**Monefy Exploratory Testing Charters**

**Application Version:** 1.16.0.2192

**Platform:** Android

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| **Test Charter 1** | |
| Priority | 1 |
| Reasoning for Priority | Being an app, this is the first and most important step to use it |
| Duration | 5 min |
| Purpose | Application Installation, uninstallation, reinstallation, update |
| Findings | * Able to Install application without any issue * Able to Uninstall application without any issue * Able to Re-install application without any issue * In case an updated version is available, able to install update |
| Bugs | None |

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| **Test Charter 2** | |
| Priority | 4 |
| Reasoning for Priority | These pages are not must have for app to work, however from marketing and revenue perspective this can have significant impact if it does not working as expected |
| Duration | 5 min |
| Purpose | Introductory Screens |
| Findings | * On fresh install, Getting Started screen * Clicking on Getting Started shows another screen with label ‘Control your spend and start saving’, with ‘Amazing’ button * Clicking on ‘Amazing’ button shows another screen with label ‘Together we’ll reach your financial goals’, with ‘I’M Ready’ button * Clicking on ‘I’M READY’ button shows offer screen, with ‘Claim My Offer’ button and ‘X’ icon |
| Bugs | * On small screen phone, claim my Offer button hides digits indicating saving % on offer page * Links for Privacy Policy and Terms of Use are not visible |
| Risk Migration | Update the UI to display complete details. Verify in devices with different screen size |

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| **Test Charter 3** | |
| Priority | 1 |
| Reasoning for Priority | The core of the application and must be verified thoroughly for good user experience |
| Duration | 30 min |
| Purpose | Monefy Dashboard |
| Findings | * On opening the app, Dashboard appears after introductory slides * Also, on first use, as you explore the application and click different icons, few info tips are displayed which helps to understand basic features functionality * Default view is for ‘All accounts’, however user can switch between accounts from right panel * Icons for Search and Transfer are displayed in top panel along with Monefy logo * By Default, ‘Cash’ and ‘Payment Card’ account is created * There are two icons + (in green) and – (in red) which indicates Income and Expense respectively. Also, the same is indicated as Text on first use of App after installation * When list is collapsed, right hamburger button (beside balance button) behaves the same as left button and balance button, which makes the function redundant * There 14/12(depending on Screen size) icons pertaining to different Expense categories surrounding Donut chart * % Of amount spend for expense can be visualized in Donut Chart, also the same is indicated under relevant expense * The default view is for current month, however if there are expense added for previous or upcoming month user can swipe left and right respectively to view details. Alternatively, user can tap label of that month to view details * Long Pressing the expense icon or relevant color in donut chart (if exists) shows Amount spend for that expense with Expense Category text e.g., Food $549.00 * User can change to different view e.g., Day/ Week/ Month/ Year/ Custom from left panel * User can add/update account and relevant info, change Currency from panel which appears when clicking on three dots (top right corner) * Following features need Monefy Pro:   + Creating own Category   + Sync to multiple devices   + Dark Theme   + Passcode Protection   + Changing Existing Category Icon |
| Bugs | * In Expense icon, the background color behind text ‘EXPENSE’ is light pink, similarly the background behind ‘INCOME’ text should be of light green color instead of white * The order of display of expense is not consistent, should be descending order of expense percentage * Icon ‘Income’ and ‘Expense’ are not consistent, as sometimes it shows ‘+’ and ‘-‘ instead of text * For expense category amount info, when long press on icon/donut chart section, the color in middle of Donut chart should be red for expense * In Order to exit Search, user need to click back button. Ideally clicking on other areas should automatically change focus and exit from search * Year is not displayed in Day, Week or Month view * Changing Currency from Main Currencies option indicates requirement of Pro memberships, however able to change Currency from Settings * For expense type, the line mapping to expense type with relevant donut chart sections is missing for ‘Toiletry’, ‘Car’, ’Communication’ |
| Risk Migration | * Make design consistent * Show Expense around donut chart in Descending order of expense % * Fix Bugs which are not sever but can enrich User experience |

