

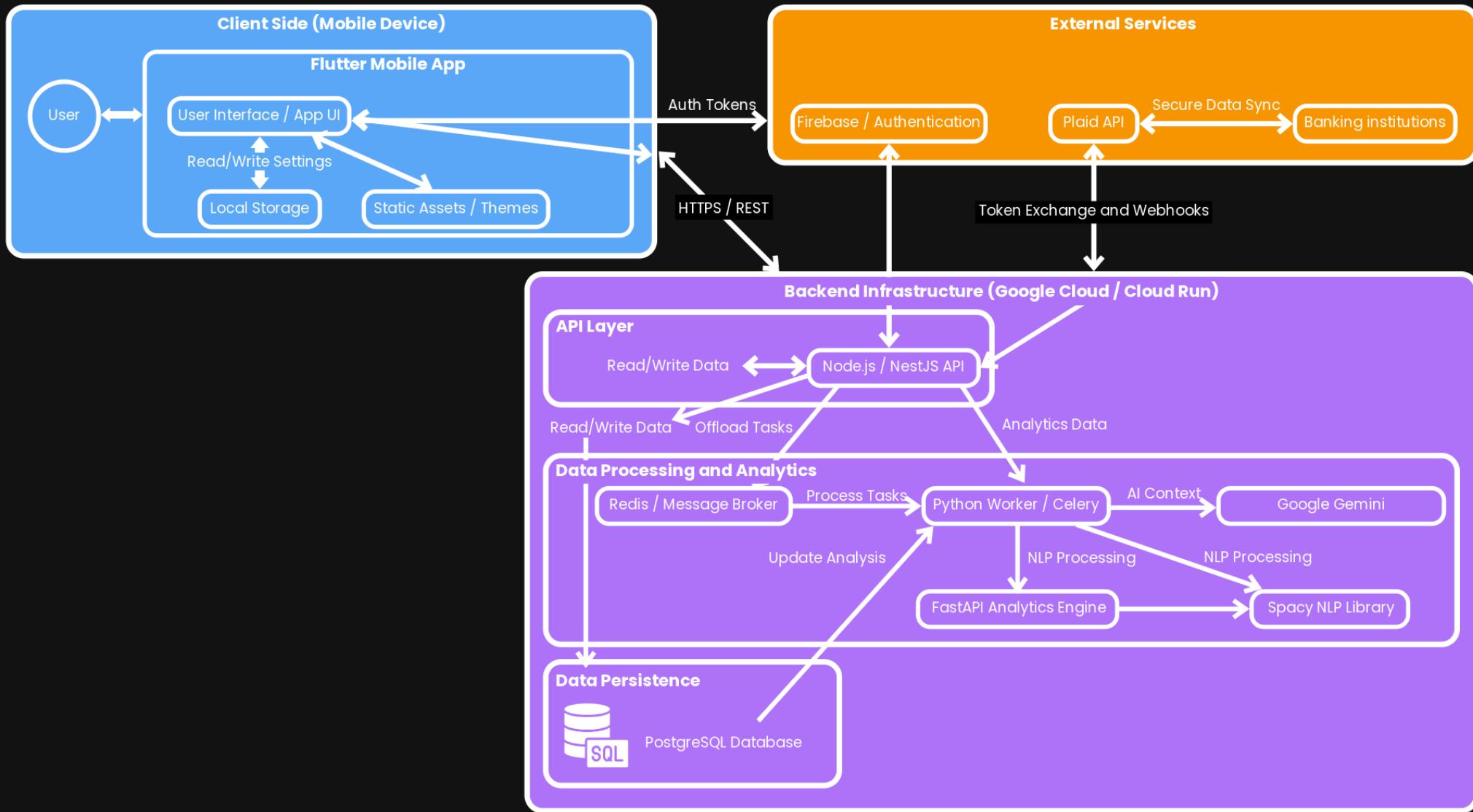


Walle.

