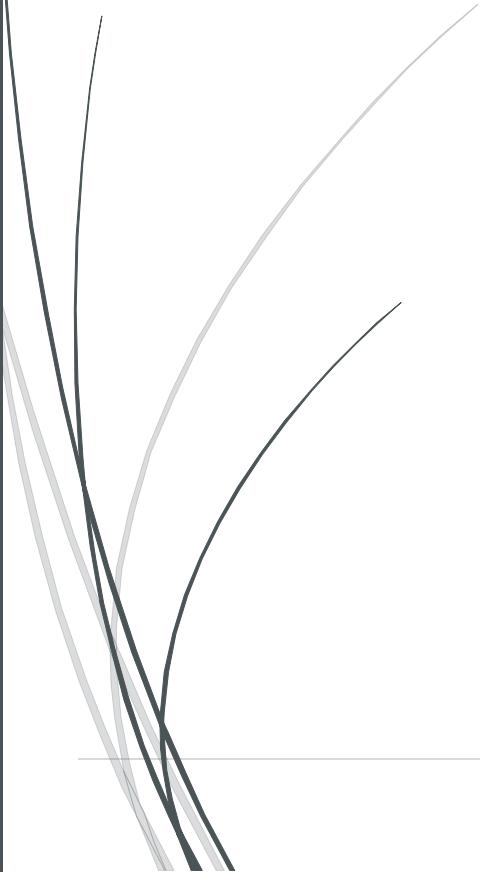




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Budget Budgie Design Document

OPSC7311



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I TABLE OF CONTENTS

2	Table Of Figures.....	2
3	Introduction	3
4	Overview	3
5	Icon Exploration.....	4
6	Detailed list of requirements & Innovative Features.....	5
6.1	Login	5
6.2	Accounts.....	5
6.3	Set a monthly total budget goal.....	6
6.4	Categories	6
6.5	Expenses	7
6.6	Add an Expense.....	7
6.7	View Expenses.....	8
6.8	Graph.....	9
6.9	Gamification.....	10
7	User Interface design.....	12
7.1	Login and Categories	12
7.2	Expenses and Graphs.....	13
7.3	Ivan Interactions.....	14
7.4	Navigation Diagram.....	15
8	Project Plan	16
9	Conclusion.....	17
10	References.....	18

2 TABLE OF FIGURES

Figure 1 Budget Budgie Logo Mockup 1 (Bettencourt Da Silva, 2025)	4
Figure 3 Budget Budgie Logo Mockup 3 (Bettencourt Da Silva, 2025)	4
Figure 4 Budget Budgie Logo Mockup 4 & 5 (Bettencourt Da Silva, 2025).....	4
Figure 5 Budget Budgie Logo Mockup 6 (Bettencourt Da Silva, 2025)	5
Figure 6 Figma Wireframes for Login and Category Screens (Bettencourt Da Silva et al., 2025).....	12
Figure 7 Wireframes created for Expense and Graph Screens (Bettencourt Da Silva et al., 2025)	13
Figure 8 The Personal Account Screen Wireframes (Bettencourt Da Silva et al., 2025)	14
Figure 9 Navigation Diagram for Wireframes (Bettencourt Da Silva et al., 2025)	15
Figure 10 : ChatGPT. [SA]. Budget App Project Plan- Gantt Chart.....	16

3 INTRODUCTION

Budget Budgie is a personal finance app created to make budgeting simple, engaging, and stress-free. Inspired by research on leading money management tools, it combines proven budgeting strategies with an interactive, gamified experience. The goal is to empower users to build better financial habits, not through restrictions, but through motivation and trust. With Budget Budgie, managing money becomes less of a chore and more of a rewarding journey.

4 OVERVIEW

Our application called **Budget Budgie** is designed as a complete budgeting solution that combines simplicity and financial planning into an easy-to-use application for those who struggle with personal finance management.

