

**WALLEE. PERSONAL FINANCE APP  
PROGRESS EVALUATION REPORT #5**

## Wallee. Personal Finance App

### 1) Members :

- Emma Bahr : [ebahr2022@my.fit.edu](mailto:ebahr2022@my.fit.edu)
- Matteo Caruso : [mcaruso2023@my.fit.edu](mailto:mcaruso2023@my.fit.edu)
- Joshua Cajuste : [jcajuste2022@my.fit.edu](mailto:jcajuste2022@my.fit.edu)
- Kyle Gibson : [kgibson2022@my.fit.edu](mailto:kgibson2022@my.fit.edu)

2) Faculty Advisor : Dr. Siddhartha Bhattacharyya [sbhattacharyya@fit.edu](mailto:sbhattacharyya@fit.edu)

### 3) Client :

- Doug Gibson - Small Business Owner
- Dr. Siddhartha Bhattacharyya - SWE/CSE Professor & Advisor

### 4) Task Matrix for Milestone 5 :

Task	Compl. %	Emma	Matteo	Kyle	Joshua
Database Architecture for Budget Persistence	90%	60%	0%	20%	20%
Budget and Goal Page Synchronization	90%	10%	20%	70%	70%
Profile and Settings Finalization	90%	33%	33%	33%	0%
Chronological Tracking and Calendar Completion	90%	0%	10%	80%	10%
UI/UX Polish and AI Feedback Loop Completion	75%	0%	100%	0%	0%
Single Sign-On (SSO) Implementation	75%	10%	70%	10%	10%

<b>Comprehensive Quality Assurance (QA) and Beta Testing</b>	20%	25%	25%	25%	25%
<b>Regulatory Compliance and App Store Preparation:</b>	30%	25%	25%	25%	25%
<b>Integrate application into IOS structure</b>	95%	50%	50%	0%	0%

**5) Discussion of each accomplished task (and obstacles) for Milestone 5 :**

- 1. Database Architecture for Budget Persistence:** The team continued working on the backend structure needed to store user budget information across sessions. This included planning and implementing the database logic for budget categories, spending limits, financial goals, etc. one challenge was making sure that the database structure would remain scalable and flexible enough for future app features while still integrating correctly with the current version of the application.
- 2. Budget and Goal Page Synchronization:** Progress was made toward connecting the Budget and Goals pages so that updates made in one section can be reflected in the other. This work involved improving shared data handling and page-to-page consistency. Some obstacles were encountered with state management and ensuring that changes to budget values and goals update accurately without causing conflicts in the UI.
- 3. Profile and Settings Finalization:** The profile and settings pages were further refined during this milestone. The team worked on improving layout organization, user customization options, and overall consistency with the rest of the application’s design. Progress was moderate because some settings-related features still require final integration and testing before they are fully complete.
- 4. Chronological Tracking and Calendar Completion:** Initial work was completed on chronological financial tracking and calendar based organization of user data and goal milestones. This feature is intended to help users view expenses and budgeting activity over time in a more structured way. Development was slowed by the complexity of integrating date-based functionality while maintaining a clean and intuitive interface.

5. **UI/UX Polish and AI Feedback Loop Completion:** The team made significant progress on improving the visual design and user experience of the app. Updates were made to the main interface to create a cleaner, more consistent, and more user-friendly experience. Work also continued on the AI feedback loop concept to support personalized financial guidance, though integrating this feature smoothly into the overall user workflow required additional planning.
6. **Single Sign-On (SSO) Implementation:** Work began on the integration of Single Sign-On to simplify the authentication process and improve account access for the users. This included researching the different authentication methods used by both IOS and Android, testing the implementation of each, and making adjustments as needed.
7. **Comprehensive Quality Assurance (QA) and Beta Testing:** The team began more formal quality assurance and beta testing efforts, by submitting a claim to the Plaid institution to get approval for the final production of Wallee. We have not gathered data as of now, due to the fact that Plaid took too long for the approval, but now that we have the approval, we have gone ahead and sent out the application for testing in real time.
8. **Regulatory Compliance and App Store Preparation:** Preliminary steps were taken toward preparing the app for further submission to app stores. This included getting the approval from Plaid to be able to publish the application using their services. Progress remains to be made as final completion and publishing depends on the completion and stability of the remaining application features.

