

# Research study for bookkeeping app

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# Project overview



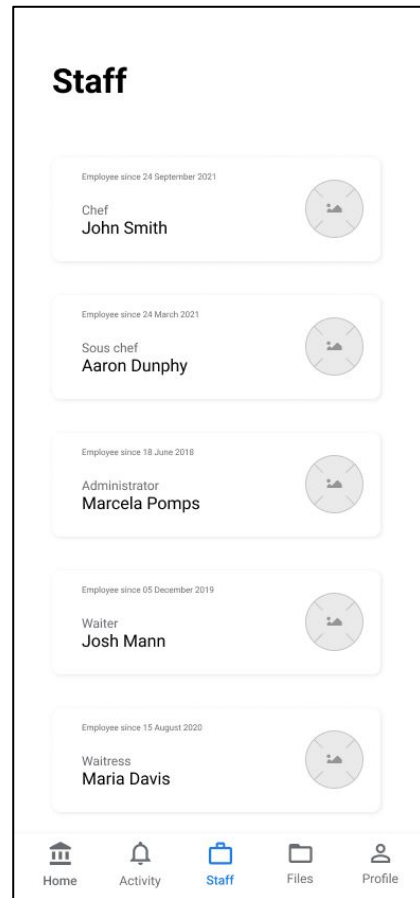
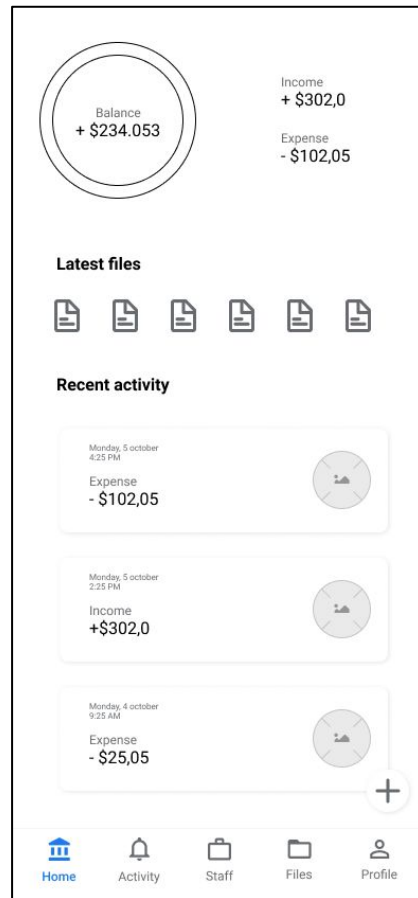
## The product:

A bookkeeping app for a local restaurant in my hometown



## Project duration:

September 2021 - October 2021



# Project overview



## The problem:

Bookkeeping apps tend to be bulky and hard to use. We want to solve that problem by creating an app with a simple and intuitive, but powerful interface.



## The goal:

The goal of the app is to be a one stop shop for managing a business' bookkeeping to save time and energy for the users.

# Project overview



## My role:

UX Researcher and Designer



## Responsibilities:

- User research
- Usability study
- Wireframing
- Prototyping

# Understanding the user

- User research
- Personas
- Problem statements
- User journey maps

# User research: summary



Going into the research I assumed users would want a feature-packed app, but after conducting the research I have realised that most users want a simple app that is easy and fast to use.

The personas in the study were a 22 year old student and part time waitress and a 36 year old freelance accountant.

# User research: pain points

1

## Clear User Flows

Concise onboarding, simple and intuitive interface will guide the users to achieving the goal easy and fast.

2

## Cheap Subscription

A cheap, fixed monthly subscription with no hidden fees that will not hinder the growth of a small businesses

3

## High Productivity

Having all the important information in one place, the possibility to set recurring income and expenses will save time and increase productivity

4

## Versatility

Easy to set up and compatible with all operating systems, the app will be running in no time.

# Persona: Marcela

## Problem statement:

Marcela is a Law student and part time waitress who needs a fast way to keep track of the stock and sales because she needs time to attend to the customers.



