

# Monetize.ai - CITS3403 Project

University of Western Australia, Australia









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## Task Schedule

### Tasks

 Date	Aa Task name	 Status	 Assigned	 Note	 Assignee	 Due	 Parent-task	 Sub-tasks
@March 17, 2023	<u>Team formed</u>	Done	Henry Ivan Long					
@March 20, 2023	<u>Idea confirmed, first meeting</u>	Done	Henry Ivan Long	Name: <u>Monetize.ai</u> , team regulation, code convention and guidelines, pages elements, pages allocation to members				
@March 27, 2023	<u>third meeting at school about github, fourth meeting online</u>	Done	Henry Ivan Long	design templates on Figma				
@March 31, 2023	<u>training on Figma design</u>	Done	Henry Ivan Long	Henry provides training on website design using Figma				
@April 6, 2023	<u>deadline for designs</u>	Done	Henry Ivan Long	5th meeting				
@April 12, 2023	<u>deadline for html and css</u>	Done	Henry Ivan Long	Long and Ivan failed to design interface for mobile devices				
@April 17, 2023	<u>Implement flask chatGPT api</u>	Done	Henry	Testing GPT-3.5 api				

 Date	Aa Task name	 Status	 Assigned	 Note	 Assignee	 Due	 Parent-task	 Sub-tasks
@April 17, 2023	<u>Yahoo finance api</u>	Done	Long	Testing yFinance api				
@April 19, 2023	<u>finish changing file structure, use jinja template for html, change js dom style to jquery style.</u>	Done	Henry Ivan Long	Refer to main branch for example and ask question on groupchat (Long failed to deliver the merging by deadline)				
@April 19, 2023	<u>bot has access to short term memory in a session by using context data</u>	Done	Henry	Bot response more accurate and relevant by providing context data as background information				
@April 22, 2023	<u>Sqlite for user info and messages</u>	Done	Ivan	Create SQLite database and some tables for storing user info, portfolio and messages				
@April 22, 2023	<u>able to make predefined query and receive response in chat screen</u>	Done	Henry Long	Bot able to answer to a predefined message from user provide stock data input and output the crawled data from yFinance				
@April 24, 2023	<u>receive user messages by gpt and return processed response to gpt</u>	Done	Henry Long	Add stock data from yFinance to gpt input prompt, modified bot output				
@April 26, 2023	<u>Database model created</u>	Done	Henry Ivan					
@April 29, 2023	<u>connect to sqlite database to store user information and chat messages</u>	Done	Henry Ivan					
@April 29, 2023	<u>database setup with function for easy access</u>	Done	Ivan	Create functions for update and get data from database				

 Date	Aa Task name	 Status	 Assigned	 Note	 Assignee	 Due	 Parent-task	 Sub-tasks
@April 30, 2023	<u>Login feature using Flask_wtf validation</u>	Done	Long					
@April 30, 2023	<u>store user session as cookie</u>	Done	Long					
@May 1, 2023	<u>Settings display user's info</u>	Done	Long					
@May 3, 2023	<u>update or delete user's stock using message</u>	Done	Henry	user can update or delete stocks in portfolio using messages				
@May 3, 2023	<u>Welcome message</u>	Done	Henry	Bot displays welcome message when login				
@May 4, 2023	<u>display portfolio based on each user's info</u>	Done	Henry	Portfolio now displays based on user in current session				
@May 4, 2023	<u>load previous message in a session for a user</u>	Done	Henry	Load few recent messages for the current user				
@May 4, 2023	<u>Build README file with installation steps</u>	Done	Henry					
@May 4, 2023	<u>input user informaion for bot as background context</u>	Done	Henry	bot is given user's data as background knowledge				
@May 4, 2023	<u>stock's recommendation from api</u>	Done	Long	Bot able to provide recommendation on stocks' current position based on reliable sources				
@May 5, 2023	<u>debug logging feature</u>	Done	Henry					
@May 5, 2023	<u>Add favicon img</u>	Done	Henry					
@May 15, 2023	<u>Hashing password for security.</u>	Done	Henry					

