2.User flows

USER FLOW 1

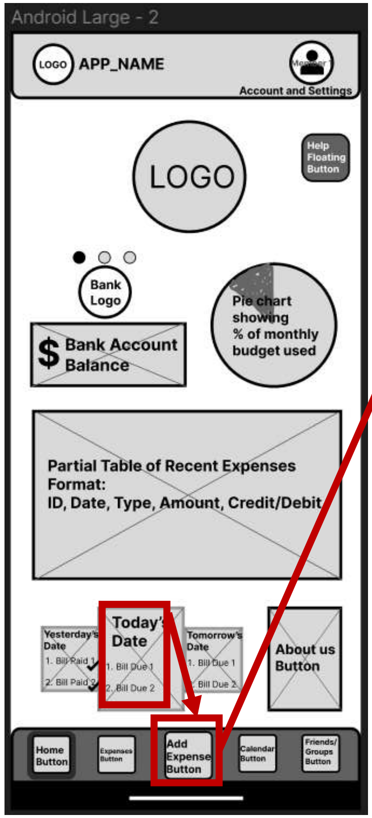
User Goal: Add a new payment detail within a group and make the payment

Persona: Alex Singh who has a very busy schedule and wants to get jobs done fast

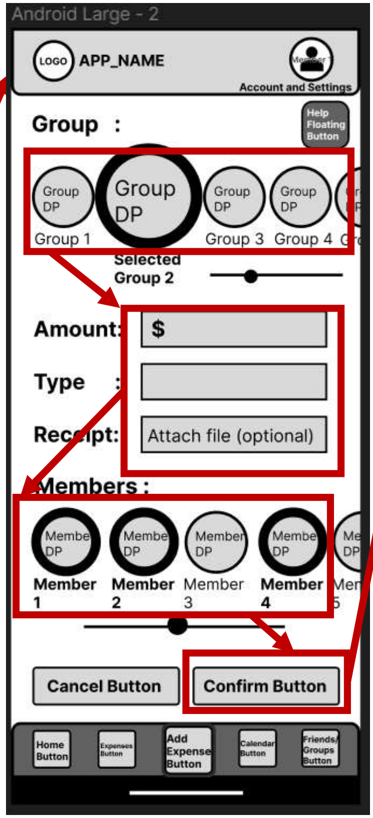
Tasks: 1. Notice that a payment must be done on the calendar widget on the dashboard (but not go to the Calendar tab since Alex does not have much time to check the entire calendar)

2. Make a payment by selecting and confirming details like group, amount, type, receipt & members.

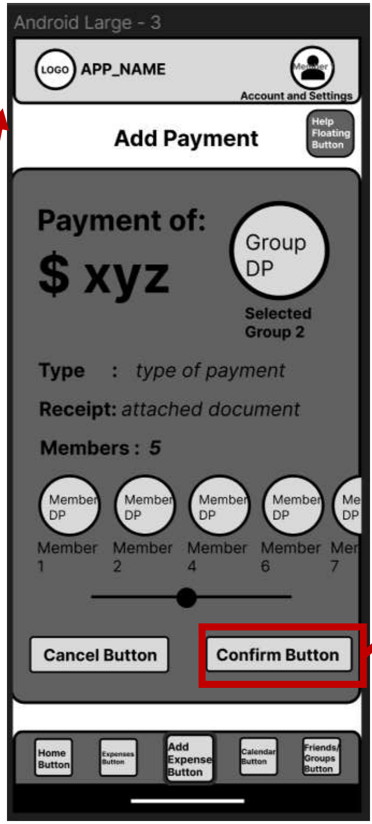
3. Confirm that the payment is done by glancing at their bank balance and expenses table widgets on the dashboard on the "Home Page".



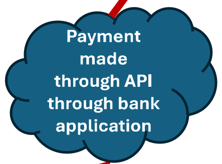
1. HOME PAGE:
Check Today's Due Bills in the Calendar Dashboard and click on the "Add Expense" button to pay the bill



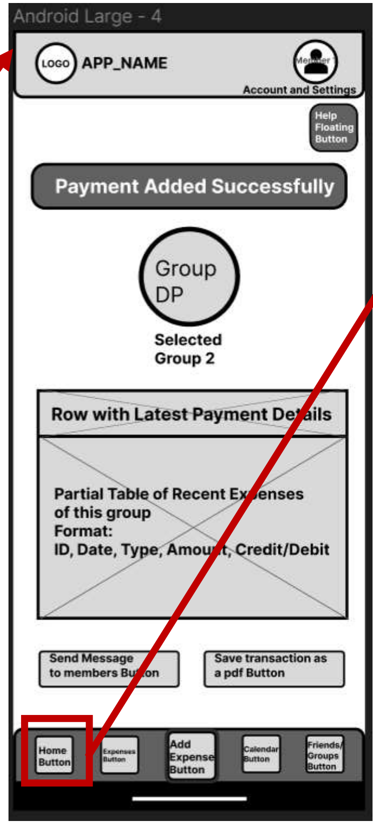
2. ADD EXPENSE PAGE:
Scroll Left-Right to select the group (indicated by thick border), enter the amount and type of bill, attach a receipt and scroll left-right to select the members (indicated by thick border). Click the 'Confirm" button when all details are entered.



