

Credit Card Rewards Maximizer - Demo Flow

Product Name: PayPilot (Example) **Flow Type:** “Happy Path” Walk-through

1. Onboarding Flow

- **Landing Screen:** Start at the Welcome/Landing page.
- **Login:** Tap “**Login**” -> Enter demo credentials (or simple tap-through).
- **Home Screen:** Land on the main dashboard (showing “Welcome” state).

2. Wallet Setup (The “Ah-ha” Moment)

- **Cards Tab:** Navigate to the “My Cards” or “Wallet” tab.
- **Add Card:** Tap the “+ Add Card” button.
- **Library Selection:**
 - Scroll through the pre-loaded **Card Library**.
 - Select **Chase Sapphire Preferred** (Travel).
 - Select **Amex Gold** (Dining).
 - Tap “**Add to Wallet**”.
- **Verification:** Show the Cards list again, now populated with the selected cards.

3. Core Feature: The Recommendation

- **Transaction Tab:** Navigate to the main input screen.
- **Input:**
 - **Merchant:** Type “Starbucks” (show autocomplete if available).
 - **Category:** Auto-detects or select “Dining”.
 - **Goal:** Leave as default (“Balanced” or “Max Points”).
- **Action:** Tap “**Get Recommendation**”.
- **Result:**
 - Show **Result Screen**.
 - Highlight the winner (e.g., “Use Amex Gold”).
 - Point out the **AI Explanation** (“4x points on dining vs 3x”).

4. Secondary Scenario (Different Category)

- **Back:** Return to Transaction Tab.
- **Input:**
 - **Merchant:** Type “Target” or “Best Buy”.
- **Action:** Tap “**Get Recommendation**”.
- **Result:**
 - Show **Result Screen**.

- Highlight different winner (e.g., “Use Citi Double Cash” or “Chase Freedom”).
- Explain why (AI recognizes “General Retail” isn’t a bonus category for Gold/Sapphire).

5. Advanced Feature (Location)

- **Back:** Return to Transaction Tab.
- **Location:** Tap ” **Use Location**”.
- **Auto-Fill:** Show address/merchant auto-filling (e.g., “Shell Gas Station”).
- **Result:** Show recommendation for Gas category.

6. Conclusion

- **Home/History:** Briefly show the transaction log.
- **Closing:** “That’s how we solve the payment decision in under 2 seconds.”