

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.

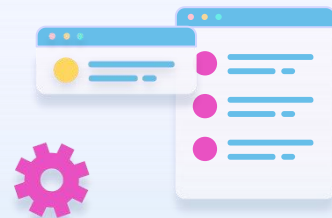
5

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:

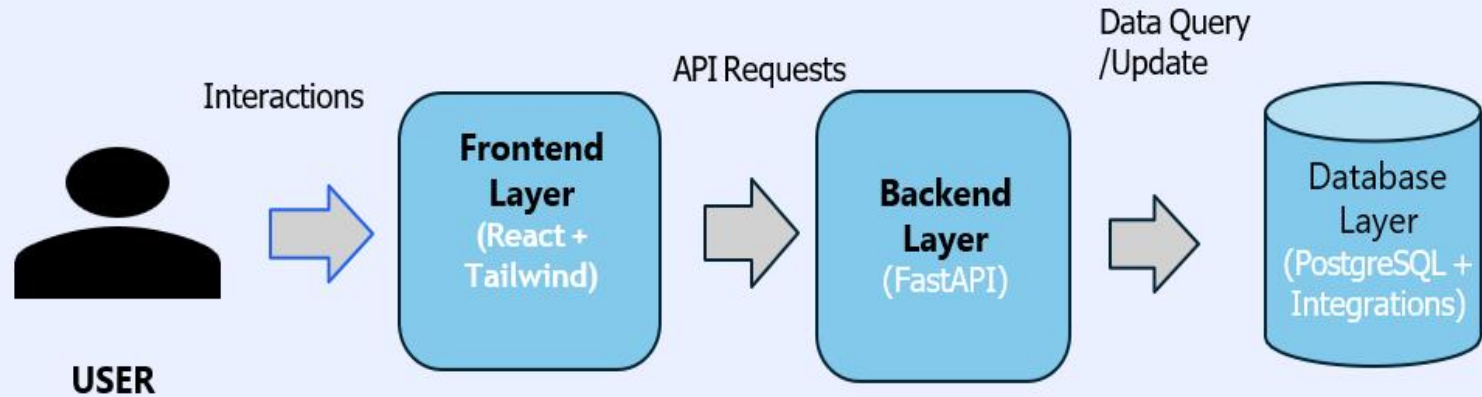
PostgreSQL →
Reliable relational
database

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

Modern Bank Management System

Manage accounts, transactions, budgets, and insights securely.

Login

Get Started

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.



Create Account

Full Name
priya ✓

Email Address
priya18@gmail.com ✓

Phone Number
0987654321 ✓

Password
#Priya123 ✓

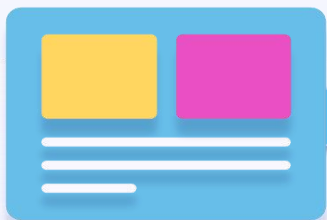
Confirm Password
***** ✓

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☒ I agree to the Terms of Service and Privacy Policy.

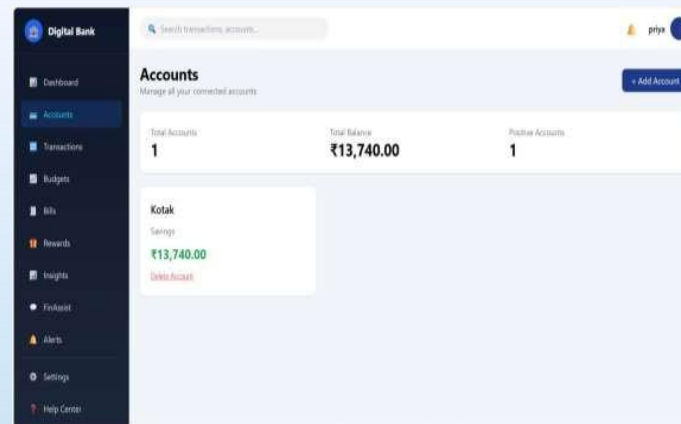
Create Account

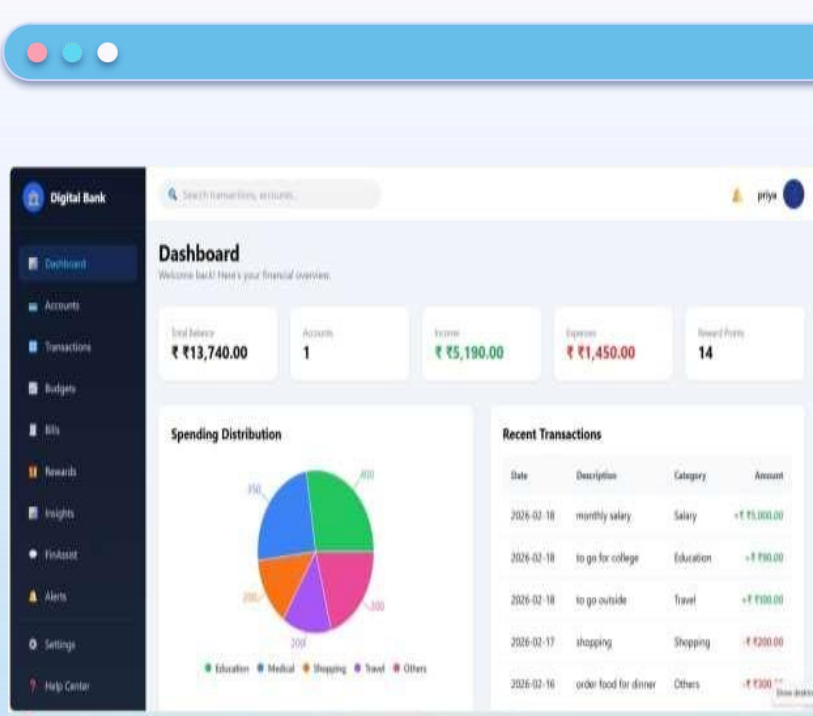
Already registered? [Login](#)



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





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

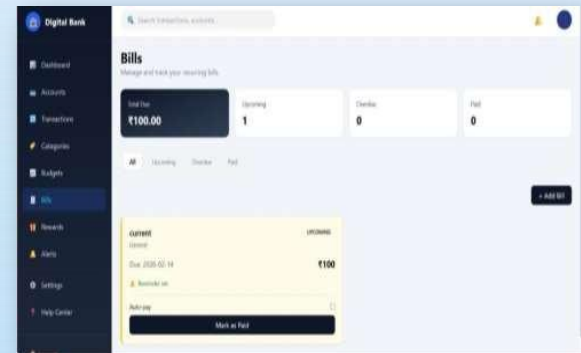


CORE FEATURES: WORKFLOW AND MANAGEMENT



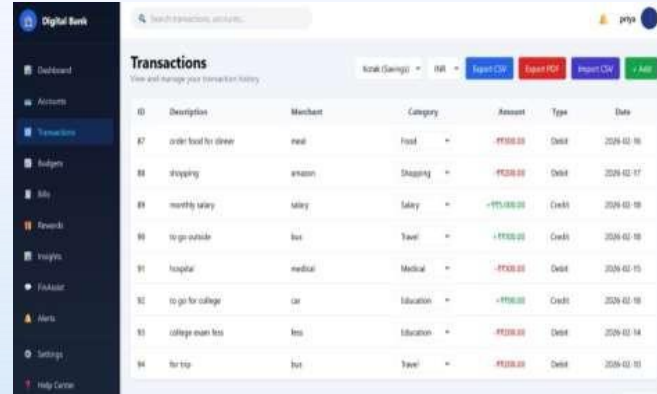
- Set category-wise budgets and track spending in real time.
- Gain visual insights for smarter financial planning