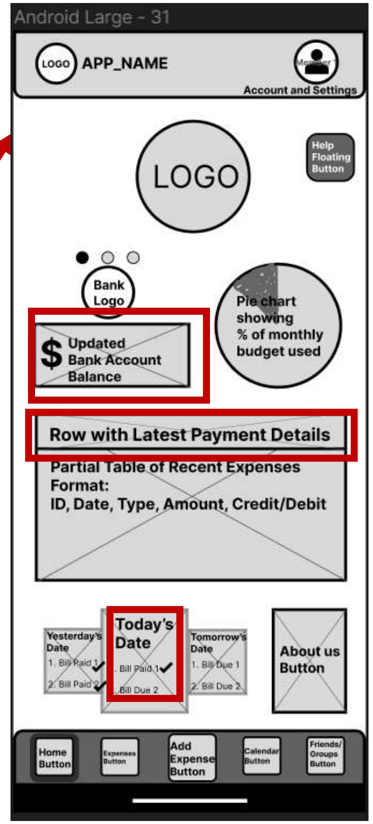
3. ADD EXPENSE REVIEW PAGE:
Review all the previously-entered details (group, amount, type, receipt, members) and click the "Confirm" button again to confirm they are all correct.

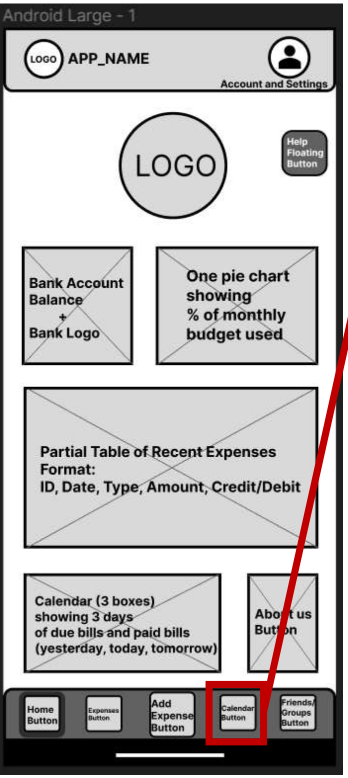


4. ADD EXPENSE COFIRMATION PAGE:
The payment details are added to the expenses table and a confirmation message is seen. If clicked on the "Home" Button...



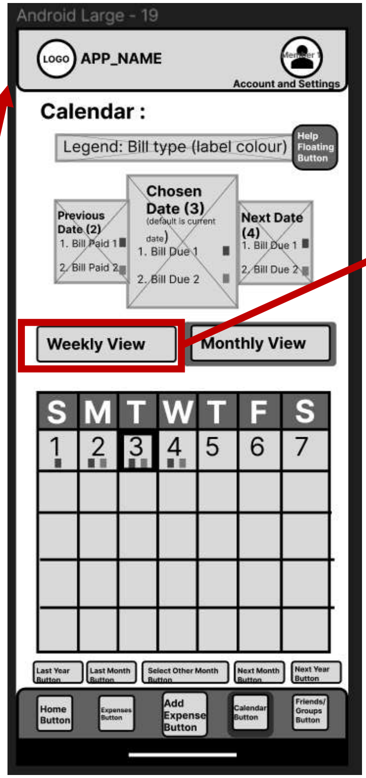
5. HOME PAGE:
If the "Home" button is clicked, and we look at the Calendar Widget on the Dashboard, the bill is paid (indicated by a tick). The bank balance and expense table shown are also updated.





1. HOME PAGE:

Go to the Calendar page to check when any payments are due.

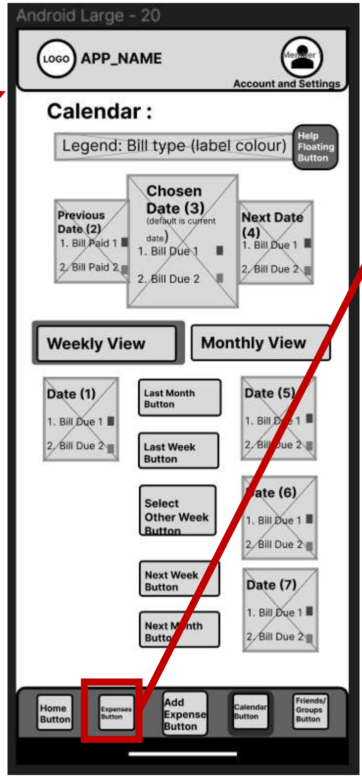


2. CALENDAR PAGE (MONTHLY VIEW):

Check the monthly view of bills due. Click on the 'Weekly" view to see the bills due in the current week

