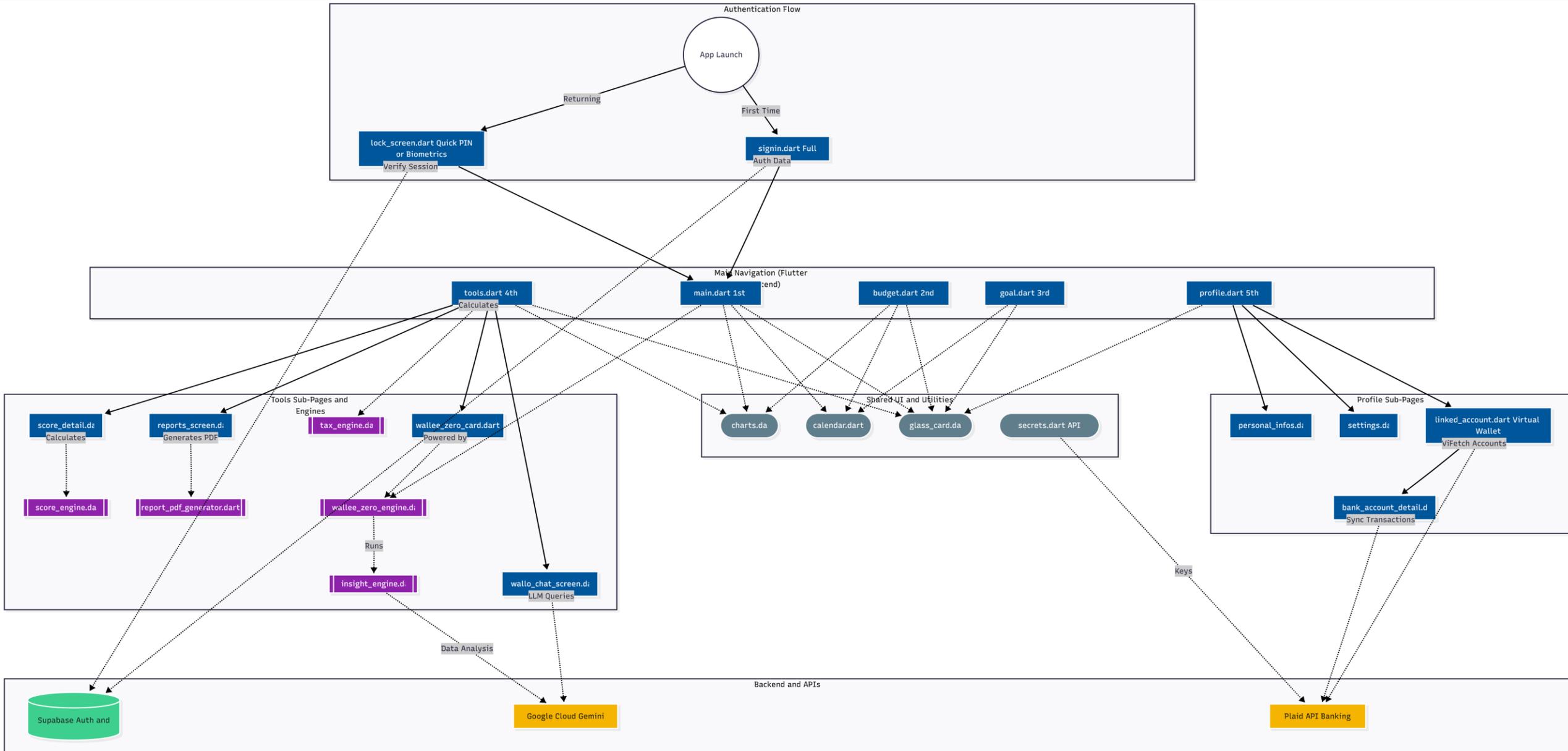




Walle. Milestone 4

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

System Architecture Design:



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

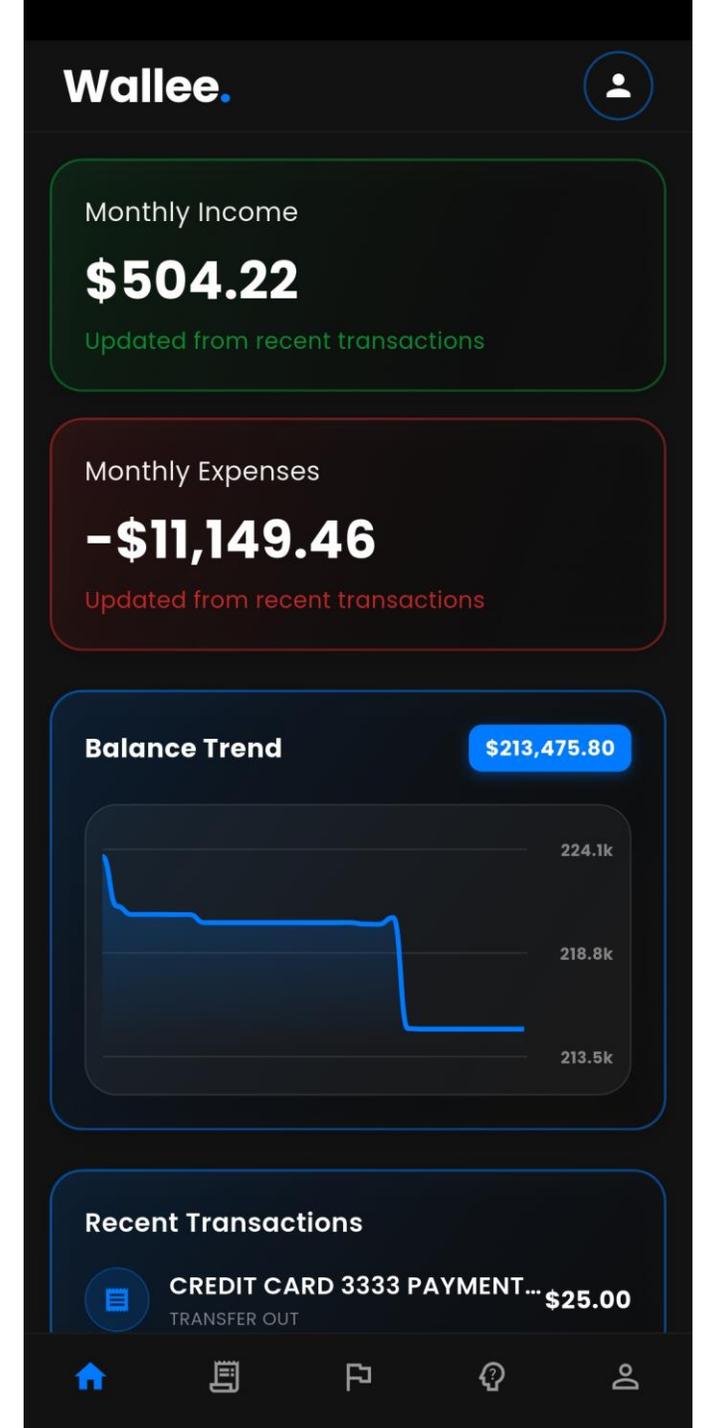
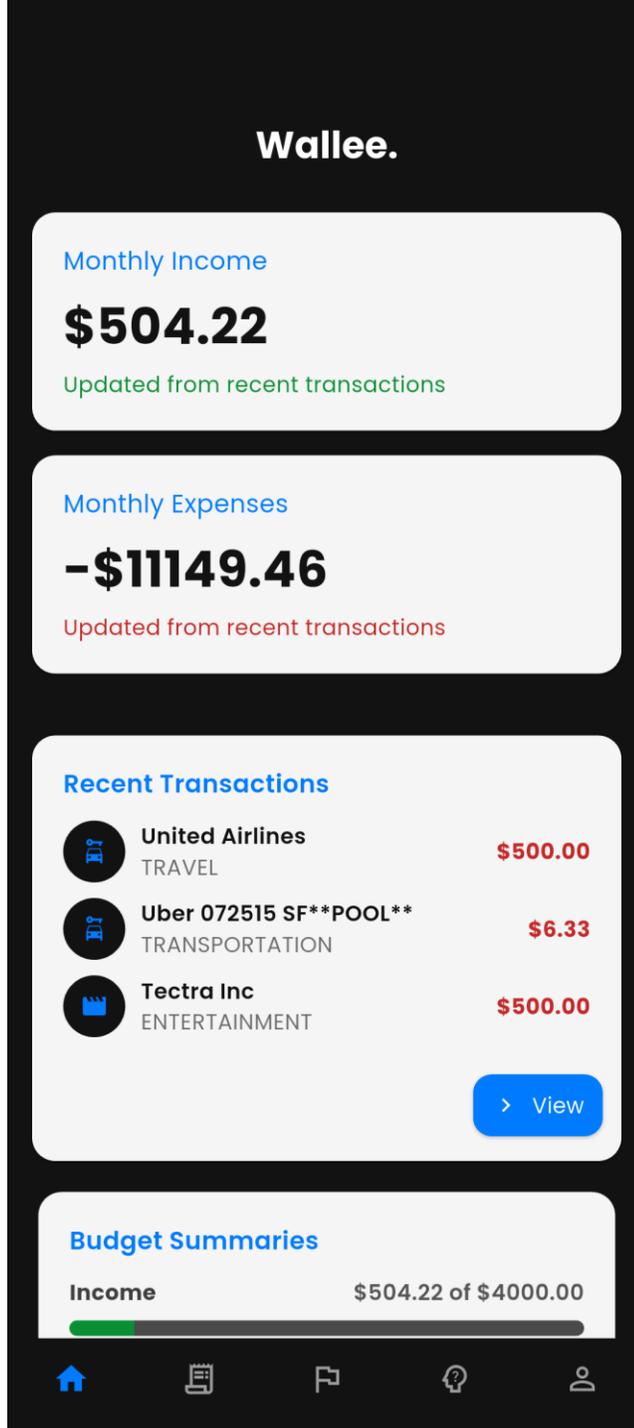
Page 4

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

Page 5

- App settings
- Profile information
- Bank connection

Main page Transactions



Main page Transactions

Recent Transactions

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

All Transactions

Past Month

Friday, February 13th

	CREDIT CARD 3333 PAYMENT... TRANSFER OUT	\$25.00
	Uber 063015 SF**POOL** TRANSPORTATION	\$5.40

Thursday, February 12th

	ACH Electronic CreditGU... RENT AND UTILITIES	\$5850.00
	CD DEPOSIT .INITIAL. ENTERTAINMENT	\$1000.00