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



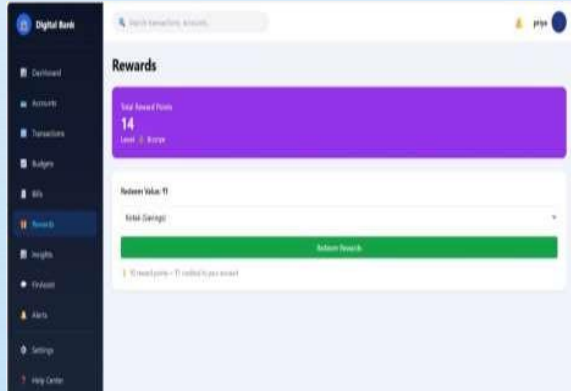
Transactions Management:

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



The screenshot shows the 'Transactions' page of a digital bank interface. On the left is a dark sidebar with navigation options: Dashboard, Accounts, Transactions (selected), Budgets, Bills, Rewards, Insights, Feedback, Alerts, Settings, and Help Center. The main area has a search bar and a title 'Transactions' with a subtitle 'View and manage your transaction history'. Below the title are buttons for 'Normal (Default)', 'Full', 'Export CSV', 'Export PDF', 'Import CSV', and '+ Add'. A table lists transactions with columns for ID, Description, Merchant, Category, Amount, Type, and Date. The table contains 8 rows of data.

| ID | Description | Merchant | Category | Amount | Type | Date |
|----|-----------------------|----------|-----------|-------------|--------|------------|
| 87 | order food for dinner | meal | Food | -₹100.00 | Debit | 2029-02-06 |
| 88 | shopping | amazon | Shopping | -₹120.00 | Debit | 2029-02-17 |
| 89 | monthly salary | salary | Salary | +₹15,000.00 | Credit | 2029-02-08 |
| 90 | to go outside | bus | Travel | +₹100.00 | Credit | 2029-02-08 |
| 91 | hospital | medical | Medical | -₹100.00 | Debit | 2029-02-15 |
| 92 | to go for college | car | Education | +₹100.00 | Credit | 2029-02-08 |
| 93 | college exam fees | fee | Education | -₹100.00 | Debit | 2029-02-14 |
| 94 | for trip | bus | Travel | -₹100.00 | Debit | 2029-02-10 |



The screenshot shows the 'Rewards' page of a digital bank interface. The sidebar is the same as in the previous screenshot. The main area has a title 'Rewards' and a search bar. Below the title is a purple box showing 'Total Award Points 14' with a link to 'View > Usage'. Underneath is a section for 'Redeem Value ₹1' with a 'Total Swagato' field and a green 'Redeem Swagato' button. A note at the bottom states '10 reward points = ₹1 redeem to your account'.

| Item | Value |
|--------------------|-------|
| Total Award Points | 14 |

Redeem Value ₹1

Total Swagato

Redeem Swagato

10 reward points = ₹1 redeem to your account

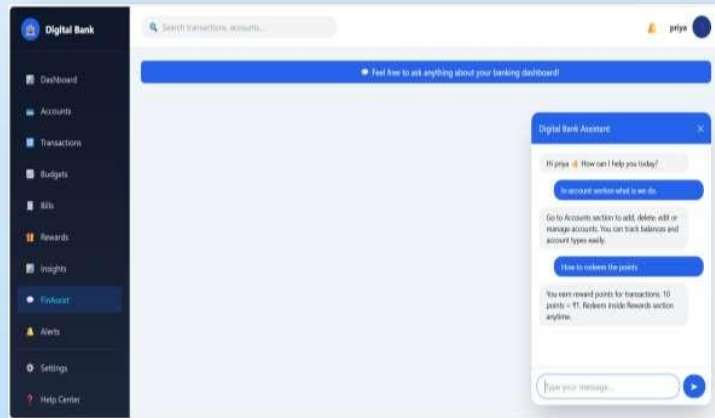
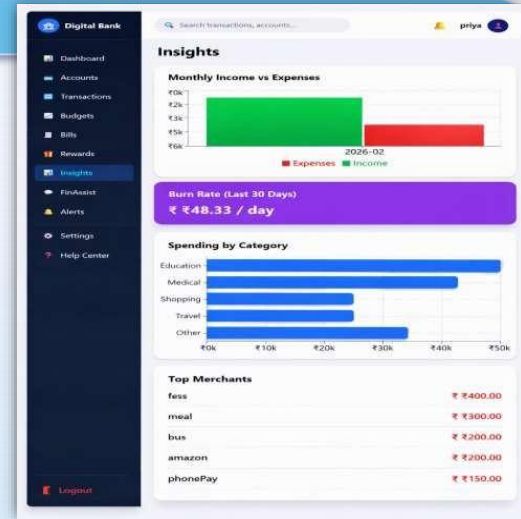
Rewards & Points System :

