Coin Control Screen Sketches

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Actor Roles

1. **Users** - Have the ability to:
    a. Ability to create an account.
    b. Ability to insert goals for the year.
    c. Ability to ask for an advisor.
2. **Advisors** - Has the users a&b ability plus:
    a. Ability to link to a user's account.
    b. Ability to give feedback to user(clients) on there account
3. **Admin** - Have the ability to make changes to other accounts:
    a. Ability to monitor users accounts.
    b. Ability to monitor advisors accounts.
    c. Ability to delete accounts.

Non-Functional Requirements

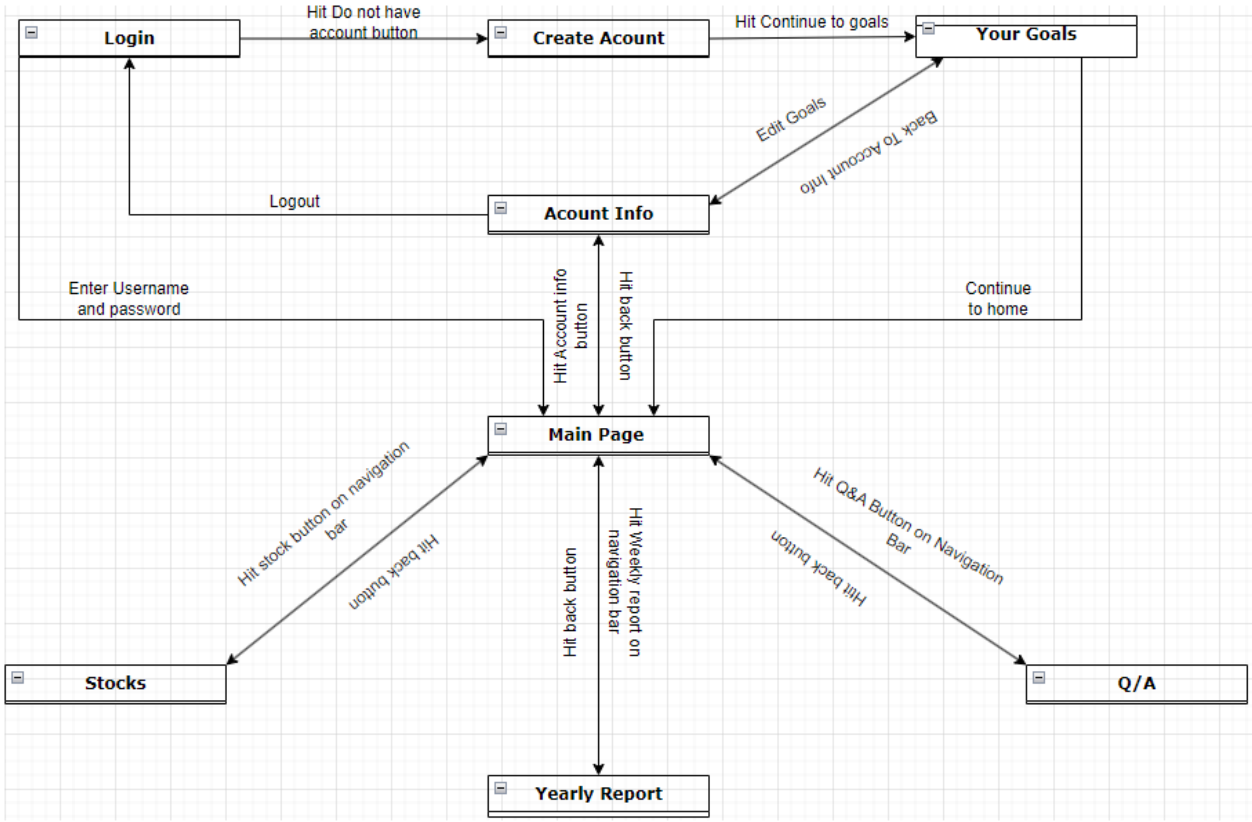
- The application must be able to support a minimum of 10 total users.
- The application must be able to downscale to a minimum of 0 total users.
- The user should not experience more than 1 second of delay for any UI element to respond.
- The application must be able to work on android devices.
- Users must be able to change their financial information as needed.

