

Do a usability test

Participant: Ashley

Method: Paper prototype walkthrough

Objective: Evaluate usability and overall user experience through three core tasks.

Task 1: Create an Account and Add a Bank Account

Page Flow: App Store → Landing Page → Create Account → Face ID → Main Page → Redirect to Plaid

Findings:

- Abi found the App Store screen visually clear, but the “In-App Purchases” label suggested a subscription model, which was misleading.
- On the Landing Page, Abi suggested that the app title should be centered rather than aligned to the top.
- The lack of promotional content or subscription details on the Landing Page caused confusion, given the App Store’s mention of in-app purchases.
- Abi was unsure how to add a bank account. Although the button was visible, there were no clear next steps. The intended flow is to redirect users to Plaid for secure bank linking, but this was not communicated.

Task 2: Log In with an Existing Account and View Transactions

Page Flow: App Store → Landing Page → Login → Forgot Password → Verification Code → Face ID → Main Page → Transactions

Findings:

- When resetting the password, Abi felt the “Continue” button should instead say “Back to Login.”
- The verification code step was confusing, as there was no prior step to input a phone number during account creation.
- The “Manage Accounts” button was small and awkwardly placed.
- The term “Spending” below the graph was unclear and lacked context.
- Abi had difficulty recognizing the transaction navigation icon in the bottom navigation bar, though they could access account transactions by tapping on the account.

Task 3: Remove Linked Accounts and Log Out

Page Flow: Main Page → Profile → Linked Accounts

Findings:

- Abi navigated to the Linked Accounts screen without issue.
- They suggested simplifying the account removal process.
- There was no visible logout button, which prevented them from completing the task.
- The title for renaming an account should be updated to “Change Account Nickname.”

Main points of interest are:

App Store:

- Remove the in app purchases tag

Landing Page:

- Move the title to the middle of the screen

Create account page:

- Add a new page to add phone number after account creation
- The move to verification code then facelid page

Forgot password page:

- Change "Continue" to "Back to Login"
- Remove the "Login" at the top of the screen

Main page:

- Remove "Manage button"
- Remove "Spending" word
- Make a page to show a redirect to Plaid

Transactions page:

- Add a drop down menu to better show how to switch between accounts while in this page
- Change the transactions nav icon to a \$

Transaction settings:

- Update the change account name title to "Change Account Nickname"

Profile page:

- Remove address field
- Add logout button

Linked accounts page:

- Remove manage button
- Add X next to each account
- Add a half screen pop up to ask the user to confirm account deletion.

Add page names under the nav bar icons

Reflection:

Conducting this usability test was an eye-opening experience that highlighted the importance of clarity and consistency in user interface design. Observing Abi's interactions with the prototype revealed several areas where assumptions made during development did not align with user expectations—such as the confusion around in-app purchases, unclear navigation icons, and missing steps in account linking. These insights emphasized how even small design choices can significantly impact usability. The session reinforced the value of early user feedback and the need to communicate functionality clearly, especially when integrating third-party services like Plaid.