- **Multi-Account Management** – Track all your accounts in one place for complete visibility.
- **Envelope-Style Budgeting** – Allocate monthly budgets into customizable categories, helping users plan.
- **Smart Expense Tracking** – Quickly add expenses, attach receipts, and categorize spending with ease.
- **Visual Insights** – Gain a clear understanding of your habits through interactive charts and detailed reports.
- **Gamified Experience** – Meet Ivan, the friendly mascot who guides your progress. Earn points, unlock rewards, and stay motivated through challenges.
- **Goal-Oriented Features** – Set personalized financial goals and receive performance scores and actionable tips to reach them.
- **Trust-First Approach** – Budget Budgie prioritizes user trust, allowing full transparency and control before requesting any in return.

5 ICON EXPLORATION

Budget Budgie will need a Logo that signifies its brand. It will need to be recognizable and easy to remember while also maintaining a level of simplicity that makes it desirable to look at. Throughout the planning process, several mockups were created for Budget Budgie's Iconic Look.



Figure 1 Budget Budgie Logo Mockup 1
(Bettencourt Da Silva, 2025)

Figure 1 is a mockup of Ivan's iconic design in colour with a curly typeface beneath Ivan. This Icon is meant to be fun and playful in contrast to life's financial stresses. The Budget Budgie app is not being created to stress out its users which is why each user will find a companion in Ivan.

Figure 3 takes an entirely different approach and attempts to hedge Budget Budgie in a professional light. With Simplistic Shapes in a monotone background. Budget Budgie is ready for corporate life, made for a more serious audience.



Figure 2 Budget Budgie Logo Mockup 2
(Bettencourt Da Silva, 2025)



Figure 2 Budget Budgie Logo Mockup 3
(Bettencourt Da Silva, 2025)

Figure 3 follows the same approach as Figure 2 but with a feather to really hinge on the aviary aspect of Budget Budgie as you are very much investing into Ivan as well when Budgeting with Budget Budgie.

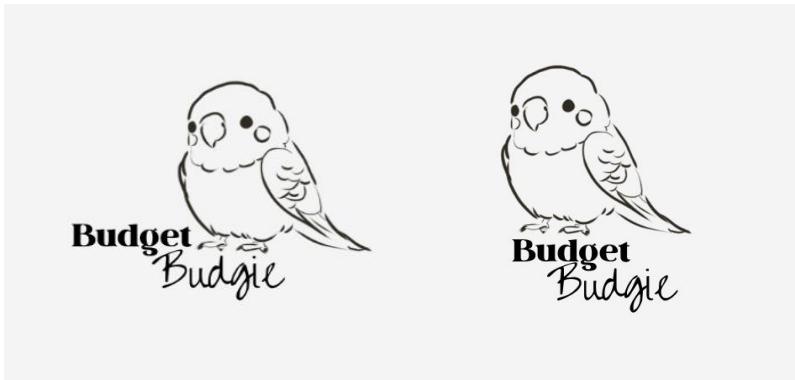


Figure 3 Budget Budgie Logo Mockup 4 & 5 (Bettencourt Da Silva, 2025)

Figure 4 shows Budget Budgie's logos as the team circles back to keep Ivan more present in the logo. It keeps Ivan's cute figure in the mix to take away the seriousness of Mockup 2 & 3 while keeping the monotone colours and corporate typeface.



Figure 5 is the last of the final Mockups to be generated and is currently in consideration for the final design.

Figure 4 Budget Budgie Logo Mockup 6
(Bettencourt Da Silva, 2025)

6 DETAILED LIST OF REQUIREMENTS & INNOVATIVE FEATURES

6.1 LOGIN

Upon opening the application, the user will be greeted by a screen with an animated version of the application mascot “Ivan” with fields for the user to input their username and password. (Ivan gets mad if the information entered is wrong, he takes security very seriously!)