- 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

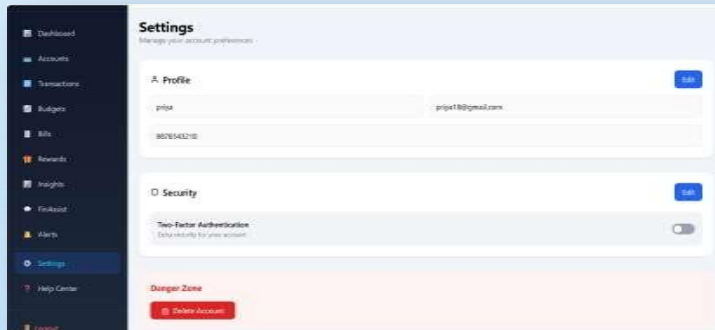
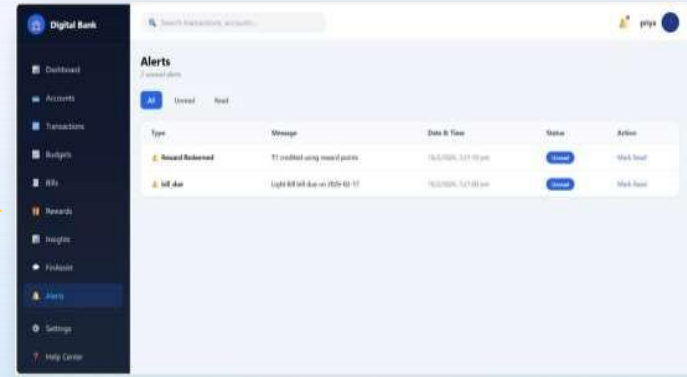


- Personalized greeting (Hi User Name)
- 2 200 rule-based query support
- Covers Accounts, Transactions, Budgets, Bills & Security
- Instant response without external AI
- Improves user interaction experience



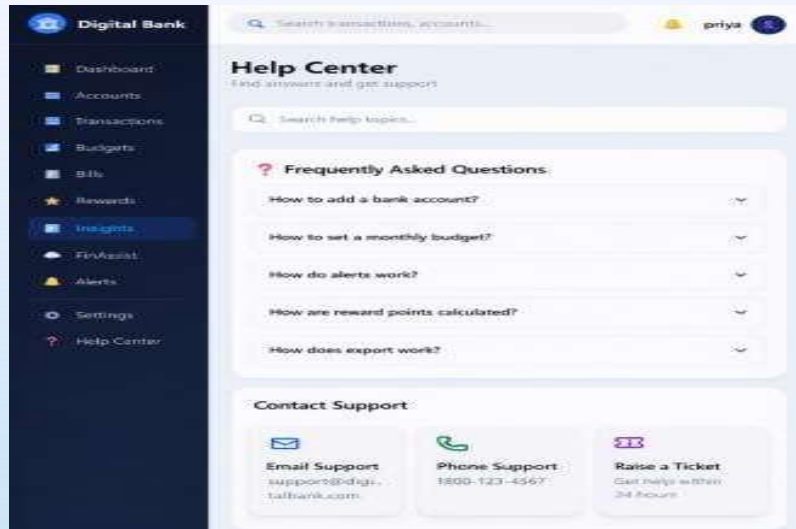
Alerts & Notifications System

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



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-Pgqnos36PVr9yC2w9QlhgEJuBydCmB/view?usp=drivesdk>





THANK YOU

