

**WALLEE. PERSONAL FINANCE APP
PROGRESS EVALUATION REPORT #1**

Wallee. Personal Finance App

1) Members :

- Emma Bahr : ebahr2022@my.fit.edu
- Matteo Caruso : mcaruso2023@my.fit.edu
- Joshua Cajuste : jcajuste2022@my.fit.edu
- Kyle Gibson : kgibson2022@my.fit.edu

2) Faculty Advisor : Dr. Siddhartha Bhattacharyya sbhattacharyya@fit.edu

3) Client :

- Doug Gibson – Small Business Owner
- Dr. Siddhartha Bhattacharyya – SWE/CSE Professor & Advisor

4) Task Matrix for Milestone 1 :

Task	Compl. %	Emma	Matteo	Joshua	Kyle	To do
1 – Compare and select Technical Tools	80%	20%	20%	30%	15%	Finalize the selection of the AI implementation to be utilized. The current focus is on developing the Android version, with plans to extend to an iOS implementation if time permits.
2 – Mobile Demos	40%	0%	0%	20%	20%	The back-end is currently under development. Next, we will begin constructing the application incrementally, testing each new component to ensure proper functionality and reliability.

3 - Resolve Technical Challenges	40%	10%	10%	10%	10%	We have initiated the setup of the API environment. The next steps involve determining the implementation of security measures, data storage solutions, and the handling of banking information.
4 - Compare and select Collaboration Tools	100%	40%	20%	20%	20%	Currently, no additional tools are planned. The selected tools for development and management are Jira, GitHub, and Visual Studio.
5 - Requirement Document	100%	40%	20%	20%	20%	Nothing.
6 - Design Document	100%	13%	13%	60%	13%	Nothing.
7 - Test Plan	100%	25%	25%	25%	25%	Nothing.

5) Discussion of each accomplished task (and obstacles) for Milestone 1 :

1. **Compare and select Technical Tools :** The research for the technical tools was necessary for us to determine which platforms and software would be best for us to use for the final project. We decided on Flutter and Plaid. We decided to use Flutter because it allows developers to write a single codebase and deploy it across multiple platforms including desktop, Android and IOS. Flutter compiles code to native machine code, allowing for higher performance applications that deliver a smoother and more responsive user experience. Plaid provides app developers with a simplified and secure access to user financial data through APIs, improving user experience by streamlining

account linking and speeding up the development of financial apps. It allows for access to real time data for features like budgeting and expense tracking, security, and compliance with financial regulations.

2. **Mobile Demos** : The back-end is currently under development, with testing progressing successfully. The team is proceeding methodically, ensuring the back-end is fully established before transitioning to the next phase, which involves incrementally building the application and testing each new component to guarantee functionality and reliability. No major issues have been encountered thus far, and we continue to advance step by step to minimize the risk of setbacks later in the process.
3. **Resolve Technical Challenges** : No significant technical challenges have been encountered to date. The team is currently focused on configuring the back-end. While learning to properly set up the API presented some initial difficulties, it does not qualify as a major technical challenge. All development machines are fully operational with the required extensions (including Flutter), and all services are successfully hosted on Google Cloud without any issues.
4. **Compare and select Collaboration Tools** : As a group we decided to communicate among ourselves using whatsapp. We have also been using email to communicate with Dr. Battahctatahcta about our project. These were chosen for ease of use and to keep communication between group members simple. For collaboration on the project and tasks we have decided to use Jira and GitHub. Emma has previous experience with Jira and recommended that we use it for keeping track of tasks. We also decided on Github for collaboration of the project due to all of us having previous experience with it. A shared google drive folder was also made to store collaboration on documentation and milestone documents.
5. **Requirement Document** : This document consolidates all previously discussed information regarding the required and expected features and behaviors of the system. It outlines what the system should accomplish, including functional requirements, interface requirements (user and/or external

systems), and performance requirements (time, space, accuracy, etc.). It also specifies features such as clear and efficient graphical and data displays to represent the user's financial situation, automated budget recalculations, and the integration of Google AI Gemini, among others.

