**SmartFin Project Plan**

Team Alpha

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# Introduction

## **Scope and purpose of document (FVJ)**

*In one paragraph, describe what is contained in this document and the general purpose of a Project Plan. In a separate paragraph, provide an overview of your application.  
  
This document contains the project plan for SmartFin, outlining our development approach, system requirements, team structure, and implementation timeline. The general purpose of a Project Plan is to define project objectives, establish deliverables, allocate resources, and provide a framework for tracking progress throughout development. It serves as a roadmap that keeps all team members aligned on goals and responsibilities.*

*SmartFin is a financial management tool catered to students just beginning their financial literacy journey. The app aims to simplify personal money management by providing easy-to-use tools and educational resources designed specifically for young adults facing their first real financial decisions. The purpose of this project plan is to lay out more details in our planning, system scope, structure and capabilities.*

# System Scope

## **Problem/Opportunity Description**

*In paragraphs 1-2, describe what the goal is of your project. What problem are you trying to solve or what opportunity are you trying to take advantage of?  
  
The goal of this project is to create an accessible financial management solution for students who are just starting to learn about personal finance. We're trying to solve the problem of financial illiteracy among young people who are dealing with unprecedented economic challenges. Young people in a time of all-time economic disparity in comparison to their older counterparts. The federal minimum wage hasn't grown since 2008, while costs of education, housing, and basic living expenses continue to rise.*

*This creates an opportunity to build a tool that not only helps students manage their limited money better but also teaches them essential financial skills they'll need throughout their lives. Students need practical, straightforward guidance that cut through complex financial jargon and gives them actionable steps to improve their financial situation.*

## **Anticipated Business/Personal Benefits**

*In one paragraph, describe what your company will hope to achieve by creating this application. In another paragraph, describe the benefits to the users.  
  
Our company hopes to achieve market entry into the growing fintech education space by targeting an underserved demographic. By focusing on students, we can build a loyal user base that may continue using our platform after graduation. This project also gives us valuable experience in user-centered design and financial technology development.*

*The benefits to users include better control over their spending, improved budgeting skills, and increased confidence in handling money. Students will learn practical financial management while using tools that make sense for their lifestyle and income level. The app will help reduce financial stress and build habits that lead to long-term financial wellness.*

## **System Capabilities**

*List of major functions of the system. These are taken from the Project Proposal and expanded upon.*

1. *Earnings and Spendings Tracker*
2. *Calendar View*
3. *Analysis*
4. *OCR / Automated Input*
5. *Subscription Tracker*
6. *Savings Goal*

## **System Context(KP)**

*Using Visio or draw.io, create a System Context Diagram which depicts the primary users of the system and the information that is exchanged between them and the system.*

*Submit the System Context file as a separate file from your plan document*

# **Schedule(VS)**

*Using MS Project/Project Libre, create a Work Breakdown Structure Chart, identifying all tasks required to complete this team project, dependencies and staff resources for each of the tasks. Include phases to group and organize your tasks and include milestones.*

*Submit the schedule file as a separate file from your plan document.*

# **Staff Organization (FVJ)**

*How is your team organized; who is the team leader and how are you organized?*Our team is organized with Favio mostly leading most discussions while leveraging Discord to meet with our teammates. We use the pinned feature to keep track of important details. Most discussions are only relevant for week-by-week tasks, so it's often unnecessary to have categorical filing. The Product Manager position will be rotated for every 1/3rd of the project to give everyone leadership experience and keep fresh perspectives on the project direction.

# **Tracking and control mechanisms**

*Describe how you plan to track changes to this and techniques that you will use to monitor the progress of the various tasks. For example, do you have regular meetings, how do you use groupware to keep the documents in-synch and current, etc?  
  
We plan to track changes and monitor progress primarily through GitHub and Discord coordination. We are currently using GitHub and rely mainly on our repository to know what version of the project we are on. All feature additions, and project milestones get tracked through GitHub's tools like issues and pull requests.*

*We use regular Discord meetings for status updates and task coordination, with pinned messages keeping everyone informed about important deadlines and decisions. This combination of GitHub for technical tracking and Discord for team communication lets us stay organized without overcomplicating our workflow. Progress gets monitored through code reviews, milestone check-ins, and feature completion updates in our repository.*