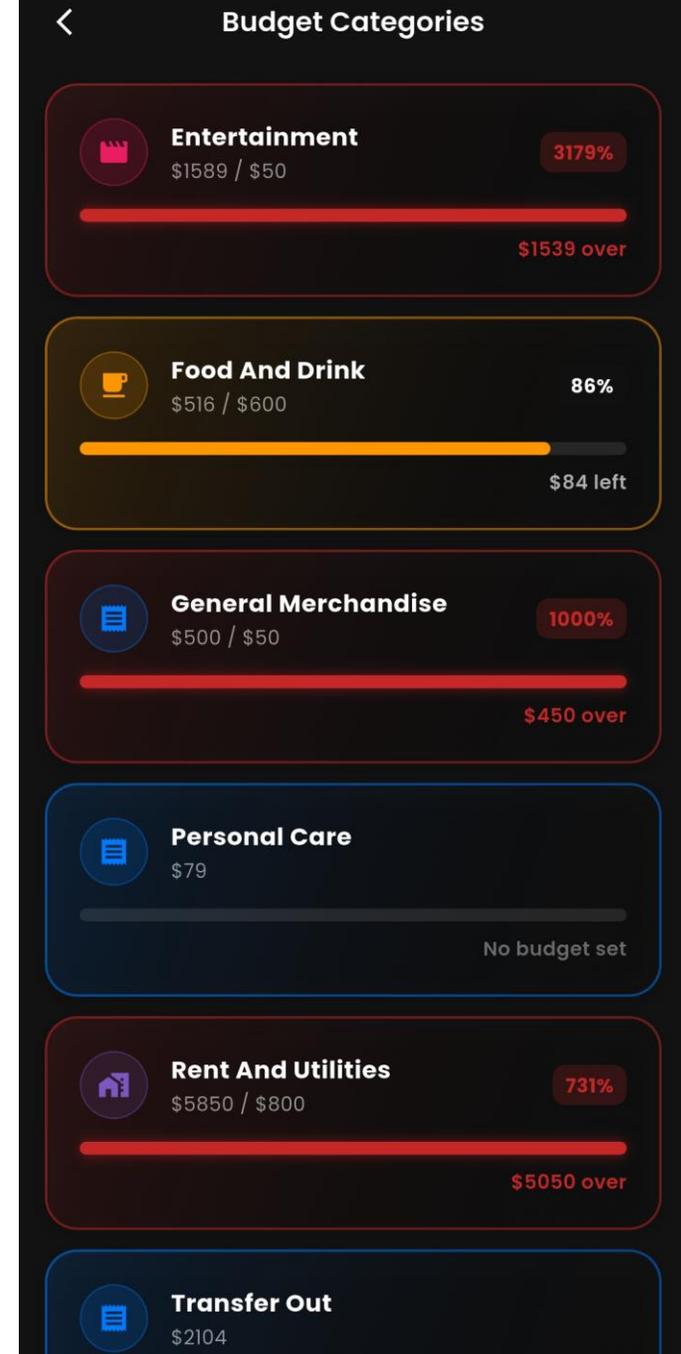
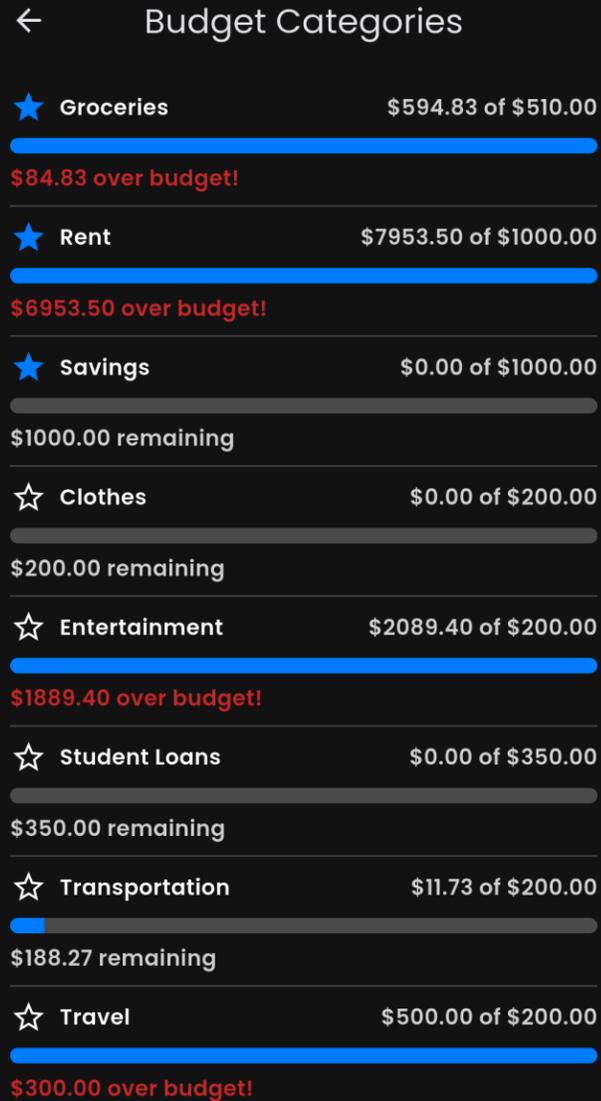
Wednesday, February 11th

	Touchstone Climbing PERSONAL CARE	\$78.50
	United Airlines TRAVEL	\$500.00

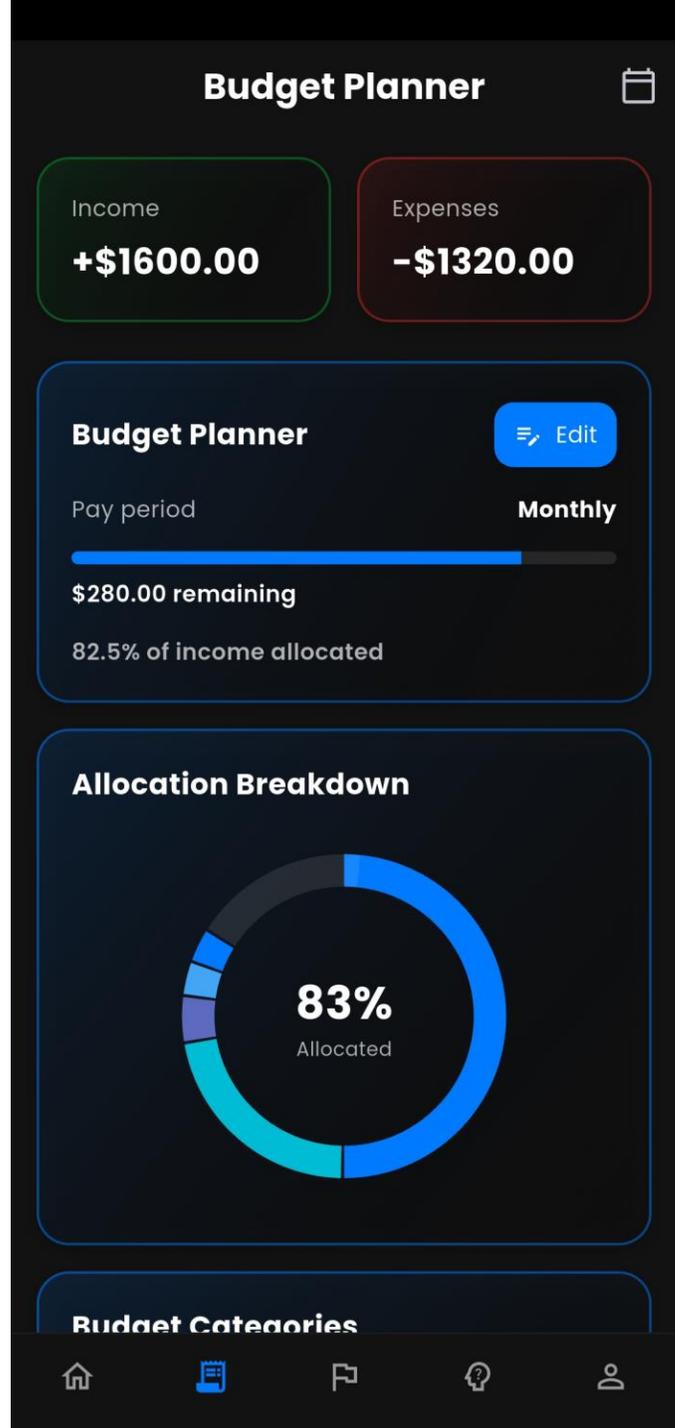
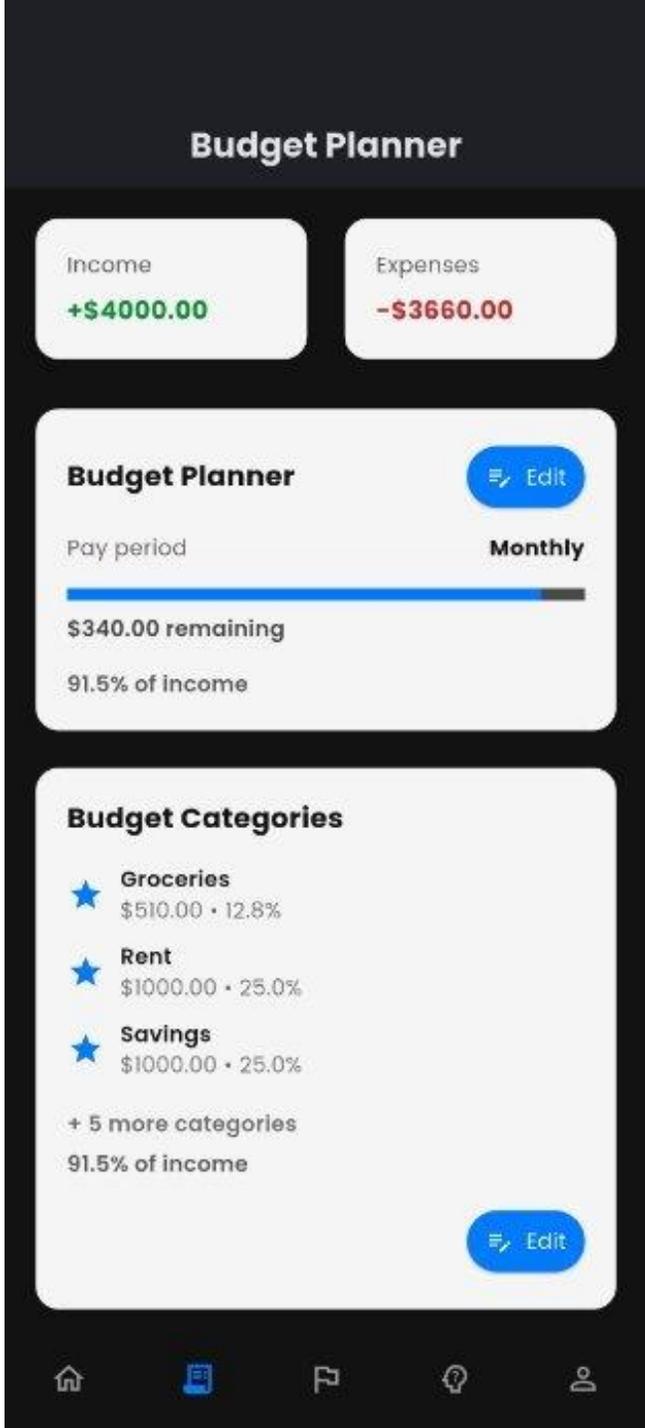
Tuesday, February 10th

