



PYPERFIN

V0.1

AN USER GUIDE TO PYPERFIN TOOL

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Chapter 1

Introduction

PyPerFin is a tool to manage your personal finance. The motivation behind this tool is to track your income, sources from where you are getting it, your monthly expenses and investments. This tool also will help you analyze your financial health in a graphical way.

The scope of the document is to explain the usage of the tool and provide examples in this regard.

Chapter 2

Usage

The application needs to be executed from the "src" location. The generated report with the name "Report.pdf" is available under docs folder

2.1 Command Line Options

```
python PyPerFin_app.py [-h] [--option OPTION] [--value VALUE] [--category CATEGORY] [-  
-comment COMMENT] [--date DATE] [--force_month FORCE.MONTH] [--force_dest FORCE.-  
DEST]
```

2.2 Description

2.3 Folder Structure

```
docs
├── create_doc.sh
├── DeveloperGuide
│   ├── Doxyfile
│   └── PyPerFin_DeveloperGuide.pdf
├── PyPerFin.bin
├── Report.pdf
├── swaratech.jpg
├── UserGuide
│   ├── PyPerFin_UserGuide.pdf
│   ├── PyPerFin_UserGuide.tex
│   ├── PyPerFin_UserGuide.toc
│   └── tmp
│       ├── PyPerFin_UserGuide.aux
│       ├── PyPerFin_UserGuide.log
│       ├── PyPerFin_UserGuide.out
│       ├── PyPerFin_UserGuide.pdf
│       └── PyPerFin_UserGuide.toc
└── README.md

src
├── CreateTable.py
├── CreateTable.pyc
├── misc_utils.py
├── misc_utils.pyc
├── PyPerFin_app.py
├── PyPerFin_classes.py
├── PyPerFin_classes.pyc
├── TableFactory.py
├── TableFactory.pyc
├── test.log
└── test

test
└── test.py

5 directories, 26 files
```

Figure 2.1: Folder Structure

Table 2.1: Description of Command line options

Abbreviated Option	Option	Details
-h	--help	show this help message and exit
--o	--option	OPTION to choose one of the below categories <i>Income: 1</i> <i>Expense: 2</i> <i>Investment: 3</i>
--v	--value	VALUE field which takes the amount for either expense or income category option
--c	--category	CATEGORY for one of the OPTION field For Income Category: <i>SALARY: 1</i> <i>DIVIDEND: 2</i> <i>INTEREST: 3</i> <i>SHARES: 4</i> <i>BONUS: 5</i> For Expense Category: <i>FOOD: 1</i> <i>FUEL: 2</i> <i>VEHICLE: 3</i> <i>COMMUTATION: 4</i> <i>RENT: 5</i> <i>ELECTRICITY: 6</i> <i>WATER_BILL: 7</i> <i>INVESTMENTS: 8</i> <i>TEL_BILLS: 9</i> <i>INSURANCE: 10</i> <i>STATIONARIES: 11</i> <i>EMIS: 12</i> <i>MEDICAL: 13</i> <i>MISC: 14</i> For Investment Category: <i>BANKS: 1</i> <i>FD: 2</i> <i>RD: 3</i> <i>PPF: 4</i> <i>MF: 5</i> <i>LIC: 6</i> <i>IND_EQUITY: 7</i> <i>FOREIGN_EQUITY: 8</i> <i>EPF: 9</i> <i>INFRA_BONDS: 10</i> <i>MISC: 11</i>
--cm	--comment	COMMENT field. It can be used to give text notes for SALARY INCOME-OPTION or can be used to select the sub-item in the INVESTMENT-OPTION using a number
--d	--date	DATE of income
--fm	--force_month	FORCE.MONTH option is to work on a particular month's data. <i>Ex: "Apr2013"</i>
--fd	--force_dest	FORCE.DEST can be used to set the destination directory for the report

Chapter 3

Examples

3.1 To Generate Report

```
python PyPerFin.py
```

3.2 To add expense: COMMUTATION for Apr2013

```
python PyPerFin.py --o 2 --c 4 --fm Apr2013 --v 2300
```

3.3 To add expense: FUEL for current month

```
python PyPerFin.py --o 2 --c 2 --v 1850
```

3.4 To add investment under IND_EQUITY of type 2

```
python PyPerFin.py --o 2 --c 2 --fm Apr2013 --v 9850 --d 30Apr2013 --cm 9MGH8G
```

3.5 To add income under DIVIDEND for current month

```
python PyPerFin.py --o 2 --c 2 --v 1850 --d 30Apr2013 --cm 9MGH8G
```