6.2 ACCOUNTS

Upon successful login by the user, they are taken to a list of all their available accounts as well as the ability to add another account. This will act as the home page of the application; there will be a static button burger menu for navigation at the top as well as a button to get back to this home screen. If the user wishes to add an account, they are met with a popup screen asking if they would like to add an account based on a custom template such as savings or credit account or if they would like to have a blank account. Custom templates add categories to that account based on which type is selected. They can always add or remove them later when they enter the account. There will also be a number representing the number of months the user has successfully maintained good spending habits by not exceeding their monthly spending.

6.3 SET A MONTHLY TOTAL BUDGET GOAL

Upon first entering the account the user will have to allocate their monthly budget for the account and then allocate the available funds to various categories that they can create themselves or have already imported from choosing a template in the accounts section. Each category has its own envelope with a dedicated amount of money that can be spent for the month, an amount in green if positive and red if the user has overspent.

6.4 CATEGORIES

Categories are displayed in responsive, scrollable blocks, with a maximum of two blocks per row for easy viewing. Each category functions as an envelope, showing the allocated budget for the month. The remaining balance is displayed with a sliding bar representing the amount spent for that category, changing colour from green if positive and red if the user has overspent. The category is also colour coded for ease of use in some of the other app features such as the graph.

At the end of the category list, a “+” block takes users to a new screen and allows them to add a new category and set its budget and colour. When adding a category, the template feature suggests optimal allocations based on the user’s historical spending data. Ivan is also present, making sure the user practices good decision making.

Additionally, Budget highlights categories or accounts that are frequently overspent, offering actionable tips to help users make informed spending decisions. Maintaining good spending habits will create a score for the user based on available data.

6.5 EXPENSES

This screen has a large, animated image of Ivan and 2 buttons that lead to “Add an expense” and “View expenses” respectively.

6.6 ADD AN EXPENSE

This screen provides users with an intuitive and structured way to record their spending. The layout is designed for clarity and ease of use:

- Category Selection: A drop-down menu allows the user to choose the category that the expense falls under. This ensures proper tracking within their budget envelopes.
- Expense Details: Two separate fields will be presented:
 - Name of Expense – A text field for entering the title or description of the expense.
 - Amount – A numeric field for inputting the cost of the expense.
- Receipt Upload: A centered square icon with a “+” symbol will be provided for users to add a photo of the receipt (optional). Tapping this icon will open the device camera or gallery.
- Submit Button: Positioned at the bottom of the screen, the submit button finalizes the entry and updates the user’s budget and category envelope accordingly.

6.7 VIEW EXPENSES

This screen enables users to review and analyze their spending for a customizable time frame. The design prioritizes clarity, flexibility, and easy navigation:

- **Period Selection:**
 - A primary drop-down menu allows users to choose between “Select Period” or “List All”.
 - If “Select Period” is chosen, two additional date picker fields will appear for Start Date and End Date, enabling precise filtering of transactions within the desired range.
- **Listing Expenses:**
 - Below the period selection, a List button will display all relevant entries based on the user’s filter settings.
 - Users can further refine results using a sorting drop-down, offering options such as:
 - Latest First
 - Earliest First
 - Amount
 - Below this is another drop down with options for categories, by default, all categories are included. If the user selects a specific category, all available entries for the category will appear. This allows users to narrow the list to a specific category for more focused analysis.
- **Expense Display Format:**
 - Each expense entry will appear as a responsive card (one per row) displaying:
 - Name of Expense
 - Amount
 - Category
 - Thumbnail of Receipt (if available)
 - The layout uses a scrollable list of clean, uniform cards for easy readability.

This feature is designed to give users complete control over how they track and evaluate spending patterns, whether they want a full overview or a focused report within specific dates or categories.

6.8 GRAPH

- When the user navigates to this screen, they are greeted by a bar graph showcasing three Days of spending data.
- At the top of the screen is a drop-down menu to switch between daily and monthly spending
- Default View: Displays the last three days/Months of data.
- Users can navigate through previous days/months using dedicated left and right arrows at the bottom of the screen, allowing them to scroll through historical data.

