

SW Engineering CSC648-848-01 Summer 2025

Limóney (Financial Budgeting Webapp)

Team 02

Milestone 3

7/31/25

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Milestone 3	Version 1	7/22/25
Milestone 2	Version 2	7/10/25
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Data Definitions

Core User & Identity Entities

1. User

Represents any person registered in the system. Each user has an account profile and can be either a standard user or an administrator. Used for login, personalization, and access control. Email is the primary identifier, and all actions in the system are associated with a user.

Financial Management Entities

1. Account

Represents a user's financial container (checking, savings, or credit). All financial activities, such as transactions, subscriptions, and budgets, are linked to specific accounts. Accounts maintain running balances and support multi-bank integration.

2. Transaction

Represents a monetary event tied to an account (like income, expense, or fund transfer). Transactions are categorized for budgeting and reporting purposes and are timestamped to track financial behavior over time.

3. Receipt

Stores digital copies of receipts (image files) linked to individual transactions. Used for personal finance tracking, tax documentation, and reimbursement validation.

4. ReimbursementRequest

Represents a formal request to be reimbursed for a transaction, often reviewed by an administrator. Tracks status and supports workflows such as pending, approved, or rejected.

5. Budget

Defines spending limits for an account over a specified period (weekly, monthly, etc.). Used to monitor and enforce financial discipline and to trigger alerts when limits are approached or exceeded.

6. Subscription

Represents recurring payments (like Netflix, utilities) tied to an account. Helps users track recurring expenses, manage due dates, and receive reminders before payments occur.

Task & Reward System

1. Task

Represents actionable to-dos or habits assigned to users (like weekly budget check-ins). Tasks can be recurring or one-time, and their completion status contributes to user engagement and reward incentives.

2. Reward

Represents points or incentives earned by users for completing tasks, staying within budget, or interacting with system features. Can be redeemed or used to motivate positive financial behavior.

Communication & Logging Entities

1. Notification

Delivers system-generated messages to users, including reminders (like budget deadline), alerts (like low balance), or informational updates (like task completion). Time-stamped and categorized for clarity.

2. LemonAidLogs

Logs each interaction between a user and the LemonAid AI assistant. Each log includes the AI's response text and a timestamp. User ratings and comments are now handled in the separate Reviews entity to support better modularity and review flexibility.

3. Reviews

Captures user feedback in the form of ratings and messages. Reviews are linked either to LemonAid logs (chatbot type) or general user experience (user_experiace type). Supports analytics and system improvement initiatives.

Support & Admin Interaction

1. SupportTicket

Represents a help or issue report submitted by a user. Includes the subject, detailed message, ticket status, and any admin responses. Used to facilitate two-way support communication.

Integration & Association

1. AccountBankLink

Represents the relationship between internal accounts and external banks. Enables multi-bank integration and prepares the system for open banking API compatibility. Supports syncing and aggregation of transaction data.

User Privileges and Registration

- Standard users can:**

- Register, log in, and manage their accounts, tasks, budgets, and AI interactions.
 - View only their own data.

- Admins can:**

- View user accounts, support tickets, and analytics logs.
 - Respond to support tickets and manage platform-level settings.

- Registration includes:** name, email, and password, with email verification planned in a future milestone

Prioritized High-Level Functional Requirements

Priority 1

1. User

- 1.1. A user shall be able to create an account.
- 1.2. A user shall be able to securely log in to their account.
- 1.3. A user shall be able to recover or reset their password.
- 1.7. A user shall be associated with one or more accounts.
- 1.10. A user shall be able to view and edit their financial data history.

2. Account

- 2.1. An account shall store income entries for a user.
- 2.2. An account shall store expense entries for a user.
- 2.3. An account shall belong to one and only one user.
- 2.4. An account shall track a balance value.
- 2.5. An account may be connected to one or more banks.
- 2.7. An account shall have a transaction history log.

3. Bank

- 3.1. A bank shall be linked to one or more user accounts.
- 3.2. A bank shall provide transaction data to the system.

4. Transaction

- 4.1. A transaction shall be classified as income or expense.
- 4.2. A transaction shall belong to exactly one account.
- 4.3. A transaction may be manually entered or synced from a bank.
- 4.4. A transaction shall be categorizable by the user or AI.

5. Subscription

5.1. A subscription shall be tied to a recurring transaction.

6. Budget

6.1. A budget shall be created for one or more spending categories.

6.3. A budget shall allow setting and tracking of goals.

9. AI Assistant (LemonAid)

9.6. The system shall store AI responses and user feedback in LemonAidLogs.

10. Notification System

10.2. The system shall deliver daily, weekly, or monthly financial summaries.

13. ReimbursementRequest

13.1. A reimbursement request may be associated with one transaction.

13.2. A reimbursement request shall have a status: pending, approved, or rejected.

15. AccountBankLink

15.1. An account may be linked to one or more banks.

15.2. A bank may be linked to one or more accounts via AccountBankLink.

16. Bank

16.1. A bank shall store balance and credit data for users.

16.2. A bank shall provide transaction data to the system.

16.3. A bank shall be viewable in the user's linked accounts dashboard.

17. Reviews

17.1. A review shall be optionally submitted by a registered user.

17.2. A review shall include a rating value (1 to 5) and an optional message.

17.3. A review shall be timestamped at the time of creation.

17.4. A review may be linked to one and only one LemonAidLog.

17.5. A review may exist independently as general user feedback not tied to any LemonAidLog.

17.6. A LemonAidLog shall be associated with at most one review.

17.7. A review shall be categorized by type (chatbot or user_experiace).

Priority 2

1. User

1.4. A user shall be able to select between manual or bank-linked financial tracking.

1.8. A user shall be classified as a customer, premium, tester, or administrator.

1.15. A user that is an administrator shall be able to respond to support tickets.

1.16. A user that is administrator shall be able to access user account data.

2. Account

2.6. An account shall be able to categorize transactions.

2.8. An account shall support spending limits and alerts.

2.9. An account shall track subscriptions and bill payments.

2.10. An account shall be able to forecast end-of-month balances.

3. Bank

3.3. A bank shall store balance and credit data for users.

4. Transaction

4.7. A transaction may be associated with a reimbursement request.

5. Subscription

5.2. A subscription shall be viewable in a centralized dashboard.

5.3. A subscription shall trigger periodic spending alerts.

6. Budget

6.2. A budget shall belong to one and only one account.

6.4. A budget shall support notifications based on spending limits.

6.5. A budget shall be able to generate monthly recaps.

10. Notification System

10.3. The system shall notify users of upcoming bills or subscriptions.

10.4. The system shall notify users of overspending events.

10.5. The system shall alert users when savings goals are off track.

Priority 3

1. User

1.5. A user shall be able to customize their interface (like dark mode).

1.6. A user shall be able to receive AI-generated financial guidance.

1.9. A user shall be able to interact with the AI chatbot for financial assistance.

1.11. A user that is an administrator shall be able to suspend or maintain site operations.

1.12. A user that is an administrator shall be able to view flagged transactions.

1.13. A user that is an administrator shall be able to suspend or maintain site operations.

1.14. A user that is an administrator shall be able to view flagged transactions.

4. Transaction

4.5. A transaction shall be editable and deletable by the user.

4.6. A transaction shall be linked to one or more receipts.

7. Task

7.1. A task shall be assigned to a user account.

7.2. A task shall be marked completed upon user action.

7.3. A task shall be of one type: savings, investing, setup, admin, testing.

7.4. A recommended task shall be generated based on user activity or AI analysis.

8. Reward System

- 8.1. A user shall be able to earn rewards for completing tasks.
- 8.2. A user shall be able to redeem rewards through the system.
- 8.3. A user shall be assigned a level based on completed actions.
- 8.4. A user shall be able to view rankings if competitive mode is enabled.

9. AI Assistant (LemonAid)

- 9.1. The AI assistant shall analyze user transactions and spending habits.
- 9.2. The AI assistant shall simulate different financial scenarios for planning.
- 9.3. The AI assistant shall forecast recurring charges and balances.
- 9.4. The AI assistant shall recommend saving opportunities and budget changes.
- 9.5. The AI assistant shall provide suggestions for uncategorized transactions.

10. Notification System

- 10.1. The system shall send reminders for logging receipts.

11. Administrator

- 11.5. An administrator shall be able to manage and moderate platform use.

12. Receipt

- 12.1. A receipt may be linked to a transaction.
- 12.2. A receipt may be stored as a binary image (JPG/PNG, max 5MB).P2
- 12.3. A receipt shall include the upload date.
- 12.4. The system shall send reminders for users to upload receipts.
- 12.5. An administrator shall be able to access user account data.

13. ReimbursementRequest

- 13.3. A reimbursement request shall be visible to administrators for review.

14. SupportTicket

- 14.1. A support ticket shall be created by a user.
- 14.2. A support ticket shall include a subject, message, and status.
- 14.3. A support ticket shall be responded to by an administrator.
- 14.4. A support ticket shall track the admin response and resolution state.

15. AccountBankLink

- 15.3. The system shall sync data from bank APIs using these links.

