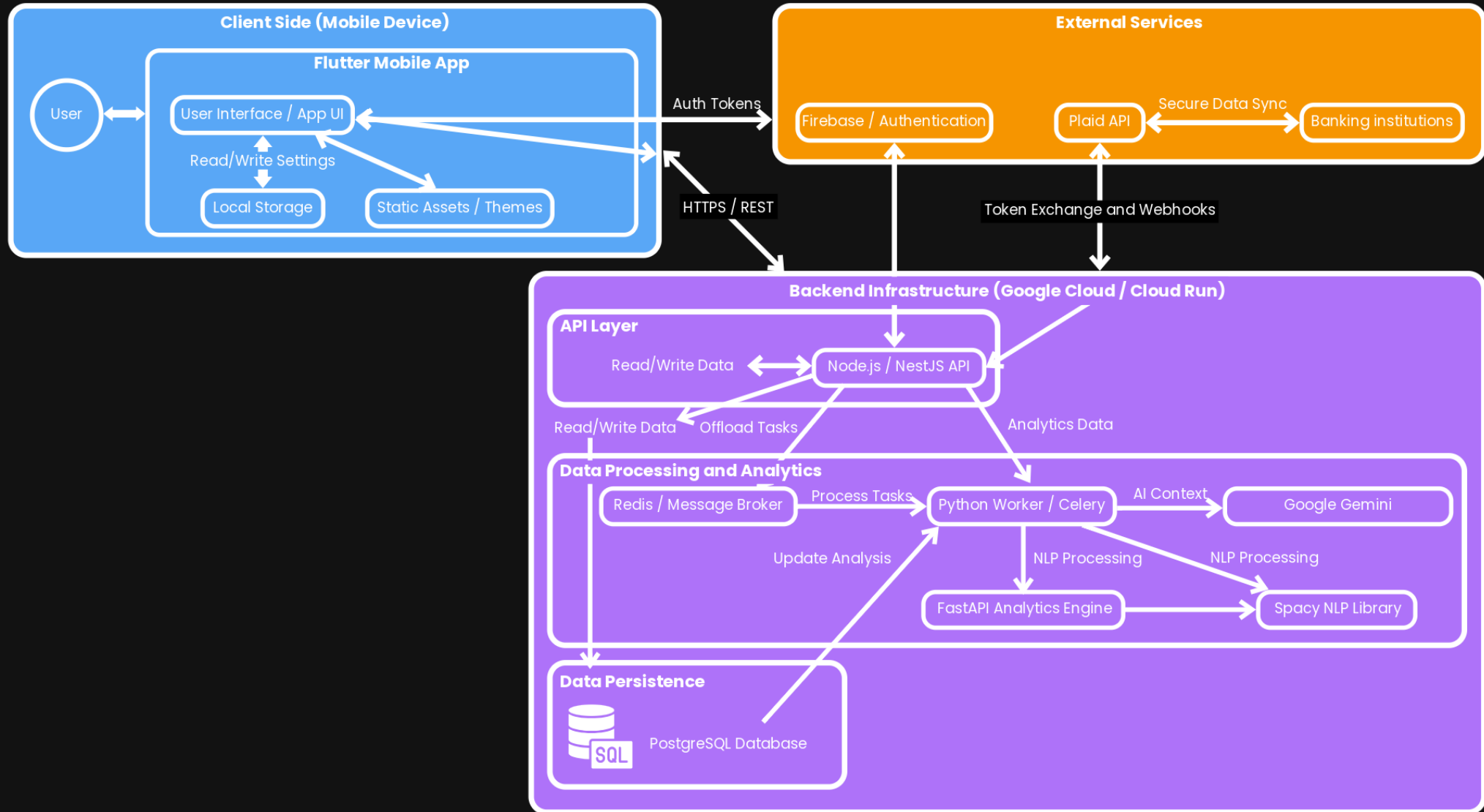




Wallee. Milestone 3

By: Emma Bahr, Matteo Caruso, Kyle Gibson, and Joshua Cajuste