	McDonald's FOOD AND DRINK	\$12.00
	Starbucks	\$4.33

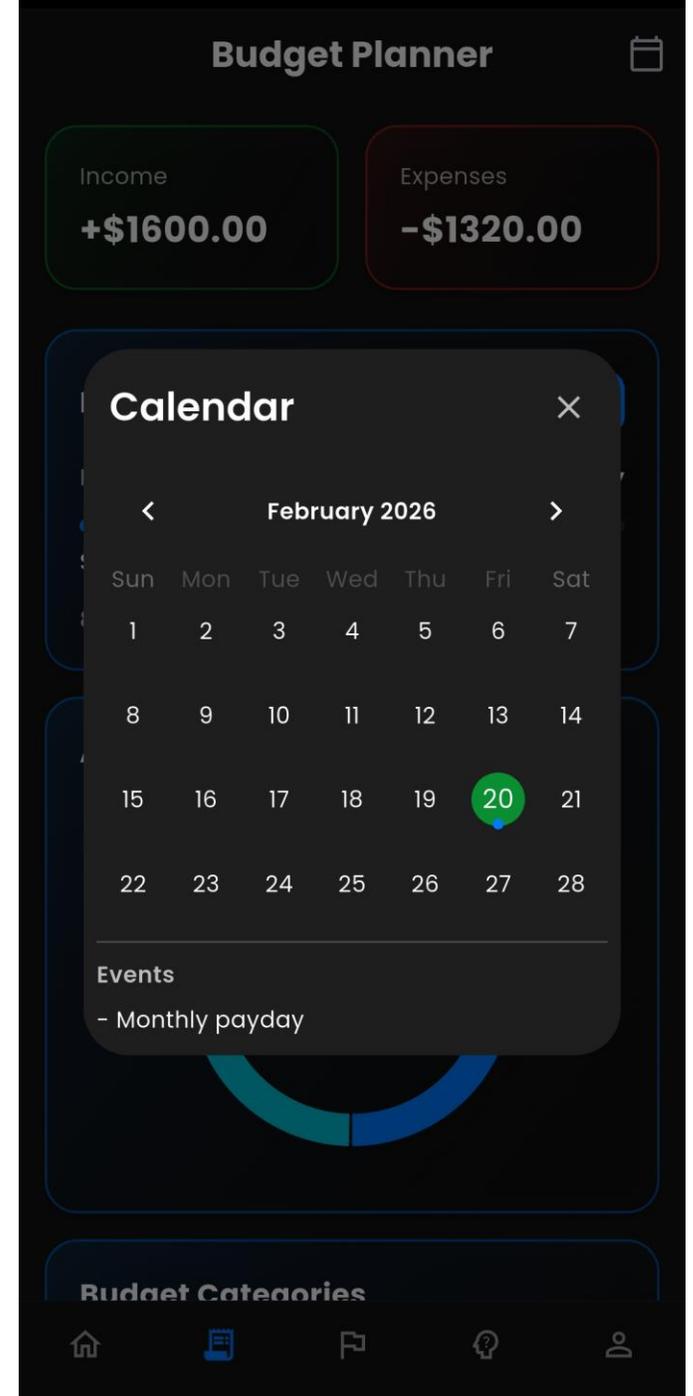
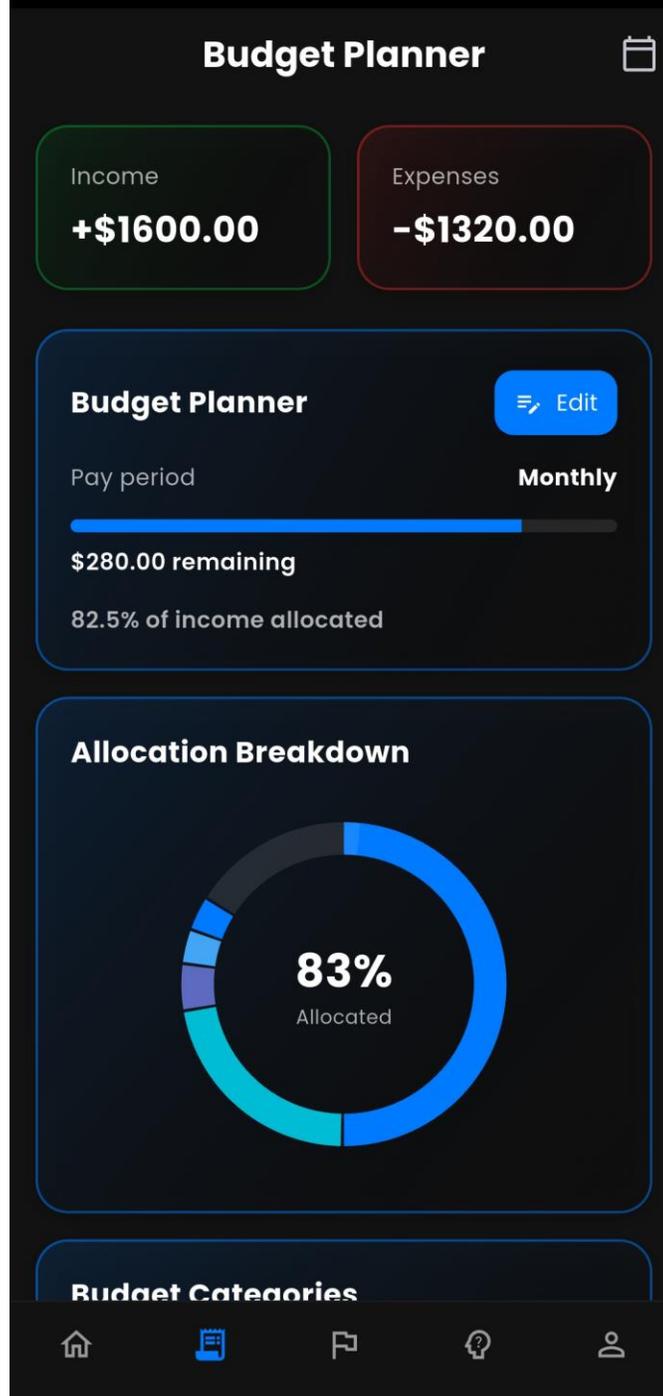
Main page Budgeting Summaries