Graph Details:

- The x-axis displays the days/months, while the y-axis shows the amount spent.
- Each bar represents a day/month and is divided into spending categories, with colours assigned to each category for easy visual distinction.

Interactive Features:

- The user can click on any bar (representing a day/month) to expand it:
 - In the expanded view, the selected bar will be highlighted and enlarged, displaying a breakdown of categories, including category names and amount spent per category.
- Clicking the expanded bar again will take the user to the “View Expenses” screen, with filters pre-populated to show only the expenses for that selected day.

Additional Indicators:

- Below each bar for the monthly graph, the system will display:
 - A score based on the user’s spending habits for that day/month (good or bad).
 - A green or red version of Ivan for if they were within their budget for the month

6.9 GAMIFICATION

Budget Budgie integrates gamification to make financial management engaging and rewarding for users. The main gamification element is Ivan and his quest and rewards system. Users are greeted by an animated Ivan, ruffled or happy based on user spending habits.

Screens:

- **Personal Account Screen**

The home screen displays Ivan, an engaging virtual character who reacts to user behavior. There is also a drop-down for **Settings**, **Quests**, **Ivan's Shop**, and **Rewards**.

- **Quests Screen**

Quests take users to a page where Ivan hands out challenges to the user based on data that the application gathers. An example would be the user receiving many points if they underspent in a category, they normally would overspend on. This screen also shows the total number of quests completed. Ivan provides “Quests” in the form of financial challenges and money tips, encouraging consistent budgeting habits.

- **Ivan's Shop Screen**

The shop takes users to a screen where users can spend their points to buy Ivan new clothes, as well as change his appearance with all outfits users have. Points can be used to unlock outfits for Ivan

- **Rewards Screen**

Rewards is another screen where users can spend their points on discounts for their monthly subscription, or in future buy coupons for discounts at pre-negotiated retailers. Subscription Discounts on Budget Budgie’s subscription-based model are part of this rewards system.

Trust-Based Rewards Model

As a new product entering the market, Budget Budgie recognizes the challenge of establishing trust with both users and potential partner companies for traditional rewards programs. To address this, our approach focuses on self-improvement and honesty:

- **Subscription Discounts as Rewards:** Instead of relying on external partnerships for incentives to start with, users can earn discounts on their subscription by maintaining good budgeting habits.
- **Why This Works:** People can easily game a system for points or regular rewards. However, when their own subscription cost depends on their honesty and discipline, they are more likely to stay genuine when they are committed to their goals.

Budget Budgie places trust in its users, fostering a sense of responsibility and ownership over their financial journey.

