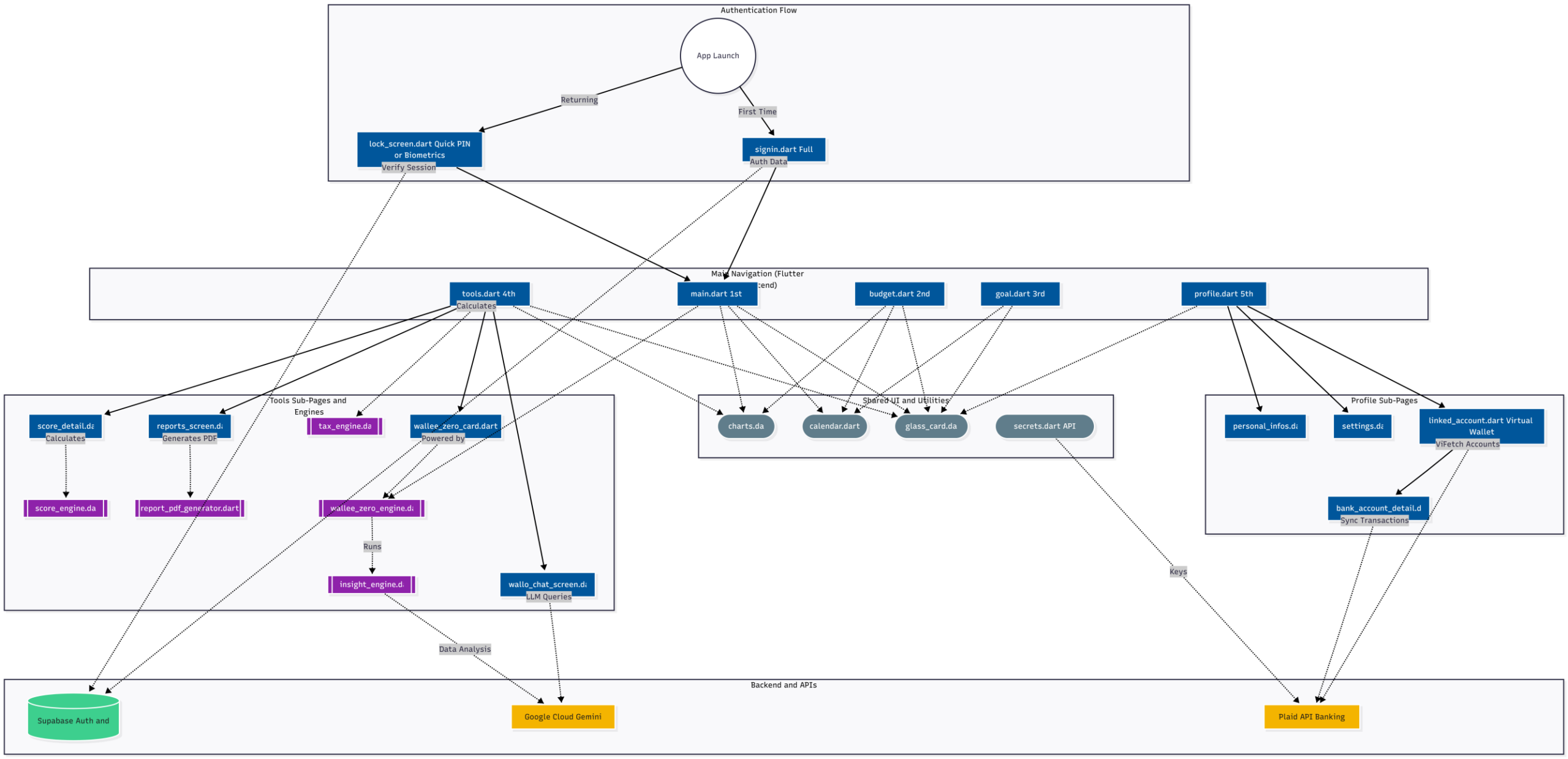
Wallee.
Milestone 4

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

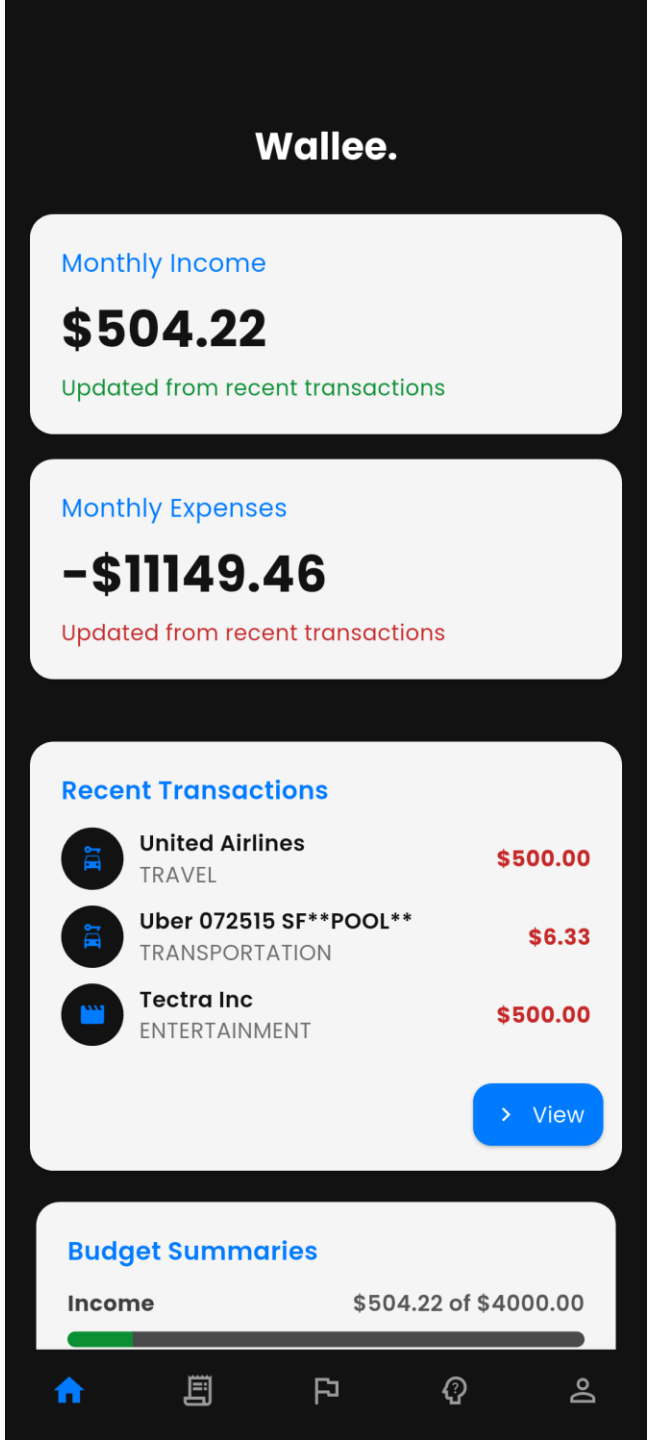
Page 2
- Create/edit budget categories
- Planned spending