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| **Test Charter 4** | |
| Priority | 1 |
| Reasoning for Priority | Another core functionality of Application, for application to be usable |
| Duration | 15 min |
| Purpose | Add Income and Expense |
| Findings | * Adding Expense can be done either via tap on relevant expense item’s icon or via New Expense icon (‘-’ / ’EXPENCE’) * Adding of Income can be done via new income icon ‘+’ / ’INCOME’ * To add amount, we can use calculator * To change Account, click on icon next to Amount, and select from list of accounts * A note related to expense can also be added * Long press on Back icon in Amount field, resets the amount to 0 * Income/Expense category can be changed via ‘Change Category’ button * It is necessary to input amount before selecting category * After edit clicking on Back, autosaves the changes and banner with option to ‘Cancel’ appears for few seconds * Also, on edit expense, Delete and Transfer icons appears * Clicking on Date, a Calendar appears, and user can change expense date either via selection or via typing the date * Total of all Income is displayed in Green text on Dashboard in center of Donut chart * Total of all expenses in displayed in Red text on Dashboard in center of Donut chart |
| Bugs | * On edit expense screen, there is no option to Cancel, as clicking Back auto saves the changes * To modify amount, user needs to clear the amount first, there is no option to update existing value * Does NOT ask for confirmation before Deleting Expense |
| Risk Migration | * Improve usability by applying principal of minimal clicks to get things done |

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| **Test Charter 5** | |
| Priority | 2 |
| Reasoning for Priority | Important functionality of Application, to view details of expenses |
| Duration | 15 min |
| Purpose | View Income and Expense List |
| Findings | * Clicking on Donut chart or Balance, or ≡ displays list of expense in descending order of Date * If Donut chart has more than one expense type, than selected expense type’s list is displayed in collapsed mode in the list * The total Amount for each day is displayed against Date. In case of days where Expense exceeds Income, amount is displayed in red for those days * Clicking on down arrow icon (right of Balance button) collapse the list and shows details of independent expense with notes (if any) * Expenses are indicated with red dot, where as income with green dot * Clicking on independent line item, takes to edit expense/income * Can Search line item via category, account, note, amount |
| Bugs | * On edit expense screen, there is no option to Cancel, as clicking Back auto saves the changes * To modify amount, user needs to clear the amount first, there is no option to update existing value * Does NOT ask for confirmation before Deleting Expense |
| Risk Migration | * Confirming before a delete action leads to better user experience |

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| **Test Charter 6** | |
| Priority | 3 |
| Reasoning for Priority | Nice to have functionality, where user can add multiple account and view details of expenses in view by Day/Month/Week/Year/ Custom |
| Duration | 15 min |
| Purpose | Verify options in Left sidebar |
| Findings | * Selecting Particular Account shows details only for that account * Selecting different timeframe - Day, Week, Month, Year, All, Interval or Custom day – shows detail for selected timeframe |
| Bugs | * Year is not displayed when changing the timeframe to view Day/Week/Month/Interval/Specific Date * Date Format is not consistent across the views |
| Risk Migration | * Make format consistent and also show Year along with Day and Month |
| **Test Charter 7** | |
| Priority | 3 |
| Reasoning for Priority | Nice to have functionality, where user can do modification related to Category, Account, Settings |
| Duration | 15 min |
| Purpose | Verify options in Right sidebar |
| Findings | * Existing Category’s Name can be modified * Category can be deleted, and this will remove all associated expense/income line items * New Account can be added * Account’s Name, icon can be edited, and Initial Balance can be added with date * There is an option to include the account amount in Balance * Also, to show account in Left Panel Account list, there is an option to Enable * Account can also be merged to other account * Under Settings, preferences can be set to Set Budget, Carry over amount, recurrence * General Settings can be done related to theme, currency, Language, First day of Week * Details of spending can be exported in CSV file * Can take Data Backup |
| Bugs | * Changing the language is allowed, however on changing language it shows Pro purchase related slides |
| Risk Migration | * Indicate Pro features with special character in the list   e.g. Dropbox \* |