Backend Tables

1. **User: Track User Information**
    a. User ID (Primary Key)
    b. First Name
    c. Last Name
    d. Username
    e. Email
    f. Password (Hashed)
2. **Weekly Info: Tracks User Weekly Info**
    a. Weekly Info ID (Primary Key)
    b. User ID (Foreign Key to User Table)
    c. Week Start Date
    d. Week End Date
    e. Weekly Expenses
    f. Monthly Income
    g. Current Bank Account Balance
    h. Desired Bank Account Balance

3. **Save: Tracks users year progress**
    a. Save ID (Primary Key)
    b. User ID (Foreign Key to User Table)
    c. Year
    d. Initial Balance
    e. Desired Balance
    f. Amount Saved
    g. Expense Budget
    h. Expenses Spent
4. **Privileges: Displays the ability that the Actors possess**
    a. Privilege ID (Primary Key)
    b. User ID (Foreign Key to User Table)
    c. Access Level (e.g., User, Advisor, Admin)
    d. Date Granted
    e. Date Revoked (Used for managing privileges)
5. **Recommendations: AI recommendations**
    a. Recommendation ID (Primary Key)
    b. User ID (Foreign Key to User Table)
    c. Recommendation Text
    d. Date Created
    e. Status (e.g., Pending, Viewed, Accepted)
6. **Violations: Keeps track if the account has been accessed by others.**
    a. Violation ID (Primary Key)
    b. User ID (Foreign Key to User Table)
    c. Violation Date
    d. Violation Type (e.g., Unauthorized Access, Suspicious Activity)
    e. Status (e.g., Investigating, Resolved)

Screen Accessibility Diagram

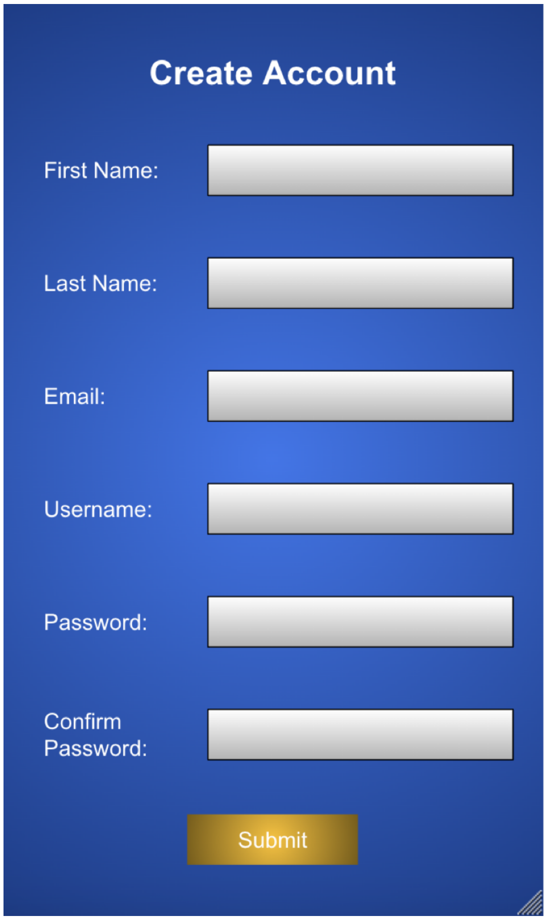


Screen Sketches

Login

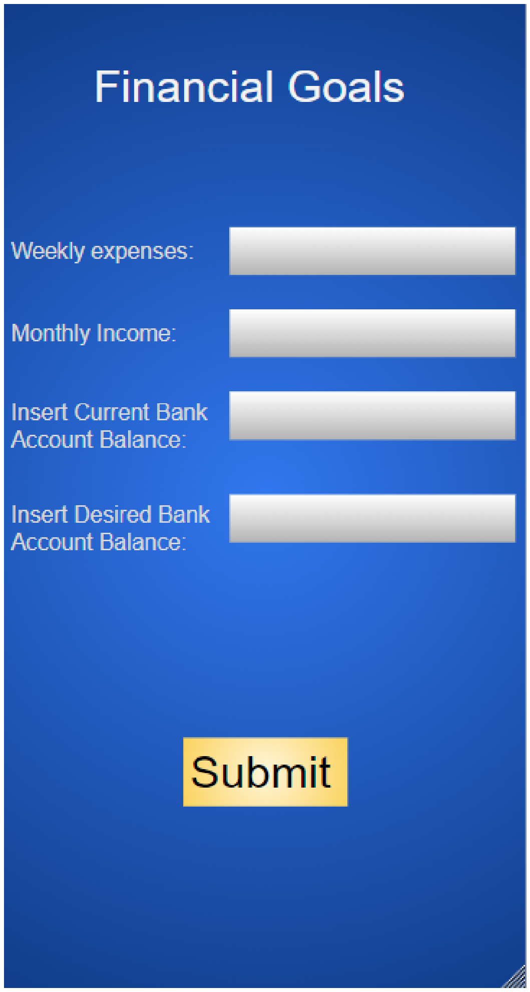
This screen allows users to login into their accounts. If the user does not already have an account there will be a button at the bottom of the page that will prompt the user to create an account. It will then take them to the create account page. If the user already has an account they will then go to the main page.

Create Account



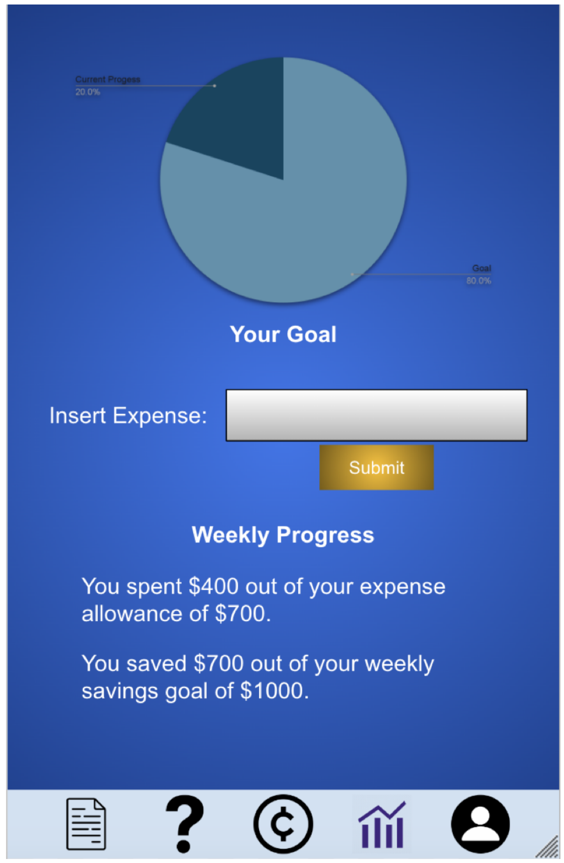
On this page the user will be prompted to insert the information that will be used to save their account in the database. Here they will be asked to enter their first name, last name email, username, and password. This information will be stored into the database and will save them as a new user. They will then be prompted to submit and continue to the next page which will be the financial goals page.