Milestone 3

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System Diagram



UI changes and clean up:

Decisions on refining UI for pages

Page 1

- Transactions
- Summaries
- Income/outcome
- Actual spending via bank and credit card transactions

Page 2

- Create/edit budget categories
- Planned spending

Page 3

- Create edit goals
- Goals based off planned budget
- Goals adjusted based off actual budget spending

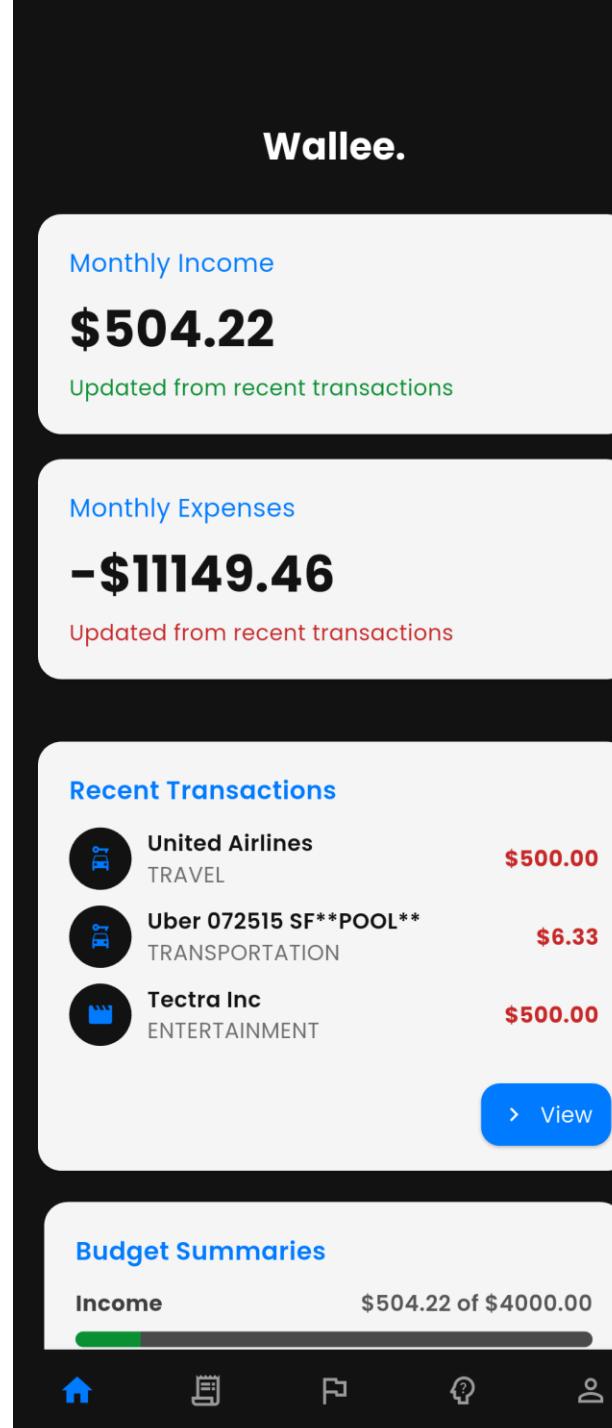
Page 4

- AI chatbot
- Tax related info
- Walle score, credit score

Page 5

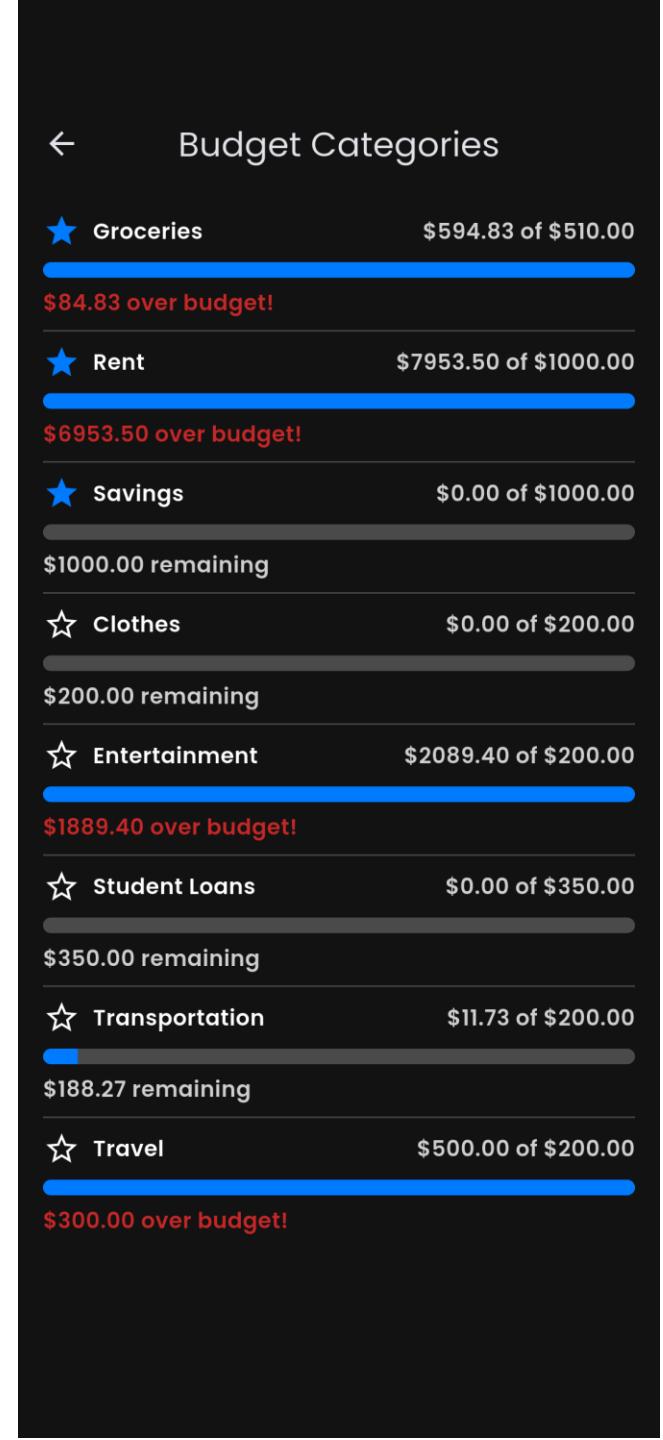
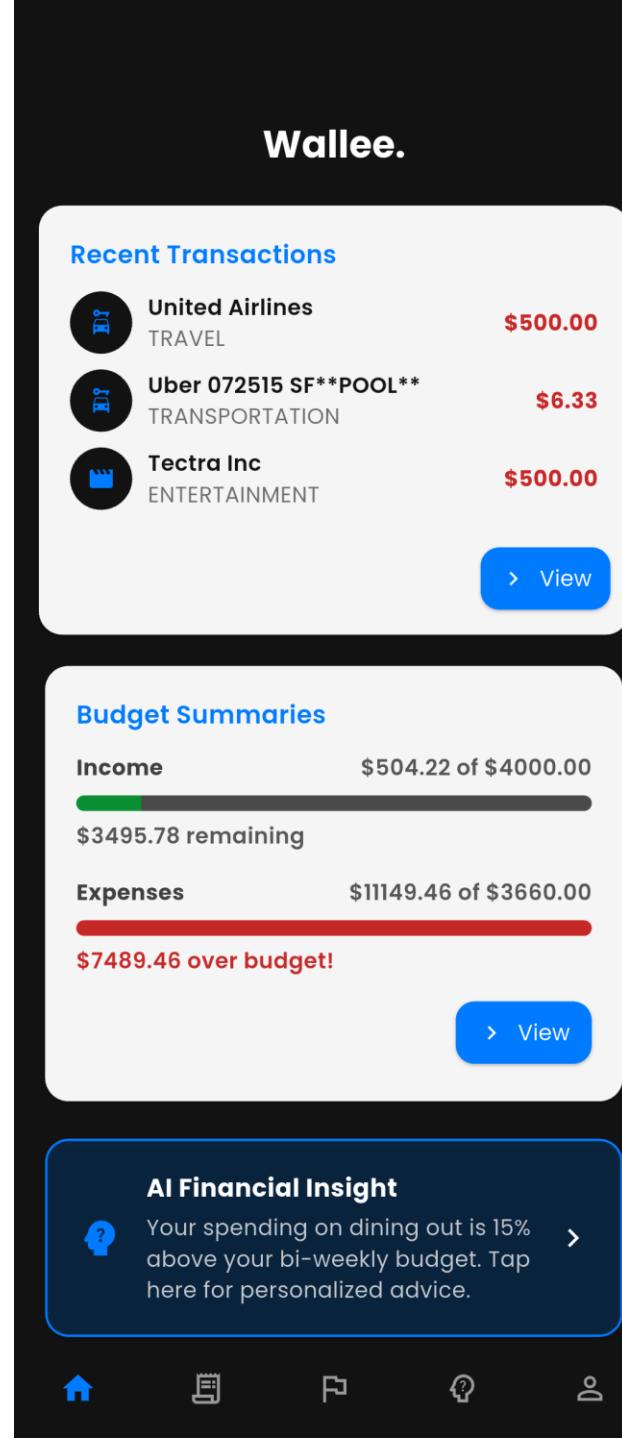
- App settings
- Profile information
- Bank connection

