

APPLICATION OUTLINE

A CONCEPT BY KARIM HAMASNI



LOGIN

SIGN UP

LOGIN WITH FACEBOOK

When the app first loads, the user has the option of logging in, signing up, or using their Facebook credentials to get in.



ACCOUNT MANAGER



RBC Signature No Limit Banking



RBC Visa Infinite Avion



Canadian Tire Options Mastercard

ADD ACCOUNT

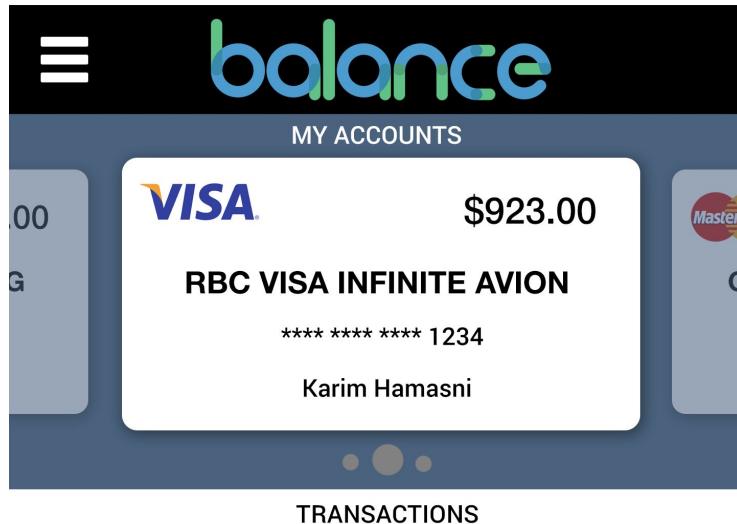
Financial Institution ▾

Username or Account Number

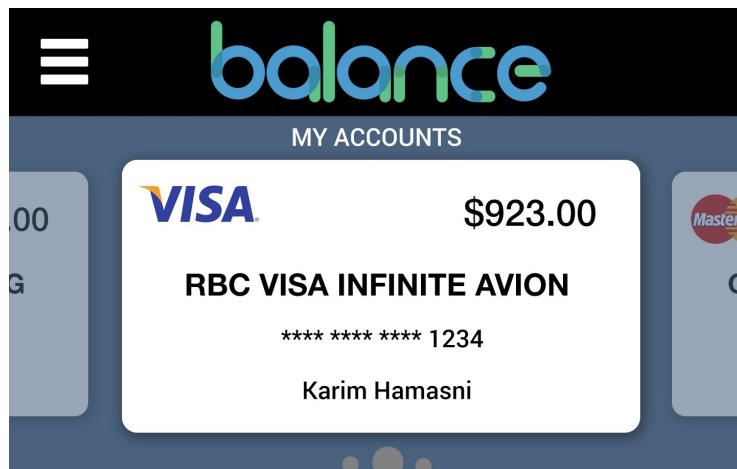
Password

ADD

The account manager page allows the user to add accounts or edit existing accounts. They choose their financial institution from the dropdown, and add their login credentials, and our app pulls their transaction history.



Here is the main page of the app, where they see their accounts and transactions for each account. This is where they begin to categorize their transactions using simple swipe gestures.



		SORT
JUL 22, 15	iBurgers	-\$14.32
JUL 22, 15	ESSO Yonge Street	-\$35.00
JUL 22, 15	MR. Lube Ajax 5232	-\$72.42
JUL 21, 15	Apple Store Yorkdale	-\$1329.32
JUL 21, 15	New York Fries York..	-\$11.16
JUL 20, 15	Cineplex Odeon VIP	-\$29.99
JUL 20, 15	STAPLES Markham	-\$89.32
JUL 19, 15	The Keg Steakhouse	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.32

For example, the top item is from a fast food restaurant. By swiping it to the left, they can categorize that transaction.



