



Wallee. Milestone 1

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Technical Tools :

Technical Tools	Purpose
Visual Studio	IDE for coding & development
Android Studio	IDE for app testing & debugging
Flutter	App development framework
Plaid	Banking integration tool / API
TrueLayer	Banking integration tool / API
Node.js (TS)	Backend runtime for APIs & webhooks
Python (FastAPI)	Backend runtime for analytics & API
NestJS	API framework & validation

Technical Tools :

Technical Tools	Purpose
PostgreSQL	Database system
Celery + Redis/SQS	Job orchestration / scheduling framework
Cron (optional)	Job scheduling tool
Google Gemini	AI API / assistant tool
spaCy	NLP library
Firebase	API backend / cloud tool
Google Cloud	Hosting / cloud platform
PostgreSQL	Database system

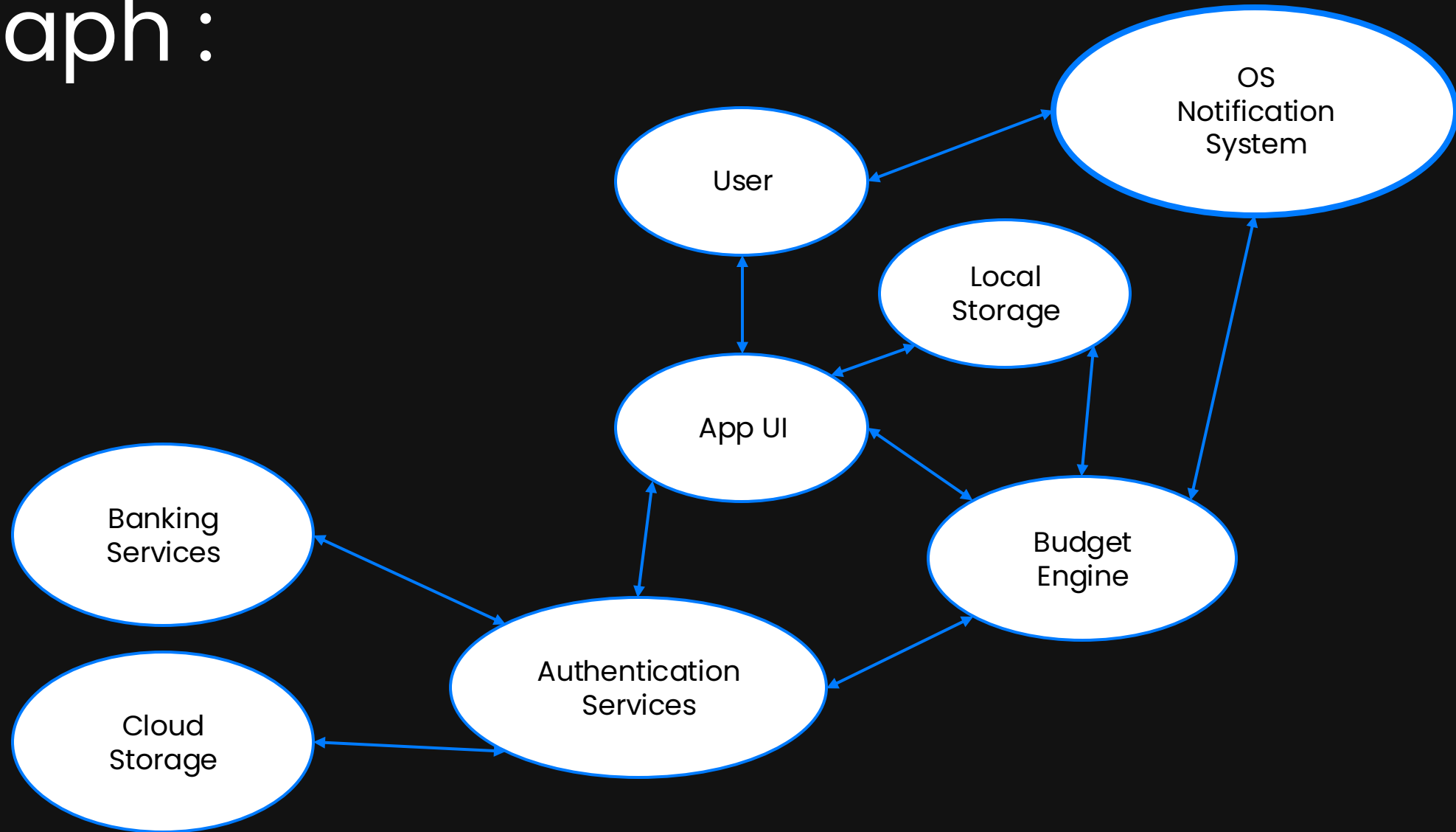
Collaboration Tools :

