smarter financial planning

- Manage recurring bills with clear due-date tracking
- Receive automated reminders to avoid missed payments(Auto-pay option for bills).

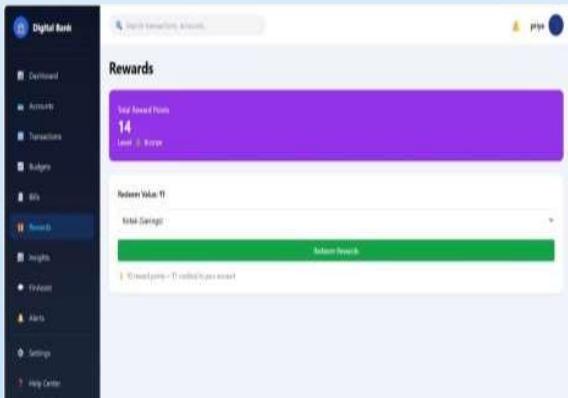




Transactions Management:

- Add / Edit / Delete transactions
- Credit & Debit classification
- Category assignment
- CSV Import
- Export to PDF & CSV
- Real-time updates

ID	Description	Merchant	Category	Amount	Type	Date
07	order food for dinner	real	Food	+₹1000.00	Credit	2024-02-10
08	shopping	amazon	Shopping	+₹2000.00	Credit	2024-02-17
09	monthly salary	Salary	Salary	+₹15000.00	Credit	2024-02-19
10	travel outside	bus	Travel	-₹1000.00	Credit	2024-02-18
11	hospital	medical	Medical	-₹500.00	Credit	2024-02-15
12	to go for college	car	Education	+₹1000.00	Credit	2024-02-18
13	college exam fees	bus	Education	+₹2000.00	Credit	2024-02-14
14	for trip	bus	Travel	+₹2000.00	Credit	2024-02-11



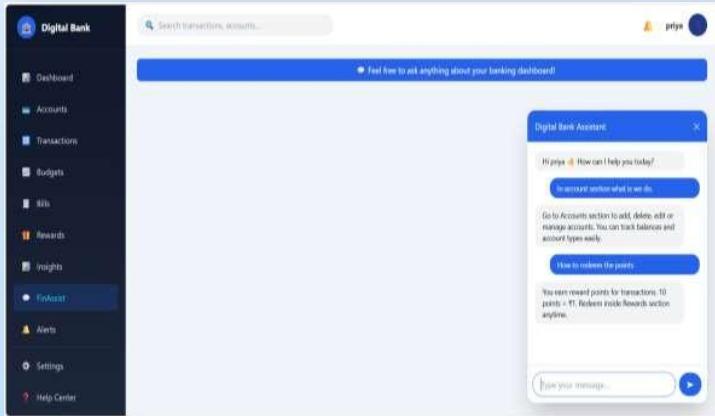
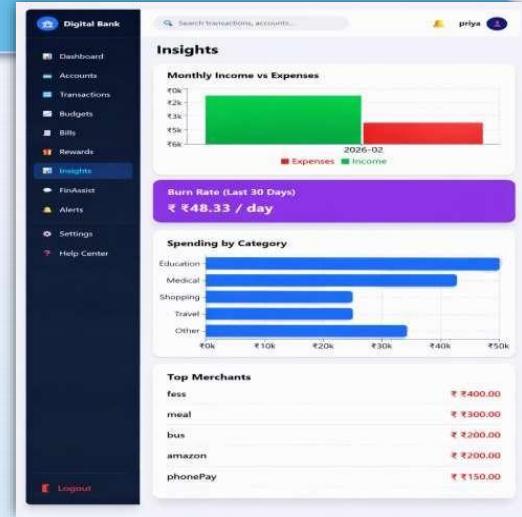
Rewards & Points System :

- Earn points on transactions
- 10 points = ₹1 redeemable
- Redeem to selected account
- Reward level classification (Bronze → Platinum)



Financial Insights :

- Monthly Income vs Expenses chart
- Burn Rate analysis
- Top merchants analysis
- Spending by category
- Data-driven financial planning



- Personalized greeting (Hi *User Name*)
- 200 rule-based query support
- Covers Accounts, Transactions, Budgets, Bills & Security
- Instant response without external AI
- Improves user interaction experience



Alerts & Notifications System

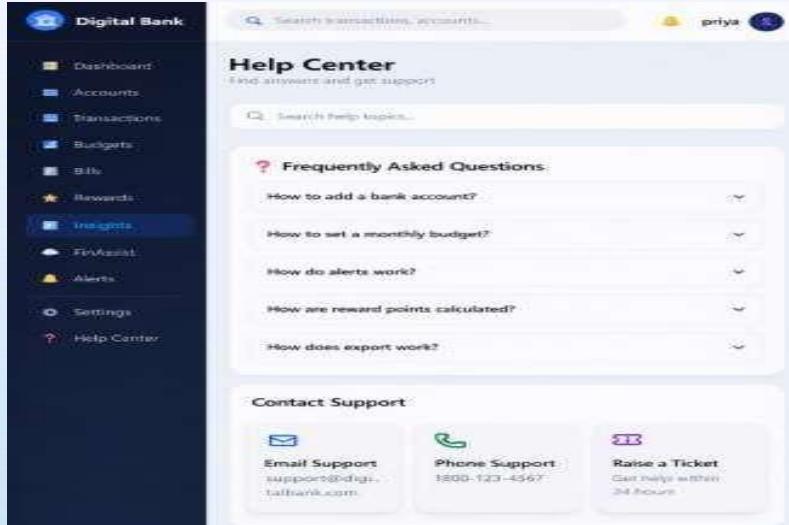
- Real-time banking notifications
- Budget exceeded & large transaction alerts
- Bill due / overdue reminders
- Reward updates
- Auto-refresh every 30 seconds

The screenshot shows the Digital Bank mobile application's navigation bar on the left with options like Dashboard, Accounts, Transactions, Budgets, Bills, Rewards, Insights, Finances, Alerts, Settings, and Help Center. The main content area is titled "Alerts" and displays two items: "Award Received" (T1 credited using reward points) and "Bill due" (Light bill due on 02/01/17). Each item has a "View" button and a "Mark Read" button.

The screenshot shows the Digital Bank mobile application's Settings screen. It includes sections for Profile (Name: pjpj, Email: pjpj1@gmail.com), Security (Two-Factor Authentication is turned off), and Danger Zone (Delete Account button). The left sidebar lists other settings categories: Dashboard, Accounts, Transactions, Budgets, Bills, Rewards, Insights, Finances, Alerts, Settings, and Help Center. The "Logout" button is at the bottom right.

Settings & Security

- Profile update (Name & Phone)
- Strong validation & password policy
- Two-Factor Authentication (2FA)
- Secure account deletion



Help center

- Centralized support section for users
- Search help topics instantly
- Frequently Asked Questions (FAQs)
- Covers accounts, budgets, alerts, rewards & exports
- Contact support via Email, Phone, or Ticket
- Quick response within 24 hours



TEAM CONTRIBUTIONS



➤ FRONTEND:

Renisha, Durga, Sowmya Sree, Marency – UI development, component design, API integration

➤ BACKEND:

Tanuja More – Backend development & API integration

Byreddy Saireddy – Backend logic & database



PRESENTATION LINK

<https://drive.google.com/file/d/19-Pggnos36PVr9yC2w9QIhgEJuBydCmB/view?usp=drivesdk>





THANK YOU