7 USER INTERFACE DESIGN

7.1 LOGIN AND CATEGORIES

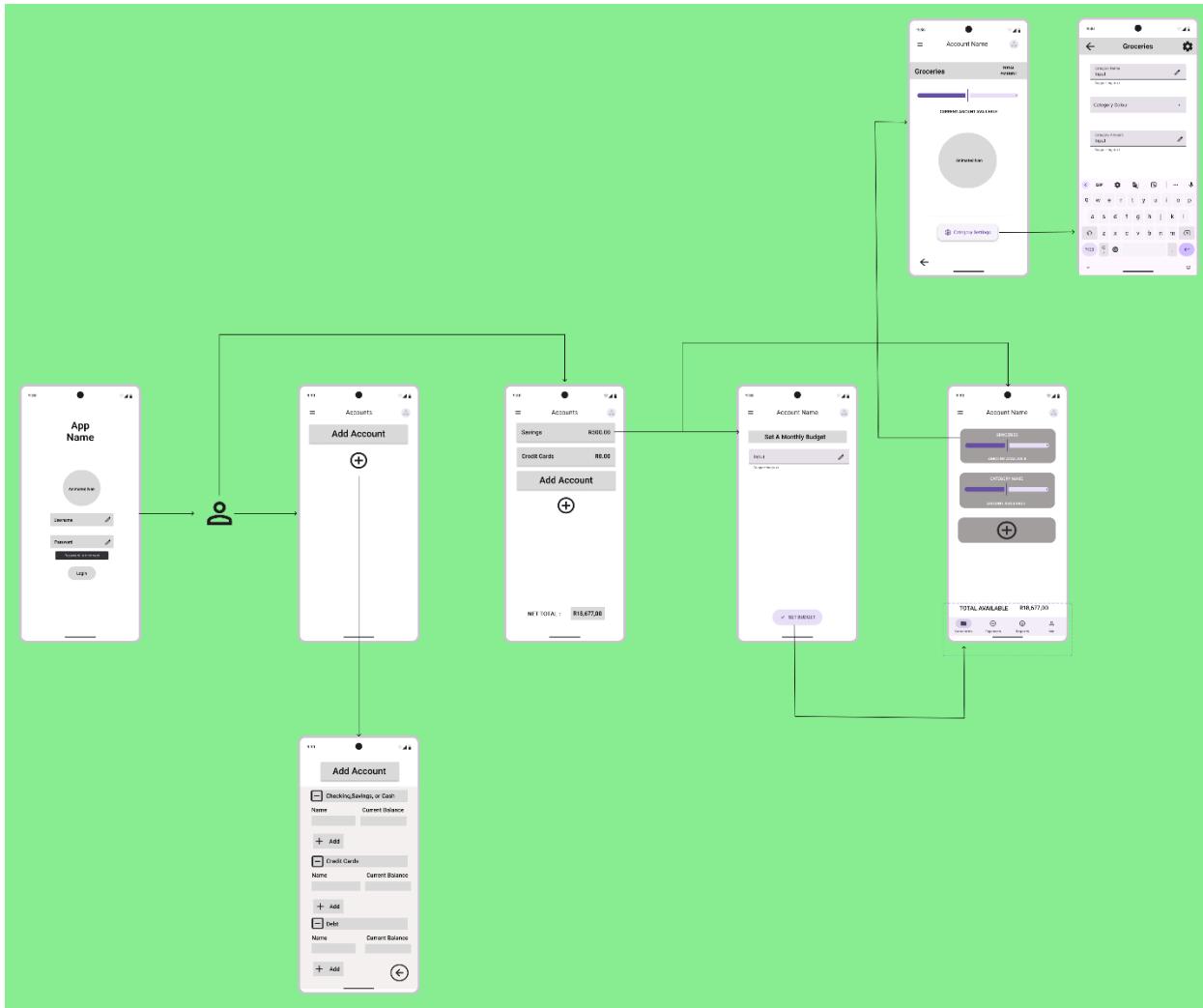


Figure 5 Figma Wireframes for Login and Category Screens (Bettencourt Da Silva et al., 2025)