**Marcela**

**Age:** 22  
**Education:** Enrolled - Law School  
**Hometown:** Craiova, Romania  
**Family:** Single, has a roommate  
**Occupation:** Student, part time waitress

*"I spend almost half of my working hours doing paperwork and then redoing it because something doesn't add up."*

## Goals

- She wants to become a lawyer
- To get herself through Law School without relying on her family

## Frustrations

- The restaurant she works at is doing their bookkeeping on paper

Marcela is a Law student that has a part time job as a waitress at a family restaurant to pay for her college fees. Marcela often encounters difficulty at work because the bookkeeping is mostly done on paper and it is difficult for the staff to write down everything while attending to the customers.



# Persona: Tom

## Problem statement:

Tom is a Busy Freelance Accountant who needs an easy and effective way to manage all of his clients because wasting time means less clients and less money.



Tom

**Age:** 36

**Education:** Accounting degree

**Hometown:** London, England

**Family:** Wife, no children

**Occupation:** Freelance Accountant

*"I avoid banks as much as possible. I use online banking because it's a lot less nerve-wrecking and much faster."*

## Goals

- To minimize the energy he puts at work, so he can focus on his personal life

## Frustrations

- Most products and services are hard to use with my visual impairment
- Switching between accounts takes too many actions

Tom is a Freelance Accountant that works for several businesses, most family owned. Tom's visual impairment causes difficulties when it comes to using most apps, but after using them for a while he manages to properly navigate them. Tom prefers a simple app that requires only a few taps to get something done over one packed with many features that takes time to get used to.

# User journey map

The user's goal is to take an order and record it in the app as soon as possible. For that she needs an app that requires as few taps as possible.

## Persona: Marcela

Goal: Take an order and record it in the bookkeeping app

ACTION	Greet the customers and guide them to an empty table	Take the customers' order and pass it to the bartender	Serve the order and record it in the app	Wrapping up with the customers	Clean the table	Record in the app
TASK LIST	Tasks A. Greet the customers B. Guide them to an empty table C. Give them menus	Tasks A. Take the customers' order B. Pass the order to the bartender	Tasks A. Take the order to the customers B. Record the table and order in the app	Tasks A. Serve the bill B. Take out the used glasses and plates	Tasks A. Pick up the bill and money B. Clean the table	Tasks A. Close the standing order on the table B. Set the table's status as empty
FEELING ADJECTIVE	● Excited	● Glad ● Satisfied	● Confused ● Overwhelmed	● Satisfied	● Relieved ● Excited	● Alert ● Glad
IMPROVEMENT OPPORTUNITIES	● Accessible menus		● Improve accessibility for the visually impaired			● Improve accessibility for the visually impaired

# User journey map

The user wants to check if a client's taxes have been paid. For that the user needs an app that includes income, expenses and tax calculation. Additionally, email integration might be useful.

## Persona: Tom

Goal: Check if a client's monthly taxes have been paid

ACTION	Open bookkeeping app	Determine which account is used	Find the client's income section	Find the client's taxes section	Switch to email app	Switch to bookkeeping app
TASK LIST	Tasks A. Open bookkeeping app B. Identify all key sections	Tasks A. Find the account management section B. Switch account	Tasks A. Find income section B. Verify and calculate all the income flows	Tasks A. Find taxes section B. Verify and calculate taxes C. Draw conclusion	Tasks A. Switch to email app B. Contact client to inform about the taxes	Tasks A. Switch to email app B. Switch client account to continue working
FEELING ADJECTIVE	<ul style="list-style-type: none"><li>● Confused</li><li>● Intimidated</li></ul>	<ul style="list-style-type: none"><li>● Confused</li><li>● Annoyed</li></ul>	<ul style="list-style-type: none"><li>● Lost</li><li>● Hopeful</li></ul>	<ul style="list-style-type: none"><li>● Alert</li><li>● Hopeful</li></ul>	<ul style="list-style-type: none"><li>● Relieved</li><li>● Glad</li></ul>	<ul style="list-style-type: none"><li>● Annoyed</li></ul>
IMPROVEMENT OPPORTUNITIES	<ul style="list-style-type: none"><li>• Better wayfinding</li><li>• Improved accessibility for the visually impaired</li></ul>	<ul style="list-style-type: none"><li>• Easier flow for switching accounts</li><li>• Improved accessibility for the visually impaired</li></ul>	<ul style="list-style-type: none"><li>• Manage financial information easier</li><li>• Improved accessibility for the visually impaired</li></ul>	<ul style="list-style-type: none"><li>• Manage financial information easier</li><li>• Improved accessibility for the visually impaired</li></ul>	<ul style="list-style-type: none"><li>• Add email integration</li></ul>	<ul style="list-style-type: none"><li>• Add email integration</li></ul>



# Paper wireframes

Sketches for the homepage.

