

**WALLEE. PERSONAL FINANCE APP
PROGRESS EVALUATION REPORT #2**

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 sbattacharyya@fit.edu

3) Client :

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

4) Task Matrix for Milestone 2 :

Task	Compl. %	Emma	Matteo	Joshua	Kyle	To do
1 - Implement UI for Budget Categorization	60%	0%	20%	0%	40%	Bug fixes, finish Budget algorithm, and implement with user goals
2 - Create and Implement Database	60%	30%	0%	30%	0%	Implement with Budget Categorization
3 - Implement Transfer of User Account Info	20%	10%	0%	10%	0%	Started briefly needs to be completed and implemented
4 - Implement UI for Setting Goals	80%	0%	60%	0%	20%	Implement Budget Categorization and finish algorithm
5 - Implement UI for Budget Summarization	40%	0%	40%	0%	0%	Needs Budget Categorization and goals to be completed first

6 - Implementing tools and API	100%	0%	0%	100%	0%	API health fine tuning and adjustments
7 - Evolve the UI for Easier Navigation	80%	10%	50%	10%	10%	UI for existing features is satisfactory but can be improved upon later
8 - Implement AI Chatbot	60%	10%	40%	10%	0%	Can be implemented with the completion of more features

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

1. **Implement UI for budget categorization :** Budget categorization being the backbone for most of the calculations of the website makes it a key feature for the application. Currently the User can manually create budget categories and once the database is finished the automation of budget categories will be implemented.
2. **Create and Implement database :** The database is working and currently storing user information allowing users to sign in and create distinct user profiles.
3. **Implement transfer of user :** Transferring user data between the database to the app has been completed, all that remains is connecting user bank information and keeping track of personally user information with their respective bank information
4. **Implement UI for Setting Goals :** The user can create goals but they cannot change or alter goals yet and since the budget categorization is not complete goals cannot be based on user budget categories yet.
5. **Implement UI for Budget Summarization :** Basic summarization UI has been implemented and can be completed once the budget budget categorization and user goals are complete.
6. **Implementing tools and API :** Small improvements to API health that will help the project in the long run were implemented.
7. **Evolve the UI for Easier Navigation :** While creating all the tools for the final

version of the app, the application even in early stages needs to be organized so we can and users can navigate the features more seamlessly.

8. **Implement AI Chatbot** : The AI chatbot has been created and implemented into the application and as more features get created and finished and the AI chatbot will have to be implemented into them and understand how the new features function.

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 also led the database creation, and testing. She finalized the milestone documentation, led quality assurance testing, and coordinated client communications.
- **Matteo** : Focused on UI/UX mobile enhancements, creating high-fidelity mockups and implementing key navigation improvement. He also advanced the AI chatbot design for smoother interaction.
- **Joshua** : Led backend development, assisted with database development, and API setup with Plaid. He ensured all data-handling processes followed security protocols.
- **Kyle** : Designed and implemented multiple front-end components including the goals and summary UIs. He performed UI testing and refined user flow accessibility.

7) Plan for the next Milestone :

Task	Emma	Matteo	Joshua	Kyle
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Conduct end-to-end system testing	25%	25%	25%	25%
Refine AI chatbot with contextual learning	0%	60%	40%	0%
Implement user authentication and security improvements	0%	20%	80%	0%
Optimize performance and database queries	50%	0%	50%	0%
Develop app deployment pipeline (Android)	10%	20%	50%	20%
Conduct usability and accessibility testing	10%	30%	40%	20%
Prepare final report and presentation materials	50%	20%	10%	20%
Finish implementing and testing user goals, custom budgeting and user profile	10%	40%	10%	40%

8) Discussion of each planned task for Milestone 3 :

- 1. Conduct end-to-end system testing:** Perform complete functional and integration testing across all modules to ensure seamless interaction between UI, backend, and database systems.
- 2. Refine AI chatbot with contextual learning:** enhance chatbot intelligence using user feedback and adaptive learning to improve recommendation accuracy and response tone.
- 3. Implement user authentication and security improvements:** finalize two-factor authentication, encrypted token handling, and data validation to meet security standards.
- 4. Optimize performance and database queries:** Reduce latency by optimizing database reads/writes and API call efficiency.
- 5. Develop app development pipeline:** establish CI/CD workflows for Android builds ensuring compatibility and efficient updates.

6. **Conduct usability and accessibility testing:** engage users for beta testing, collecting feedback to refine the design and ensure ADA compliance.
7. **Prepare final report and presentation materials:** compile final deliverables including documentation, user manuals, and presentation slides for milestone 3.

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

- **Meeting 1: October 24, 2025**

10) Client feedback on the current milestone

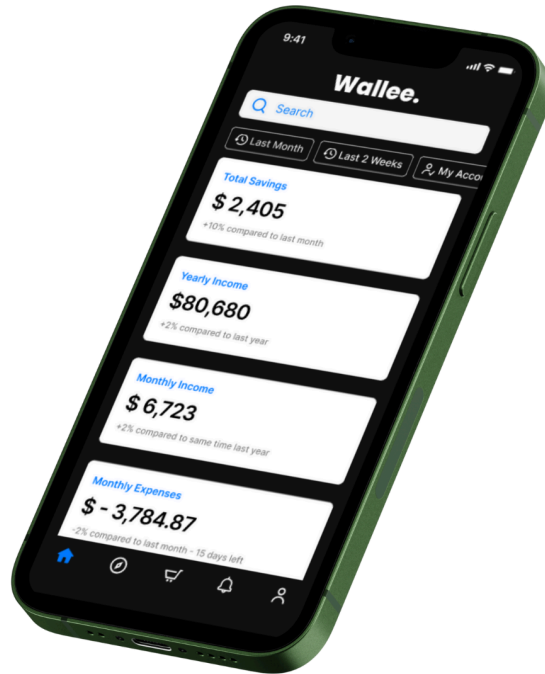
- Mr. Gibson : Application features are satisfactory
- Dr. Siddhartha Bhattacharyya : see Faculty Advisor Feedback below.

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

The team was unable to meet with Dr. Siddhartha Bhattacharyya due to availability issues and conflicts, but did send over examples and demos of applications.

12) Faculty Advisor feedback on each task for Milestone 2 :

Faculty Advisor Signature: _____ **Date:** _____



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

Faculty Advisor Signature: _____

Date: _____