Five Guys Burger

Automotive

Banking

Charity

Childcare

Clothing

Education

Events

Groceries

Restaurants

Entertainment

Gifts

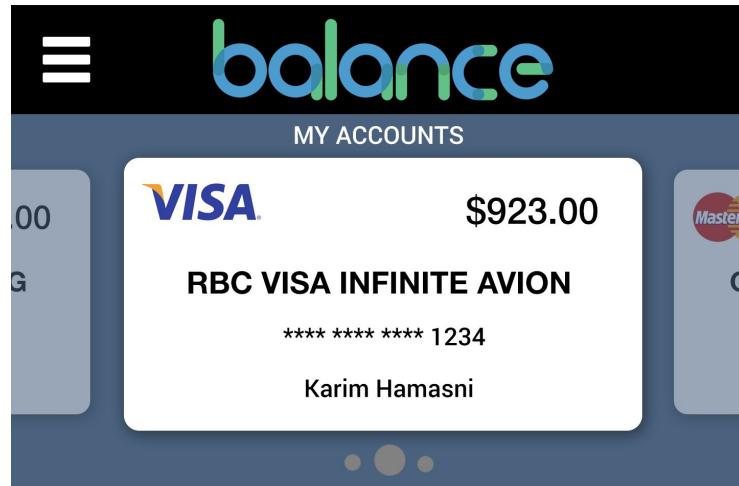
Healthcare

Household

Work

Edit List of Categories

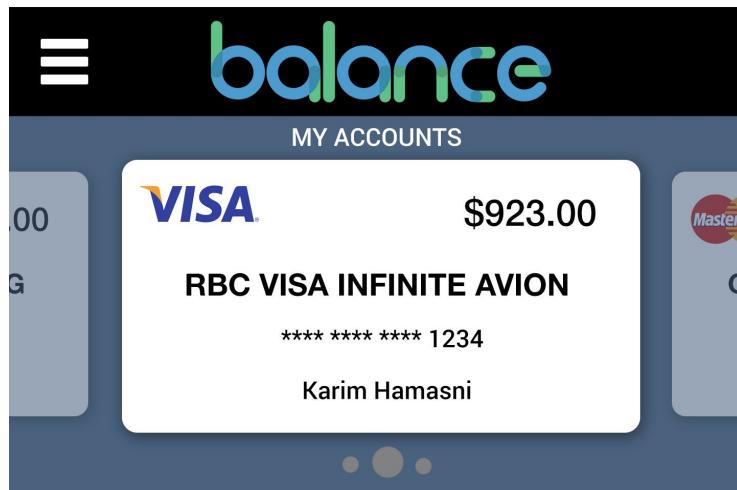
Once swiped, the user is presented with an editable expense category list where they can simply tap the category that the particular transaction belongs to.



TRANSACTIONS

JUL 22, 15	Five Guys Burgers <small>Restaurant</small>	-\$14.32
JUL 22, 15	ESSO Yonge Street	-\$35.00
JUL 22, 15	MR. Lube Ajax 5232	-\$72.42
JUL 21, 15	Apple Store Yorkdale	-\$1329.32
JUL 21, 15	New York Fries York..	-\$11.16
JUL 20, 15	Cineplex Odeon VIP	-\$29.99
JUL 20, 15	STAPLES Markham	-\$89.32
JUL 19, 15	The Keg Steakhouse	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.32

That line item is now categorized as a restaurant expense.



JUL 22, 15	Five Guys Burgers Restaurant	-\$14.32
SSO Yonge Street	-\$35.00	SORT
JUL 22, 15	MR. Lube Ajax 5232	-\$72.42
JUL 21, 15	Apple Store Yorkdale	-\$1329.32
JUL 21, 15	New York Fries York..	-\$11.16
JUL 20, 15	Cineplex Odeon VIP	-\$29.99
JUL 20, 15	STAPLES Markham	-\$89.32
JUL 19, 15	The Keg Steakhouse	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.32

The second item is an automotive expense, so simply swipe left.