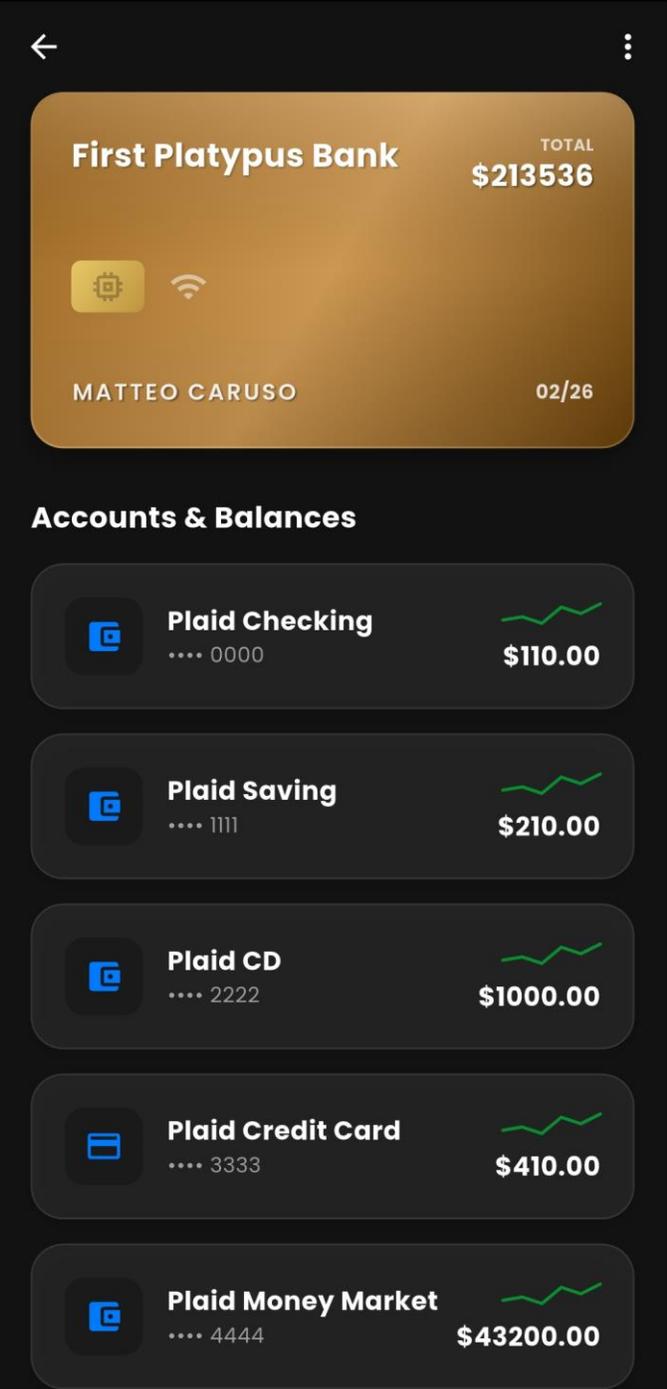
Budget payment period customization



Calendar Implementation

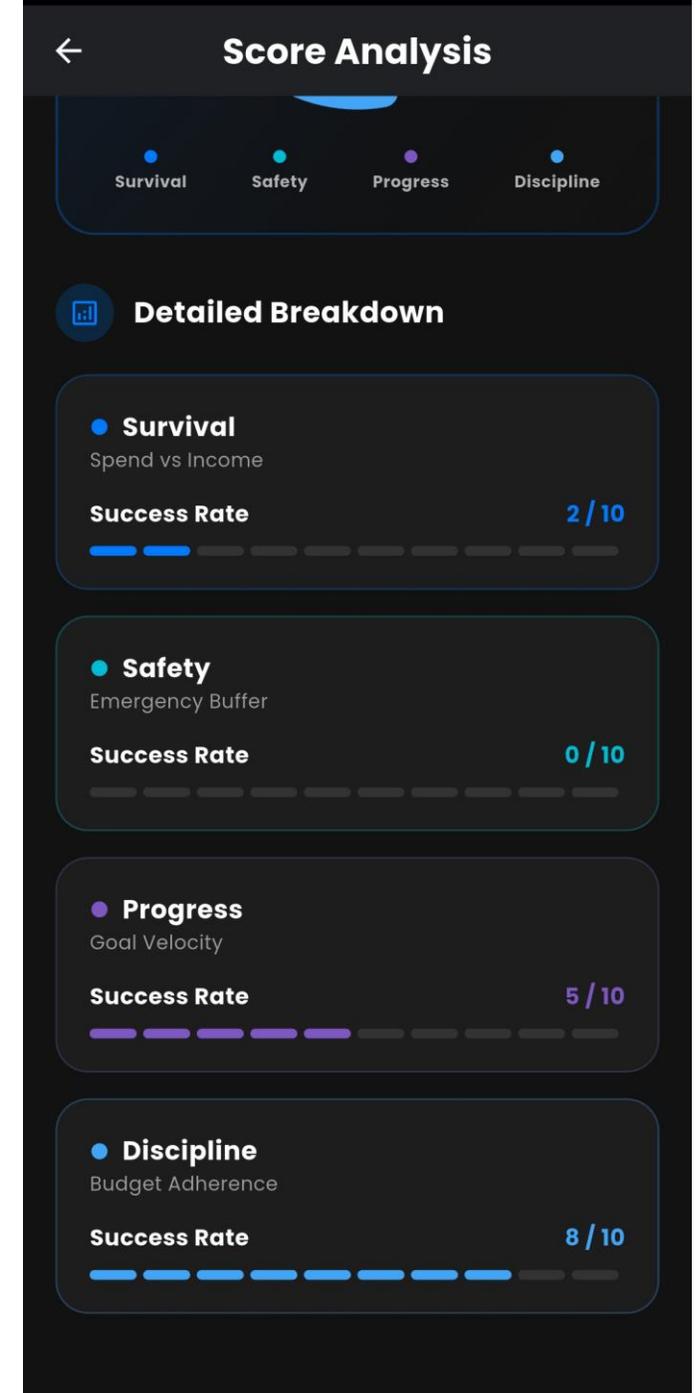


Digital Wallet



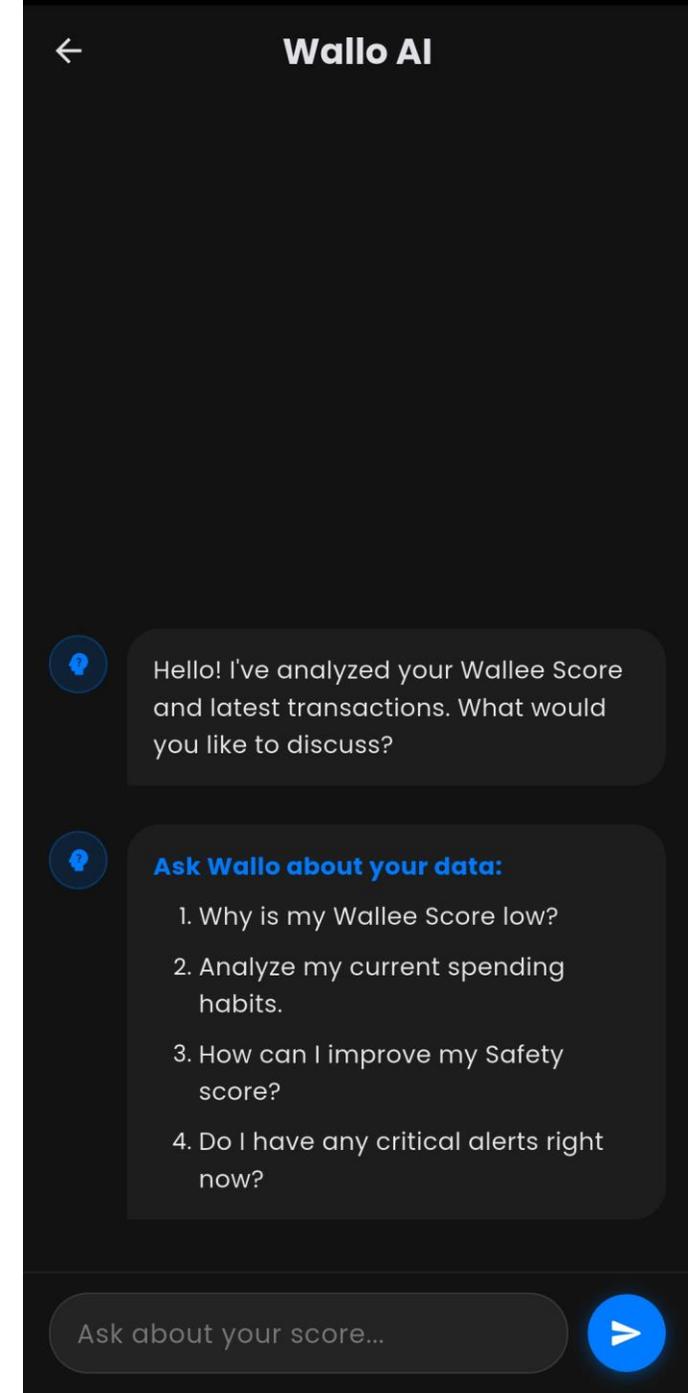
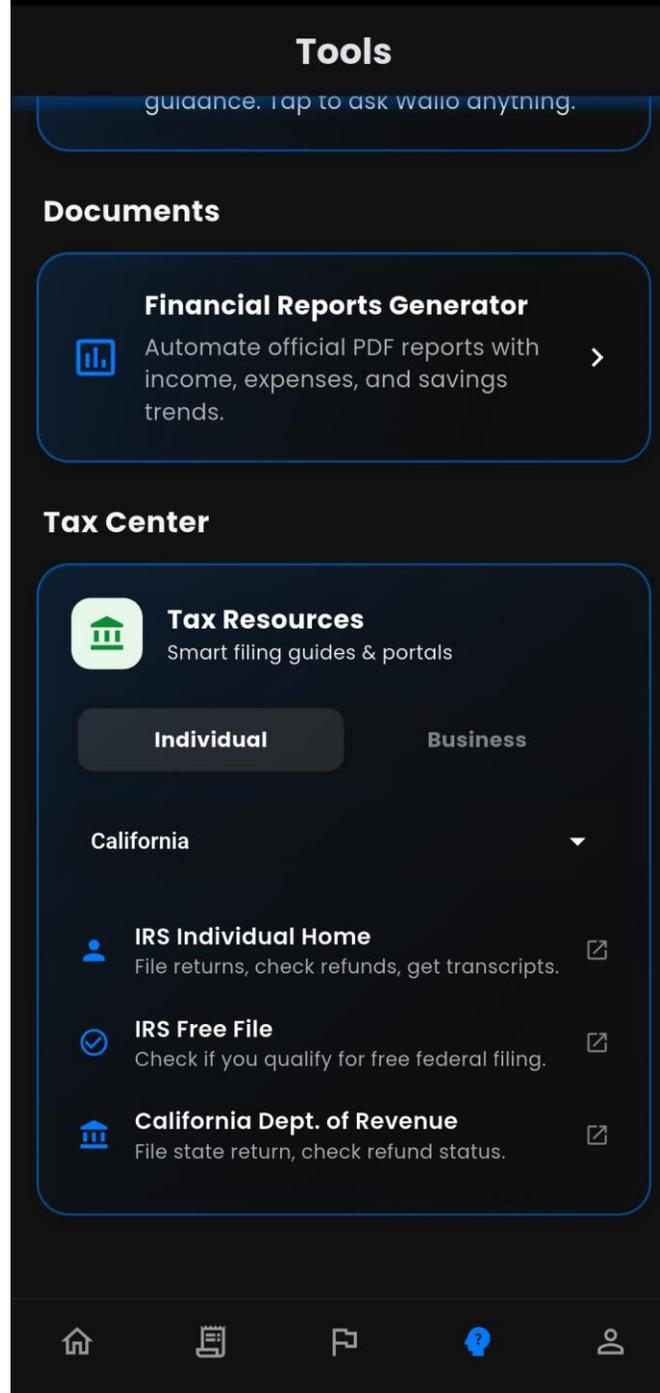
Tools Page :

- Wallee Score
- Wallee Zero
- Wallo Assistant



Tools Page :

- Reports
- Tax Resources



Task Matrix:

Task	Emma	Matteo	Kyle	Joshua
Hide api keys	0%	0%	0%	100%
Link budget and goal pages	0%	10%	90%	0%
Finish user profile page and settings page	30%	30%	30%	10%
Finish user reports	0%	100%	0%	0%
Finish implementing AI	0%	20%	0%	80%
Start implementing time and calendar	0%	0%	70%	0%
Connect bank accounts in the database	100%	0%	0%	0%
UI (animations, color coded, sign-in page, etc)	0%	100%	0%	0%

UI Demo :

- https://drive.google.com/file/d/1QFRxqtr5DRFgyOa1prsgSWLdzmNS2Bxx/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