Budget Budgie Design Document

7.2 EXPENSES AND GRAPHS

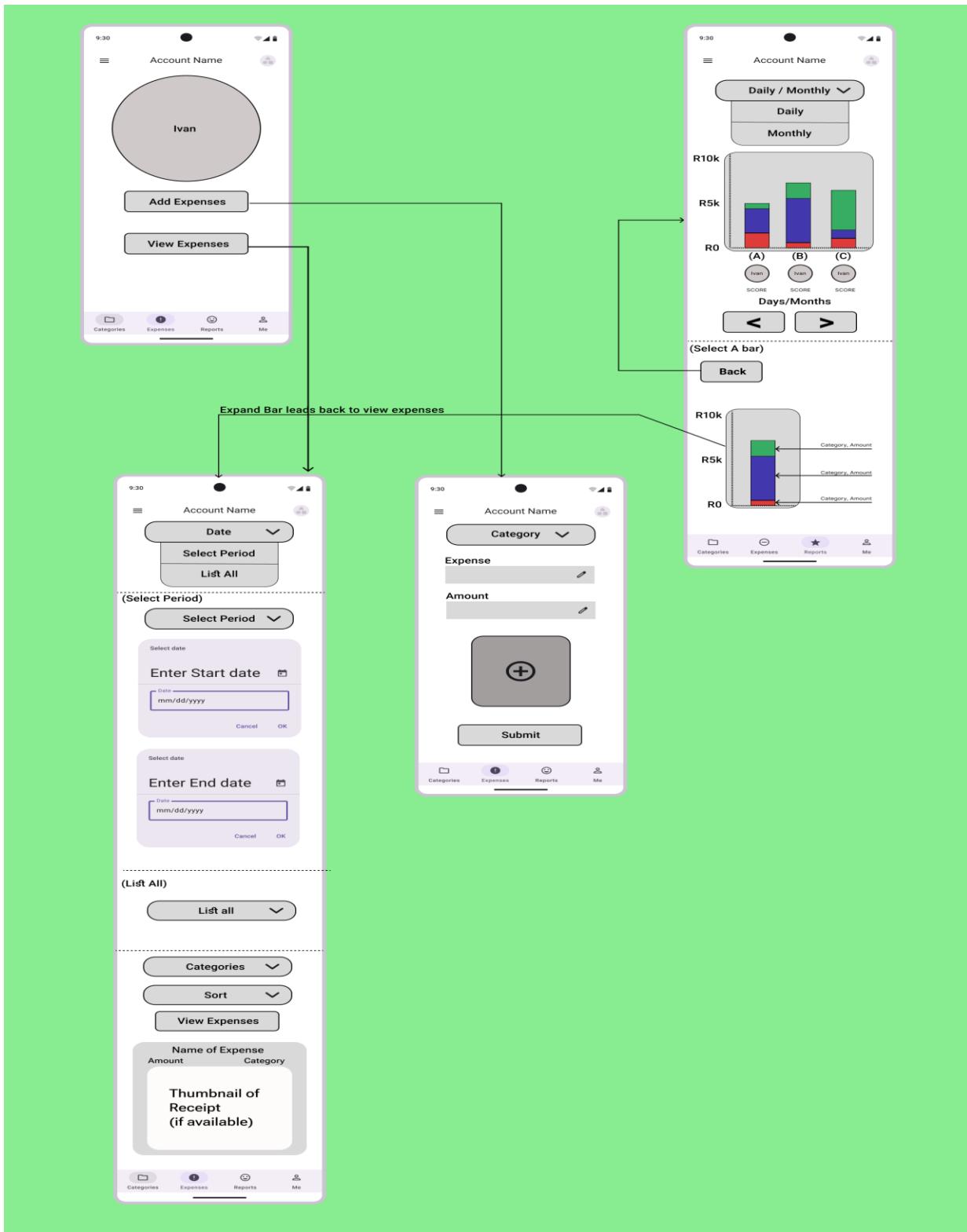


Figure 6 Wireframes created for Expense and Graph Screens (Bettencourt Da Silva et al., 2025)