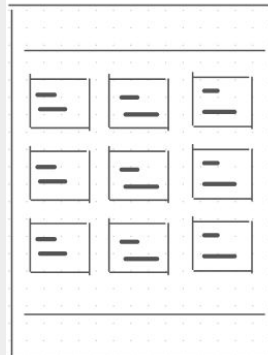
It will include:

- Balance, income and expenses
- Latest used files
- List of recent activity for income and expenses

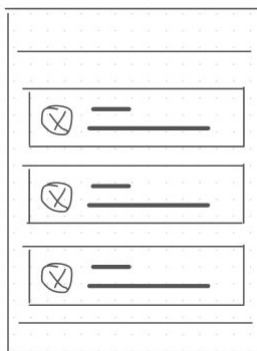
Option A



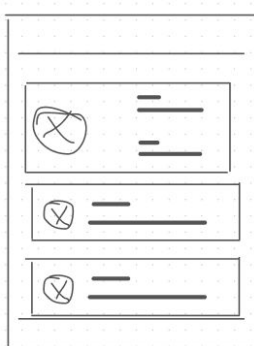
Option B



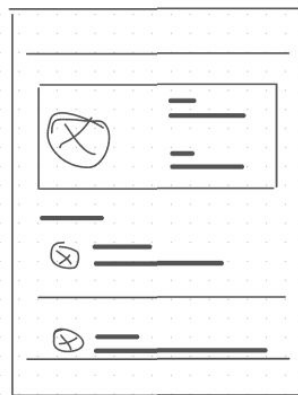
Option C



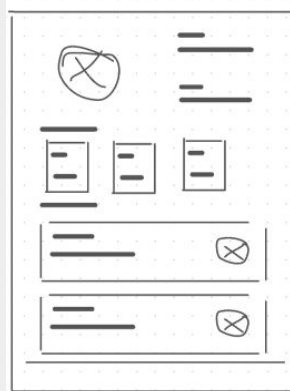
Option D



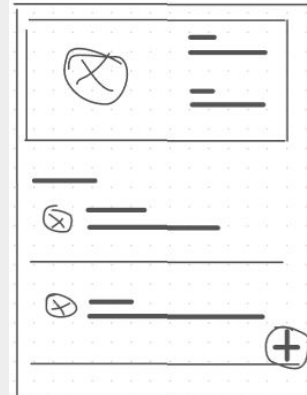
Option E



Option F



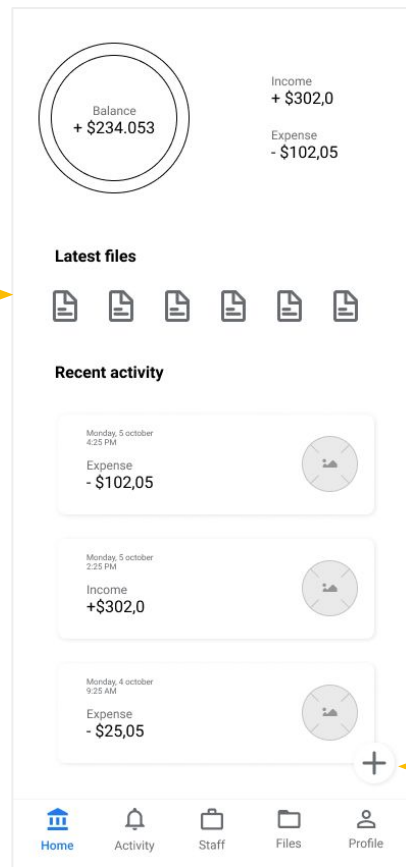
Option G



# Digital wireframes

The homepage is packed with valuable info and quick access to the most important features via the PLUS button.