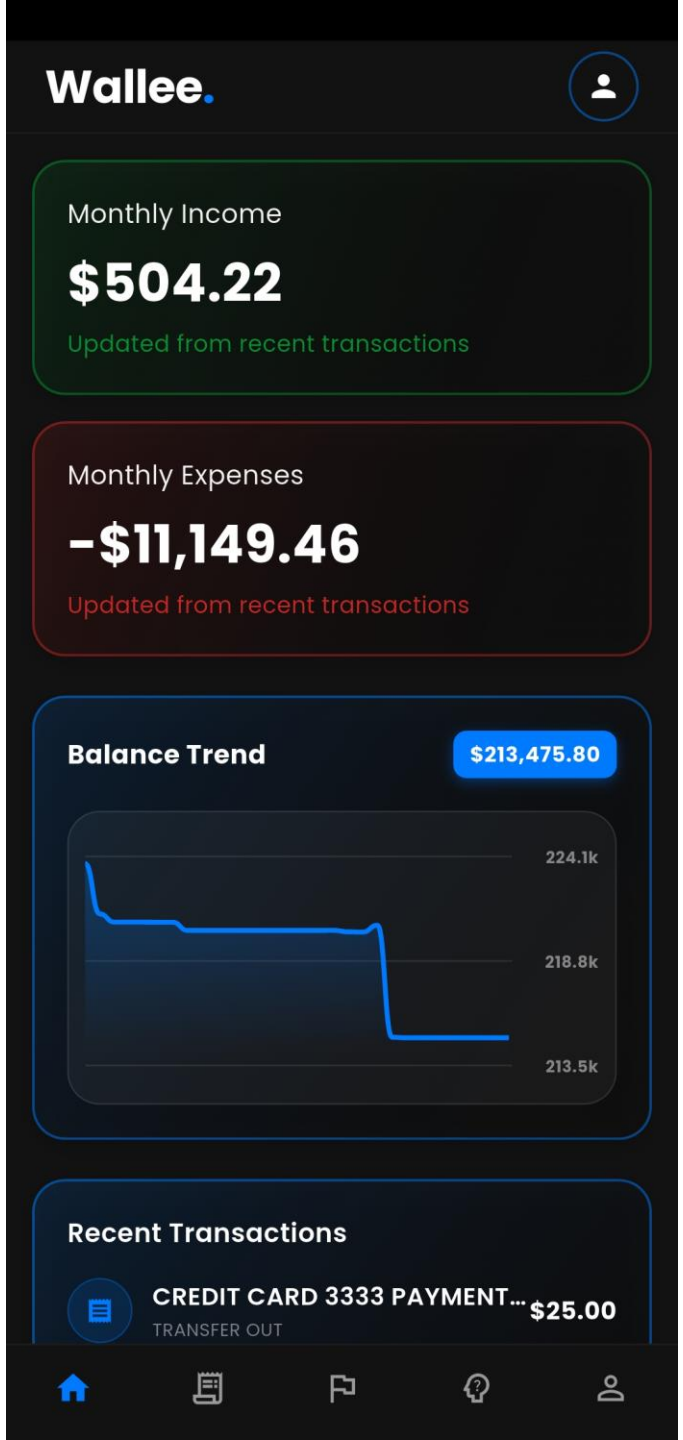
Page 3
- Create edit goals
- Goals based off planned budget
- Goals adjusted based off actual budget spending

Page 4
- AI chatbot
- Tax related info
- Walle score, credit score

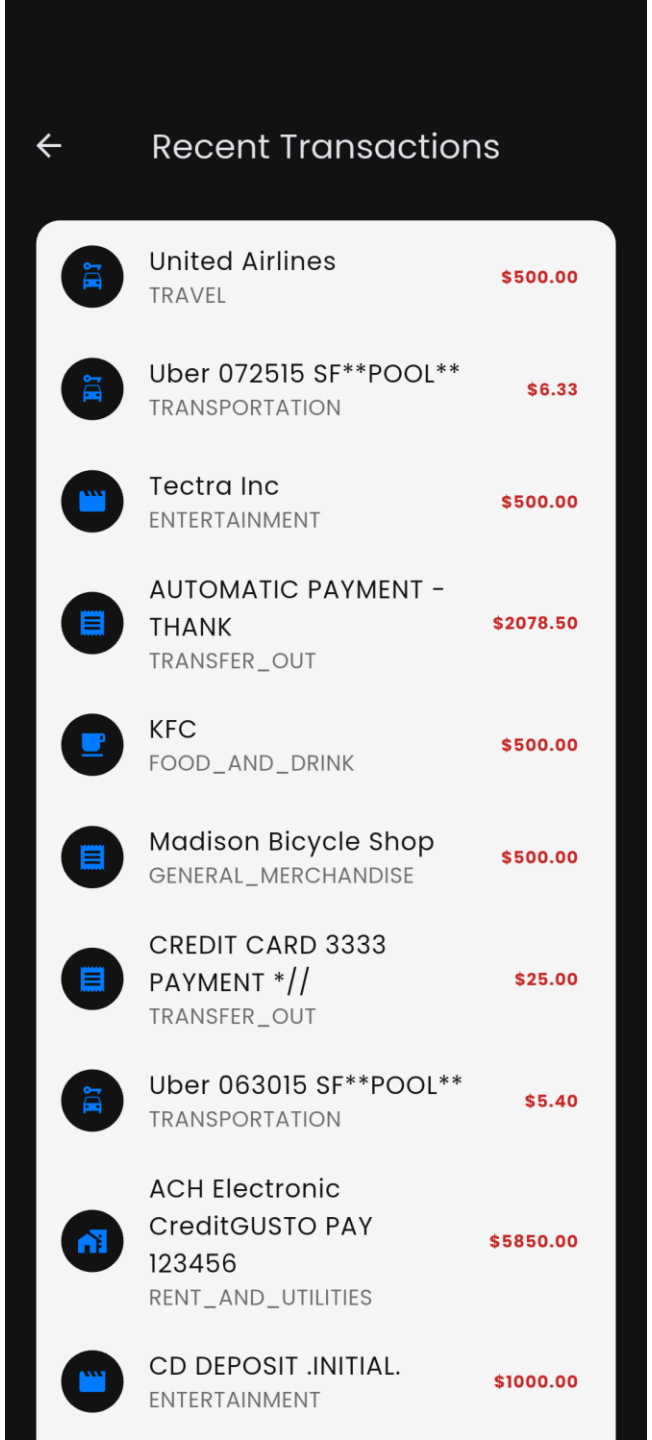
Page 5
- App settings
- Profile information
- Bank connection