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

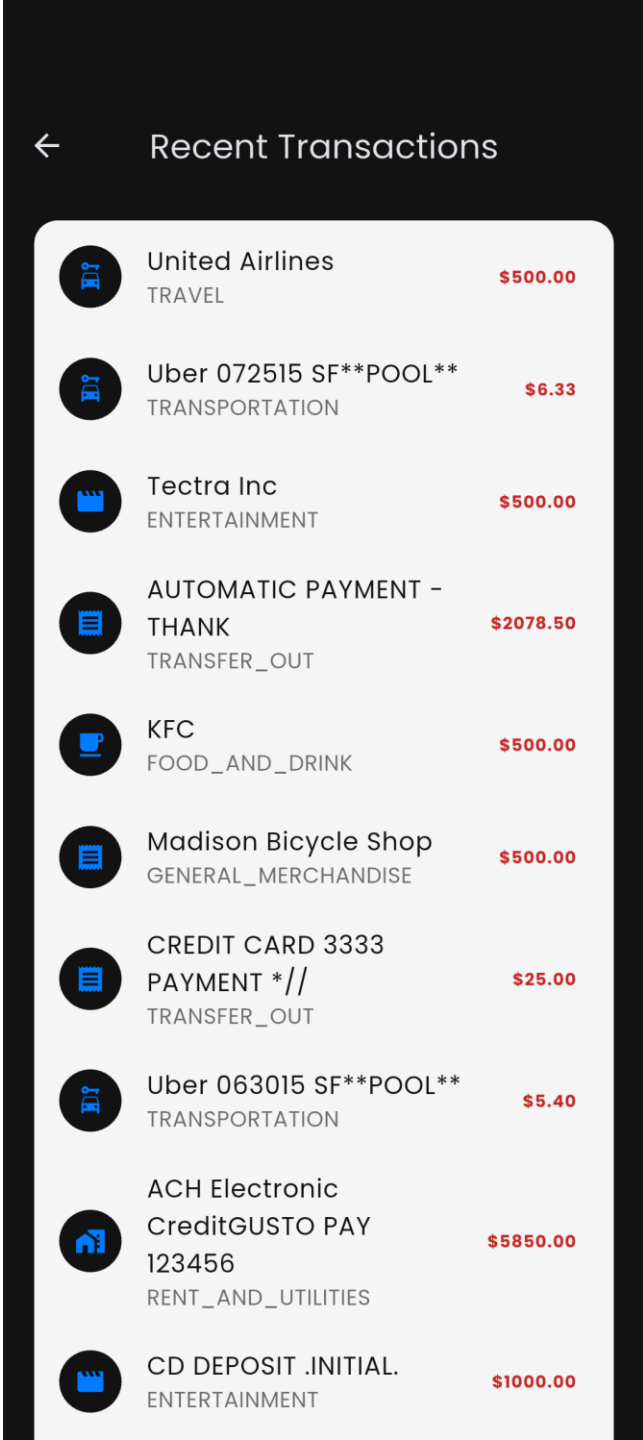
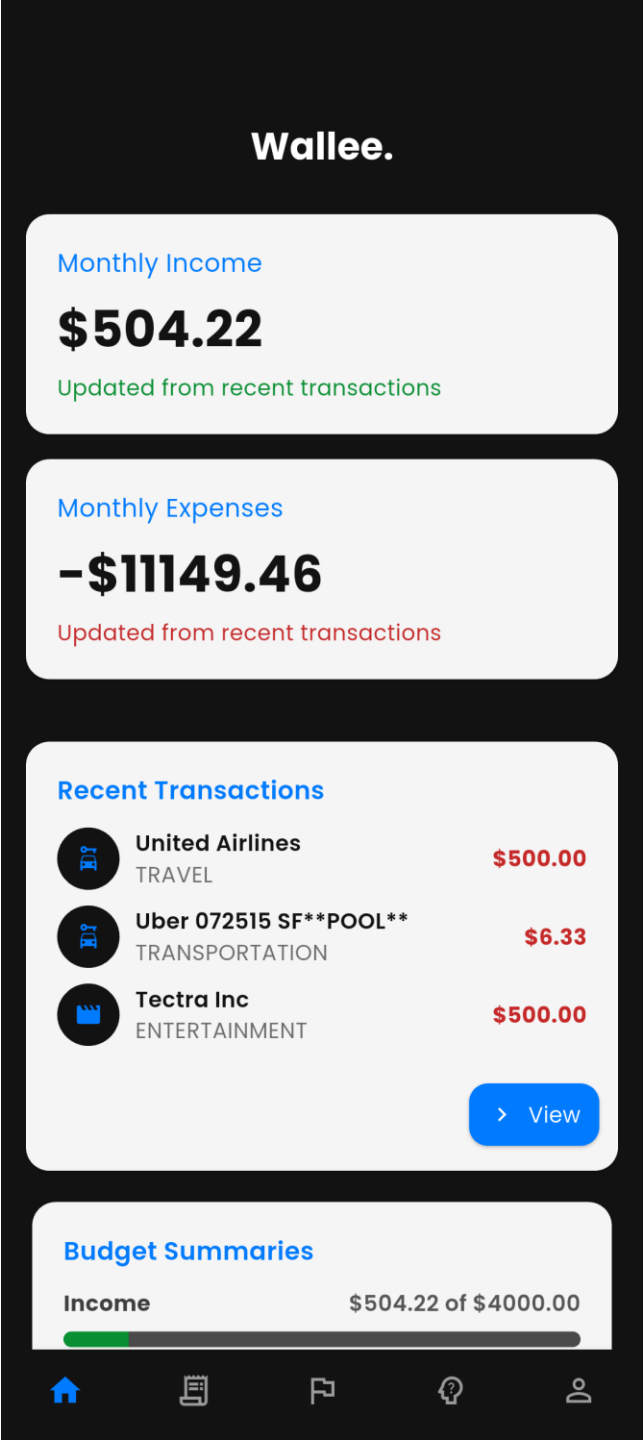
Page 4