Collaboration Tools	Purpose
GitHub	Version Control & Code Hosting
Jira	Task & Project Management
WhatsApp	Team Communication
Google Drive	File Storage & Sharing

Task Matrix :

Task	Compl. %	Emma	Matteo	Joshua	Kyle	To do
1 – Compare and select Technical Tools	80%	20%	20%	30%	15%	- Decide on AI implementation to use - Focus on Android version first - iOS version planned if time allows
2 – Mobile Demos	40%	0%	20%	20%	20%	- Back-end development in progress - Build app incrementally - Test each component for functionality and reliability
3 – Resolve Technical Challenges	40%	10%	10%	10%	10%	- API environment setup started - Plan security measures - Decide on data storage solutions - Define handling of banking information
4 – Compare and select Collaboration Tools	100%	40%	20%	20%	20%	- No additional tools planned - Using Jira, GitHub, and Visual Studio for development and management
5 – Requirement Document	100%	40%	20%	20%	20%	Nothing.
6 – Design Document	100%	13%	13%	60%	13%	Nothing.
7 – Test Plan	100%	25%	25%	25%	25%	Nothing.

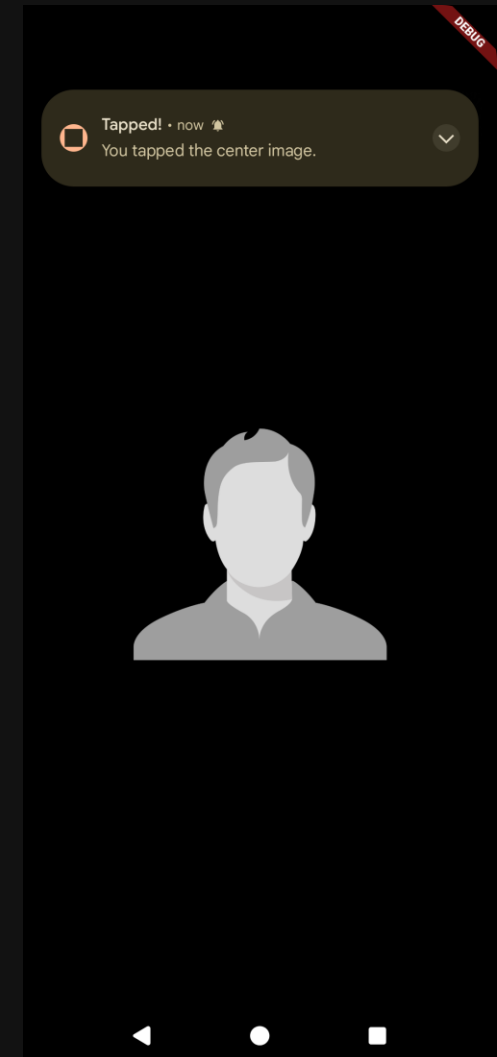
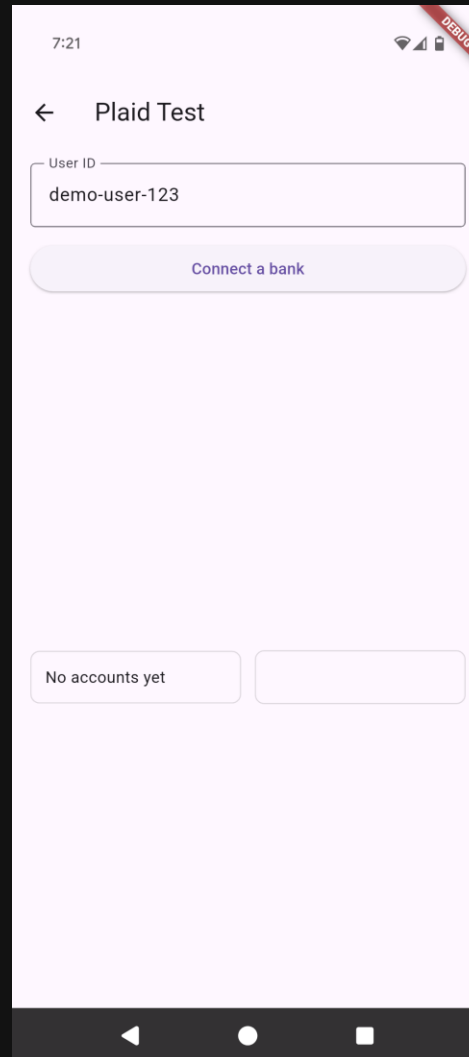