7.3 IVAN INTERACTIONS

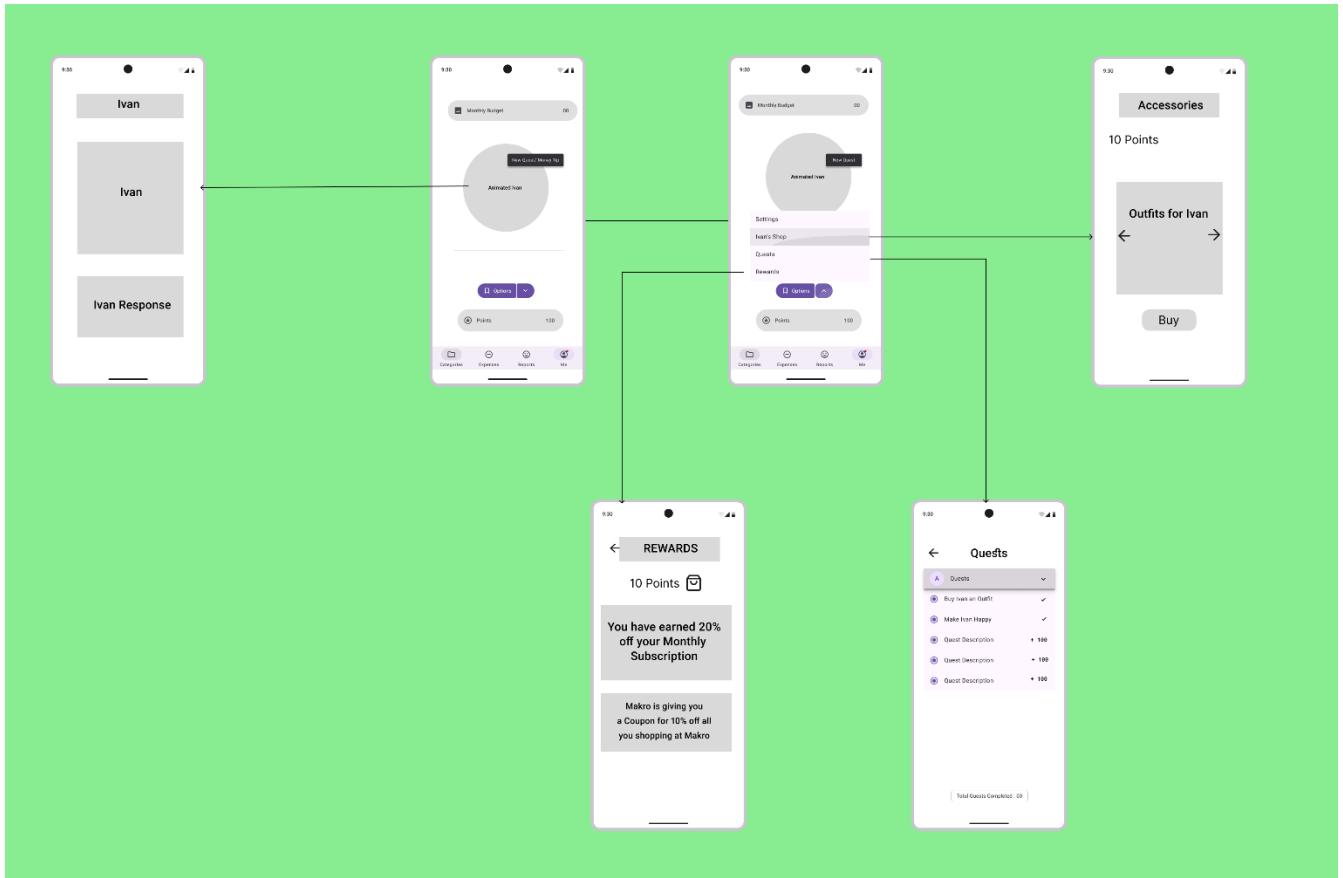


Figure 7 The Personal Account Screen Wireframes (Bettencourt Da Silva et al., 2025)

Here is a link to our complete wireframe with screen descriptions of our Budget Budgie Application.

<https://www.figma.com/design/dlaufIRsJ0jsCzSPXoi9UU/Budget-Budgie-WireFrame?node-id=0-1&t=D7XG4kM9n6tvBRCL-1>

7.4 NAVIGATION DIAGRAM



Figure 8 Navigation Diagram for Wireframes (Bettencourt Da Silva et al., 2025)