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

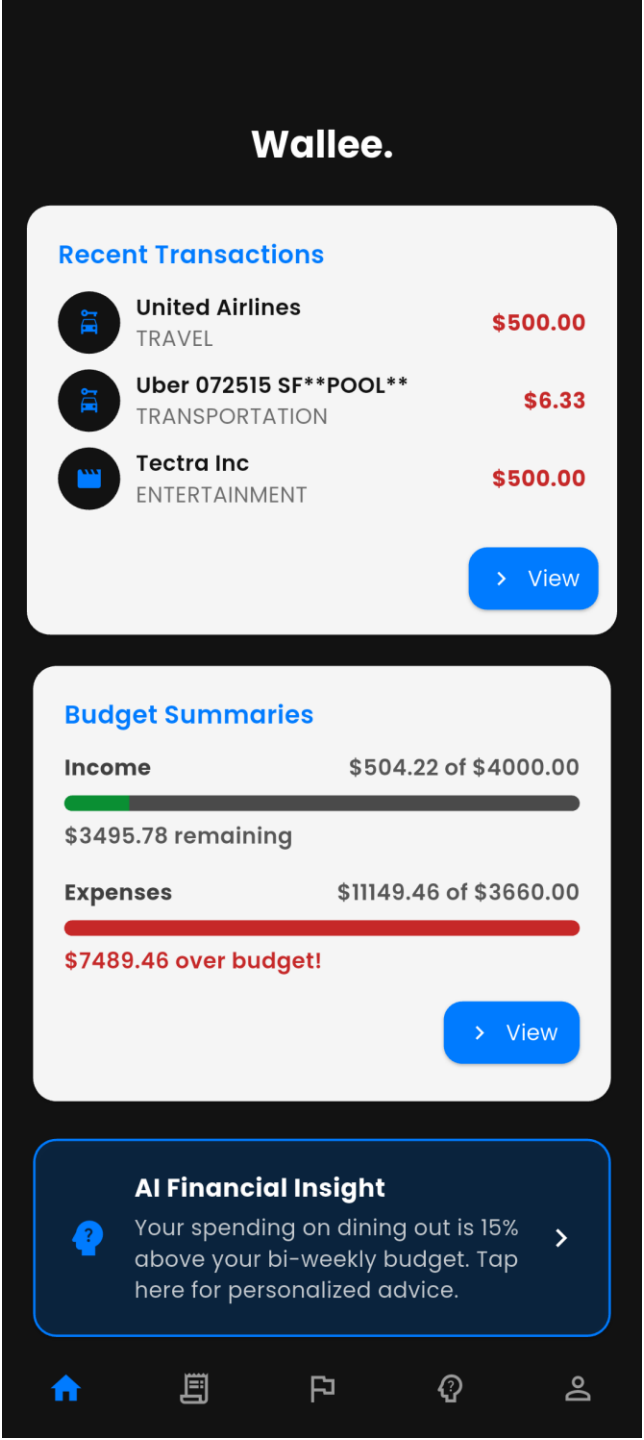
Page 5

- App settings
- Profile information
- Bank connection

Main page Transactions



