



Walle. Milestone 6

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Finalized Layout

Current Pages

Page 1

- Transactions
- Summaries/Trends
- Income/outcome
- Actual spending via bank and credit card transactions
- Week at a glance
- Recurring payments and subscriptions

Page 2

- Create/edit budget categories
- Planned spending/earning
- Calendar

Page 3

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

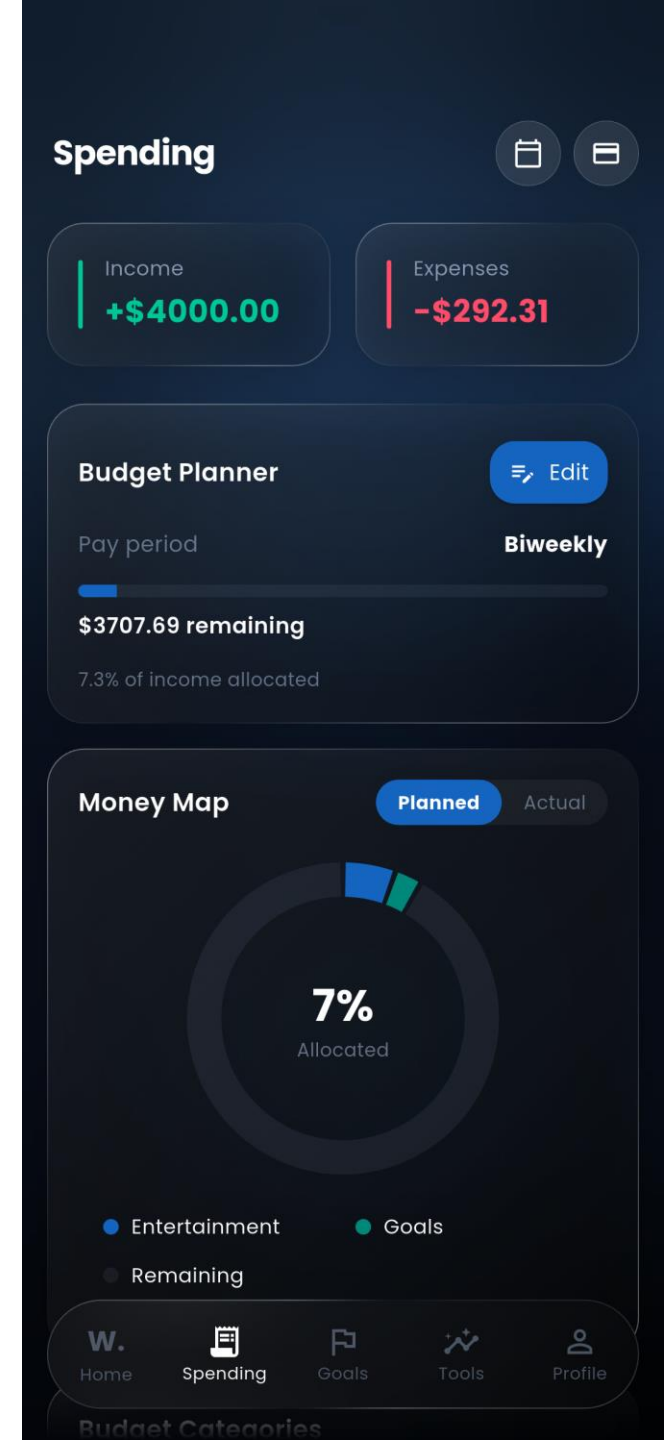
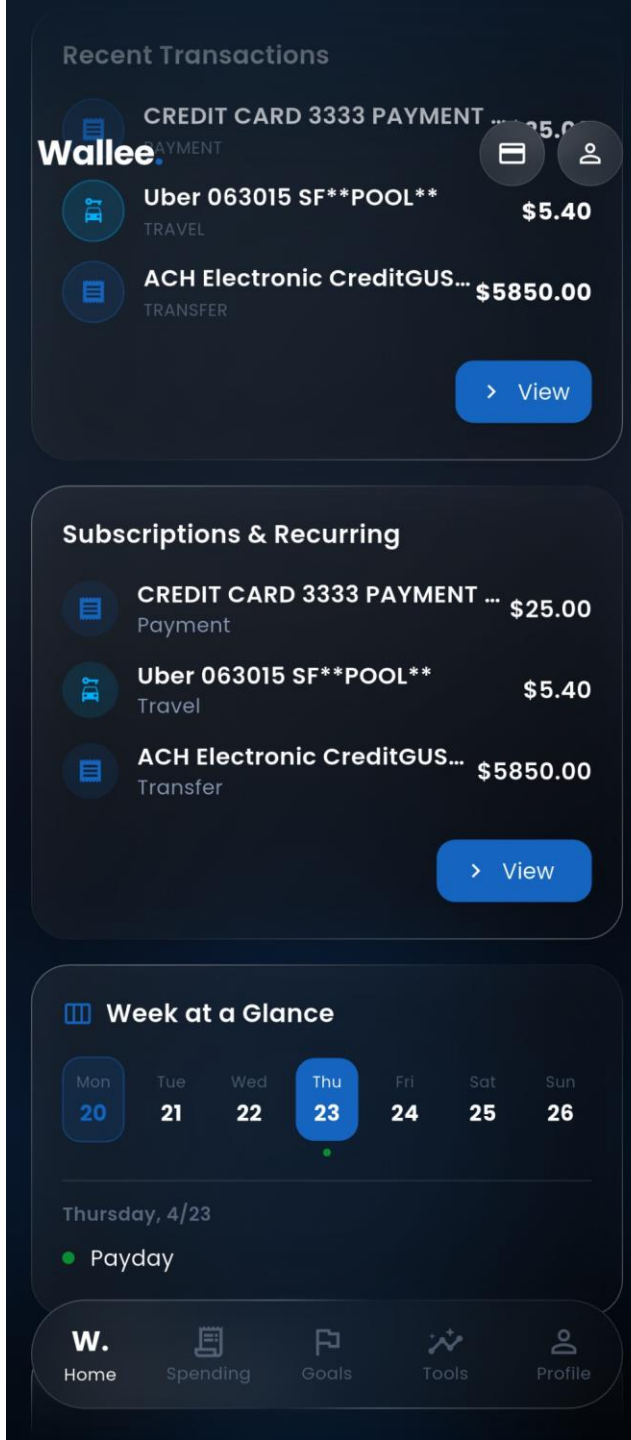
Page 4