17. Reviews

- 17.8. A review shall be viewable by system administrators for quality assurance and analysis.
 - 17.9. A review shall be stored securely and associated with the submitting user, if applicable.
 - 17.10. A review shall support analytics use cases for measuring system effectiveness and user satisfaction.
-

UI/UX Wireframes

The wireframes illustrate a user flow for managing credit card payments:

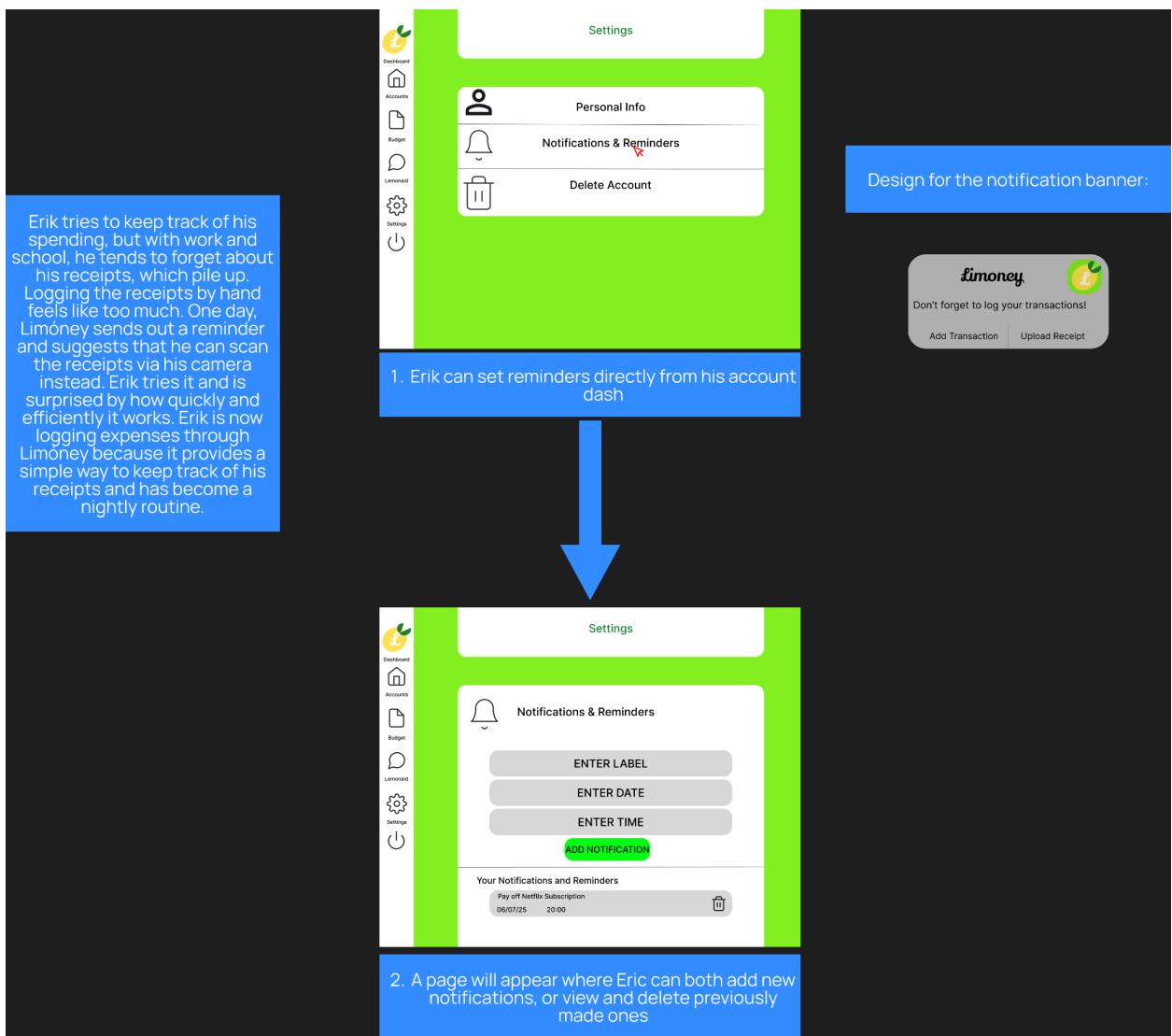
- Step 1:** The user navigates to the "Accounts" screen, where they can view their savings, checking, investment, and loan accounts. A blue arrow points from the sidebar menu to the "Accounts" section.
- Step 2:** The user selects the "Credit Card" account from the dropdown menu. A red arrow highlights the "Credit Card" item in the dropdown.
- Step 3:** The user views the "Transactions" screen for their credit card. The screen shows a transaction history with three entries: a \$35.00 charge to Target, a \$98.00 charge to Nordstrom, and a \$27.00 charge to Amazon. Each transaction has a "Pay Off" button. A blue box contains the text: "1. Eric goes to a specific credit card transaction screen. The pay off buttons on each transaction indicate which expense hasn't been paid off yet."
- Step 4:** The user performs a payment, marking one transaction as paid. The transaction history now shows the \$35.00 charge to Target as "Paid". A blue box contains the text: "2. Next, Eric pays off one expense on the transaction gets marked as "paid". Then the credit card balance is updated."

2. Tracking Multiple Reimbursements:

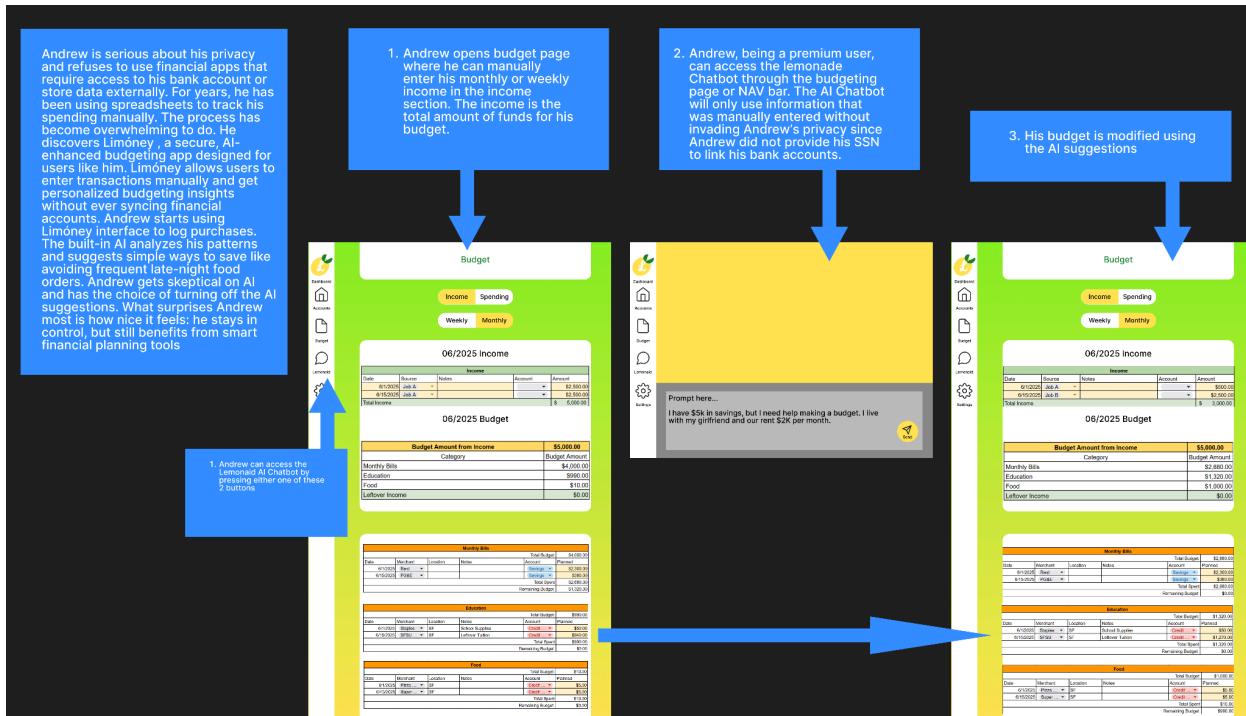
The wireframes illustrate a user flow for tracking multiple reimbursements:

- Step 1:** Student A goes to the specific expense for the restaurant bill and clicks on the drop down menu and select "Reimbursement request". He also receives a notification for large bills over \$100. He has prompted to split the bill.
- Step 2:** Student A notes down how much money each of his friends owe him and sends them reimbursement requests.
- Step 3:** Student A notes down how much money each of his friends owe him and sends them reimbursement requests.