Quick access to the latest files and recent activity gives the user quick access to the latest events

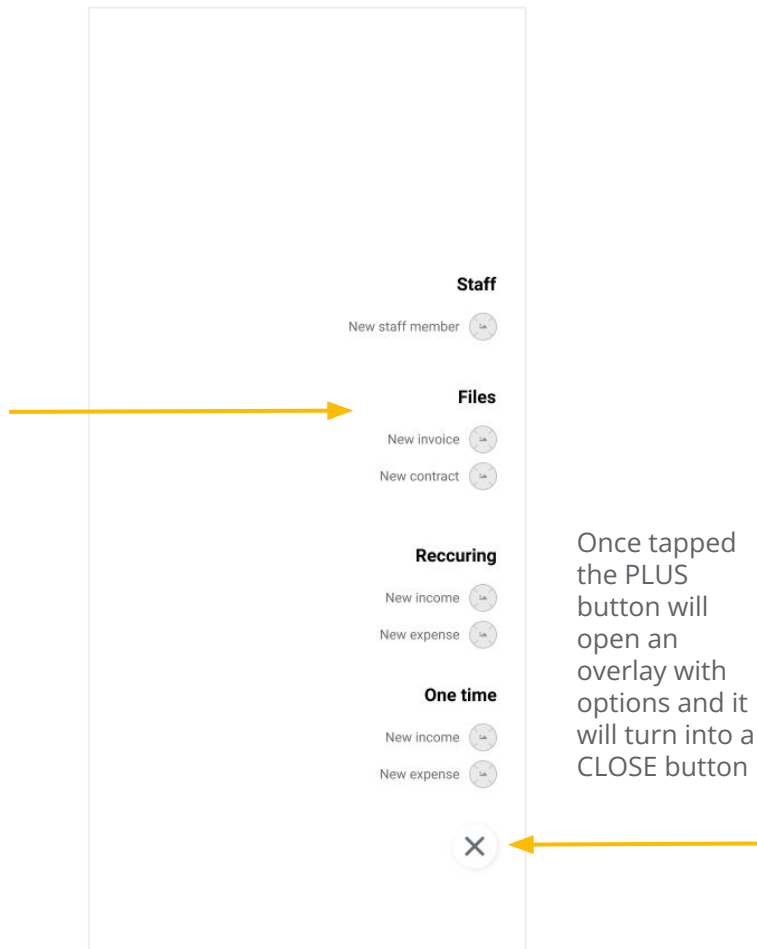


The PLUS button gives the user quick access to the most important functions: adding new staff members, invoices, contracts, income, expenses.

# Digital wireframes

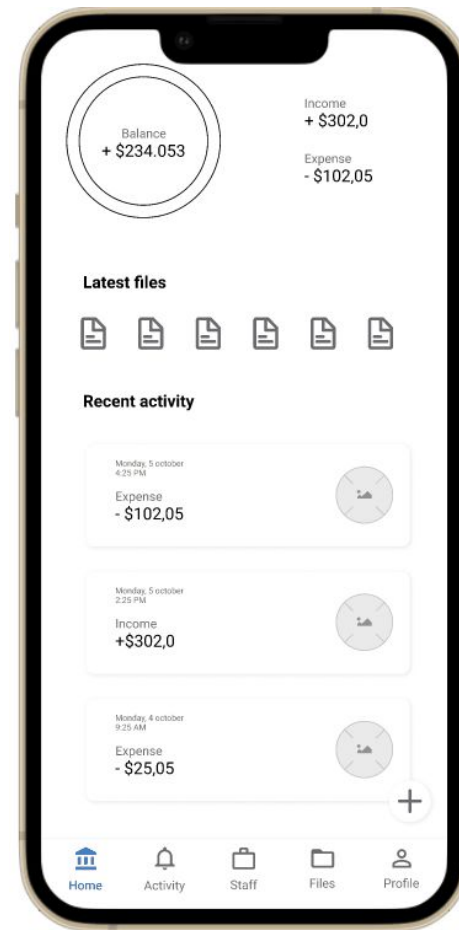
The round PLUS button gives access quickly to the most important features of the app.