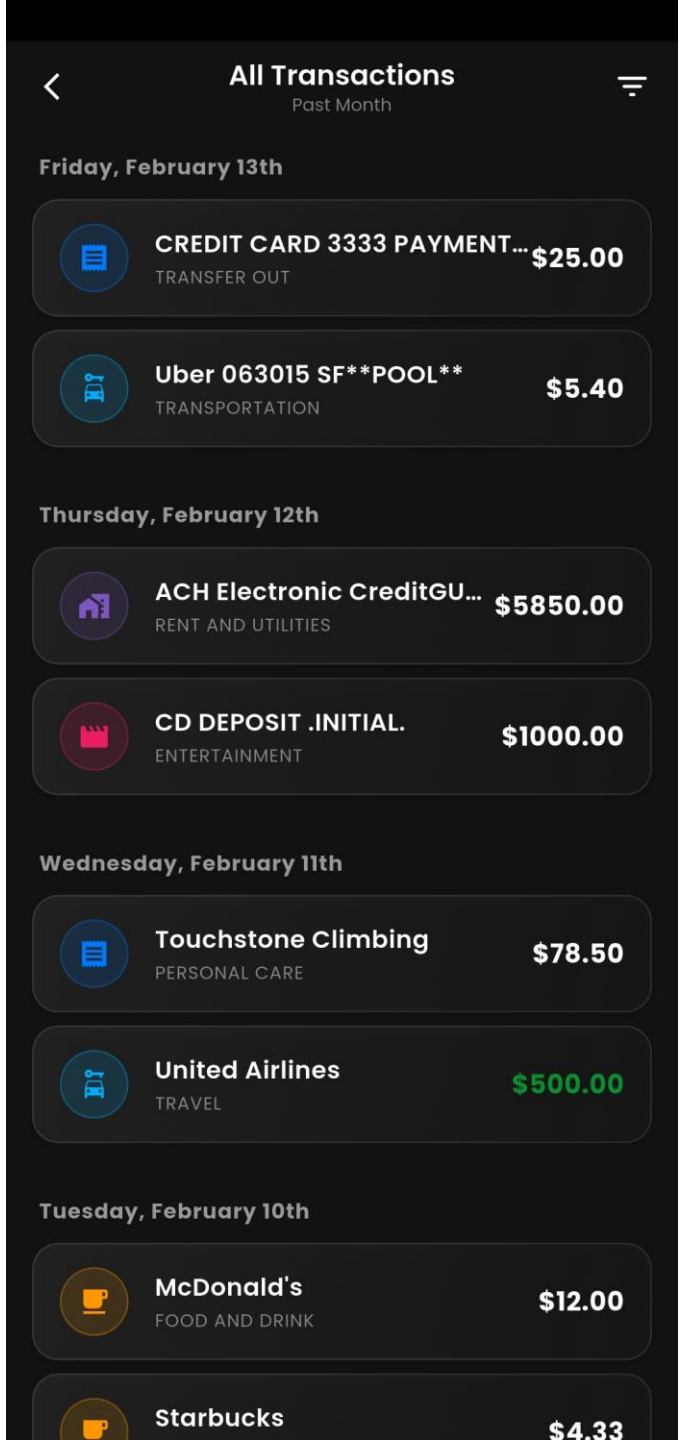
Main page Transactions



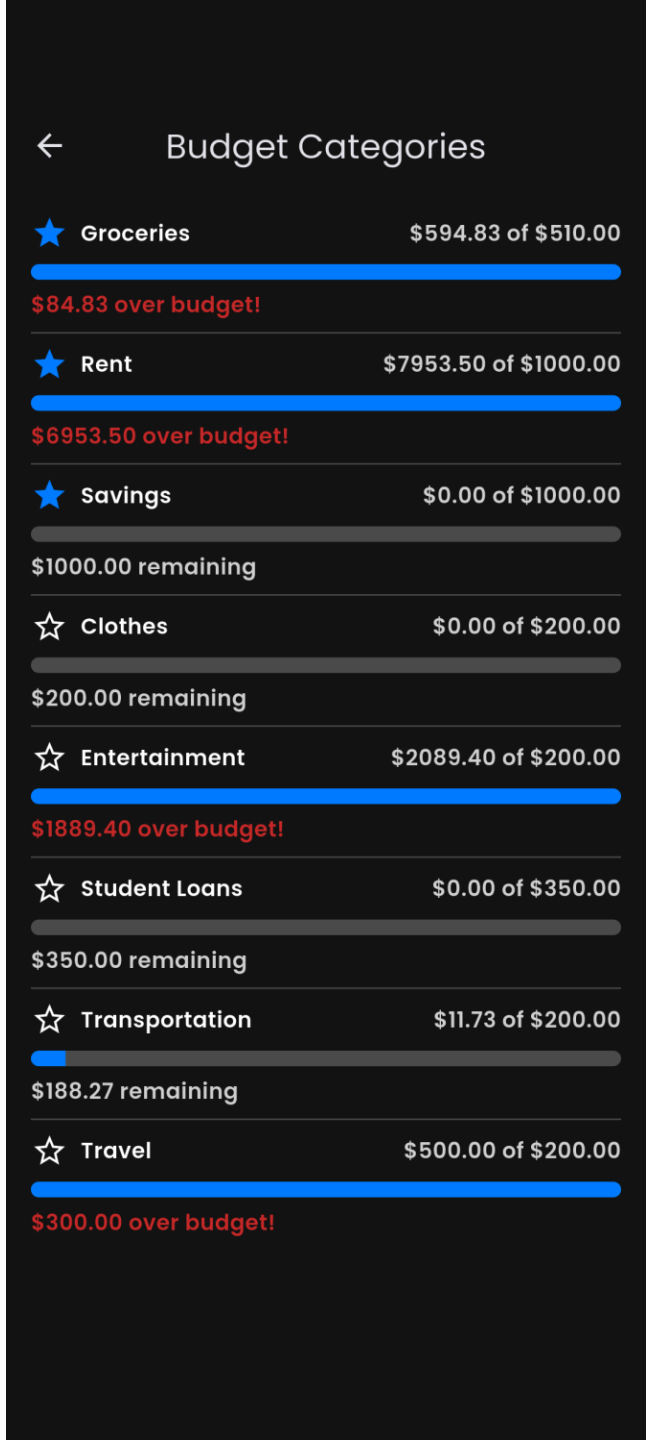