- AI chatbot
- Walle score, credit score

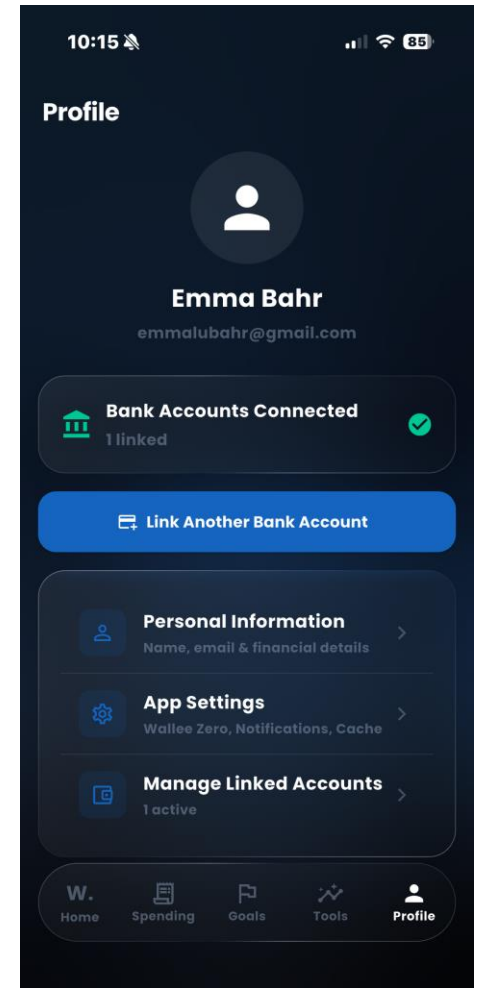
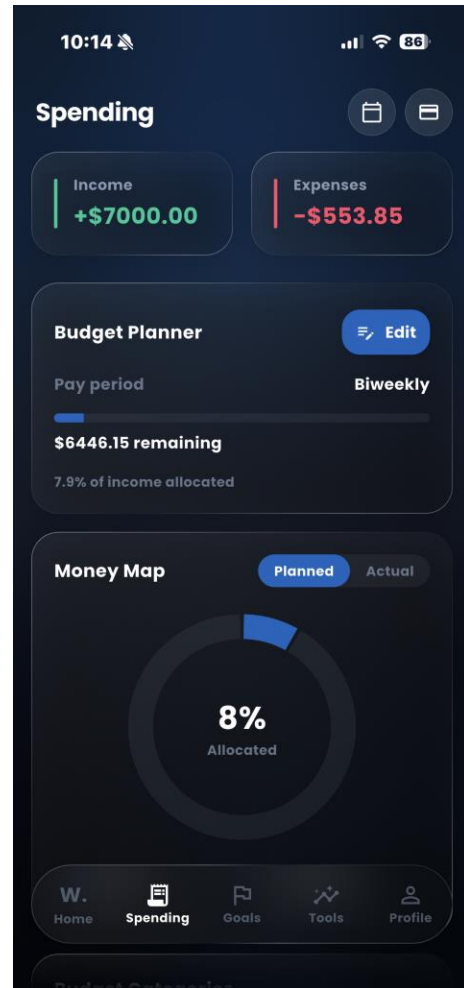
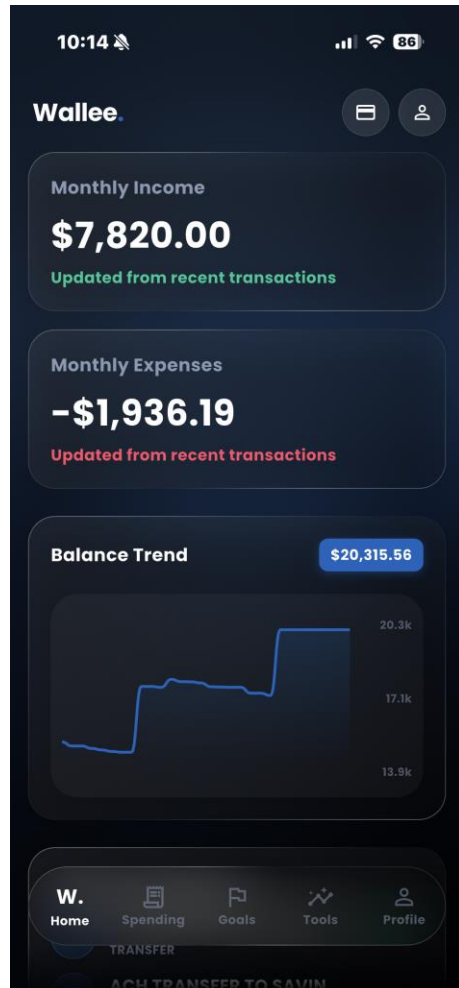
Page 5