Main page Budgeting Summaries



Budget Summaries

Income

\$504.22 of \$4000.00

\$3495.78 remaining

Expenses

\$11149.46 of \$3660.00

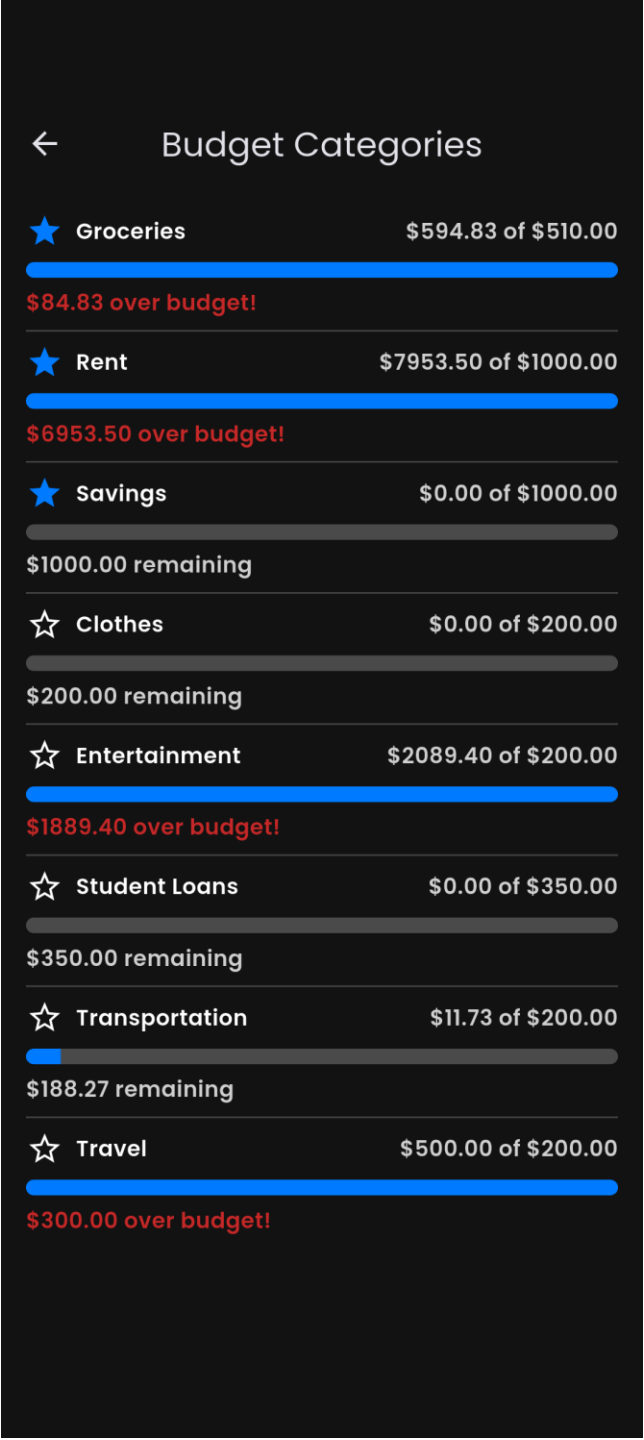
\$7489.46 over budget!