Financial Goals



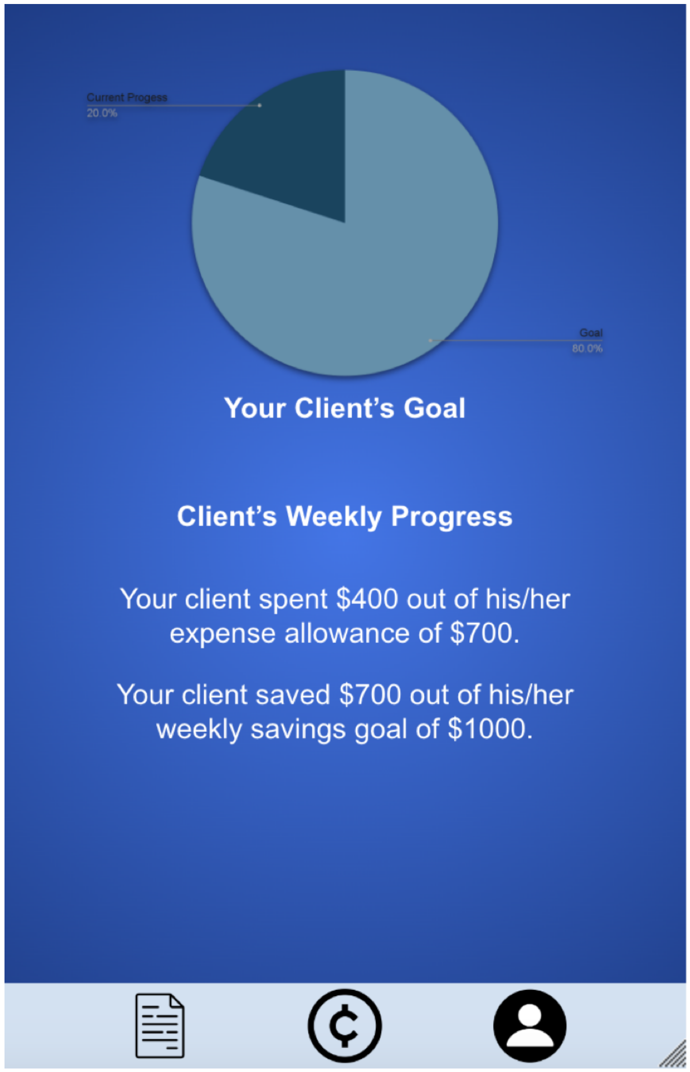
This page will be the main factor in setting up the user's account. The user will be prompted to enter their financial information as well as their desired financial goal. The information from here will be saved with the user's information in the database, and based on the numbers that were entered, there will be user specific advice and data displayed on other screens in the application.

Main Page



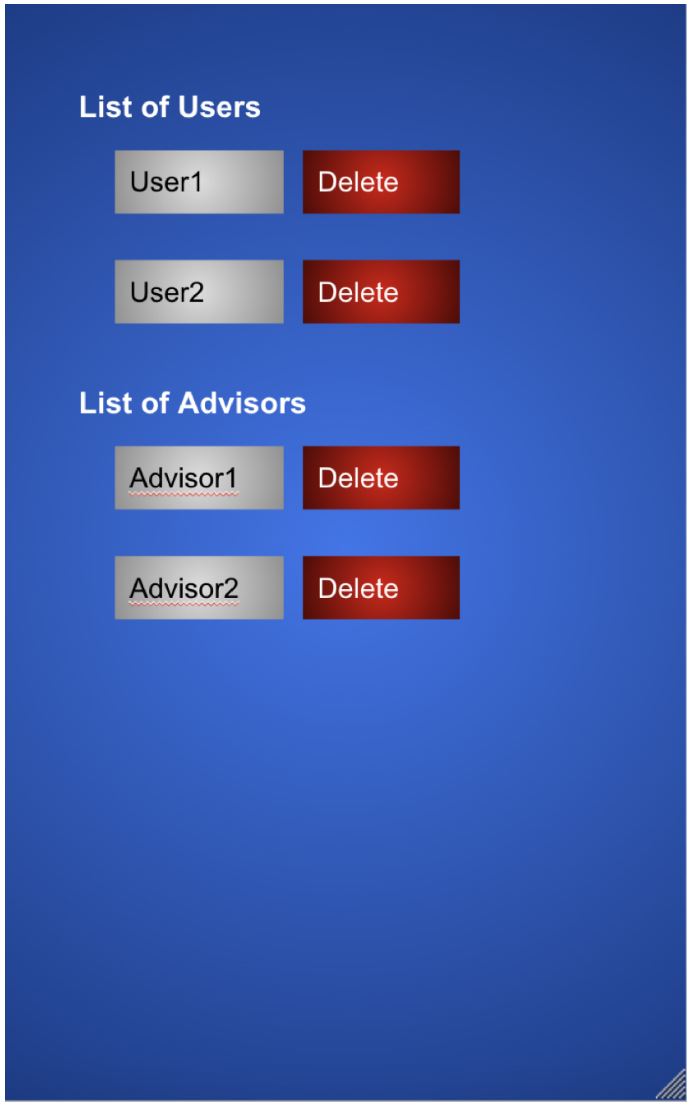
This will be the primary screen in the Coin Control application. There will be a pie chart at the top of the screen that displays the user's progress towards his/her goal. Underneath the pie chart, there will be a text box where the user can enter an expense. The prompt for the expense is intended to keep track of the users weekly expenses to ensure that they're on track. The user will also be able to see his/her weekly progress based on what they are spending/saving for that week. Lastly, there will be a navigation bar that will lead to the user's yearly report, Q&A screen, stocks screen, and account info.

Advisor's View



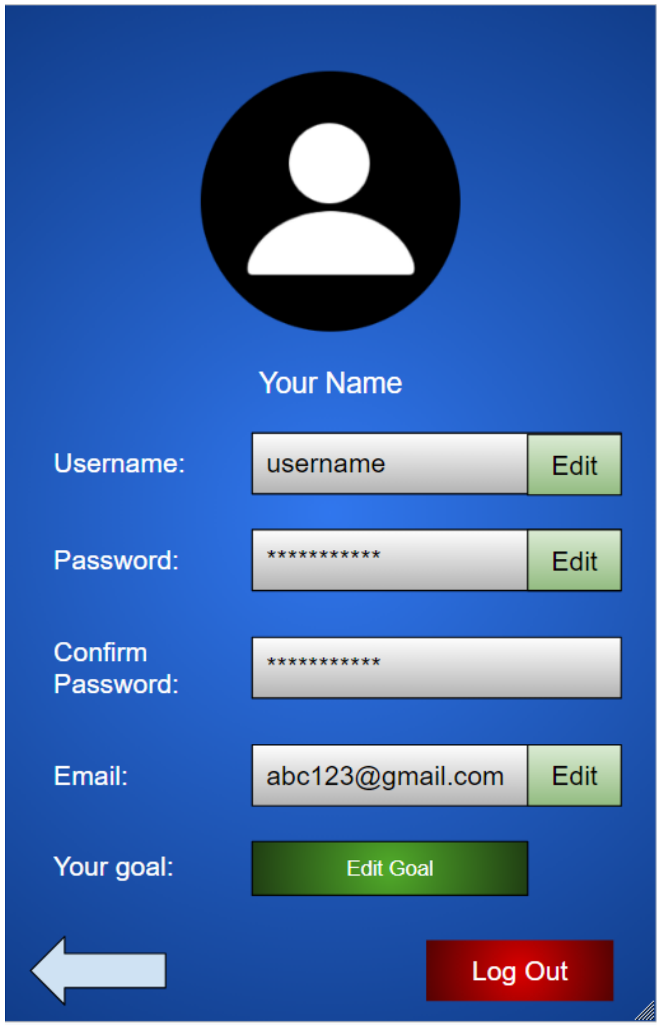
On this page, the advisor will be able to keep track of their client's progress towards their goal. It is very similar to the regular user's home page, but with some minor changes. The advisor can also view the client's weekly progress. The navigation bar will only be able to direct the advisor to the client's yearly report and to the advisor's account information.

Admin's View



This page is only for the admin of the Coin Control application. The admin will be able to view all the users and advisors that have created accounts in the app. The admin will also have the ability to delete users and advisors' accounts.

Account Info

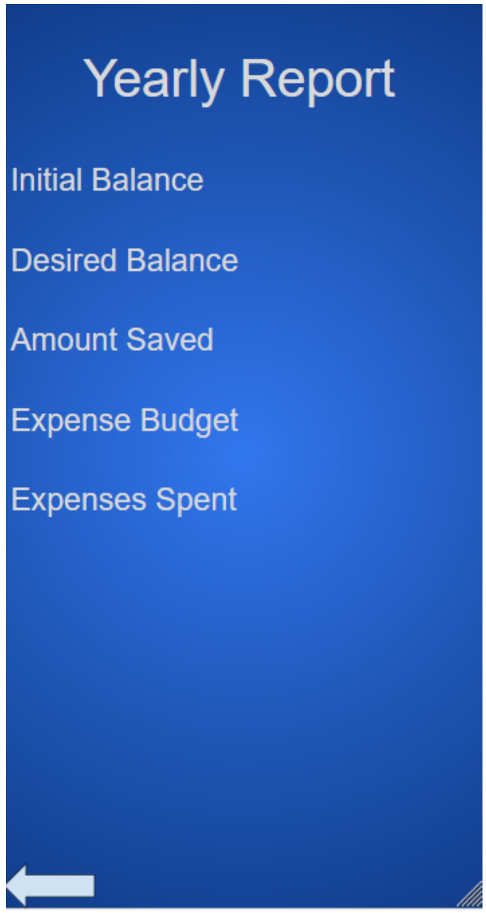


This page is where regular users and advisors can manage their accounts. The user's information will be displayed on the screen, but the password will be hidden for privacy purposes. Users will have the option to edit their usernames, passwords, and emails. There will also be a button "Edit Goal" that leads to the Financial Goals screen, where users can edit their financial goal and information. Lastly, there will be a button to log out of the account.

Stocks

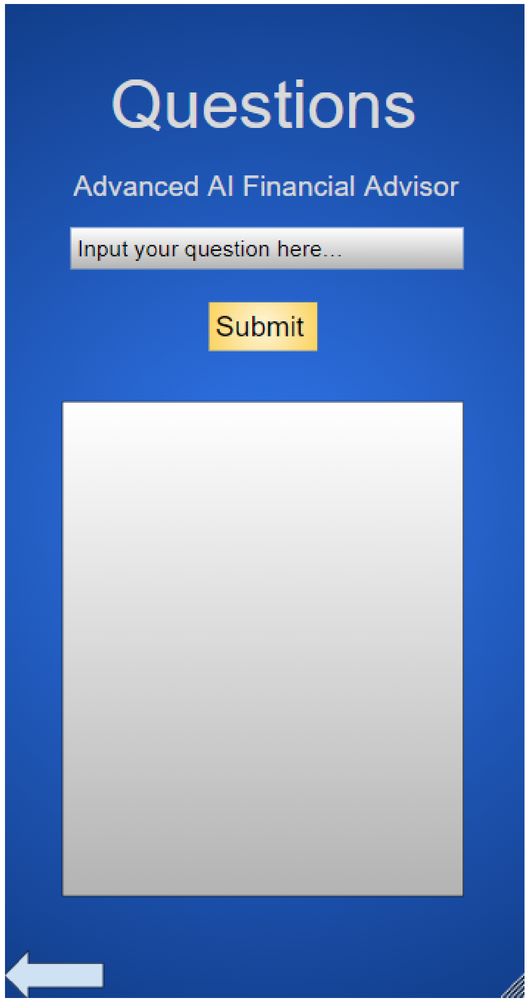
On this page the user can view valuable information about the stock market. The information will be real stock market NASDAQ info, pulled from an API. The user can also hit the back arrow button to go back to the main page.

Yearly Report



Here the user can see their yearly report, which includes: The balance they started with in their account, the balance they desire to have in their account, the amount of money they've currently saved throughout the year, the amount of allowance they can spend throughout the year, and the amount of money they have currently spent throughout the year. The user can hit the back arrow button to go back to the home page.

Q/A



On this page, the user will be able to ask financial questions to an AI based financial advisor. The user will be prompted to insert a question at the top, then the question will be received by AI. The intent is to use a ChatGPT API in order to assist the user with their financial questions.