Main page Transactions

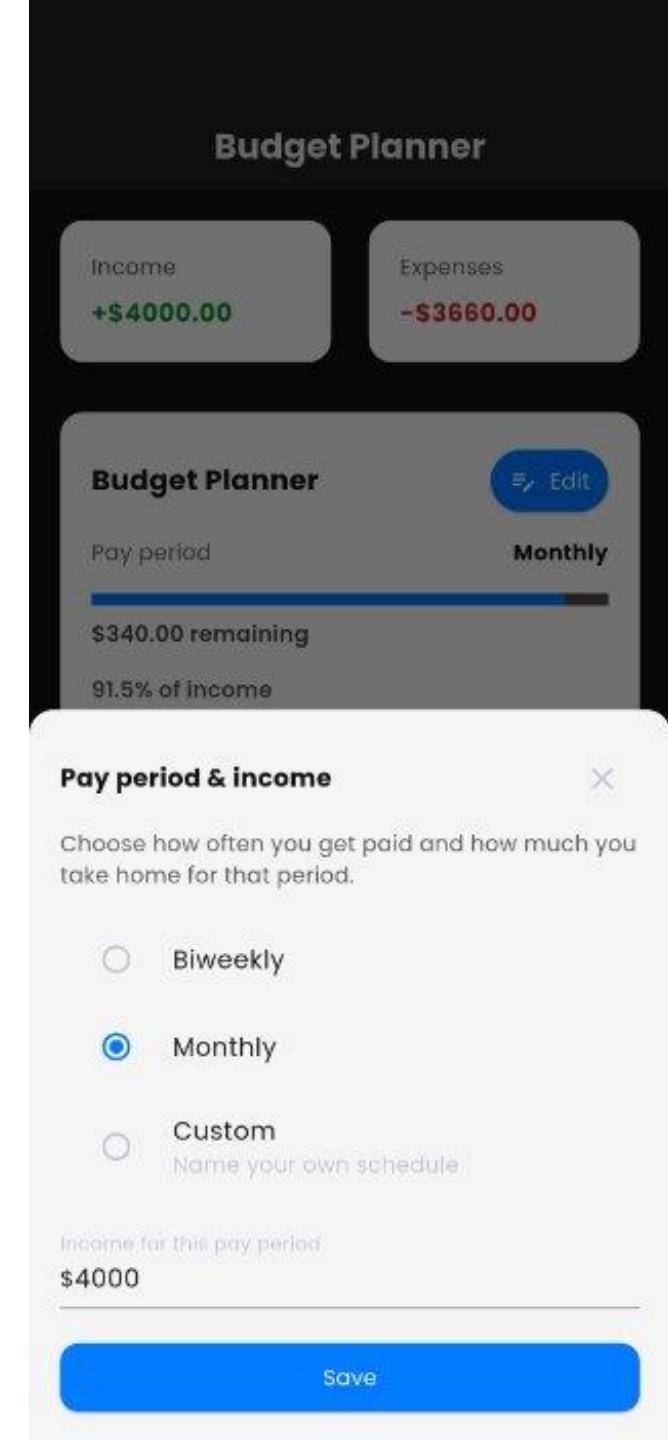
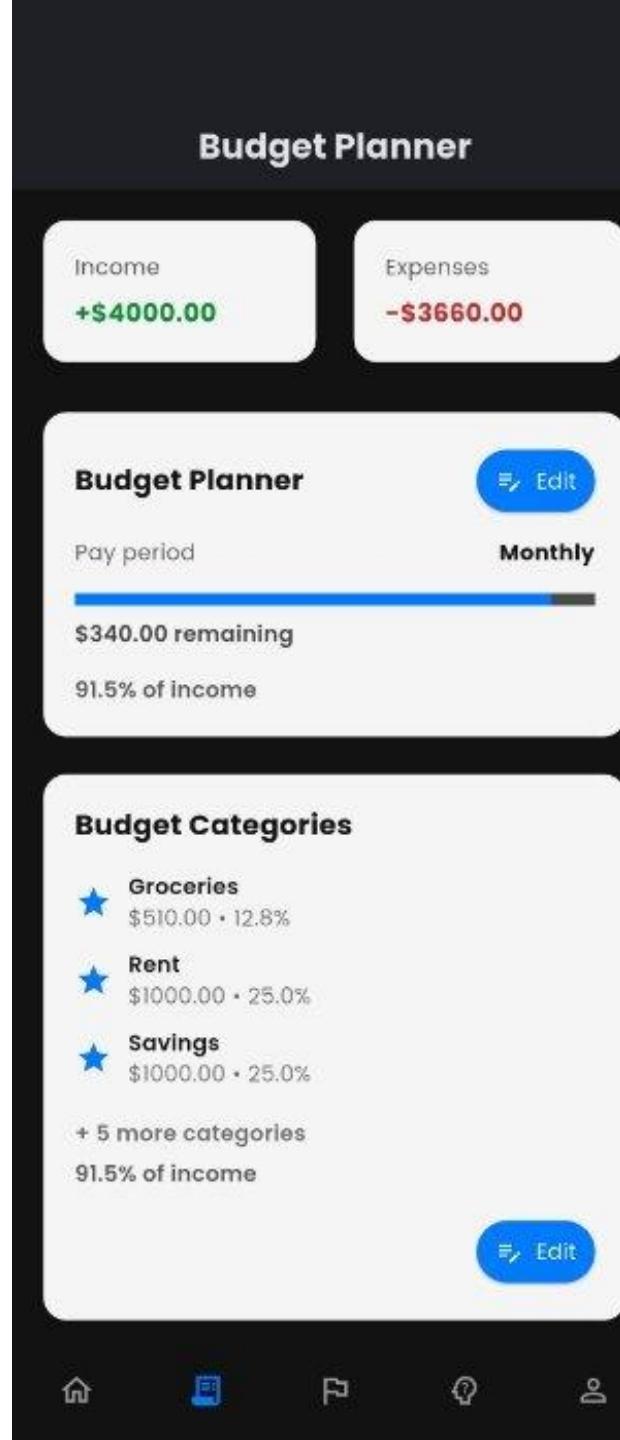


Recent Transactions		
United Airlines	TRAVEL	\$500.00
Uber 072515 SF**POOL**	TRANSPORTATION	\$6.33
Tectra Inc	ENTERTAINMENT	\$500.00
AUTOMATIC PAYMENT -		
THANK		\$2078.50
TRANSFER_OUT		
KFC	FOOD_AND_DRINK	\$500.00
Madison Bicycle Shop	GENERAL_MERCHANDISE	\$500.00
CREDIT CARD 3333		
PAYMENT *//		\$25.00
TRANSFER_OUT		
Uber 063015 SF**POOL**	TRANSPORTATION	\$5.40
ACH Electronic		
CreditGUSTO PAY		
123456		\$5850.00
RENT_AND_UTILITIES		
CD DEPOSIT .INITIAL.	ENTERTAINMENT	\$1000.00

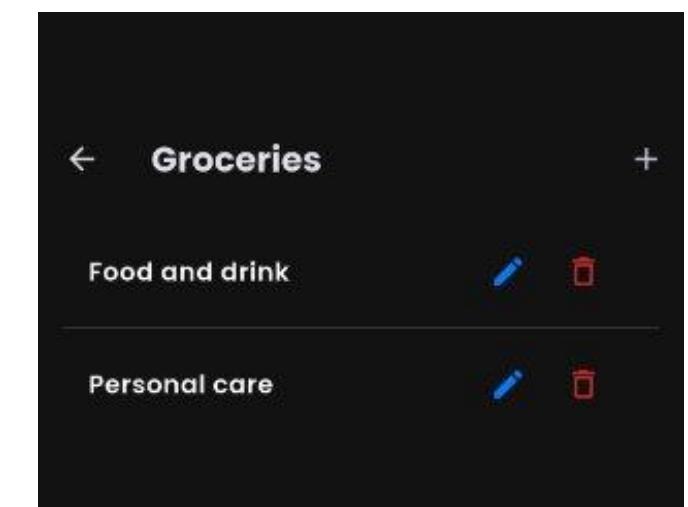
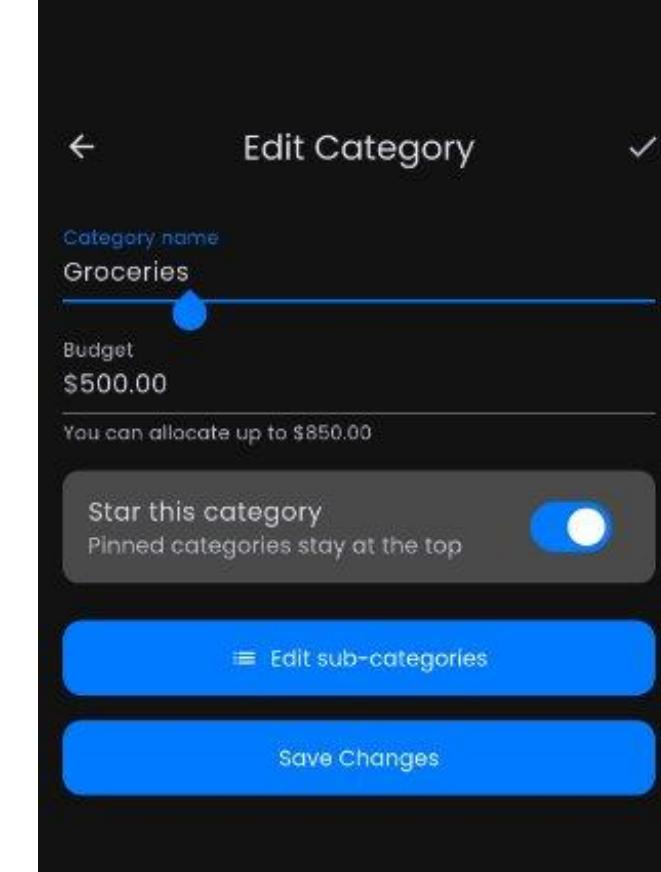
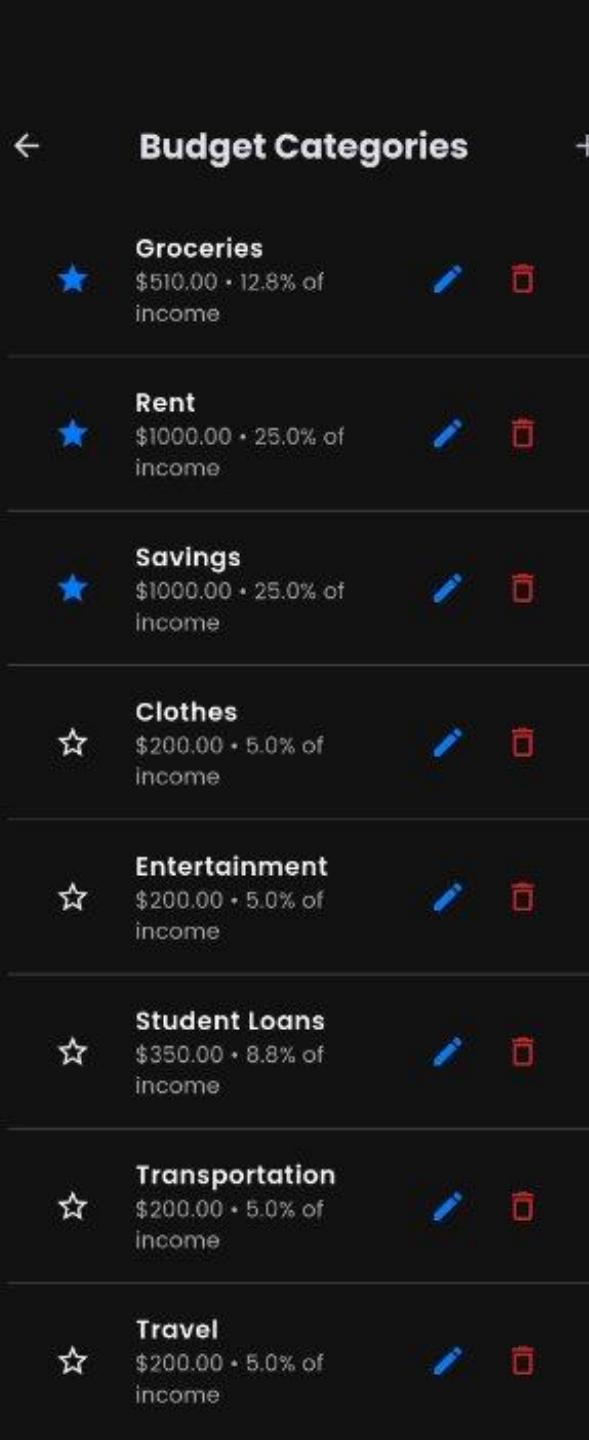
Main page Budgeting Summaries