> View

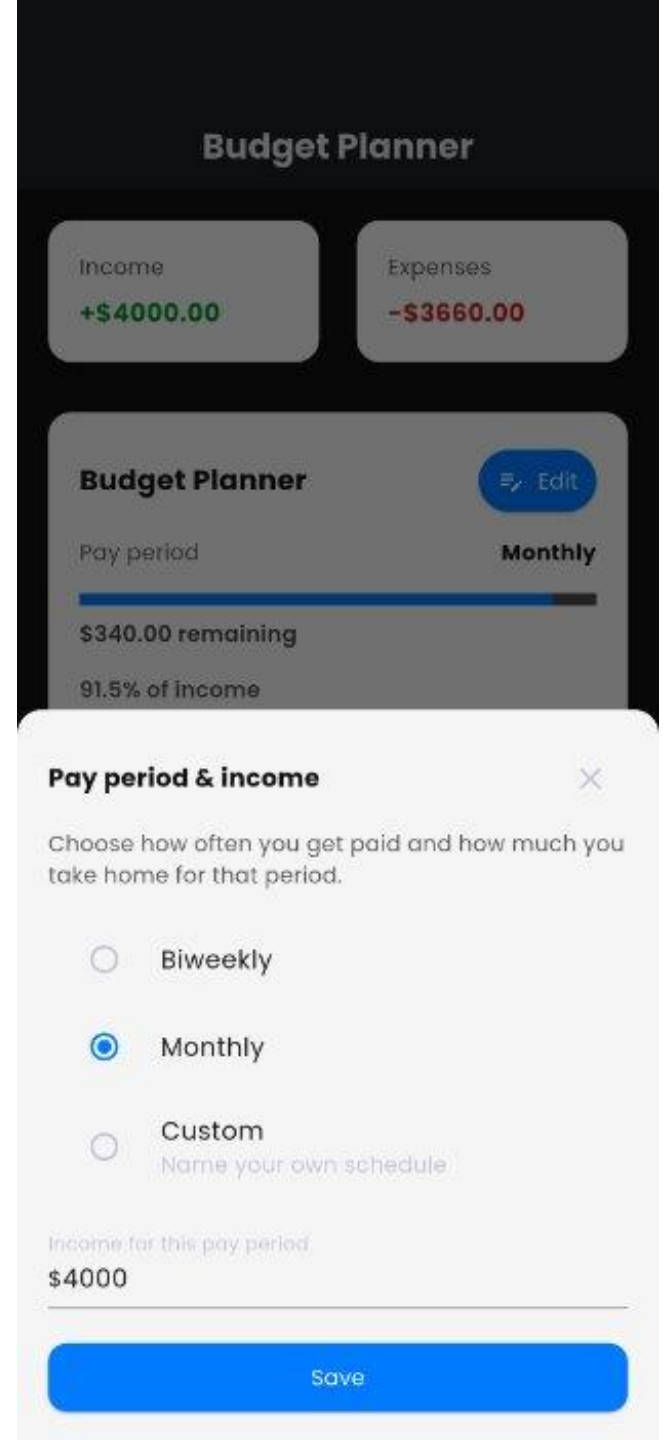
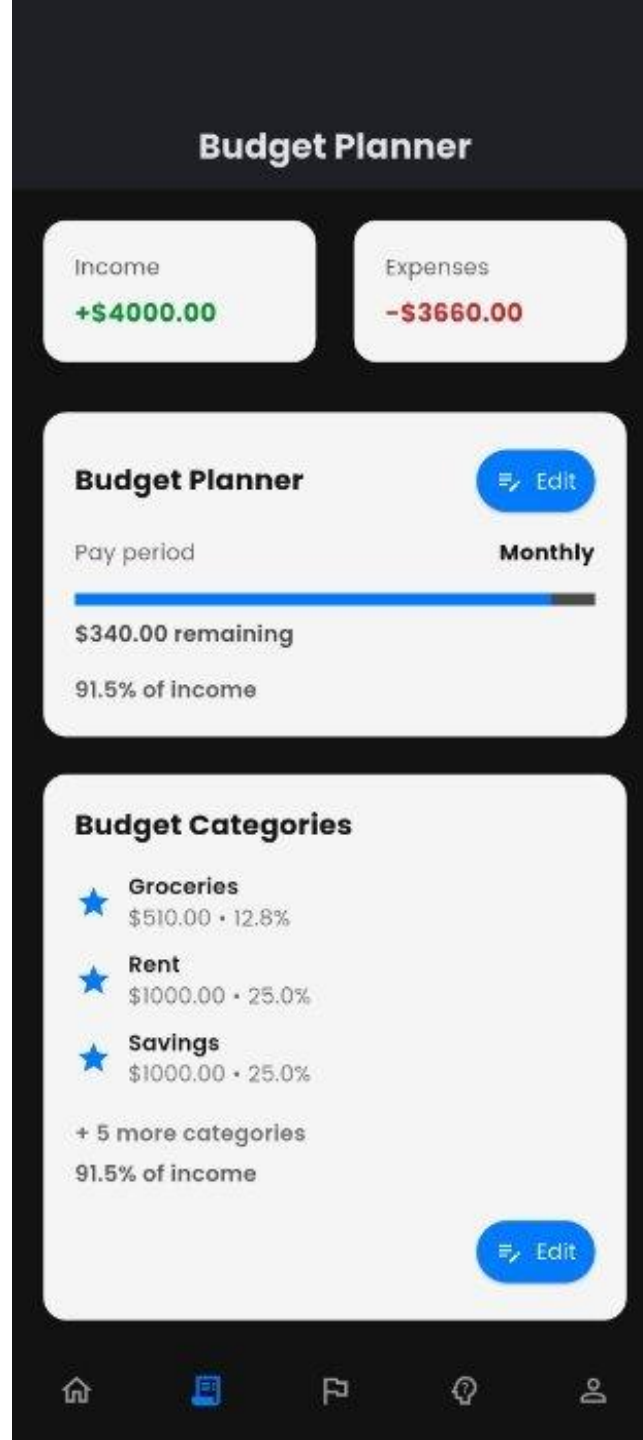
AI Financial Insight