- App settings
- Profile information
- Bank connection

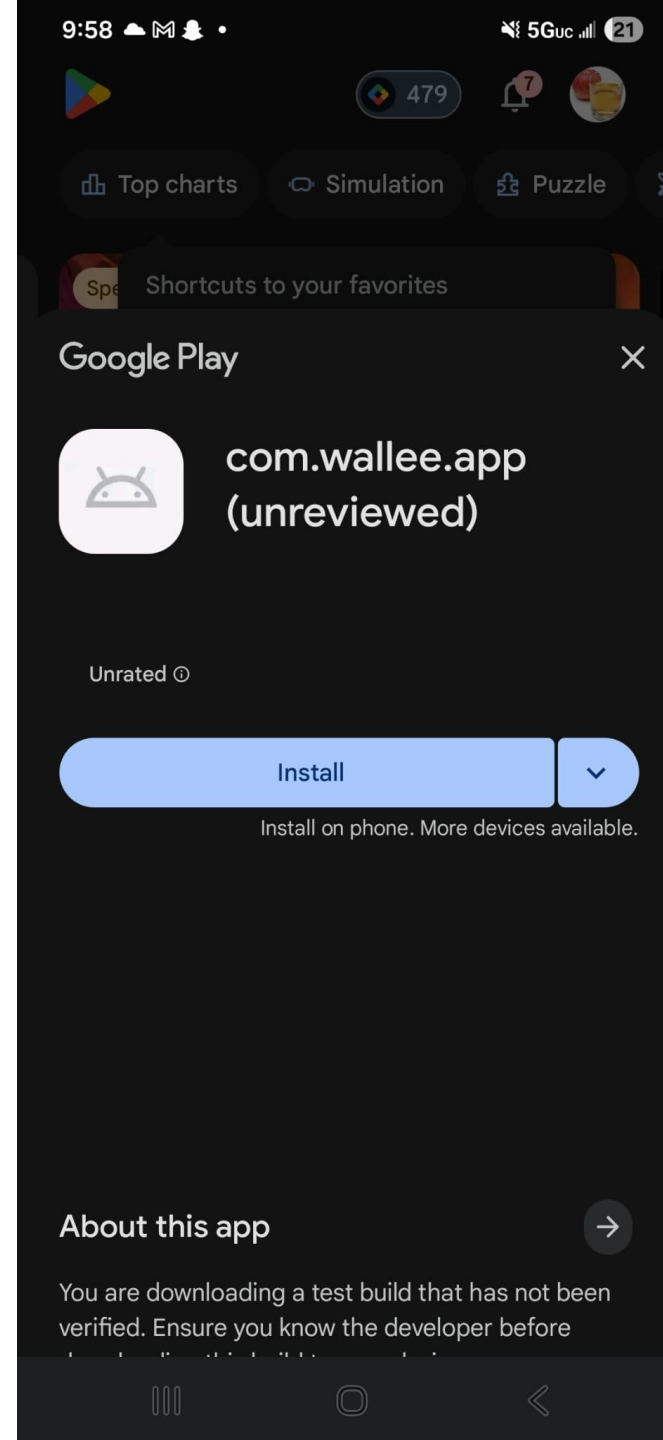
UI Clean-up



IOS UI Version



App up on Android Store



Finalizing Testing and User feedback

Feature	% of Users Selecting in Top 2	Raw Votes (Out of 52)
Visual Cashflow (Sankey / Money Map)	79%	41
Wallee Discipline Score	65%	34
Wallo AI Assistant	39%	20
Automated PDF Reports	14%	7
Tax Hub / Resources	4%	2

Comprehension Level	% of Users	Raw Votes
Instantly clear at a glance	67.30%	35
Understood after a few interactions	25.00%	13
Relied mostly on the text/numbers	5.80%	3
Found the color shifts confusing	1.90%	1

Usability Rating (1-5)	Meaning	% of Users
5-May	Highly Intuitive (Zero friction)	59.60%
5-Apr	Intuitive (Found it quickly)	28.80%
5-Mar	Neutral (Expected behavior)	7.70%
5-Feb	Slight Friction	3.90%
5-Jan	Confusing / Got Lost	0.00%