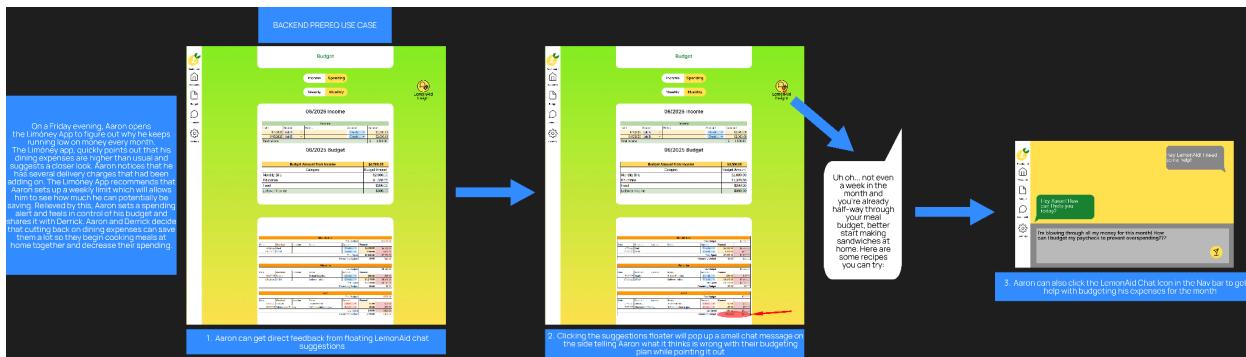
3. Log Transaction:



4. Security Concern:



5. Receive AI Suggestions:



6. Currency Exchange:

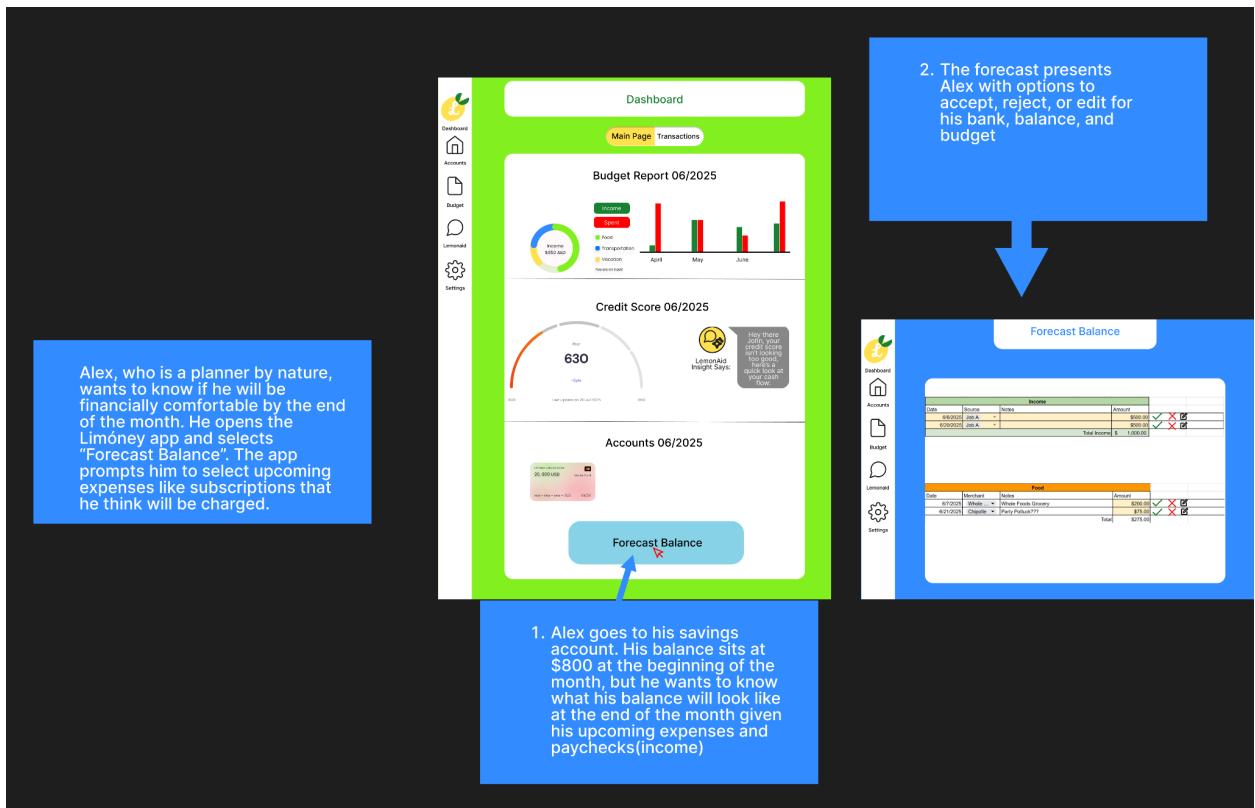


7. Tracking Ongoing Expenses:

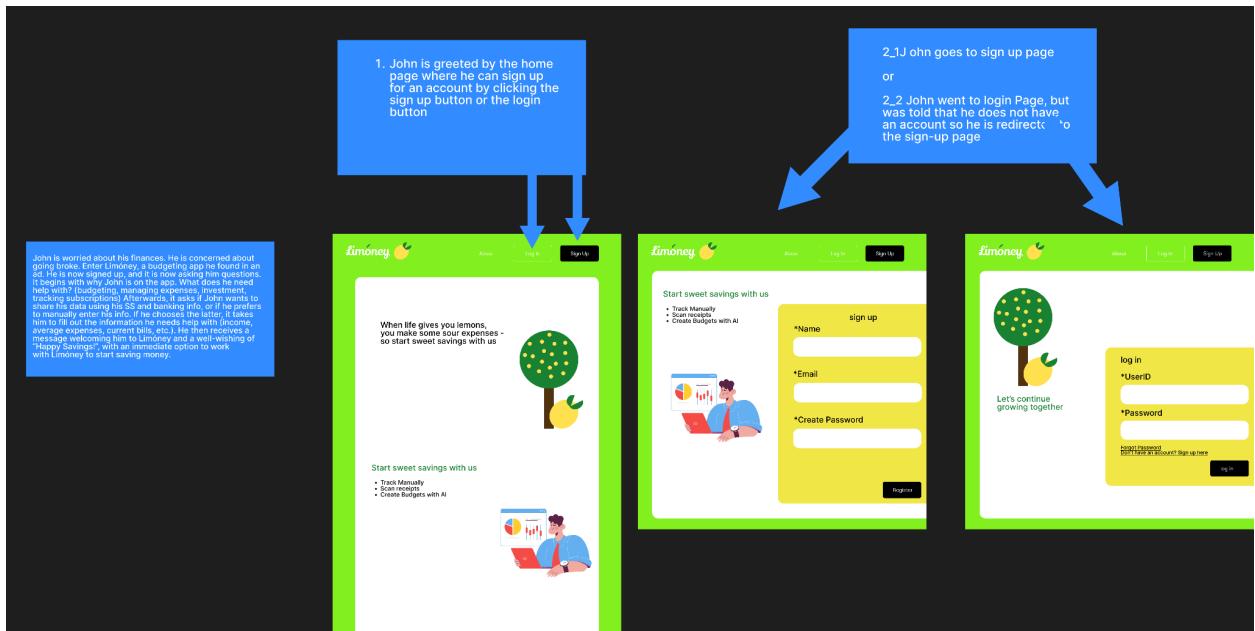
The image consists of three panels illustrating subscription management:

- Panel 1 (Left):** A narrative text about Max, a college student who uses the Limoney app to manage his subscriptions.
- Panel 2 (Center):** A dashboard view showing a list of transactions. A blue arrow points from the sidebar to the "Subscriptions" tab. A callout box highlights the "repeat" button indicating a recurring transaction.
- Panel 3 (Right):** A detailed view of a specific transaction for Netflix. A blue arrow points from the transaction row to a callout box showing the "Edit" and "Cancel Subscription" options.

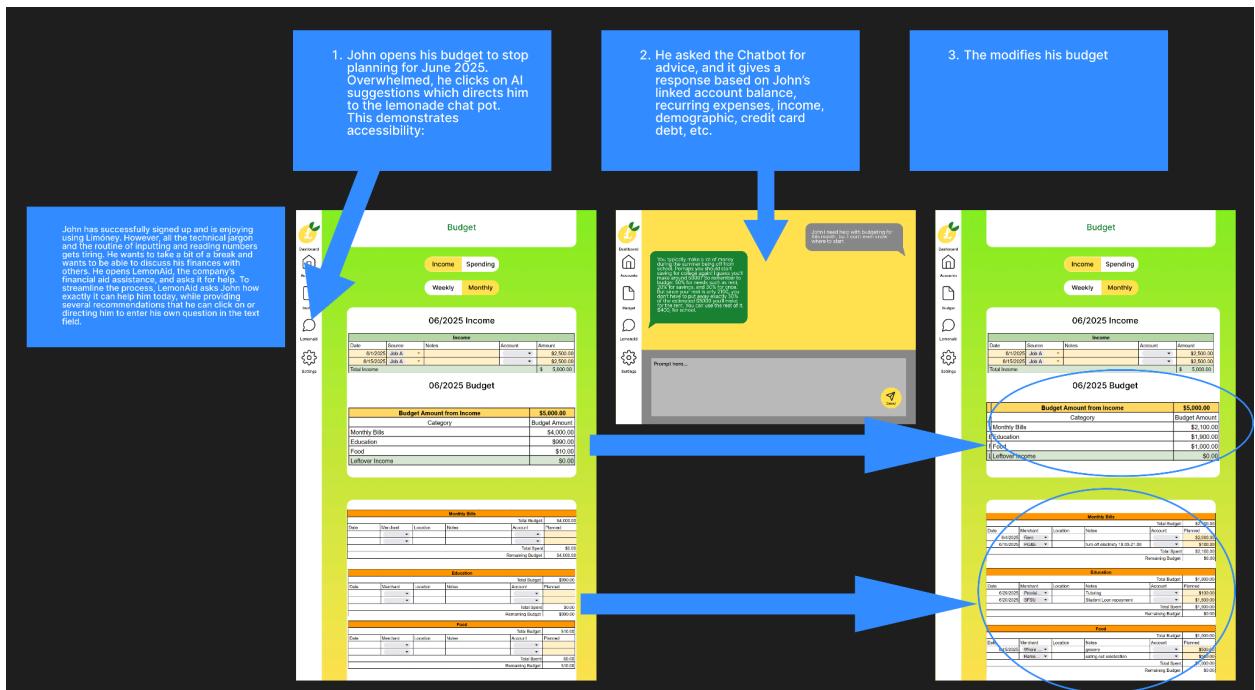
8. Predicting Balances at The End of The Month:



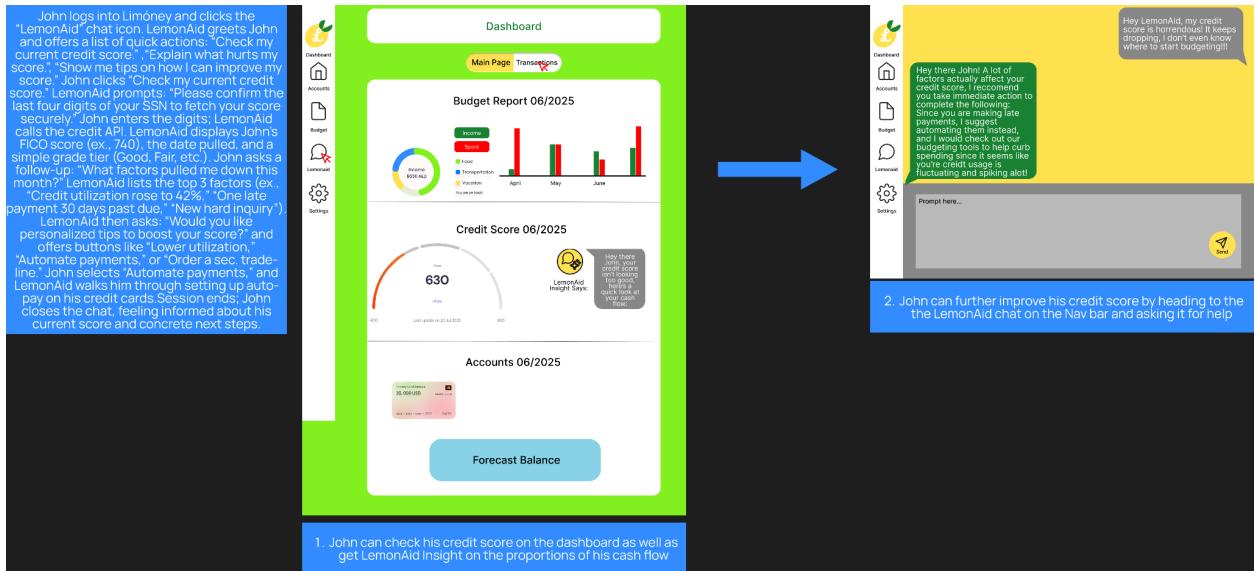
9. Signing Up/Intro UI:



10. Chatbot/AI Assistance:



11. Credit Score Inquiry:



FIGMA LINK:

<https://www.figma.com/proto/VRQplRZM2PeWQ1DOF1hh7t/CSC-648-Team-02?node-id=0-1&t=XNTNx3me7XfSEqa-1>

High-Level System Design

High Level Database Architecture

Initial Database Requirements

- **User**

- A User shall be associated with 0 to many Accounts.
- A User shall be able to create and manage 0 to many Tasks.
- A User shall be rewarded with 0 to many Rewards.
- A User shall receive 0 to many Notifications.
- A User shall be able to submit 0 to many SupportTickets.
- A User shall have 0 to many LemonAidLogs.
- A User can be a subtype Administrator.
- A User may receive responses from users that are admin via associated SupportTickets.
- A User shall be able to submit 0 to many Reviews.

- **Account**

- An Account shall belong to exactly 1 User.
- An Account shall be associated with 0 to many Transactions.
- An Account shall be linked to 0 to many Budgets.
- An Account shall be linked to 0 to many Subscriptions.
- An Account shall be associated with 0 to many Banks through AccountBankLink.

- **Bank**

- A Bank shall be linked to 0 to many Accounts via AccountBankLink.
 - A Bank may serve multiple Users through its linked Accounts.
- **Transaction**
 - A Transaction shall belong to exactly 1 Account.
 - A Transaction shall have 0 or 1 associated Receipt.
 - A Transaction shall be associated with 0 or 1 ReimbursementRequest.
 - **Receipt**
 - A Receipt shall be associated with exactly 1 Transaction.
 - **ReimbursementRequest**
 - A ReimbursementRequest shall be linked to exactly 1 Transaction.
 - **Subscription**
 - A Subscription shall belong to exactly 1 Account.
 - **Budget**
 - A Budget shall belong to exactly 1 Account.
 - **Task**
 - A Task shall be assigned to exactly 1 User.
 - **Reward**
 - A Reward shall be associated with exactly 1 User.
 - **Notification**
 - A Notification shall be sent to exactly 1 User.
 - **LemonAidLogs**
 - A LemonAidLog shall be created by exactly 1 User.

- **SupportTicket**
 - A SupportTicket shall be created by exactly 1 User.
 - A SupportTicket may be responded to by 0 or 1 Users that are admin.
- **Reviews**
 - A Review shall be submitted by 0 or 1 Users.
 - A Review may be associated with 0 or 1 LemonAidLogs.
 - A Review shall include a required rating and message.
 - A Review shall be classified by type (e.g., chatbot or user experience).
 - A Review shall automatically store the timestamp of submission.

DBMS Selection

We will use **MySQL** because it is a popular, reliable relational database that integrates seamlessly with Node.js/Express, handles financial and user data easily, and is approved by our CTO.

Database Organization

User

Attributes:

- userId: unique identifier for each user INT UNSIGNED
- name: full name of the user VARCHAR(45)
- email: login credential and unique contact identifier VARCHAR(45)
- password: hashed user password VARCHAR(255)
- userType: determines user role (standard or admin) ENUM('standard', 'admin')

Relationships:

- 1 to 0...* with Account
- 1 to 0...* with Task
- 1 to 0...* with Reward
- 1 to 0...* with Notification
- 1 to 0...* with SupportTicket
- 1 to 0...* with LemonAidLogs
- 1 to 0...* with Reviews

Account

Attributes:

- accountId: unique identifier for each account INT UNSIGNED
- userId: reference to owning user INT UNSIGNED
- balance: current account balance INT UNSIGNED
- accountType: financial category of the account ENUM('checking', 'saving', 'credit')

Relationships:

- 1 to 1 with User
- 1 to 0...* with Transaction
- 1 to 0...* with Budget
- 1 to 0...* with Subscription
- 1 to 0...* with AccountBankLink

Bank

Attributes:

- bankId: unique identifier for each bank INT UNSIGNED
- name: name of the financial institution VARCHAR(45)

Relationships:

- 1 to 0...* with Account via AccountBankLink

Transaction

Attributes:

- transactionId: unique identifier for each transaction INT UNSIGNED
- accountId: reference to the linked account INT UNSIGNED
- amount: transaction amount (positive or negative) INT
- category: user-defined or system-defined transaction tag VARCHAR(40)
- type: defines purpose as income, expense, or transfer ENUM('income', 'expense', 'transfer')
- date: date of the transaction event DATE
- subscriptionId: optional link to related subscription INT UNSIGNED

Relationships:

- 1 to 1 with Account
- 1 to 0...1 with Receipt
- 1 to 0...1 with ReimbursementRequest
- 1 to 0...1 with Subscription

Receipt

Attributes:

- receiptId: unique identifier for each receipt INT UNSIGNED
- transactionId: reference to associated transaction INT UNSIGNED
- dataUploaded: date the receipt was uploaded DATE
- image: stored binary data of the receipt BLOB

Relationships:

- 1 to 1 with Transaction

ReimbursementRequest

Attributes:

- requestId: unique identifier for the request INT UNSIGNED
- transactionId: transaction that the reimbursement applies to INT UNSIGNED
- status: workflow status of the request ENUM('pending', 'approved', 'rejected')

Relationships:

- 1 to 1 with Transaction

Subscription

Attributes:

- subscriptionId: unique identifier for each subscription INT UNSIGNED
- accountId: reference to the linked account INT UNSIGNED
- name: title or label for the subscription VARCHAR(45)
- amount: amount of the recurring payment INT UNSIGNED
- interval: frequency of recurrence ENUM('daily', 'weekly', 'monthly', 'yearly')

- nextDueDate: next expected billing date DATE

Relationships:

- 0...* to 1 with Account
- 0...1 to 0...* with Transaction

Budget

Attributes:

- budgetId: unique identifier for the budget INT UNSIGNED
- accountId: reference to the associated account INT UNSIGNED
- limitAmount: allowed budget limit INT UNSIGNED
- startDate: budget period start date DATE
- endDate: budget period end date DATE