Budget payment period customization



Budget Categorization customization and sub- category creation



Transfer of Bank Account Info

2:26



2:27



Wallee Demo uses Plaid to connect
your account

🇺🇸 +1 Phone

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go faster next time. [Learn more](#)

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Continue as guest



X



X

Select your institution

Search

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CHASE



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SoFi

current



TRUIST

citibank

usbank

PNC



TD

REGIONS

charles SCHWAB

Linking Multiple Accounts

Linked Accounts

Unknown Bank

12 accounts

 Unlink

Last synced: 9m ago

 **Plaid Checking** **\$110.00**
checking • 0000 Available

 **Plaid Saving** **\$210.00**
savings • 1111 Available

 **Plaid CD** **\$1000.00**
cd • 2222 Available

 **Plaid Credit Card** **\$410.00**
credit card • 3333 Current Balance

 **Plaid Money Market** **\$43200.00**
money market • 4444 Available

 **Plaid IRA** **\$320.76**
ira • 5555 Available

 **Plaid 401k** **\$23631.98**
401k • 6666 Available

 **Plaid Student Loan** **\$65262.00**
student • 7777 Available

Task Matrix:

Task	Compl. %	Emma	Matteo	Joshua	Kyle	To do
Conduct end-to-end system testing	25%	25%	25%	25%	25%	Test new implementations
Refine AI chatbot with contextual learning	80%	0%	60%	20%	0%	Finish AI chatbot
Implement user authentication and security improvements	70%	10%	25%	35%	0%	Added User accounts and securely linked bank accounts to the account
Optimize performance and database queries	80%	35%	0%	45%	0%	Link accounts to budget, budget to savings
Develop app deployment pipeline (Android)	50%	0%	10%	40%	0%	Development on android framework
Conduct usability and accessibility testing	60%	10%	20%	15%	15%	Find testers for app and send it out
Prepare report and presentation materials	100%	30%	30%	15%	25%	None
Finish implementing and testing user goals, custom budgeting and user profile	90%	0%	40%	0%	50%	Take feedback from outside users and make adjustments

UI Demo :

- https://drive.google.com/file/d/1soCB19PLE4gd35tWiPhr5bFbFApIcnbx/view?usp=drive_link

Milestone 4:

- Ensure integrity and security of user back and financial information
- Design and implement advanced menus
- Implement and test Goal recalculations base on budget and actual spending
- Implement and test AI-driven financial insights and proactive alerts
- Implement and test visualizations (tables and graphs comparing budget vs. actual)
- Improve AI chatbot responses
- Refine security, encryption, and overall menu design for better usability