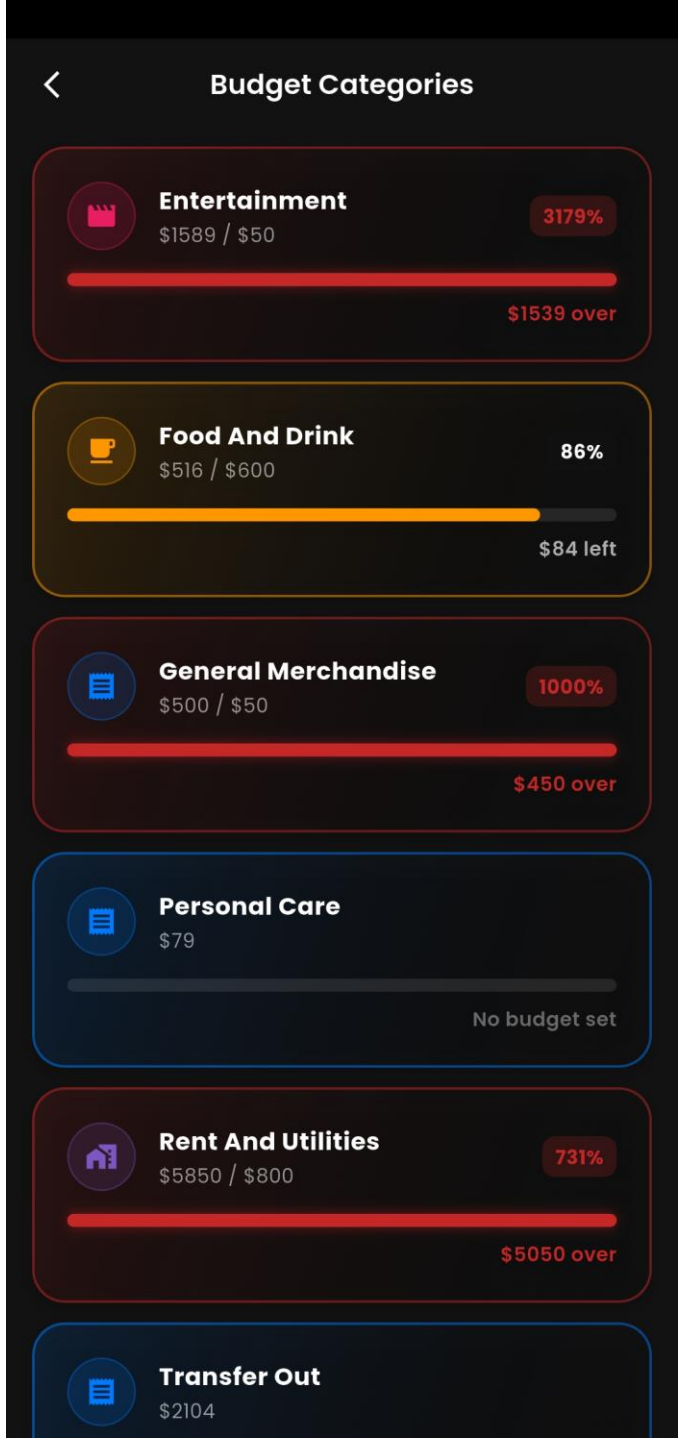
Main page Transactions



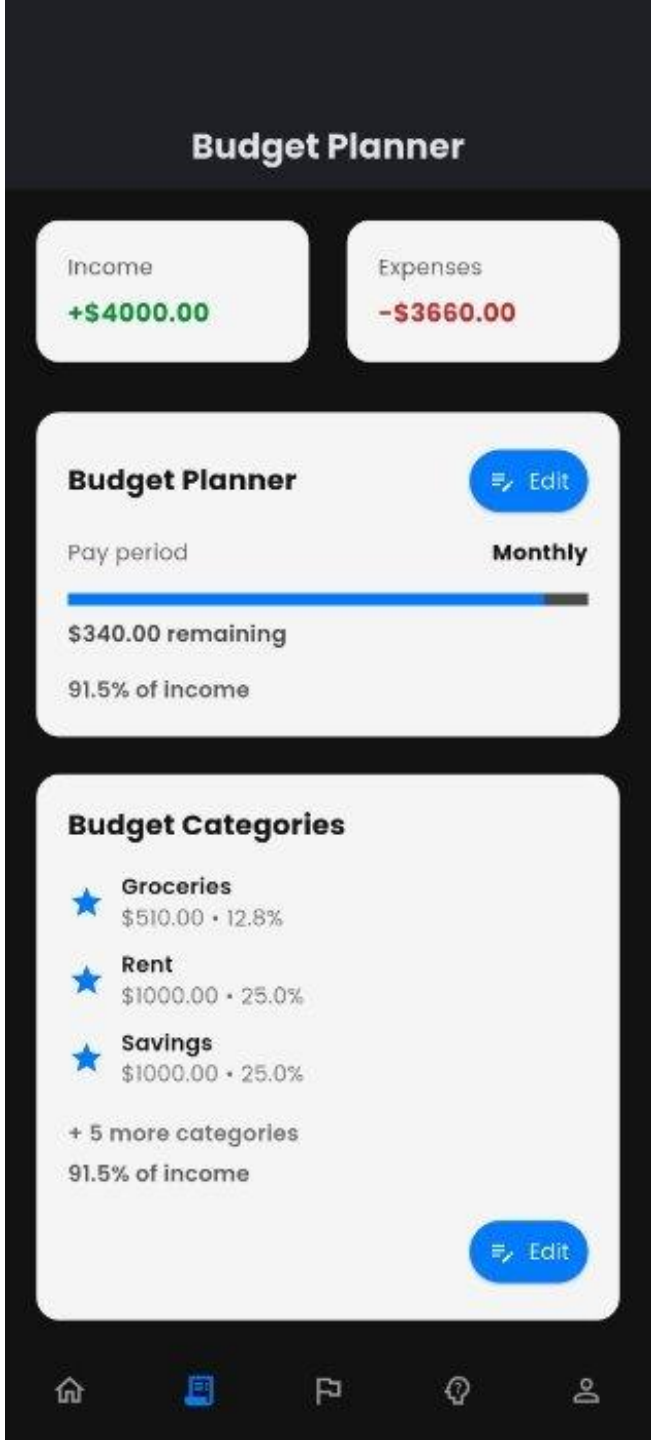


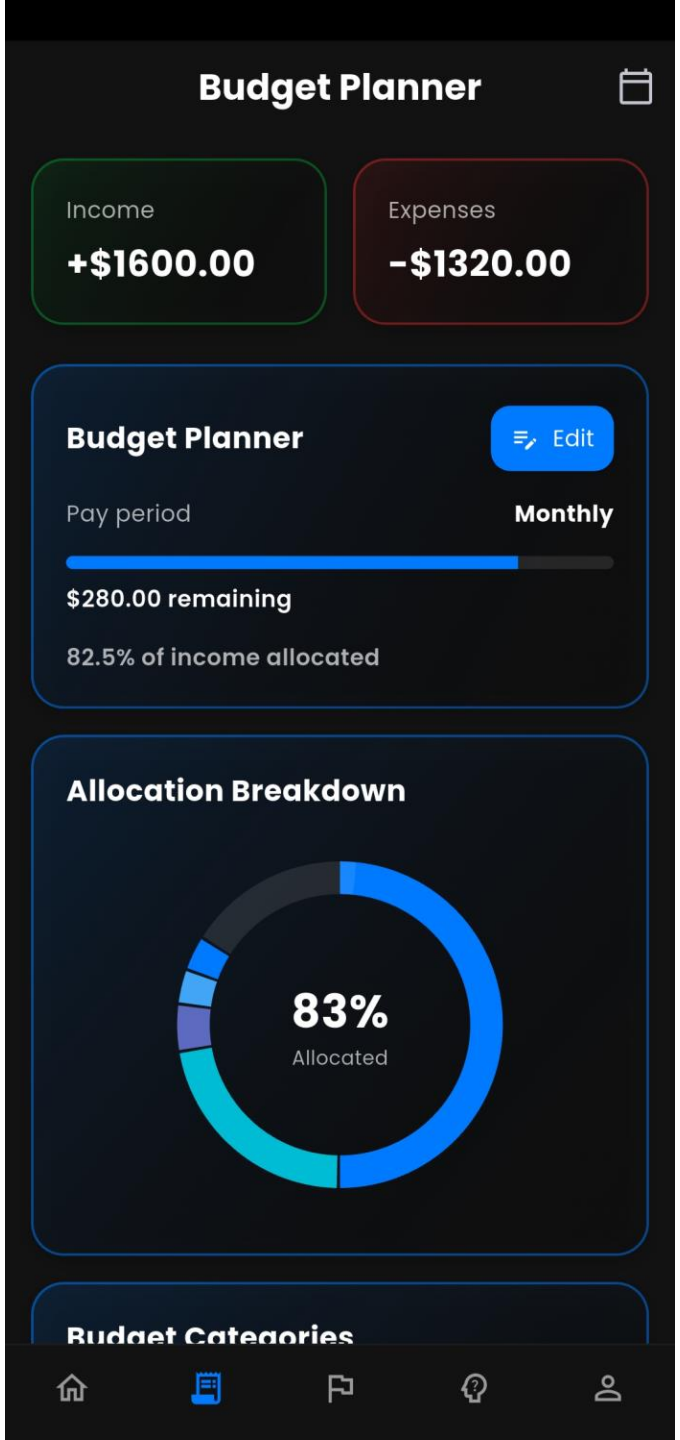
Main page Budgeting Summaries



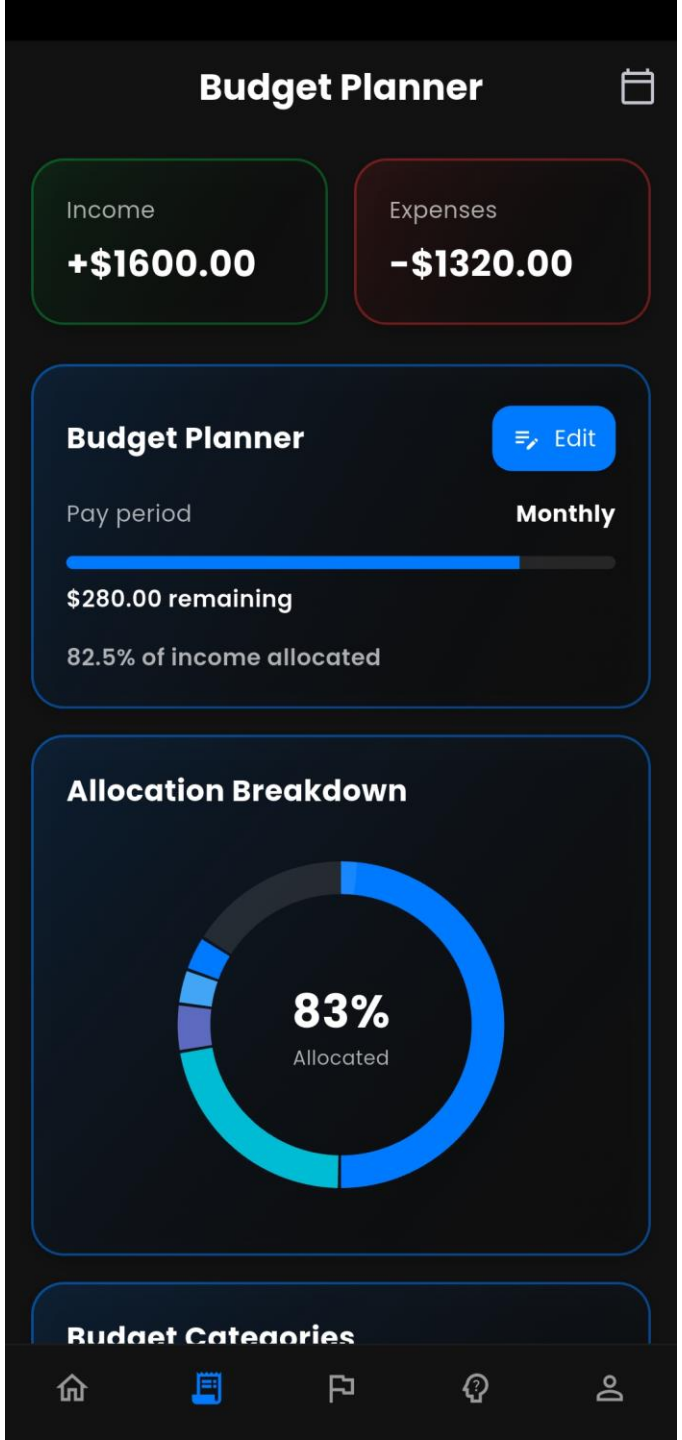


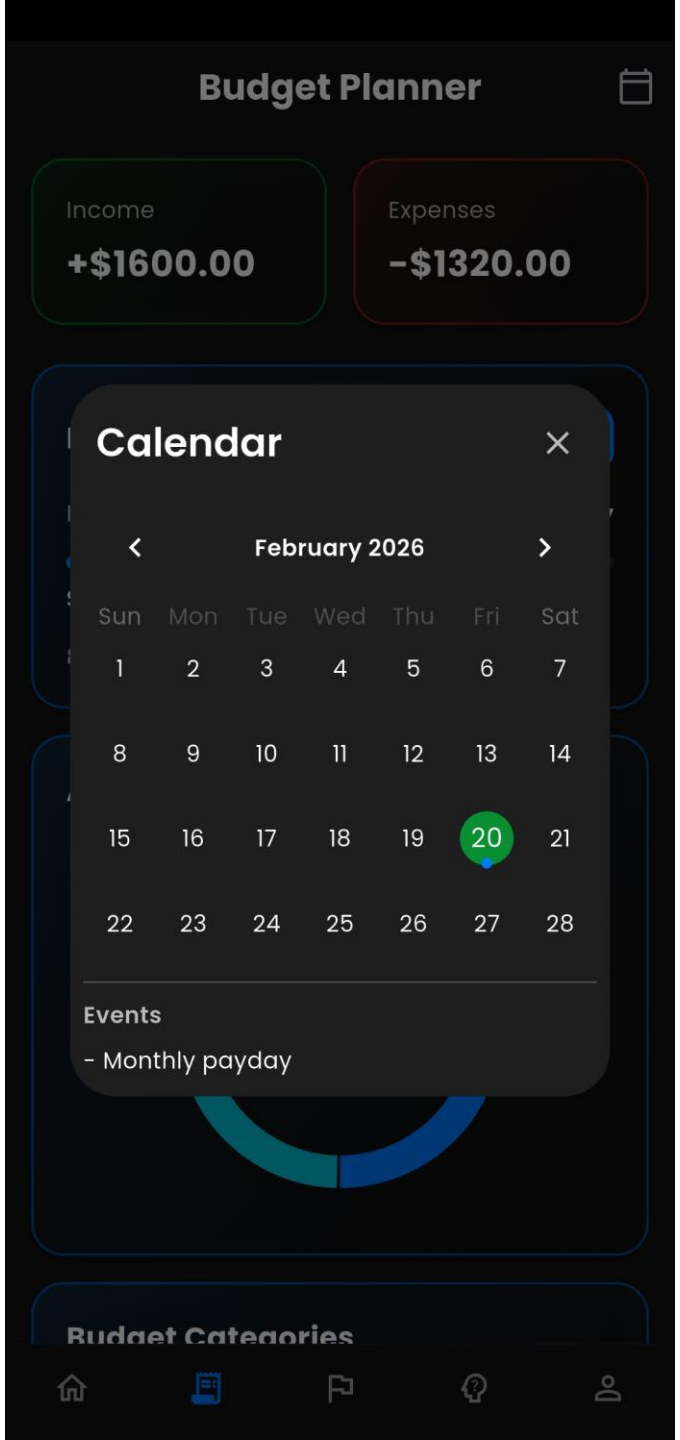
