Financify Project Plan (5 Modules)

This document provides a step-by-step breakdown of the Financify (Personal Finance Management System) project into 5 modules along with a suggested timeline for completion. The project uses React, Spring Boot, and MySQL with integrations like Plaid for bank accounts and Lemon Squeezy for subscriptions.

Module 1 – User Authentication & Settings (Foundation)

- Implement User Registration & Login (Spring Boot + JWT authentication).
- Create User Profile Management (update name, email, password).
- Setup role-based access (e.g., admin vs user if needed).
- Frontend: Basic React forms for login/registration + protected routes.
- Database: Users table (user_id, name, email, password, role).
- Outcome: Secure entry point for the application.

Module 2 – Transactions Module

- Implement CRUD operations for transactions (add, edit, delete, search).
- Allow CSV imports for bulk transactions.
- Frontend: Table for transactions, filter by date/category/type.
- Backend: APIs for CRUD and CSV processing.
- Database: Transactions table (transaction_id, user_id, amount, type, category, date).
- Outcome: Users can manage financial records inside the system.

Module 3 – Bank Accounts Module

- Allow users to add, edit, and delete bank accounts.
- Integrate with Plaid API (or mock API) for bank connection.
- Backend: APIs for linking/unlinking accounts.
- Database: Bank_Accounts table (account_id, user_id, bank_name, account_type, balance).
- Frontend: Form to connect bank account + view balances.
- Outcome: Users can connect their real or mock bank accounts.

Module 4 – Subscriptions Module

- Implement Subscription Plans (free, premium, etc.).
- Integrate with Lemon Squeezy (or Stripe) for payments.
- Backend: Subscription workflow (start, cancel, renew).
- Database: Subscriptions table (subscription_id, user_id, plan, status, start_date, end_date).
- Frontend: Subscription page with upgrade/downgrade options.

- Outcome: Monetization and premium features are ready.

Module 5 – Dashboard & Analytics

- Display visualizations of income, expenses, and savings (charts).

- Show financial trends (monthly summary, spending categories).

- Use chart libraries (e.g., Recharts/Chart.js).

- Backend: Aggregate APIs (total income, total expense, savings per month).

- Frontend: Interactive dashboard with filters (date range, category).

- Outcome: Complete financial management platform with insights.

Suggested Timeline

- Week 1: Complete Module 1 – Authentication & Settings

- Week 2: Complete Module 2 – Transactions Module

- Week 3: Complete Module 3 – Bank Accounts Module

- Week 4: Complete Module 4 – Subscriptions Module

- Week 5: Complete Module 5 – Dashboard & Analytics, testing, and integration

By following this modular plan, you can complete the Financify project step by step in 5 weeks. Each module builds upon the previous one, ensuring smooth integration and a fully functional personal finance system by the end.