Your spending on dining out is 15% above your bi-weekly budget. Tap here for personalized advice.

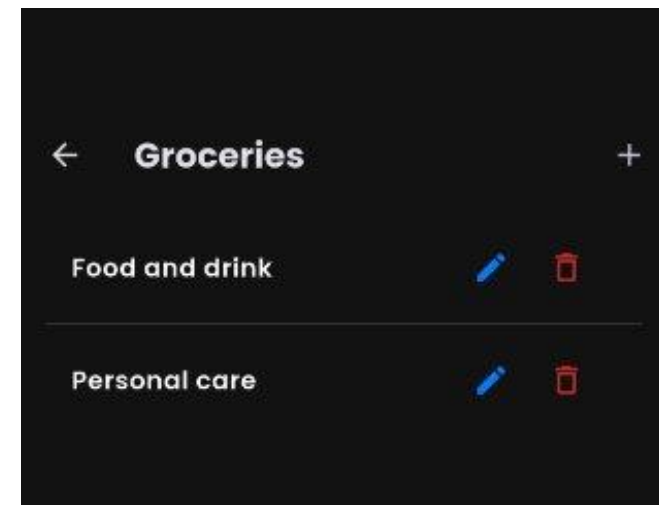
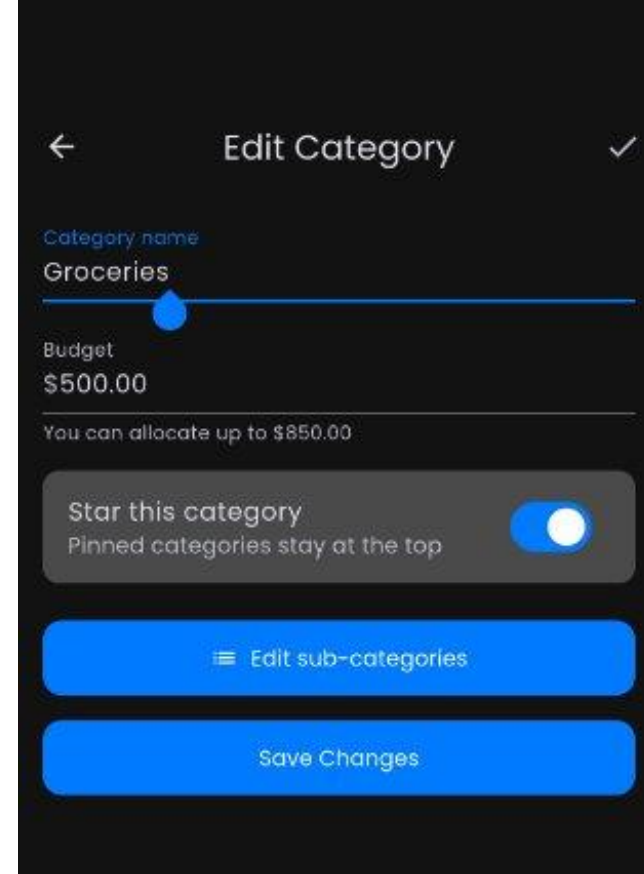
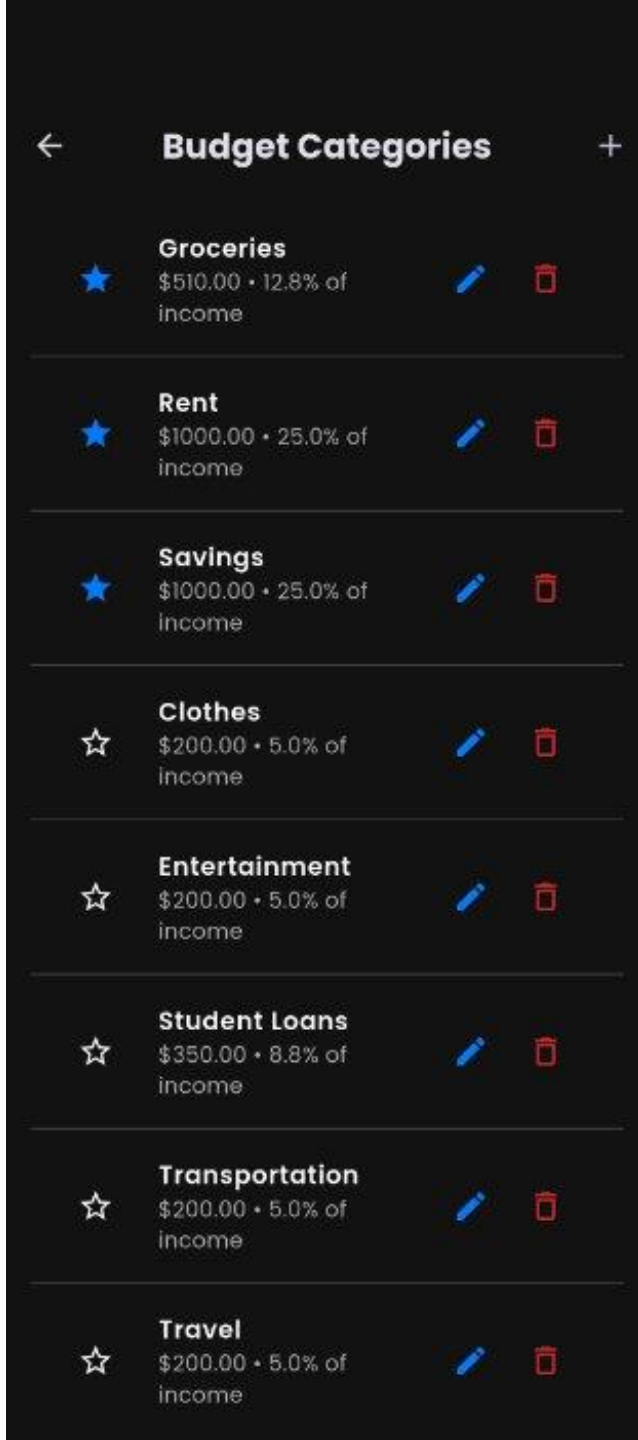
>