Relationships:

- 0...* to 1 with Account

Task

Attributes:

- taskId: unique identifier for the task INT UNSIGNED
- userId: owner of the task INT UNSIGNED
- type: classification of task recurrence ENUM('daily', 'weekly', 'one-timer', 'custom')
- status: current progress or completion state ENUM('pending', 'completed', 'overdue')

Relationships:

- 0...* to 1 with User

Reward

Attributes:

- rewardId: unique identifier for the reward INT UNSIGNED
- userId: associated user who earned the reward INT UNSIGNED
- points: number of reward points earned INT

Relationships:

- 0...* to 1 with User

Notification

Attributes:

- notificationId: unique identifier INT UNSIGNED
- userId: recipient of the notification INT UNSIGNED
- type: nature of the message ENUM('info', 'alert', 'reminder')
- content: message content TEXT
- date: delivery timestamp DATETIME

Relationships:

- 0...* to 1 with User

LemonAidLogs

Attributes:

- logId: unique identifier for the AI interaction log INT UNSIGNED
- userId: user who interacted with LemonAid INT UNSIGNED
- output: AI response content TEXT
- timestamp: time when interaction occurred TIMESTAMP

Relationships:

- 0...* to 1 with User
- 1 to 0...* with Reviews

Reviews

Attributes:

- reviewId: unique identifier for the review INT UNSIGNED
- userId: reviewer (nullable) INT UNSIGNED
- logId: linked LemonAidLog (nullable) INT UNSIGNED
- message: textual feedback left by the user TEXT
- rating: numeric rating level ENUM('1', '2', '3', '4', '5')
- createdAt: when the review was submitted TIMESTAMP
- type: identifies whether the review targets chatbot or UX ENUM('chatbot', 'user_experienc')

Relationships:

- 0...1 to 1 with User
- 0...1 to 1 with LemonAidLogs

SupportTicket

Attributes:

- ticketId: unique identifier INT UNSIGNED
- userId: creator of the ticket INT UNSIGNED
- subject: brief title of the issue VARCHAR(45)
- message: full description of the issue TEXT
- status: progress status of the ticket ENUM('open', 'in progress', 'closed')
- adminResponse: optional admin reply TEXT
- adminId: (optional) userId of admin responder INT UNSIGNED

Relationships:

- 1 to 1 with User
- 0...1 with User as responder (adminType only via userType)

AccountBankLink

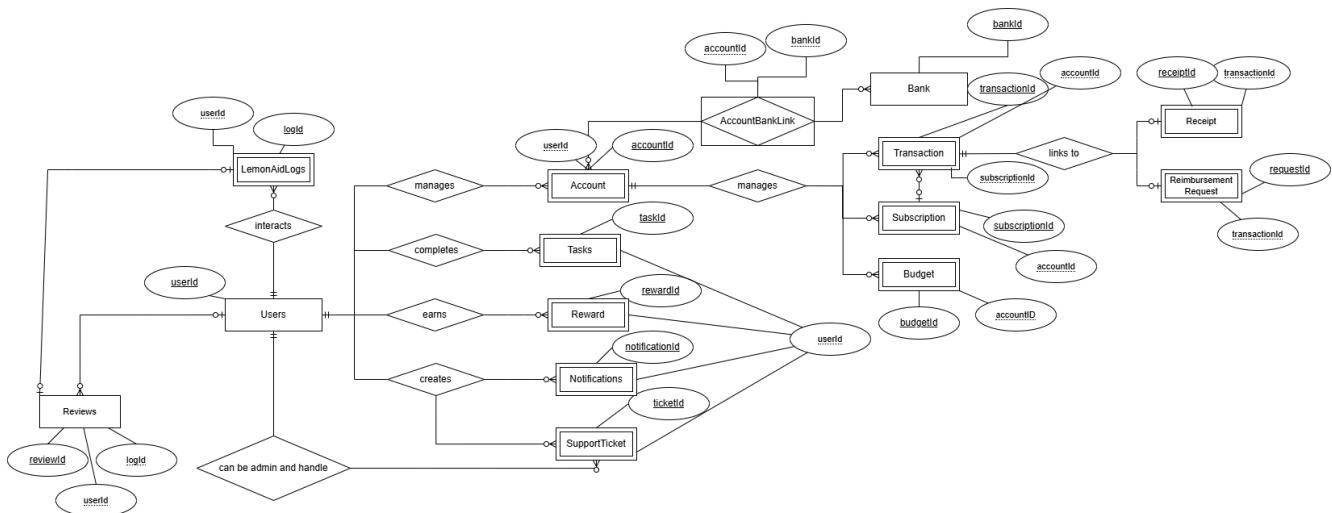
Attributes:

- accountId: part of the composite key; links to an account INT UNSIGNED
- bankId: part of the composite key; links to a bank INT UNSIGNED

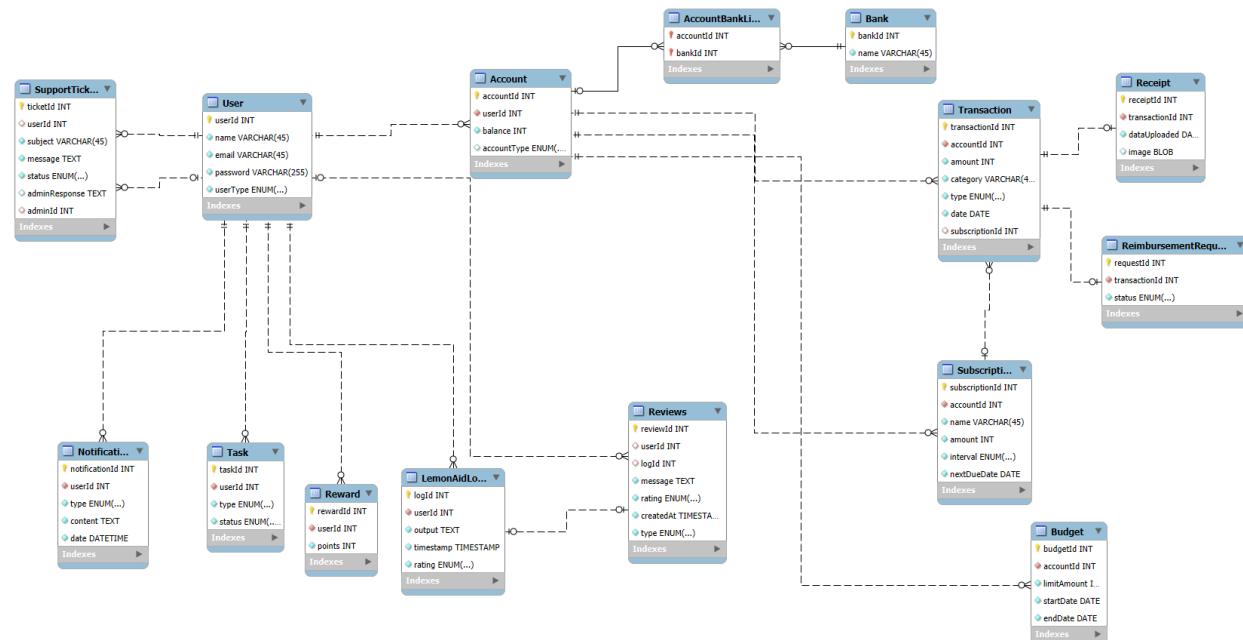
Relationships:

- M:N between Account and Bank

Entity Relationship Diagram:



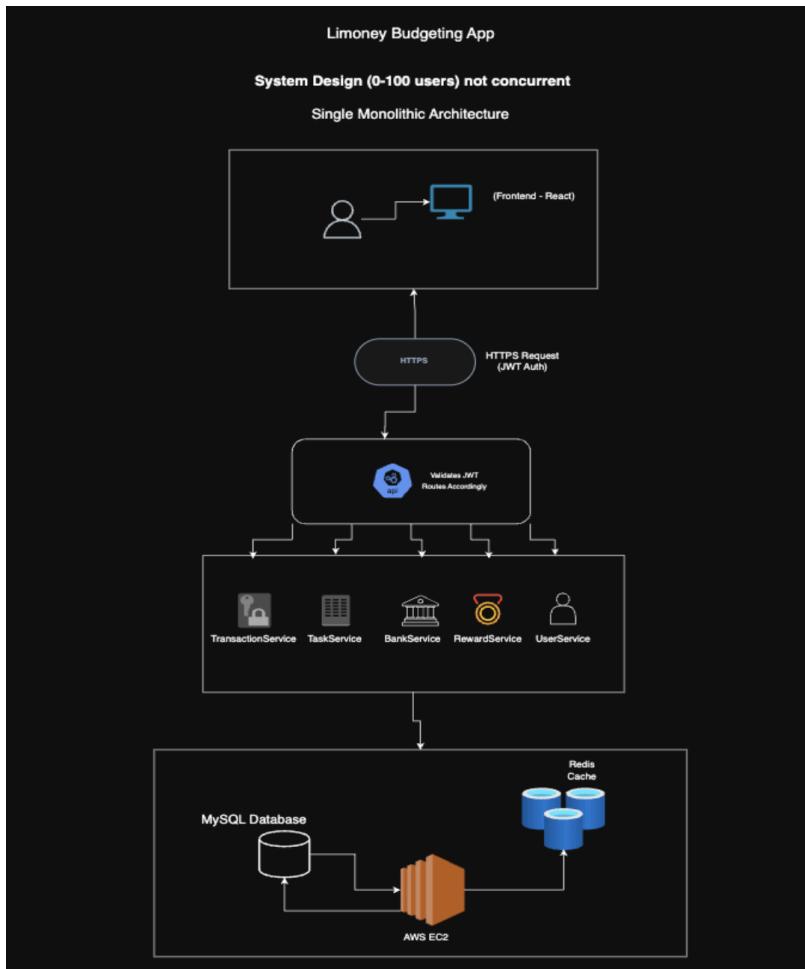
Extended Entity Relationship Diagram:



Backend Architecture

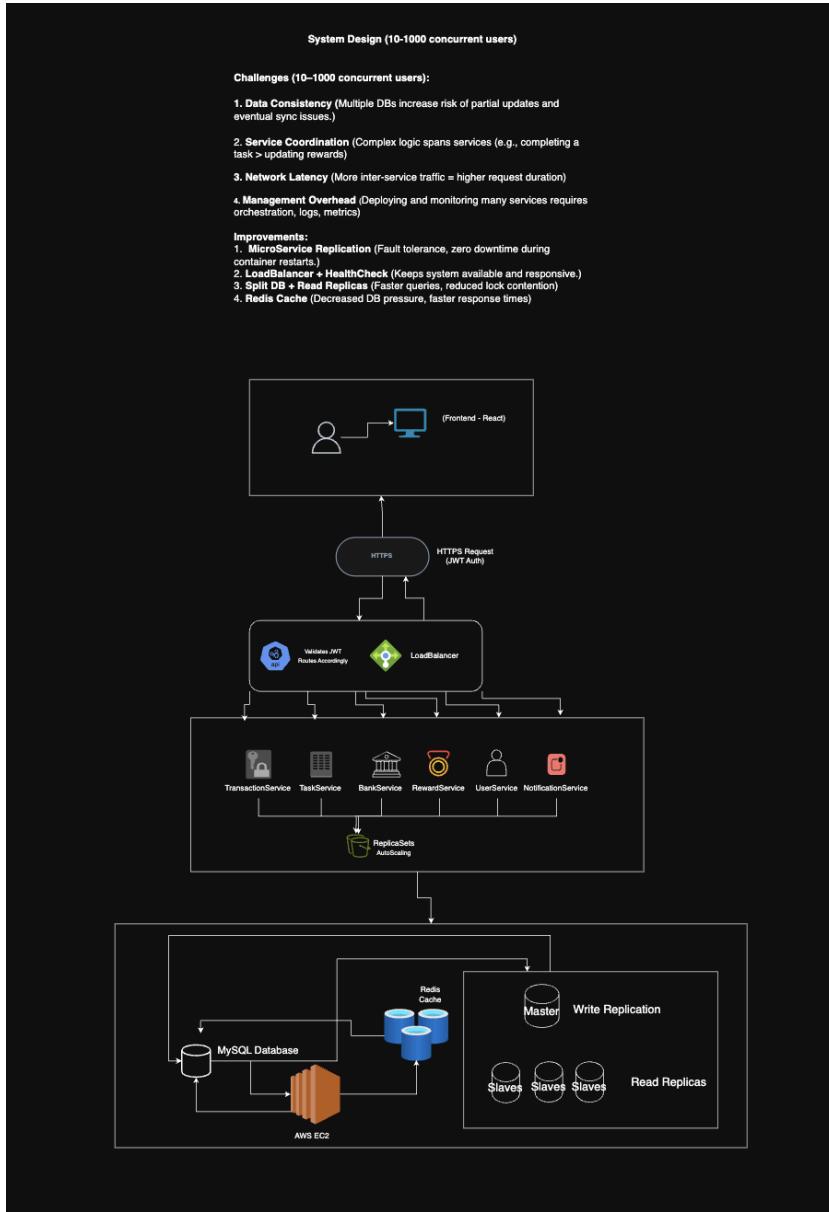
ALL SCALE DESIGN

The Limoney Budgeting App for 0-100 (not concurrent) users uses a single monolithic architecture. The frontend (React) communicates via HTTPS (JWT Auth) to a backend API, which validates JWT and routes requests to services such as TransactionService, TaskService, BankService, RewardService, and UserService. All services interact with a single MySQL database (hosted on AWS EC2) and an optional Redis cache for session/AI caching.



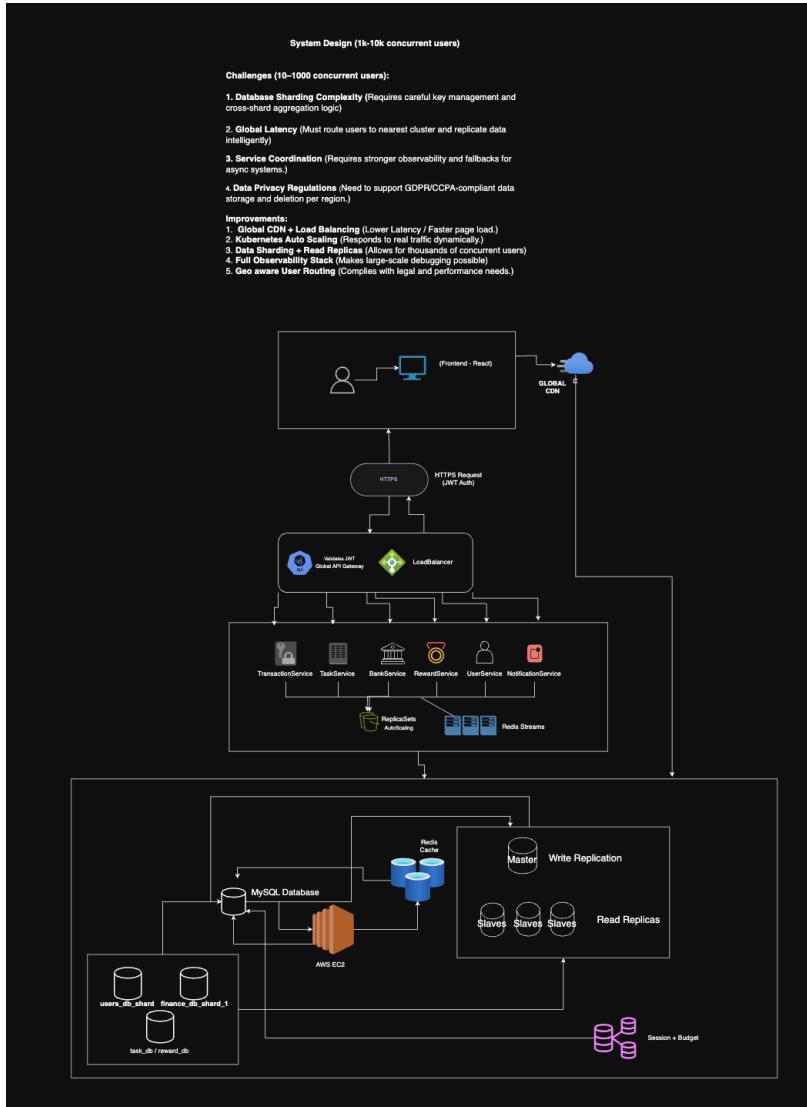
MEDIUM SCALE DESIGN

For 10-1000 concurrent users, the system introduces microservice replication, load balancing, and read replicas for the database. The backend is horizontally scalable with Dockerized microservices, an auto-scaling NGINX load balancer, and health checks. The MySQL database uses master-read replica architecture for scalability, and Redis is used for caching AI and frequent queries. Improvements include fault tolerance, health checks, and reduced DB pressure.



LARGE SCALE DESIGN

For 1k-10k concurrent users, the system leverages Kubernetes-managed microservices, global CDN, and database sharding by user region. The backend is orchestrated with Kubernetes for auto-scaling and CI/CD. The database layer uses sharding and a mix of read/write replicas, with multi-layer Redis caching. Security is enhanced with rate-limiting, API key enforcement, and mutual TLS between services. The architecture supports global latency reduction and compliance with data privacy regulations.