The most important functions of the app



# Low-fidelity prototype

[Link to low-fidelity prototype and  
brief description of the user flow]





# Usability study: findings

Write a short introduction to the usability studies you conducted and your findings.

## Round 1 findings

- 1 Users want the Plus button more obvious
- 2 Users want the homepage to have more options
- 3 Users want the text easier to read

## Round 2 findings

- 1 Users want to add staff members easier
- 2 Users will respond better to an animation after completing tasks
- 3 Users want to add incomes easier

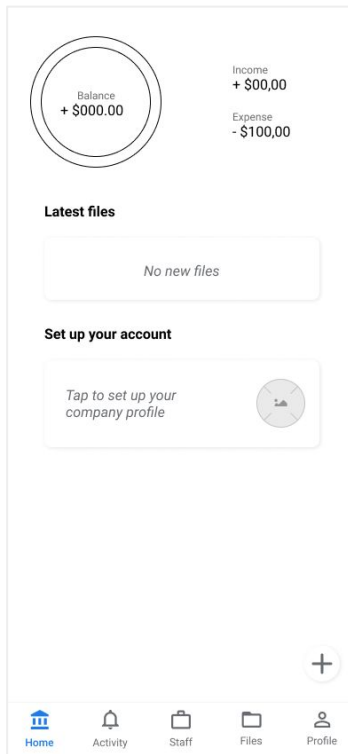
## Refining the design

- Mockups
- High-fidelity prototype
- Accessibility

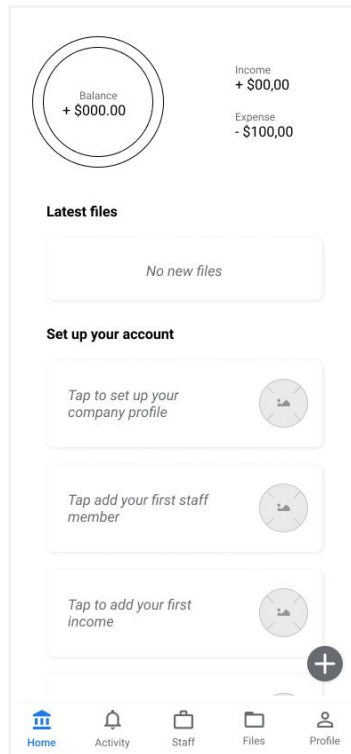
# Mockups

During the usability study it was observed that the users want more options in the homepage and that the round PLUS button was hard to be noticed.

Before usability study



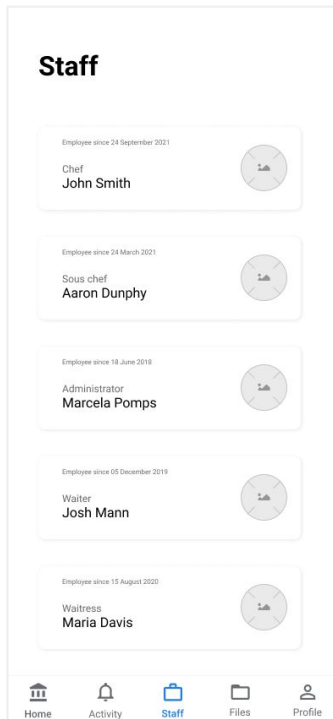
After usability study



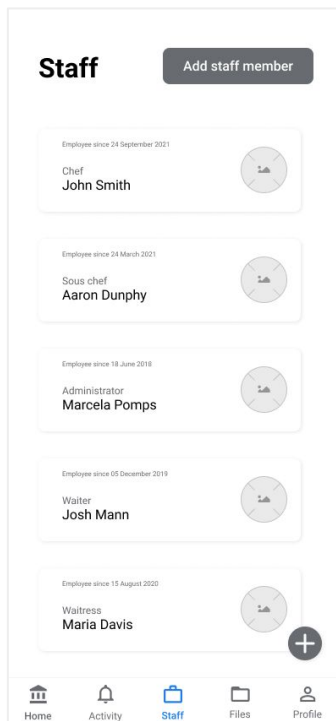
# Mockups

During the usability study it was observed that adding a new staff member was one of the most difficult user flows. The new buttons will simplify this flow.