 Date	Aa Task name	 Status	 Assigned	 Note	 Assignee	 Due	 Parent-task	 Sub-tasks
@May 15, 2023	<u>Change risk tolerance using message</u>	Done	Henry					
@May 15, 2023	<u>rebalance portfolio feature</u>	Done	Henry					
@May 19, 2023	<u>make sure render on mobile devices</u>	Done	Henry Ivan Long					
@May 19, 2023	<u>Manual in-app</u>	Done	Henry Long					
@May 20, 2023	<u>reset context data using keyword "reset"</u>	Done	Henry					
@May 20, 2023	<u>stock price target</u>	Done	Henry	user can receive stock price target from chatbot				
@May 20, 2023	<u>Content for Help center and About Us</u>	Done	Henry Long					
@May 21, 2023	<u>reset portfolio data using message</u>	Done	Henry					
@May 21, 2023	<u>pass website validator</u>	Done	Henry Ivan Long					
@May 21, 2023	<u>search messages in History page</u>	Done	Ivan	User able to search for conversations using keywords				
@May 21, 2023	<u>Prepare submission files</u>	Done	Henry Ivan Long					
@May 21, 2023	<u>Testing units and selenium test</u>	Done	Henry Ivan Long					
@May 22, 2023	<u>Submission day.</u>	Not Started						
@May 26, 2023 1:00 PM	<u>Presentation day.</u>	Not Started						

## Meeting Minutes 1 - 20/03

- Name: Monetize.ai
- Project idea discussion
- Team regulations
- Pages elements sketched
- Pages design allocation to members
- Code convention and guidelines

### Git - steps to follow when start coding

- git pull
  - (if your branch is too far behind main or your parent working branch) git merge
  - coding here
  - git commit
  - git push

### Python

- **Module name:** snake\_case
- **Package name:** snake\_case
- **Class name:** UpperCamelCase
- **Method name:** snake\_case
- **Exception name:** UpperCamelCase
- **Function name:** snake\_case
- **Parameter name:** snake\_case
- **Local variable name:** snake\_case

### filename

Python filenames must have a `.py` extension and must not contain dashes ( - ).

### Meeting Minutes 2 - 27/03

- Design ideas discussion:
  - choosing theme
  - components and
  - features required

Henry: Chat-screen and Portfolio design

Long: Login, Sign Up and Settings design

Ivan: History, About Us, Manual design

### Meeting Minutes 3 - 31/03

- Henry provided training on designing frontend using Figma
- Start designing pages using Figma for desktop and mobile interface

### **Meeting Minutes 4 - 06/04**

- Deadline for pages design on Figma
- Writing html and css for the design from Figma

### **Meeting Minutes 5 - 12/04:**

- Deadline for html and css design
- Finish creating the HTML and CSS for Login, Sign Up and Setting pages.

Long: working on Finance of Counting profits using yFinance.

Henry: Implement gpt-3.5 api call

Ivan: working on create sqlite db and functions

### **Meeting Minutes 6 - 17/04**

- Changing the HTML to Jinja style and Updates all the files to different folders in a good format of jQuery for Flask

Henry: provide bot with a way to remember previous conversation context

Long: testing on the updated values of yFinance, for Tickers, Company Names, Start Dates, End Dates, Profits

Ivan: message history, search messages

### **Meeting Minutes 7 - 19/04**

Henry: merging code and documenting

Ivan: SQLite db successful storing information for stocks

Long: user can receive stock information from yFinance using template message

### **Meeting Minutes 8 - 22/04**

Henry:

- merging code and combine gpt-3.5 response with yFinance information about the stock
- User can receive stock information by normal chat message to chatbot

Long: extract Users Inputs as different Values using GPTS, and fetch those data through yFinance counting profit functions and fetch over GPT again to create responses for the users

Ivan: continue on search messages

### **Meeting Minutes 9 - 24/04**

Henry:

- Update or delete stock in portfolio using message
- Welcome message in chat screen

Long: finalise the GPTS and yFinance functions and Update on Queries so users to be able to ask question specifically on counting on their profits of certain share of stocks

Ivan:

- Created and finalise relational database schema

- Adjusted current database models

## Meeting Minutes 10 - 26/04

Henry:

- Display portfolio based on each user's data using cookie
- Load recent messages for new session

Long: start creating Validations on the Login and Sign Up Features using Flask WTF and Update on HTML

Ivan:

- Able to store user's information and stocks to DB
- Made functions for easy using DB

## Meeting Minutes 11 - 29/04

Henry:

- Build README file with installation steps
- Input user's personal and stocks information for bot enquiries
- debug logging feature

Long:

- Continue working on the Login Features
- Update the Login Users to Cookies sessions
- Update the Values of the Users to the setting page

Ivan: continue working on searching feature

## Meeting Minutes 11 - 14/05

- Fix error related to chatbot query and database
- make sure mobile interface works
- Validate html and css files
- Unittest and selenium test

Henry:

- Implement hashing for password
- Change risk tolerance by message
- Implement suggesting rebalancing portfolio feature
- Price target for stocks
- reset portfolio using messages

Long: update content for Manual and About Us page

Ivan:

- continue working on search feature for History page
- Redesign for History, Manual and About Us page for mobile interface