Five Guys Burger

Automotive

Banking

Charity

Childcare

Clothing

Education

Events

Groceries

Restaurants

Entertainment

Gifts

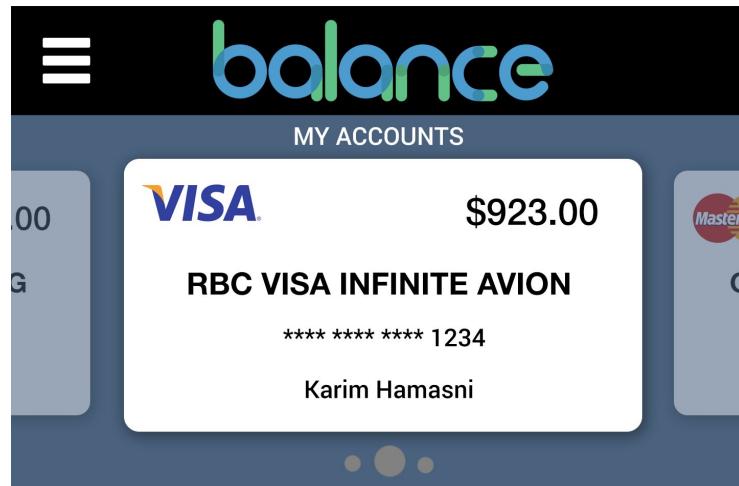
Healthcare

Household

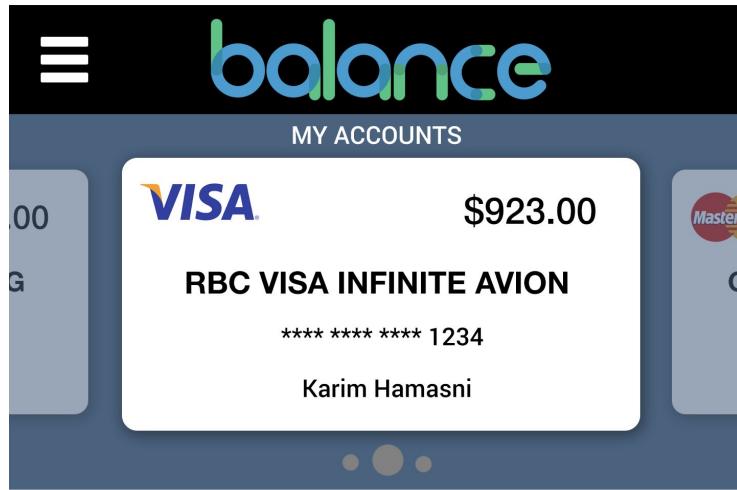
Work

Edit List of Categories

Tap the automotive category.



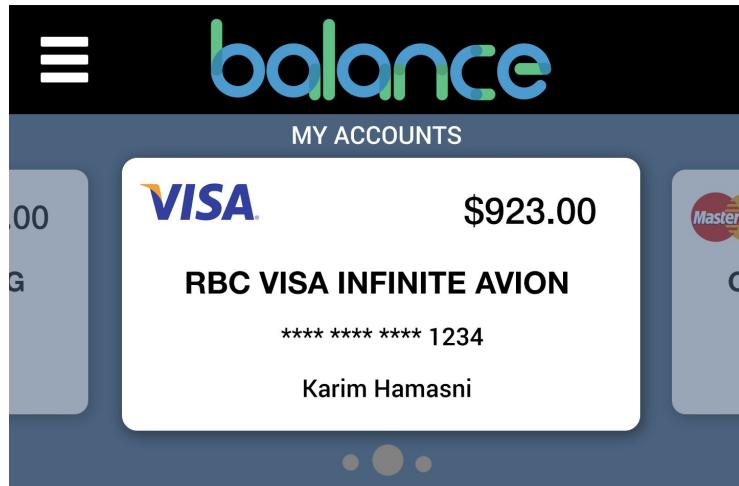
That line item is now categorized.



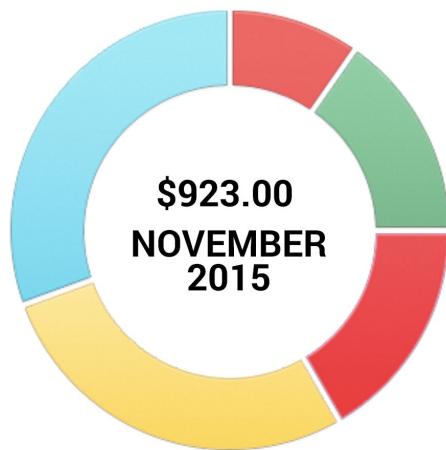
TRANSACTIONS

JUL 22, 15	Five Guys Burgers Restaurant	-\$14.32
JUL 22, 15	ESSO Yonge Street Automotive	-\$35.00
JUL 22, 15	MR. Lube Ajax 5232 Automotive	-\$72.42
JUL 21, 15	Apple Store Yorkdale Work	-\$1329.32
JUL 21, 15	New York Fries York.. Restaurant	-\$11.16
JUL 20, 15	Cineplex Odeon VIP Entertainment	-\$29.99
JUL 20, 15	STAPLES Markham Work	-\$89.32
JUL 19, 15	The Keg Steakhouse Restaurant	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.39

Eventually, all transactions will be categorized based on the type of expense.

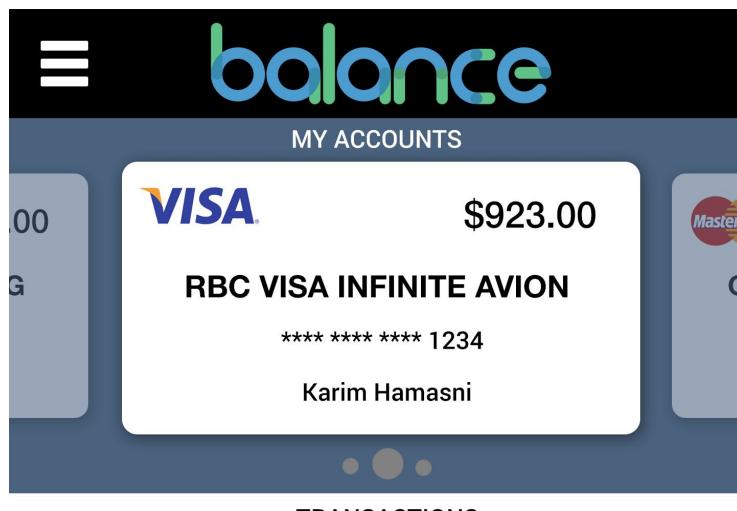


BUDGET REPORT



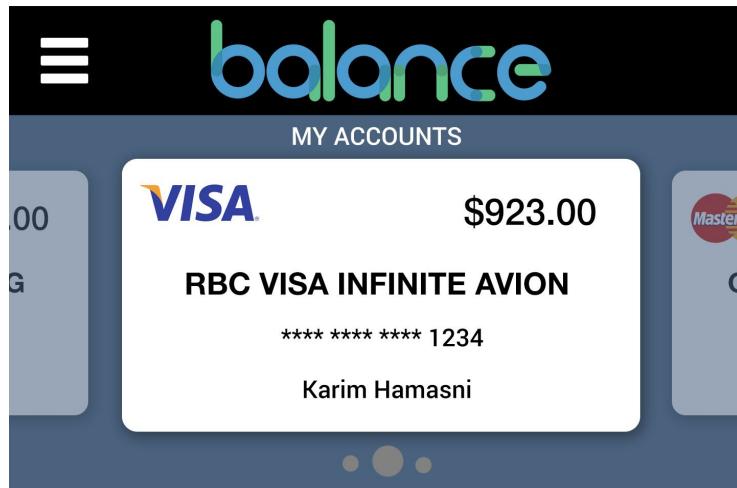
28%	AUTOMOTIVE	>
27%	CLOTHING	>
19%	RESTAURANTS	>

With this information, the user can see budget reports on their spending, and generate PDF's that they can save/e-mail to themselves for their own records or tax keeping purposes.