Budget payment period customization



Budget Categorization customization and sub- category creation



Transfer of Bank Account Info

2:26



Wallee Demo uses Plaid to connect
your account

 +1 Phone



Use your phone number to log in or sign up with Plaid to
go faster next time. [Learn more](#)

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to receive updates on plaid.com

Continue

Continue as guest

2:27



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chime®



BANK OF AMERICA



CHASE 

NAVY
FEDERAL
Credit Union

 PayPal

SoFi 

current

Capital One

TRUIST 

citibank

usbank









 PNC



 REGIONS

charles
SCHWAB

Linking Multiple Accounts

← Linked Accounts ↻ +		
Unknown Bank Unlink		
12 accounts		
⌚ Last synced: 9m ago		
	Plaid Checking checking • **** 0000	\$110.00 Available
	Plaid Saving savings • **** 1111	\$210.00 Available
	Plaid CD cd • **** 2222	\$1000.00 Available
	Plaid Credit Card credit card • **** 3333	\$410.00 Current Balance
	Plaid Money Market money market • **** 4444	\$43200.00 Available
	Plaid IRA ira • **** 5555	\$320.76 Available
	Plaid 401k 401k • **** 6666	\$23631.98 Available
	Plaid Student Loan student • **** 7777	\$65262.00 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 bankk 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 andriod 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