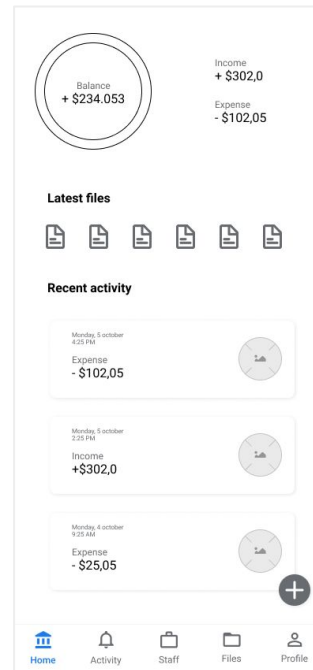
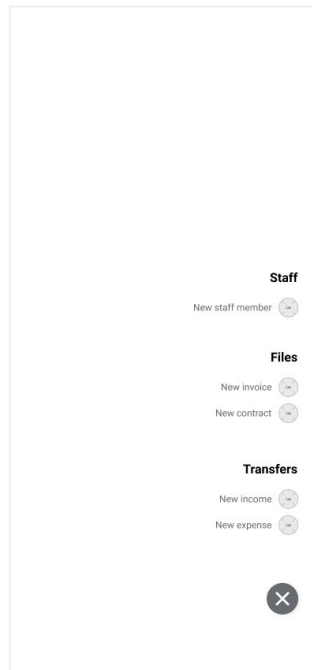
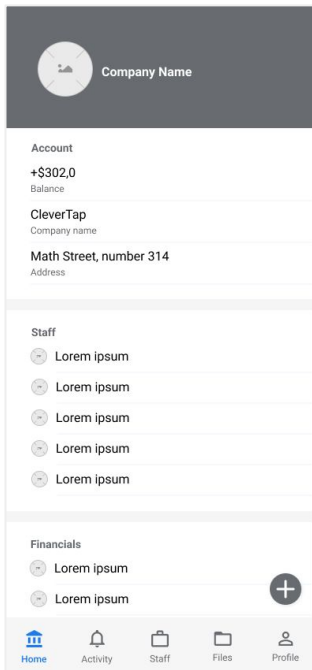
Before usability study



After usability study



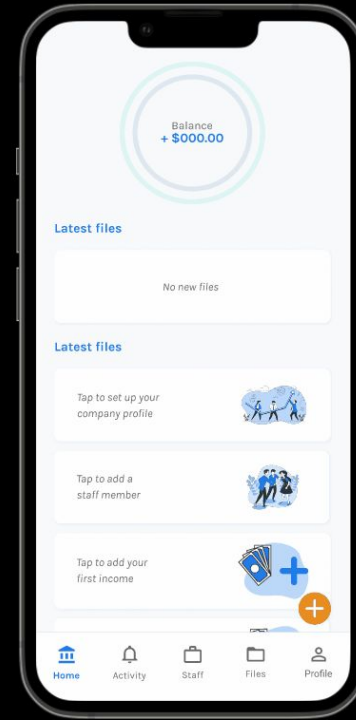
# Mockups



# High-fidelity prototype

[Link to high-fidelity prototype]

*In progress*



# Accessibility considerations

1

## Colour Contrast

A good contrast between the elements in the page makes the app easy to navigate for both low-sighted and colour-blind users.

2

## Feedback

Each action will give user feedback on the outcome of the action.

3

## Screen readers and AT

Images have alt properties and we used semantic HTML.

# Going forward

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- Takeaways
- Next steps



# Takeaways



## Impact:

*"I think using this kind of app would benefit my business."*

Restaurant owner that participated in the study.



## What I learned:

Throughout the project I have learned about all the stages of a UX Research study and about the bookkeeping needs of a restaurant.

# Next steps

1

QR code scan

Scanning a bill and automatically adding the expense to the balance would save the users time.

2

Sync with bank apps

The next step in making this app a one stop shop would be the integration with bank apps.

3

Stock

Including the remaining stock and integrating the bills and orders of the restaurant's customers would be a useful feature.

# Let's connect!



Feel free to contact me for any kind of inquiries.

If you want to view more of my work check my Behance account.



[Iulian Pistol on Behance](#)



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