8 PROJECT PLAN

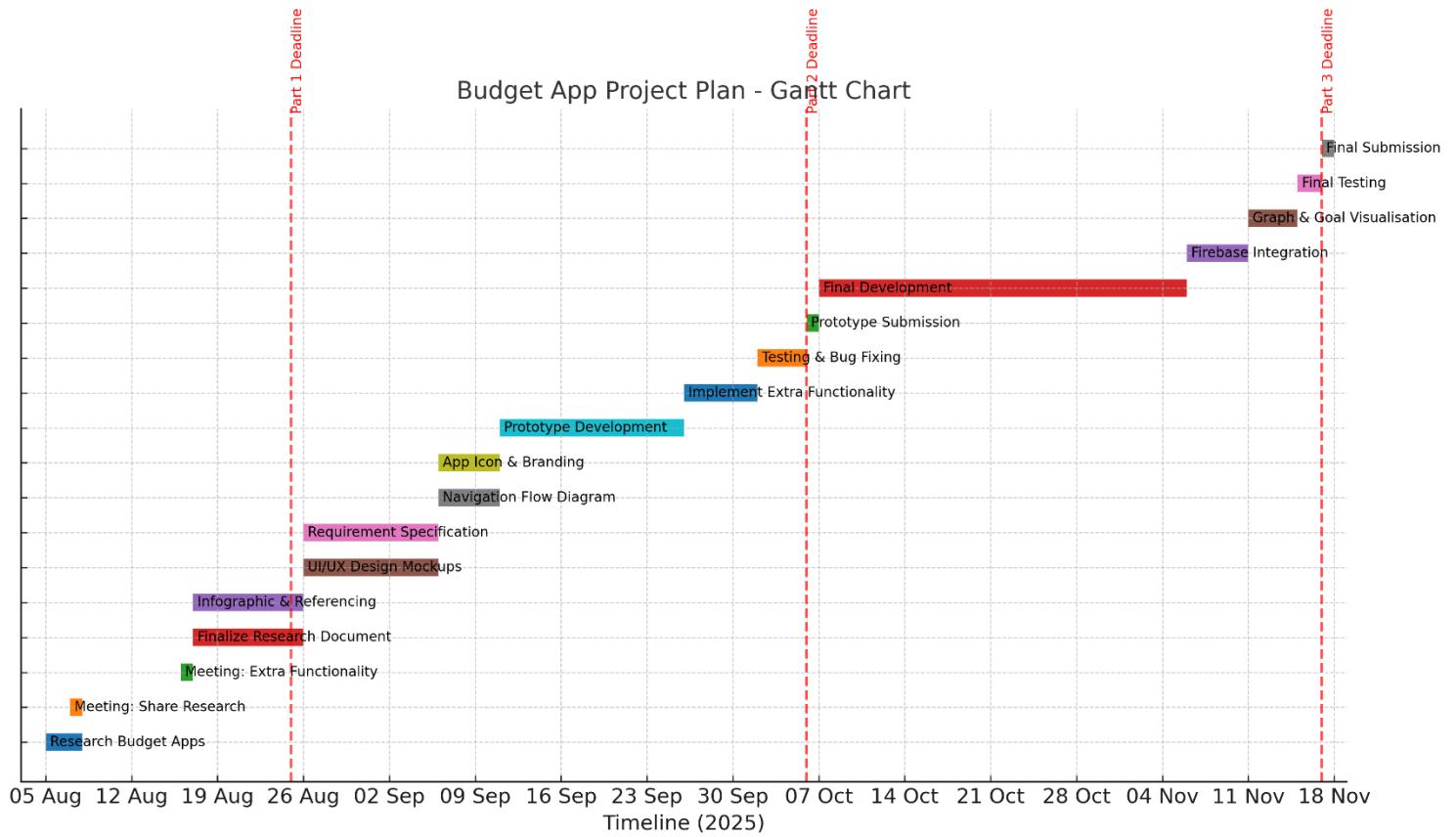


Figure 9 : ChatGPT. [SA]. Budget App Project Plan- Gantt Chart.

9 CONCLUSION

Budget Budgie isn't like any other money management application, it's an ever-present, ever watching financial entity, there to help its users along the difficult path of maintaining good financial habits. By making use of features such as category- based "Budgeting", visual analytics and our interactive mascot Ivan, who is there to take the users stress and turn it into motivation. With our trust-first approach and innovative rewards system, Budget Budgie empowers users to stay consistent, honest, and focused on their financial goals.

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