ARCHITECTURE SUMMARY

Microservices Architecture

- Domain-driven microservices: each major business capability is its own independently deployable service
 - Services: UserService, BankService, BudgetService, SubscriptionService, TaskService, AIRecommendationService, RewardService
- Service communication:

- Synchronous calls via REST APIs
- Asynchronous messaging for AI triggers and reward events

Backend System Design

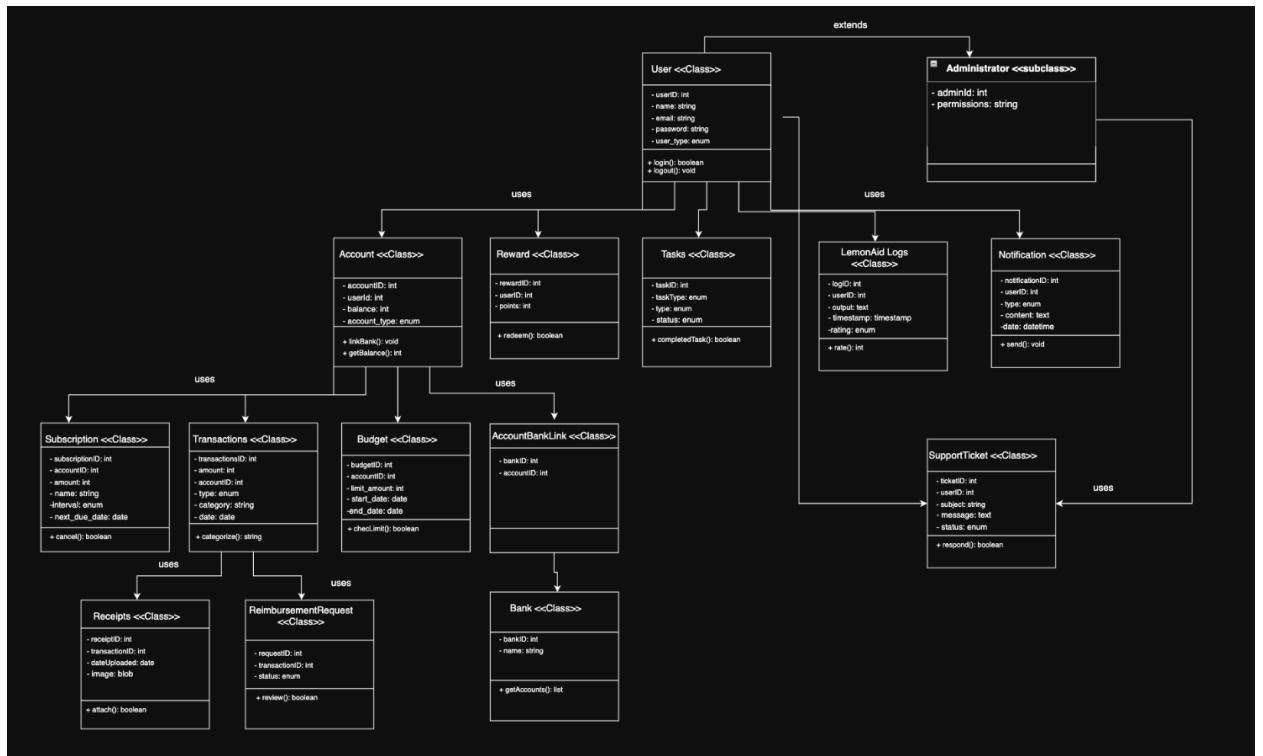
- **Load Balancing**
 - NGINX reverse proxy or AWS ALB to evenly route traffic
 - Health checks to verify service availability
 - Supports horizontal scaling for better availability and responsiveness
- **Caching Strategies**
 - Cache-aside pattern for database query results (e.g., user budget history)
 - LRU eviction policy to optimize memory usage
- **Reliability & Fault Tolerance**
 - Each service runs in its own Docker container managed by Kubernetes
 - Circuit breakers (Resilience4j) to prevent cascading failures
 - Retry and timeout policies to stabilize inter-service connections
- **Containers & Orchestration**
 - Docker containers ensure portable environments (local → staging → production)
 - Kubernetes handles deployment, health checks, auto-scaling, and rolling updates
- **Data Replication & Consistency**
 - Master-Slave replication for MySQL to boost read throughput
 - Synchronous writes for critical services (e.g., TransactionService, SavingsService)
 - Eventual consistency acceptable for non-critical operations to improve performance

- **Security Considerations**

- JWT authentication for all incoming requests
- Role-Based Access Control (RBAC) distinguishing Admins vs. Customers
- Mutual TLS for service-to-service communication
- Rate limiting and request logging at the API gateway
- Data encryption: AES-256 at rest and TLS in transit

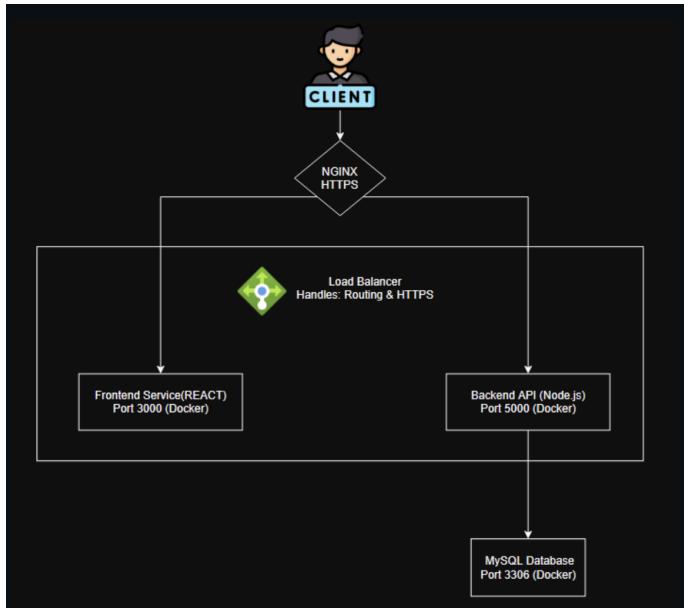
UML Design

- The following UML diagram illustrates the key domain classes and service interfaces for the Limóney backend system.