User / Development Manual

- Includes technical documentation, user feedback/suggestions, and the development processes
- Diagrams
- Test cases

Lessons Learned

- Cross Platform Integration
- API services
- How to implement automated chat bot
- First mobile app
- Differences between IOS and Android systems
- Encryption in a database of sensitive information

Poster



Wallee. Personal Finance App

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Goal and Motivation

Traditional finance apps assume fixed monthly income

Fail users with variable income:

- Students
- Freelancers
- Gig workers

Require constant manual updates

Provide low adaptability to real-life finances

Problem ("Pain Points"):

- Budget breaks when income changes
- No real-time financial insight
- Users lack clear understanding of financial health

Our Goal:

- Create a dynamic, adaptive budgeting system
- Provide real-time, automated financial insights
- Make finance simple, visual, and intelligent

System Design

Architecture

- Frontend: Flutter
- Backend: Node.js (NestJS)
- DB: PostgreSQL (Supabase)
- Banking API: Plaid

Data

- Secure bank sync
- Real-time updates

Backend Modules

- Auth | Transactions | Budget | Plaid
- Analytics
 - Budget recalculation
 - Income detection
 - Health score

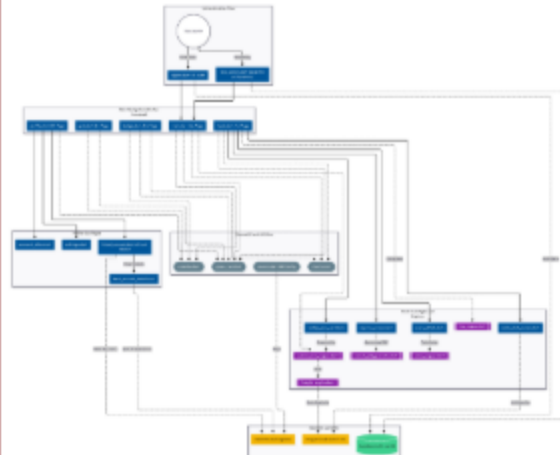
Two-Layer AI

- Wallee Zero: logic
- Wallo: explanation

Methods

- Data Integration:** Plaid API for secure bank syncing, real-time transactions via webhooks, stored in Database
- Backend:** Node.js (NestJS) with Auth (JWT), Transactions, Budget, and Plaid modules.
- Frontend:** Flutter app with dashboard, financial health score, goal tracking, and AI chat.
- Analytics Engine:** In app budget recalculation, income detection, and health scoring.
- AI System:** Two-layer model—Wallee Zero (logic layer) and Wallo (AI interface), with verified outputs only.
- Security:** Supabase PostgreSQL with Row-Level Security (RLS), AES-256 encryption, and JWT authentication.
- Testing:** Focused on accuracy, reliability, performance (latency), and user feedback.

System Architecture Diagram



Mobile App Page Description

Home: High-level financial overview with balance summary, key insights, and important alerts.

Dashboard: Visual spending breakdown with category analysis and trend tracking over time.

Budget: Real-time budget monitoring with adjustable limits, progress tracking, and overspending alerts.

Goals: Create savings goals and track progress with clear milestones and completion status.

Transactions: View, search, and filter recent transactions with categorized spending history.

AI Chat (Wallo): Ask questions and receive personalized insights, budgeting advice, and spending explanations.

Main Dashboard of Mobile App



Task Matrix:

Task	Compl. %	Emma	Matteo	Kyle	Joshua
Finalize testing	95%	24%	24%	23%	24%
Finish the poster for senior design showcase	100%	25%	25%	25%	25%
Finish the technical documentation	100%	25%	25%	25%	25%
Upload the app on the stores	75%	25%	40%	0%	10%
Continue to collect application feedback via users	95%	25%	25%	25%	20%

A logo consisting of a white letter 'W' with a period, centered within a dark blue rounded square. The square has a glowing blue border.

W.

Thank you!
Any Questions?