6. **Design Document** : The design document was made following the assignment specifications. It explains the setup of the system and the different user screens. This document will be updated as the system design and coding become clearer.
7. **Test Plan** : The test plan document was created to list the various use cases of the project to describe how the users should be using the application. The document then provides a description of the expected outcome of each use case as well as alternative paths. Test cases will be made more specific as we continue to build and implement the project.

6) Discussion : Contribution of each team member to Milestone 1 :

All team members have actively participated in every aspect of the process thus far. The comparison and selection of technical tools, as well as the choice of collaborative tools, were carried out collectively.

- **Emma** : serving as team leader, has maintained and updated Jira, ensuring the project remains on track. She played a key role in developing the project plan and was responsible for preparing the Requirements Document.
- **Matteo** : has supported Jira management, contributed to the project plan and this Progress Report, and initiated work on the AI implementation for Milestone 2 to mitigate potential technical challenges. He has also begun exploring visual design options for the upcoming mobile demo using Figma.
- **Joshua** : has led the back-end development, including setting up the API and Firebase and hosting the system on the cloud. He has contributed the most hands-on experience with the back-end to date and is also responsible for the Design Document.
- **Kyle** : has provided support across documentation, testing, design, and requirements, as well as contributing to this Progress Report.

7) Plan for the next Milestone :

Task	Emma	Matteo	Joshua	Kyle
Implement UI for budget categorization	0%	0%	0%	100%
Create and Implement database	50%	0%	50%	0%
Implement transfer of user account info	80%	0%	20%	0%
Implement AI chatbot	0%	80%	20%	0%
Implement UI for setting goals	0%	0%	0%	100%
Implement UI for budget summarization	0%	0%	0%	100%
Evolve the UI for easier navigation	0%	100%	0%	0%

8) Discussion of each planned task for Milestone 2 :

1. **Implement UI for budget categorization:** Creating the backend for automatic budget categorization based on user preferences and user information from the database. The User preferences and customization will be adjustable via the UI.
2. **Create and Implement database:** Create a database for user bank information.
3. **Implement transfer of user account info:** Allow for users information to be pulled from a bank account using Plaid.
4. **Implement AI chatbot:** Creating an AI chatbot using gemini AI and implementing UI to chat with.
5. **Implement UI for setting goals:** Create backend for users to set budget goals based on income and budget categories and implement a UI for user customization.

6. **Implement UI for budget summarization:** Using data from user database and chrome user preferences to create a summary of user spending and comparing to planned spending and budget goals.

7. **Evolve the UI for easier navigation:** Create a more user friendly front end to allow for easier navigation and traversal.

9) Date(s) of meeting(s) with Client during Milestone 1 :

- **Meeting 1: Sept. 15, 2025**

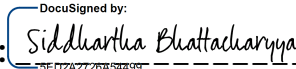
10) Client feedback on the current milestone

- Mr. Gibson :
- Dr. Siddhartha Bhattacharyya : see Faculty Advisor Feedback below.

11) Date(s) of meeting(s) with Faculty Advisor during Milestone 1 :

The team will be meeting Dr. Siddhartha Bhattacharyya on Friday, September 25th.

12) Faculty Advisor feedback on each task for Milestone 1 :

Faculty Advisor Signature:  Date: 9/29/2025



13) Evaluation by Faculty Advisor

- **Faculty Advisor :** detach and return this page to Dr. Chan (HC 209) or email the scores to pkc@cs.fit.edu.
- **Score (0-10) for each member :** circle a score (or circle two adjacent scores for .25 or write down a real number between 0 and 10).

Emma	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10
Matteo	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10
Joshua	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10
Kyle	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10

DocuSigned by:
Siddhartha Bhattacharyya
9E02A2720A34498

Faculty Advisor Signature: _____

Date: 9/29/2025

Make sure to include use case templates that help in understanding what problem are you planning to solve.