

Team Number: 5

Team Name: Savings Squad

Team Members: Andrew Yang, Patrick Hunt, Michael Thomas, Julie Huang

Application Name: BudgetBeam

Application Description: Our application will help users track their sources of income and expenses and manage their monthly budget. The users can create their own categories of income or expenses to fulfill their personalized needs. Our application will display a simple visualization of this so the user can get a quick overview of their finances for the month at a glance. Additionally, the user will be able to add their current savings, if the user's net income for the month is negative, we will calculate how long they can maintain the negative net income with their current savings.

If the user wishes to view past transactions/expenses, they can view prior expenses by date, which will retrieve data from our database and present it to the user in a well-organized, readable format. The user will also be able to generate an expense report for the month, which will create a neat and well-organized log of all the expenses that the user has entered for a given month, aggregating data from all expenses and displaying how much money was spent on each category that was added by the user, and how much was spent in total. It will also show how much money the user has saved, or if they went over budget, and by how much they exceeded their budget.

Vision Statement: For individuals and families who are seeking an efficient way to manage their finances, the BudgetBeam is a budgeting app that simplifies the process. Unlike traditional forms of budgeting, our product offers a user-friendly interface and customizable features to meet our users' unique financial needs.

Development Methodology: Agile

Communication Plan: The team will communicate through Discord and Zoom. Discord will be our primary means of communication outside of team meetings held through Zoom – we will also communicate via IM if the situation demands.

Meeting Plan:

- Team Meeting: We will be meeting twice a week, remotely via Zoom on Sundays at 2:00PM, and on Thursdays at 3:30PM.
- Weekly meeting with TA:
 - Day: Thursday

- Time: 4:00-4:15 PM
- Location: Online

Wireframe:

<https://www.figma.com/file/N2TXVPQYjfVr59mutzAh7N/Untitled?type=design&node-id=0%3A1&mode=design&t=OOHAjLh5IwpmwRfJ-1>

BudgetBeam

BudgetBeam

Login

Username

Password

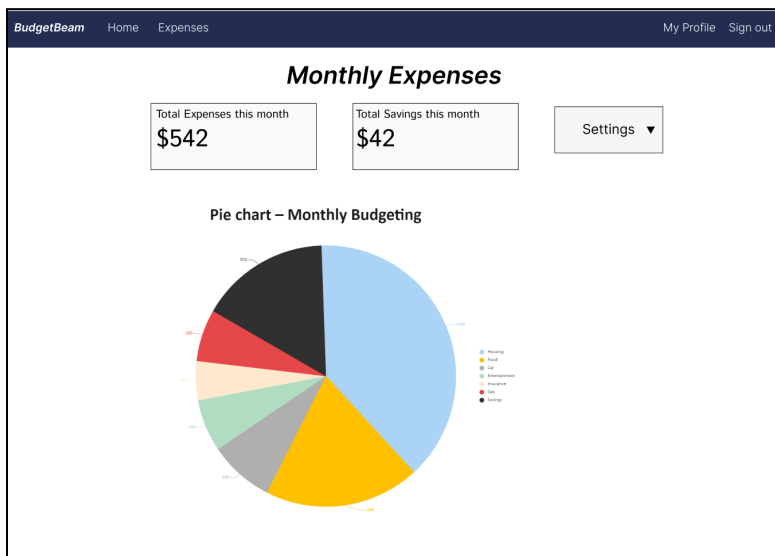
Don't have an account?
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BudgetBeam Home Expenses My Profile Sign out

My Expenses

Total Expenses: \$334

Expense	Amount	Date	Category
Car Insurance	\$130	10/12/23	Auto
Gas	\$49	10/24/23	Auto
Groceries	\$79	10/6/23	Food
Dinner	\$52	10/3/23	Food
Tickets	\$24	10/29/23	Entertainment



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New Expense

Expense Name

Amount

\$

Category

▼

Date

XX/XX/XXXX

Monthly Expenses

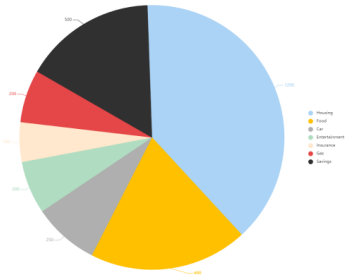
Total Expenses this month
\$542

Total Savings this month
\$42

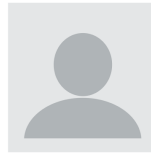
Settings

- Add Category
- Remove Category
- Adjust Budget
- Adjust Income

Pie chart – Monthly Budgeting



Welcome, User!



Username: User
[Change password](#)

Create Expense Report

Create Expense Report

Select Month

October

Show Expense Report

Expense Report for October

Category	Amount
Auto	\$500
Food	\$179
Entertainment	\$113
School	\$200
Total Expenses for October	\$992
Total Amount saved for October	\$-24

Use Case Diagram:

