



Mobile Deposit

This tool was designed to move the paper work process to a digital experience.

Role

UX/UI Designer

Responsibilities

- MVP
- Prototyping
- Usability Testing
- Collaboration

Project Duration

Year 2022 (6 Months)

Tools

- Mural / Miro
- Adobe XD

Team

- 1 UX Designer
- 1 Researcher

Two smartphones are shown side-by-side. The left phone displays a screen for entering check information, showing fields for 'Check Amount*' and 'Check Number*', along with two sample check images from 'FIRST BANK OF THE LAKE'. The right phone displays an 'Invoice Information' screen with a table of transaction details. The top of the slide features a background image of a smiling man in a blue polo shirt standing in a grocery store aisle filled with Frito Lay products.

Invoice Information

Sales #75268031	\$600.00
Returns #75268031	-\$0.00
Taxes	\$30.00
Total Due	\$630.00
Total Amount Collected	\$630.00
Variance	\$0.00

Check #1234 !

Amount	\$500.00
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Money Order #1020304050 !

Amount	\$128.00
Money Order Expense	\$2.00

Problem Statement

Currently, small-format RSRs (Route Sales Representatives) and RSAs (Retail Sales Associates) manage customer payments—including checks, money orders, and cash—through a labor-intensive, manual process that relies **heavily on paper**, leading to inefficiencies and **increased risk of errors**.

Goals

The primary goal was to digitize the highly manual and paper-intensive payment handling process managed by small-format Route Sales Representatives (RSRs) and Retail Sales Associates (RSAs). By transitioning to a **digital solution**, the tool aims to streamline daily operations, reduce human error, accelerate deposit processing, and improve transaction visibility across teams.

User Interviews

- Business Owners
- Sales Accounting
- Route Sales Representatives (RSRs)
- Retail Sales Associates (RSAs)

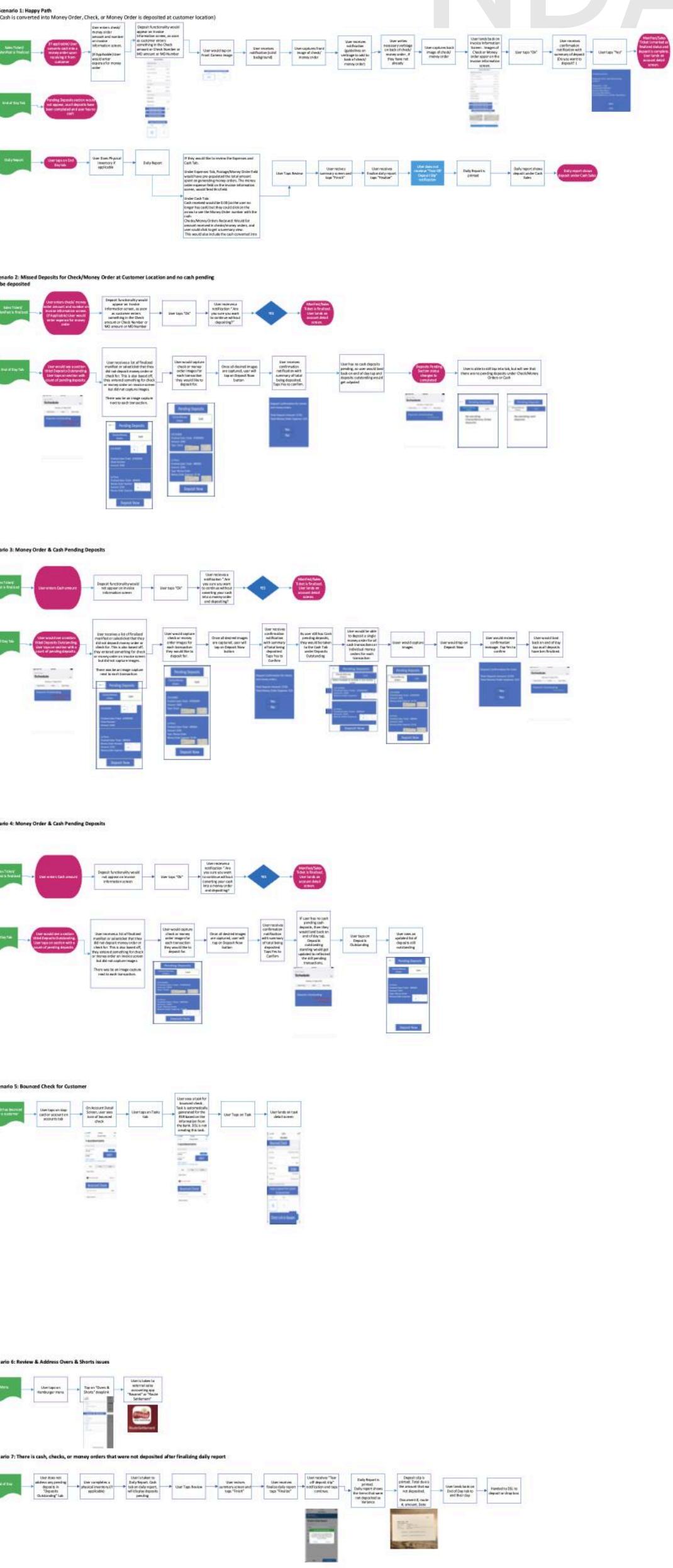
Pain Points

- Add & deposit a check/money order.
- Save a partial deposit.
- Review finalized sales ticket.
- Add cash deposit(s).
- Add & deposit multiple checks/money orders.
- Complete pending deposits.
- Combine multiple deposits into one deposit.
- Skip pending deposit(s).
- Check deposits status.
- Review transactions in Daily Report.
- Perform a manual sync for deposits.
- Create a manual deposit for pending deposits.

Process Flow Scenarios

To ensure the tool covered real-world use cases, we designed for **seven key process flow scenarios** that reflect the day-to-day operations and edge cases faced by RSRs and RSAs:

- **Scenario 1: Happy Path** – The ideal flow where all deposits (checks, money orders, cash) are entered and finalized without any issues.
- **Scenario 2: Missed Check/Money Order Deposits** – Deposit for checks/money orders was missed at the customer location, but no cash is pending.
- **Scenario 3: Pending Money Order & Cash Deposits** – Both money orders and cash remain pending and need to be added and finalized.
- **Scenario 4: Partial Deposits** – Either cash or money order is deposited, and the remaining type is still pending (alternate version of Scenario 3).
- **Scenario 5: Bounced Check** – A previously deposited check is returned, requiring corrective action and audit trail updates.
- **Scenario 6: Overs & Shorts** – Identifying and resolving discrepancies between reported and actual deposit amounts.
- **Scenario 7: Missed Deposits After Final Report** – Cash, checks, or money orders were not deposited even after finalizing the daily report, triggering exception handling.



MVP

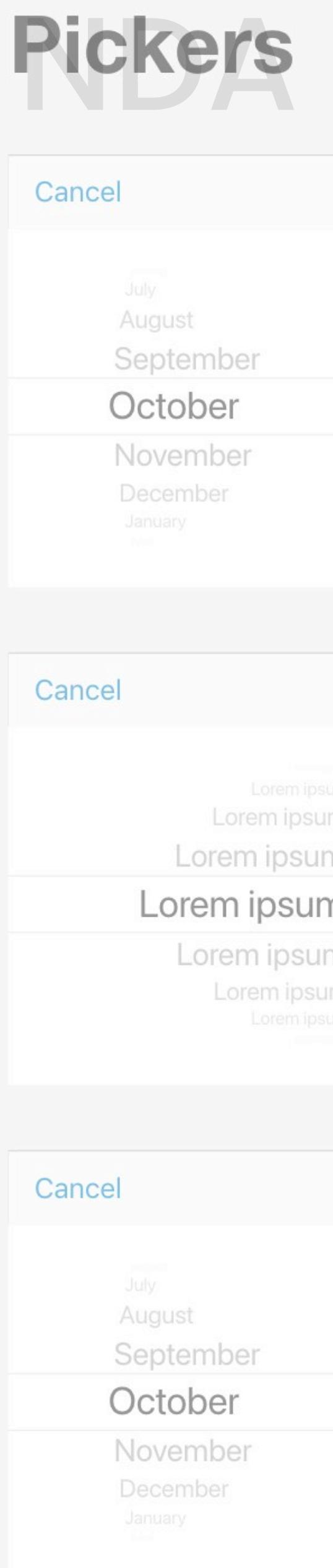
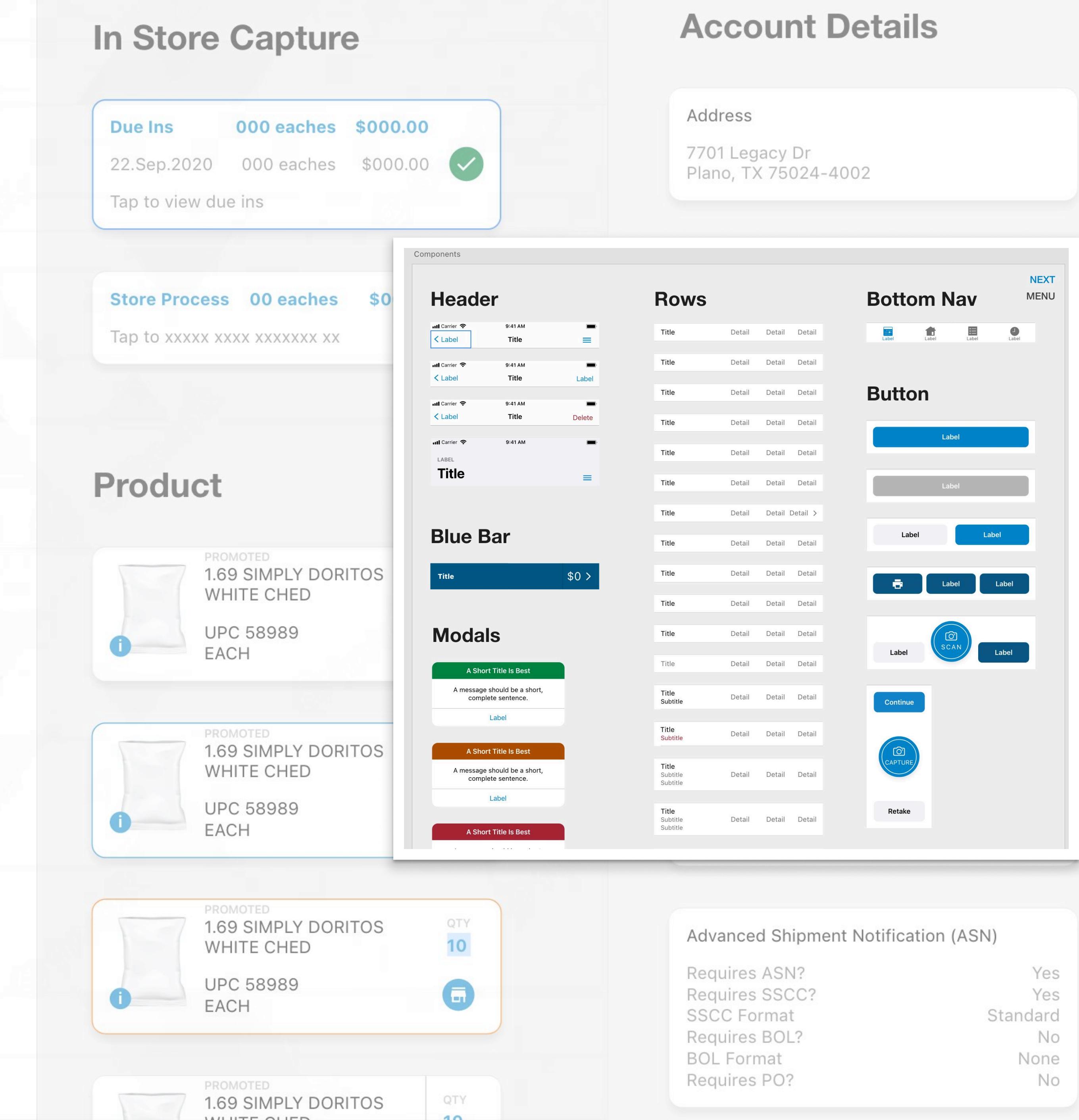
I collaborated on mapping all seven scenarios into detailed conditional flow journeys to capture every possible path and exception in the user experience. The screen shared here represents the **core hub—the heart of the Frito-Lay product**—where key decision points and actions are initiated, ensuring smooth handling of deposits across different conditions.



Design System

Elements

The design system developed is a **hybrid model**, thoughtfully crafted by incorporating principles and best practices referenced from HFI (Human Factors International).



Hi-Fi Links

Here are the links covering all 7 scenarios, each mapped to its respective user flow. The links are shared below for reference.

- [XD link 1](#)
- [XD link 2](#)

Customer - Sales Ticket flows



Customer - Unacknwoledged Manifest Ticket flows (Cash Only)



Pending Deposits



Usability Testing

We tested several screens with actual users, gathered their feedback, and used those insights to refine the MVP. The updated user journeys have now been finalized.

Image Instructions

User Feedback: Users found difficulty reading the image instructions and would quickly glance over it.

Design Change: Modals have been added to the appropriate screens to provide instructions when capturing images.

Invoice Information

User Feedback: Users expressed that the screen is overwhelming with content and would like the ability to edit rather than go back to edit.

Design Change: Document cards replaced text fields and user can edit payment information at this point in the process.

Information Modals

User Feedback: Users wanted verification when completing a MB process. As this process is new and different than the current process, users wanted a fail-safe before proceeding with an action.

Design Change: Modals have been added to the appropriate screens to provide information and alert user of intended action.

Golden Thread

The Golden Thread ensures the design decision stays aligned with business goals and user needs. It helps maintain a clear connection from user insights to final solutions, supporting traceability and strategic focus throughout the project.