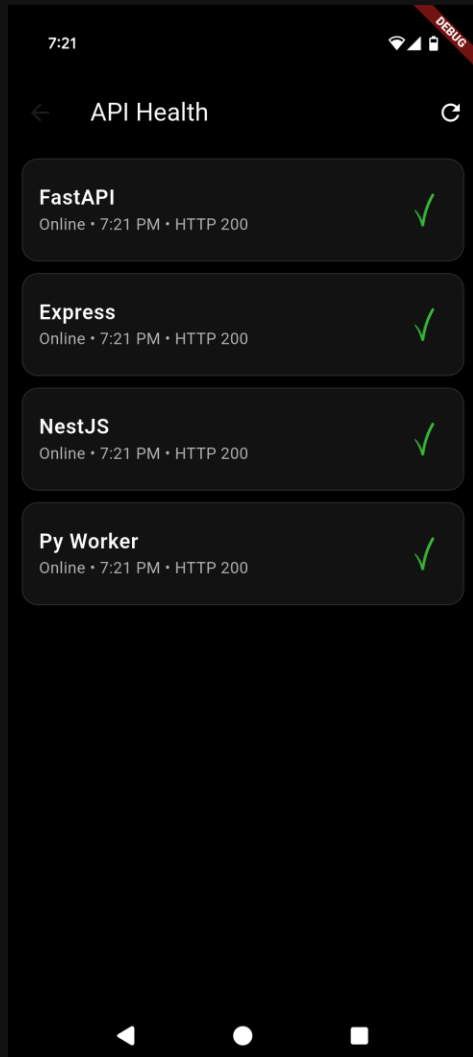
Graph :



Demo :

- **Backend “API Health”:** Monitors the status of FastAPI, Express, NodeJS, and Python Worker to ensure proper functionality.
- **Plaid Integration:** Demonstration using a User ID to connect securely to a bank account.
- **Notifications:** Basic pop-up notification system implemented.
- **Flutter Fun:** Exploration of Flutter features through interactive tap-based programs.
- **App layout:** Layout out what we plan to have our Application Pages to look like.

Backend Demo :



UI Demo :

- https://drive.google.com/file/d/1NrZAvblYs82dnMIghyHg9hAHid4LJQS_/view?usp=sharing

Milestone 2 (Oct. 27th) :

- Create data-base for each user's bank and financial information.
- Begin more evolved design for app UI and navigation flow.
- Implement, test, and demo initial account integration and transaction categorization.
- Implement, test, and demo weekly/bi-weekly budget summaries.
- Implement, test, and demo savings goal creation and tracking.
- Implement, test, and demo initial AI chatbot functionality with sample responses.
- Collect user feedback from early prototype testing.