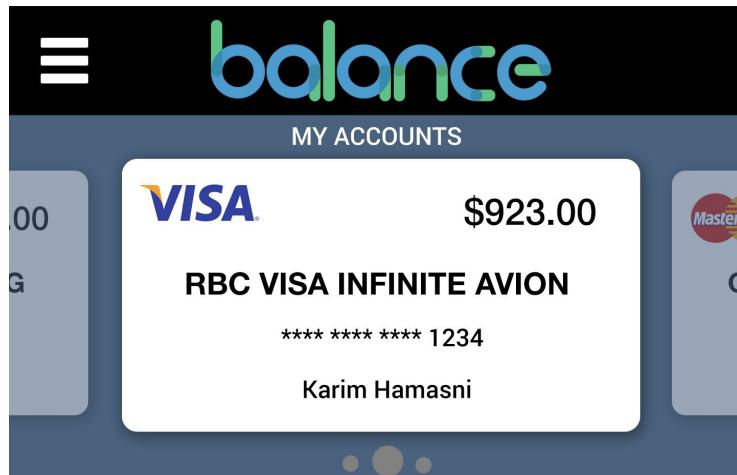
JUL 22, 15	Five Guys Burgers Restaurant	-\$14.32
JUL 22, 15	ESSO Yonge Street Automotive	-\$35.00
JUL 22, 15	MR. Lube Ajax 5232 Automotive	-\$72.42
JUL 21, 15	Apple Store Yorkdale Work	-\$1329.32
JUL 21, 15	New York Fries York.. Restaurant	-\$11.16
JUL 20, 15	Cineplex Odeon VIP Entertainment	-\$29.99
JUL 20, 15	STAPLES Markham Work	-\$89.32
JUL 19, 15	The Keg Steakhouse Restaurant	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.32

As time goes on, the application learns from the users past categorizations and tries to guess what the expense is. You can see the guessed categories underneath the titles.



JUL 22, 15	Five Guys Burgers Restaurant	-\$14.32
JUL 22, 15	ESSO Yonge Street Automotive	-\$35.00
JUL 22, 15	MR. Lube Ajax 5232 Automotive	-\$72.42
JUL 21, 15	Apple Store Yorkdale Work	-\$1329.32
JUL 21, 15	New York Fries York.. Restaurant	-\$11.16
JUL 20, 15	Cineplex Odeon VIP Entertainment	-\$29.99
JUL 20, 15	STAPLES Markham Work	-\$89.32
JUL 19, 15	The Keg Steakhouse Restaurant	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.32

To confirm that the 'guess' is correct, the user simply force touches the line item (on newer devices) or swipes right (on older devices)



JUL 22, 15	Five Guys Burgers Restaurant	-\$14.32
JUL 22, 15	ESSO Yonge Street Automotive	-\$35.00
JUL 22, 15	MR. Lube Ajax 5232 Automotive	-\$72.42
JUL 21, 15	Apple Store Yorkdale Work	-\$1329.32
JUL 21, 15	New York Fries York.. Restaurant	-\$11.16
JUL 20, 15	Cineplex Odeon VIP Entertainment	-\$29.99
JUL 20, 15	STAPLES Markham Work	-\$89.32
JUL 19, 15	The Keg Steakhouse Restaurant	-\$189.21
JUL 19, 15	SportingLife Hwy 7	-\$895.32

And then the transaction is locked in as the category guessed. If the guess is wrong, the user can always swipe left and manually select the right category.