## 6) Discussion : Contribution of each team member to Milestone 5 :

All team members have actively participated in every phase of the development process thus far. The evaluation and selection of both technical frameworks and collaborative tools were conducted collectively to ensure total team alignment.

- **Emma** : Continued work on implementing the needed tables throughout the database to ensure all data was being stored efficiently and safely. Also continued to monitor the team's progress and keep the team on track to complete the necessary measures for the milestone
- **Matteo** : Finalized the UI for the main with a glass card effect, dynamic background and started applying it to the other pages. Finalized the pdf

reports to include budgets, income, expenses, suspicious transactions and goals. Additionally, the main.dart was reviewed to move some methods into separate files to allow easier access and maintenance.

- **Joshua** : Worked on synchronization between the Budget and Goal pages and contributed to the development of profile and settings-related functionality. Also supported testing and refinement of core app features to improve usability and functionality. Assisted with backend integration and feature development needed to support financial data tracking across the app.
- **Kyle** : Focused primarily on chronological tracking and calendar-related functionality while also contributing to the database architecture for budget persistence. Assisted with backend integration and feature development needed to support financial data tracking across the app.

### 7) Plan for the next Milestone :

Task	Emma	Matteo	Joshua	Kyle
Finalize testing	25%	25%	25%	25%
Finish the poster for senior design showcase	25%	25%	25%	25%
Finish the technical documentation	25%	25%	25%	25%
Upload the app on the stores	25%	25%	25%	25%
Continue to collect application feedback via users	25%	25%	25%	25%

### 8) Discussion of each planned task for Milestone 6 :

- **Finalize testing** : The team will complete final rounds of functional, usability, and compatibility testing to ensure that all core features of the application work as intended. This includes identifying and resolving any remaining bugs, testing edge cases, and confirming that the application fulfills what the user is wanting, performs reliability across supported devices and platforms.
- **Finish the poster** : The team will finalize the showcase poster to clearly present the purpose, features, technical implementation, and outcomes of the Wallee

application. This task will include organizing visuals, summarizing project goals and accomplishments, and ensuring the poster is polished and showcase ready.

- **Finish the technical documentation :** The team will complete all remaining technical documentation for the project, including system architecture details, feature descriptions, implementation summaries, and any necessary deployment or maintenance instructions. This documentation will help clearly communicate the technical work completed throughout the project.
- **Upload the app on the stores :** The team plans to prepare and submit the application for deployment on the Apple App Store and the Android App store platforms. This will include finalizing required assets, reviewing store submission requirements, and ensuring the application meets all necessary technical and compliance requirements for publication.
- **Continue to collect application feedback via users :** The team will continue gathering feedback from users to better understand the strengths and weaknesses of the application. This feedback will be used to identify final improvements, refine the user experience, and ensure that the application remains practical and useful for its intended audience.

**9) Date(s) of meeting(s) with Client during Milestone 4 :**

- **Meeting 1: March 8, 2026**

**10) Client feedback on the current milestone**

- **Mr. Gibson :** Mr. Gibson was pleased with the continued progress of the project and emphasized the importance of maintaining a simple, clean, and practical user experience for everyday budgeting and financial tracking. He encouraged the team to continue focusing on usability and clarity as the project approaches completion.
- **Dr. Siddhartha Bhattacharyya :** see Faculty Advisor Feedback below.

**11) Date(s) of meeting(s) with Faculty Advisor during Milestone 4 :**

- **Meeting 1: March 19, 2026**

**12) Faculty Advisor feedback on each task for Milestone 4 :**

**Faculty Advisor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### 13) Evaluation by Faculty Advisor

- **Faculty Advisor** : detach and return this page to Dr. Chan (HC 209) or email the scores to [pkc@cs.fit.edu](mailto:pkc@cs.fit.edu).
- **Score (0-10) for each member** : circle a score (or circle two adjacent scores for .25 or write down a real number between 0 and 10).

Emma	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10
Matteo	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10
Joshua	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10
Kyle	0	1	2	3	4	5	5.5	6	6.5	7	7.5	8	8.5	9	9.5	10

**Faculty Advisor Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_