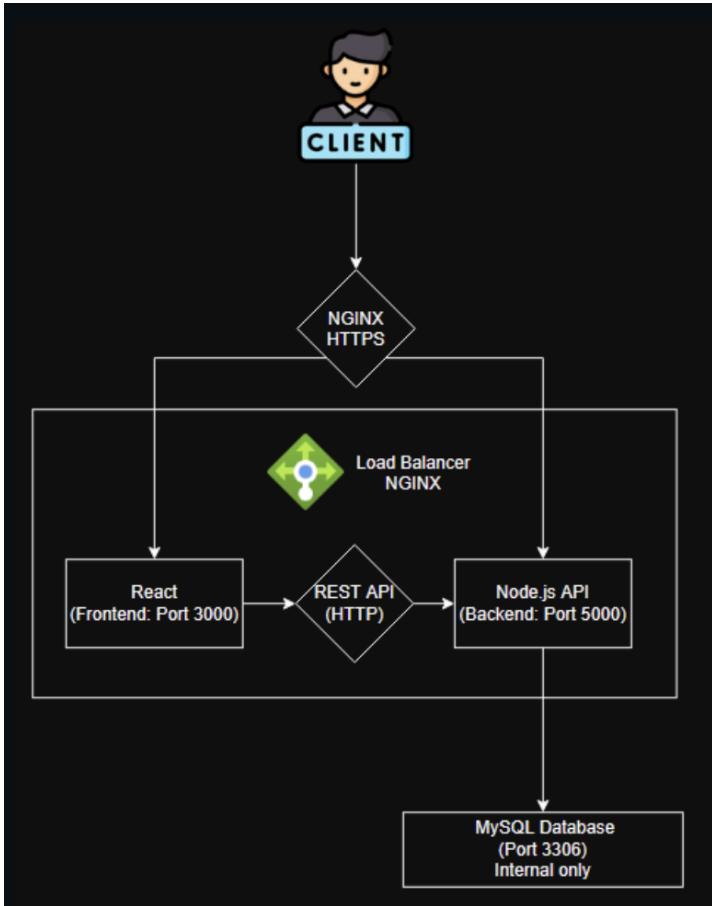


High Level Application Network Protocols and Deployment Design

Network & Development Diagram



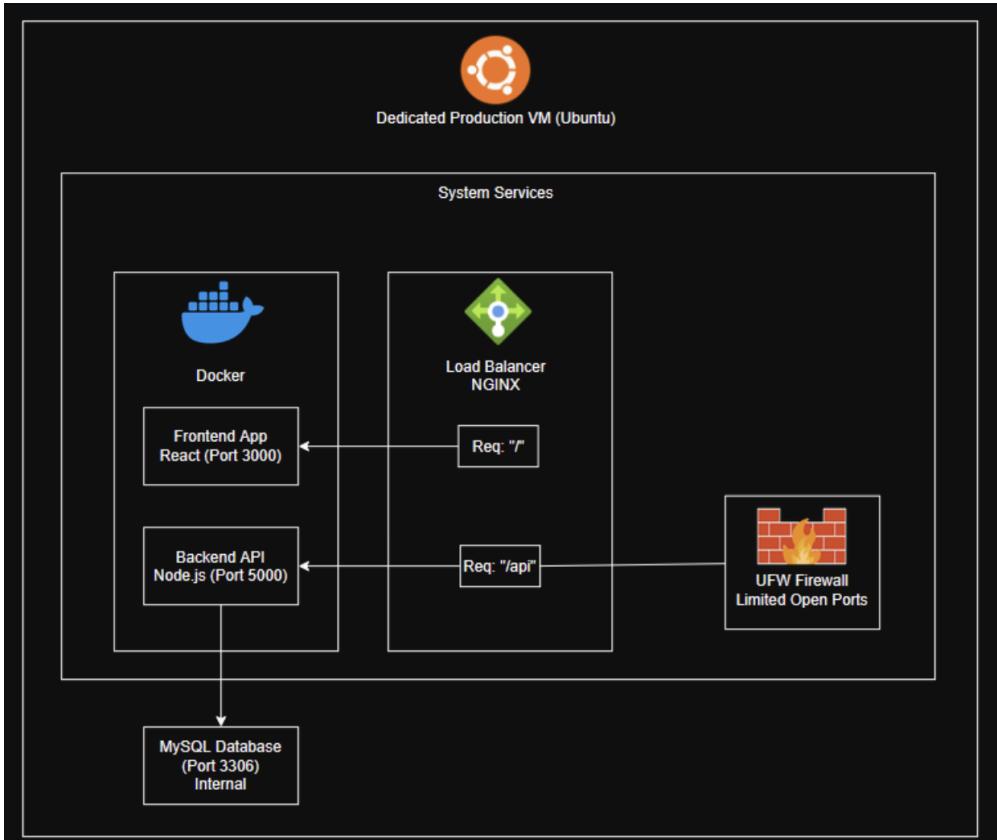
Application Networks Diagram



Protocols

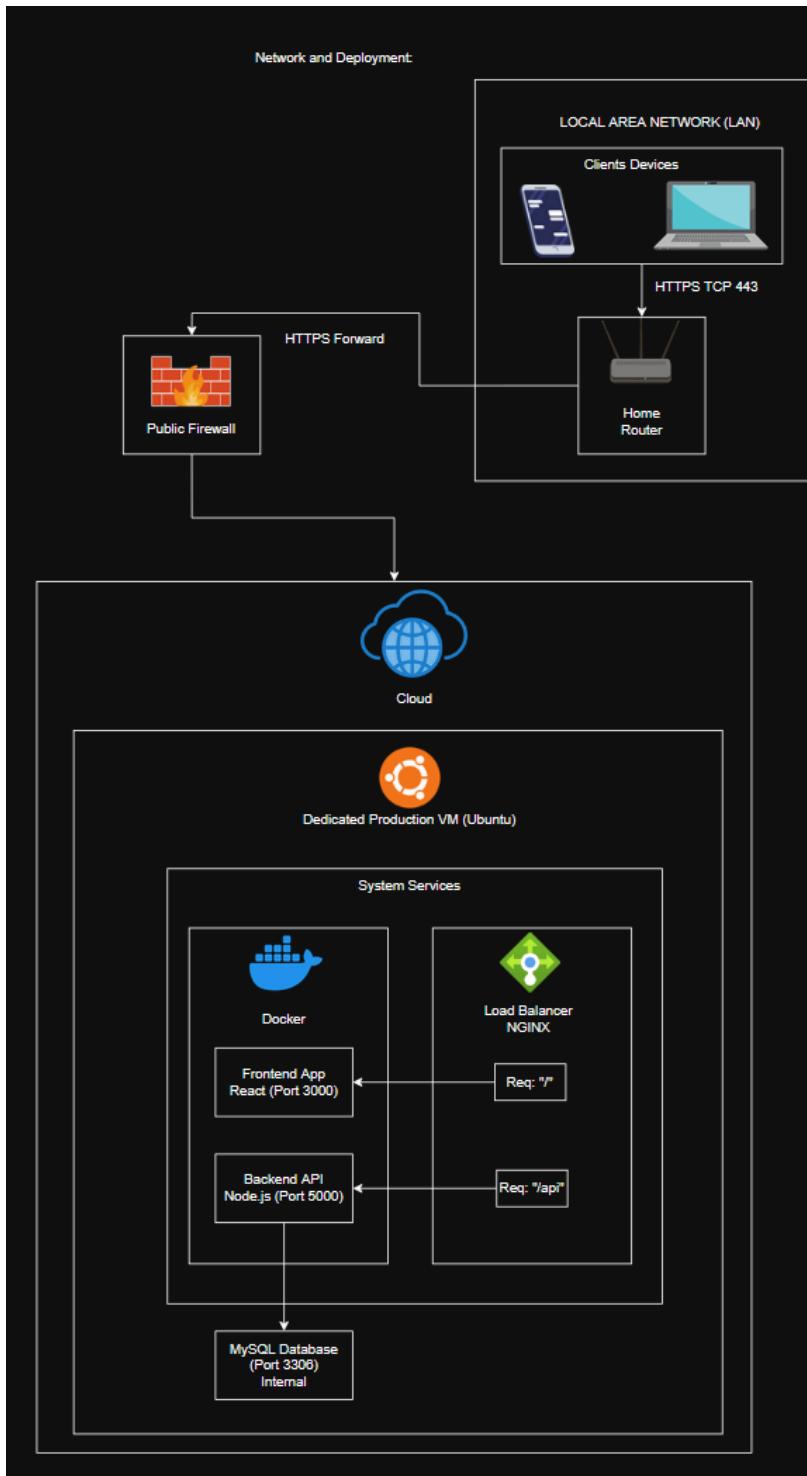
Network uses HTTPS for securing client access with NGINX, routing to React frontend and Node.Js backed. The backend accesses MYSQL database internally over TCP/IP. Services run on Docker bridge network, with security enforced through SSL/TLS, CORS, and a UFW firewall that restricts access only to essential ports to the application to work. NGINX is the main gateway and proxy which isolates the internal services from the public.

Deployment Diagram



This diagram illustrates the system's structure on a dedicated Ubuntu server. Docker manages the React frontend and Node.js backend processes. NGINX handles incoming traffic and routes it to the appropriate service. A UFW firewall restricts network access, allowing only essential ports. The backend securely connects to an internal or cloud-hosted MySQL database.

Network and Deployment Diagram



Integration with External Components

External Components:

- Gemini API for our LemonAid Chatbot component

Internal Libraries:

- Bycrypt: for hashing passwords
- Dotenv: for “.env” variable handling
- Cors: for securing cross-origin request
- Mysql12: for database connection

High Level APIs and Main Algorithms

High-Level APIs

- **Account & Transaction Management API**
 - Allows users to securely manage accounts, log income/expenses, categorize transactions, and attach receipts.
- **Budget & Subscription API**
 - Helps users create, update, and track budgets and recurring payments with due-date reminders.
- **Task & Reward System API**
 - Supports gamification by letting users complete tasks and earn reward points based on activity.
- **Notification API**
 - Delivers alerts, reminders, and system messages tied to user activity and financial goals.
- **Support & Admin API**
 - Enables users to submit support tickets and allows admins to manage and respond to them.

- **LemonAid AI Interaction API**

- Logs interactions between users and the LemonAid assistant and allows users to rate each AI response.

Main Algorithms and Processes

AI Rating System: After each LemonAid interaction, users rate the response on a scale of 1–5. These ratings will track AI quality over time and may later feed into an admin review process or an AI fine-tuning feedback loop.

Spending Categorization: Transactions are initially auto-labeled via simple keyword matching, with a roadmap to evolve into a smarter, pattern-based classification engine.

Budget Alerts: The system runs periodic checks of current spending against set budget limits and sends notifications when users approach or exceed those thresholds.

Reward Calculation: Points are awarded for completing financial tasks or goals; the calculation factors in task type, frequency, and any completion streaks to drive user engagement.

Software Tools and Frameworks

Current Technology Stack

- Node.js + Express (backend API framework)
- MySQL (relational database)
- React (or plain HTML/CSS/JavaScript) for the frontend
- Docker (for containerized deployment)
- AWS EC2 running Ubuntu 22.04 (cloud hosting)
- Let's Encrypt + Certbot (SSL certificates)

Planned Integrations

- Firebase Authentication (optional, for user auth & password resets)
 - GenAI API (for the LemonAid assistant)
 - Any new tools will be approved by the instructor before implementation.
-

List of Team Contributions

Name	Contributions	Score (1-10)
Emily Perez	started and finished tech doc for m3, fixed fetch errors, refined data definitions, refined erd, created eer, set up guide for setting up working environment, connected pages together, set up and enforced code standards, handled pull requests, assigned tasks to members, implemented final database(forward engineered eer), adjusted algorithms to new database, implemented all parts of the settings page, implemented public page ui, got domain for site, got ssl certificates, implemented ui for reimbursement requests ranking algo, deployed code onto server	8
Ishaank Zalpuri	helped with UI/UX Wireframes, created accounts page in the userlogin pages, organized file directory, implemented ui for delete accounts, implemented ui	7.5

	for transactions, fixed figma to new implemented design, implemented ui for adding accounts	
Andrew Brockenborough	Added navbar for the userlogin pages, created parts of the settings page, helped with organizing the technical documentation, kept the readmemd up to date,	5
Dani Luna	led and designed the UI/UX Figma Wireframes, created TODO list, implemented ui for budget page, helped handle pull requests, implemented ui for balance forecas, implemented ui for dashboard	9
Jonathan Gonzalez	fixed uml diagram for m3, helped with public page ui implementation, fixed ui for settings, implemented reimbursement request and its functionalities	7.5
Gene Orias	implemented search functionality logic, implemented rating functionality logic, set up all the jsx files (pages), set up gemini api for lemonaidchat, fixed ui for lemonaid chat, fixed ui for accounts page, set up ui for transactions of accounts, helped organize userloginpages for coordination,	9