Budget payment period customization



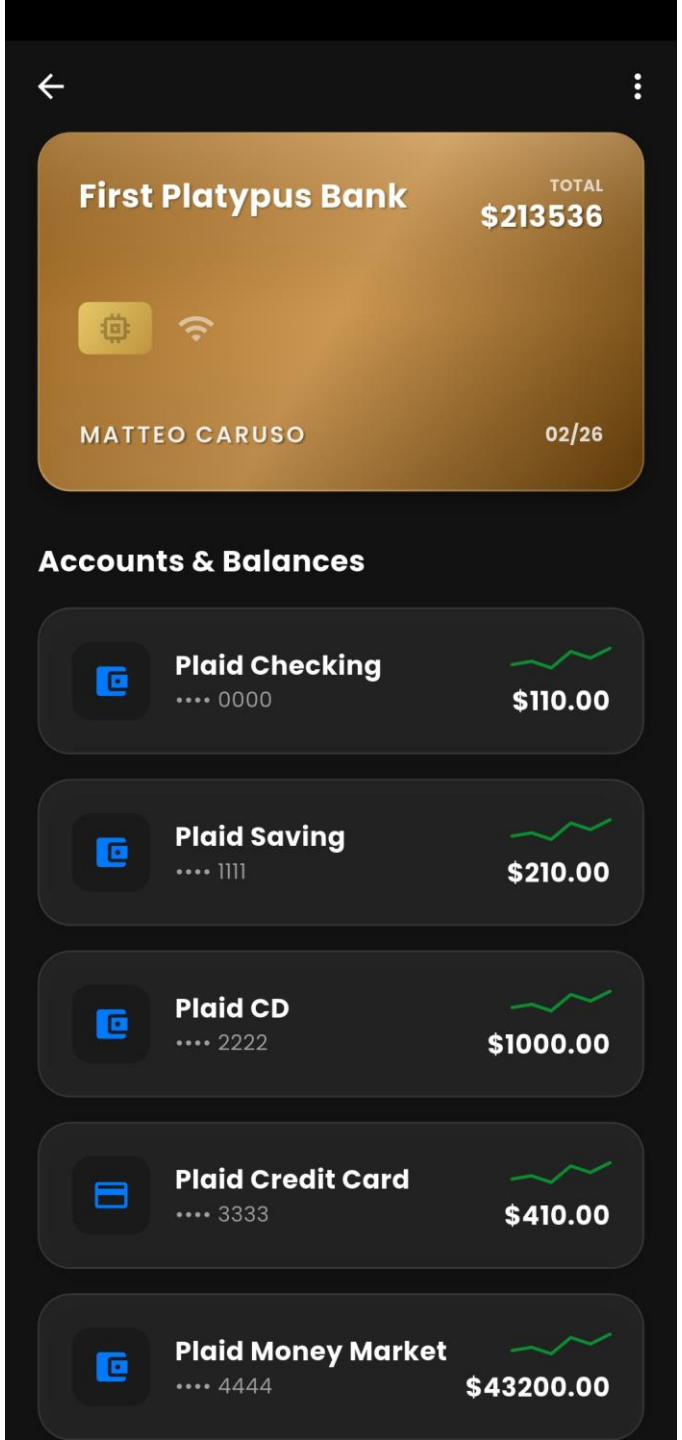


Calendar Implementation



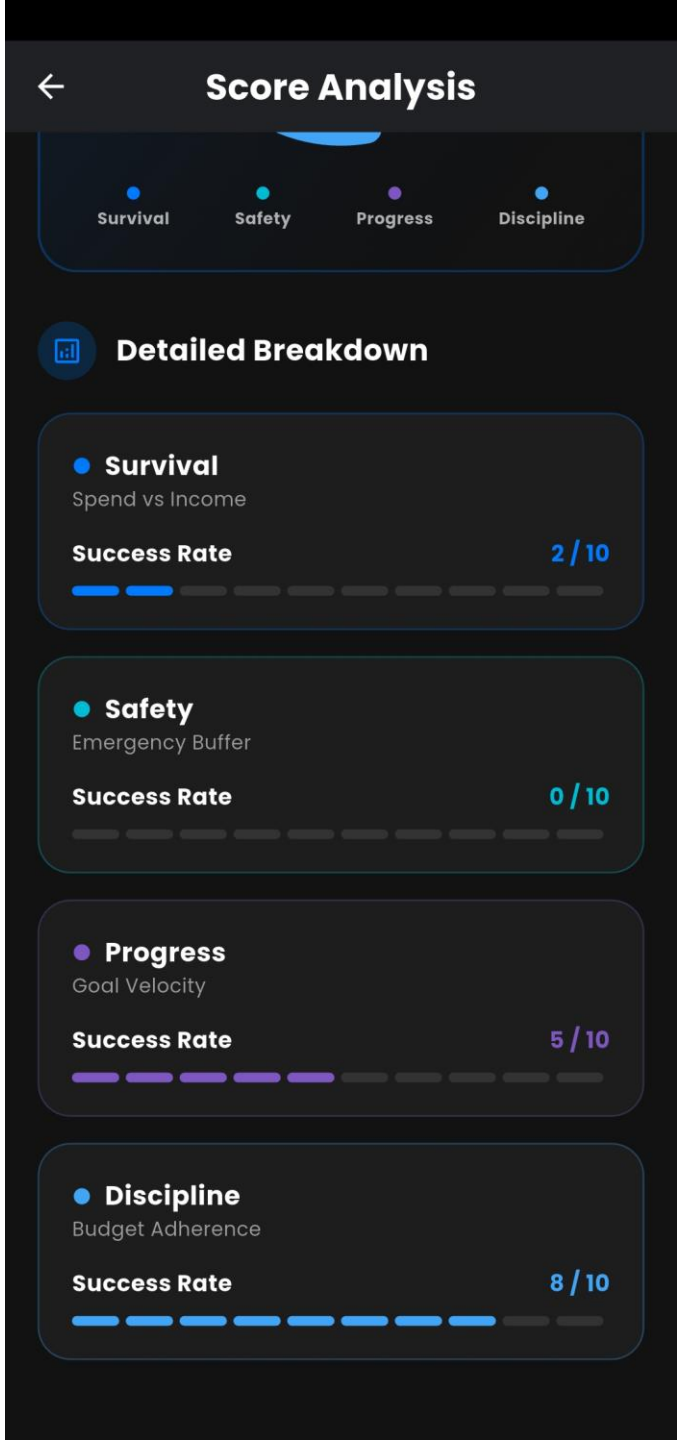


Digital Wallet



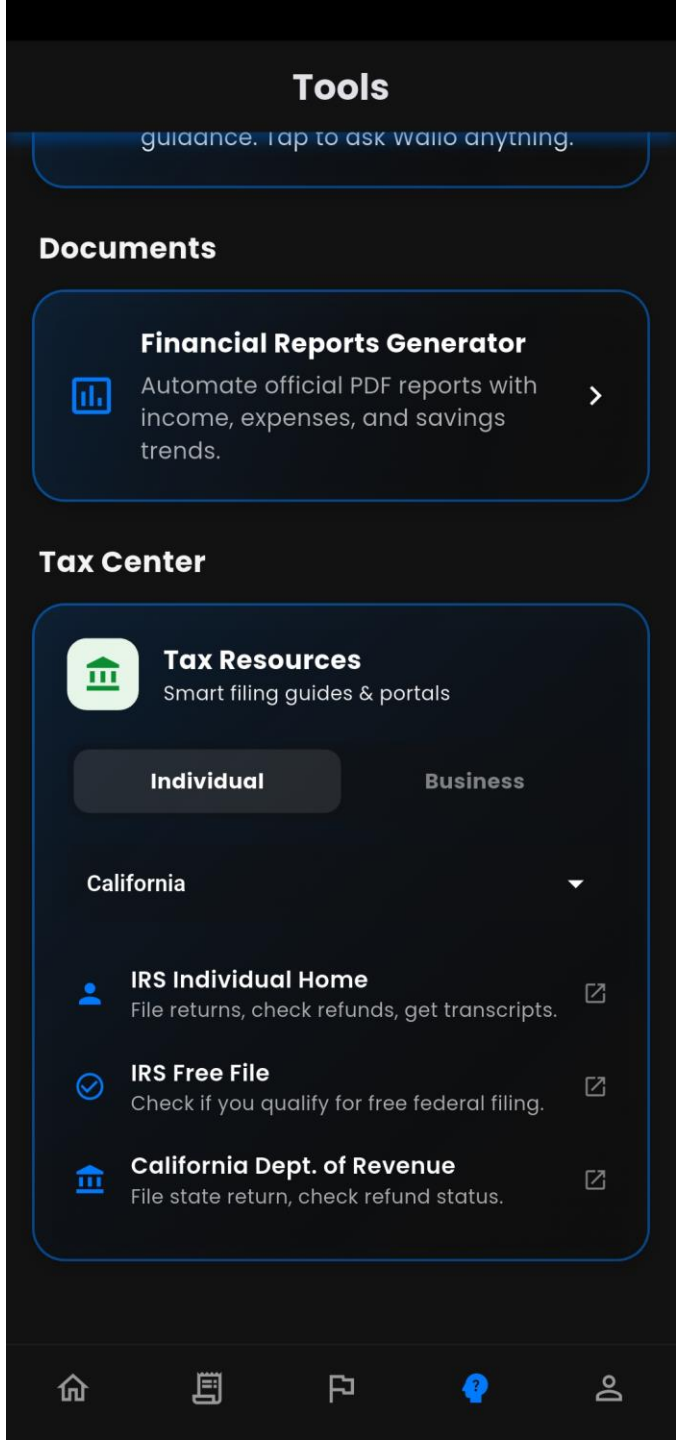
Tools Page :

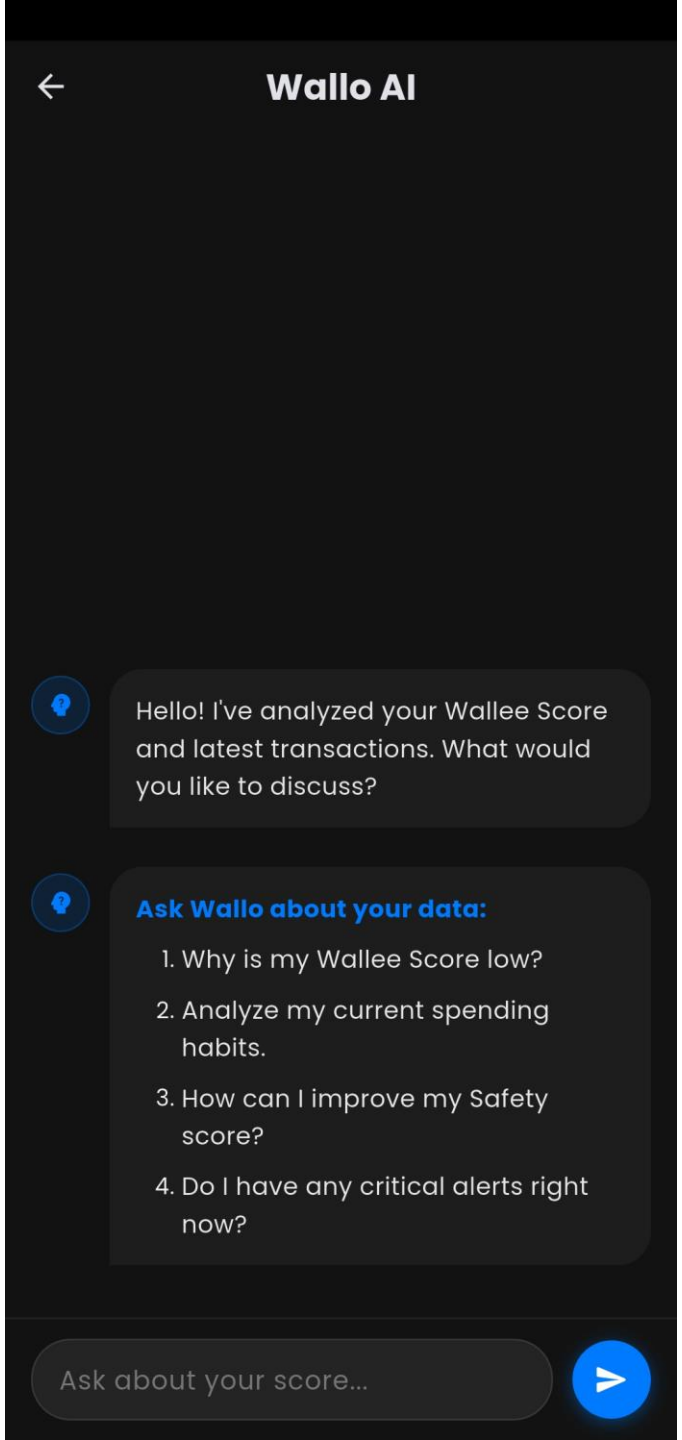
- Wallee Score
- Wallee Zero
- Wallo Assistant



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