3. CALENDAR PAGE (WEEKLY VIEW):

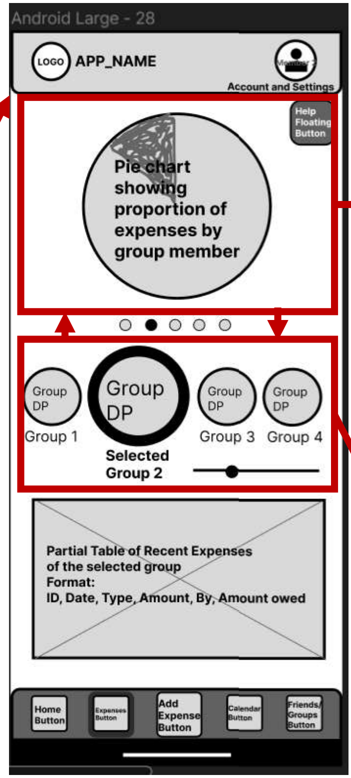
Now that we know the date for the payment, go to the Expenses page to check personal expenses

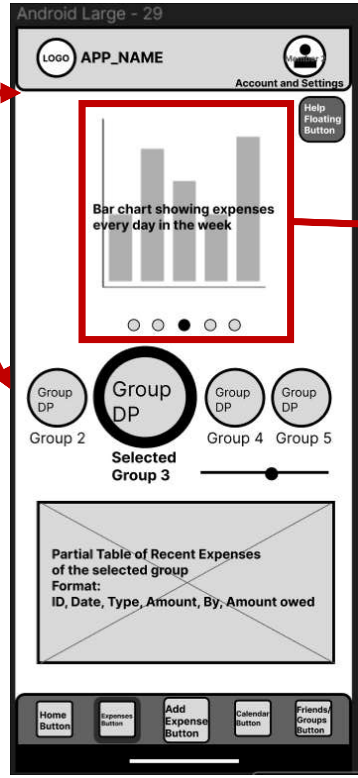


4. EXPENSE TABLES AND GRAPHS PAGE (different views):

Change graphs of a particular group by swiping left-right to select what type of financial information one wants to see.

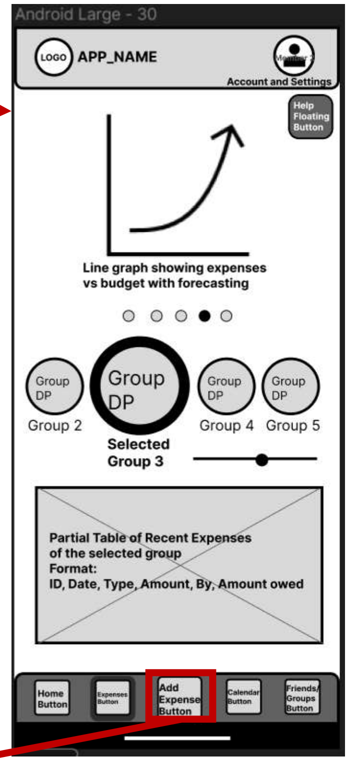
Change the group for which you want to see the recent expenses table and the graphs for by swiping left-right.





5. EXPENSE TABLES AND GRAPHS PAGE:

After reviewing the financial details, add an expense/payment by pressing the button below.



USER FLOW 1

with a different Persona

User Goal: Add a new payment detail within a group and pay for it

Persona: John Baker, a fellow flatmate, who is cautious and takes their time looking at finer details.

Tasks: 1. Go to the Calendar page and check which payment is due.

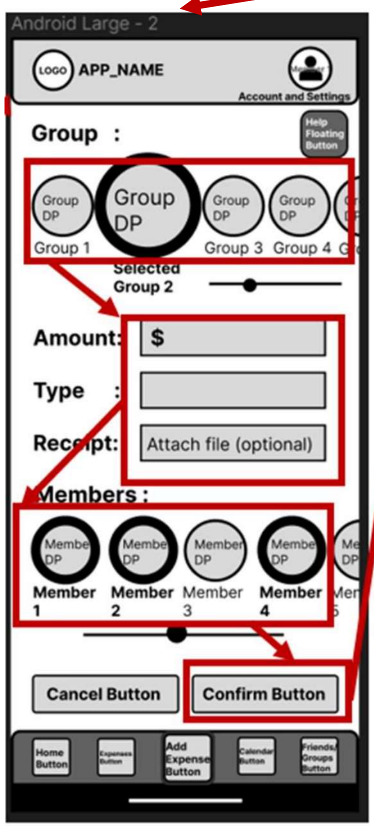
2. Go to the Expenses page to check their own budget and financial details to know if they are eligible to pay.

3. Make a payment by selecting and confirming details like group, amount, type, receipt & members.

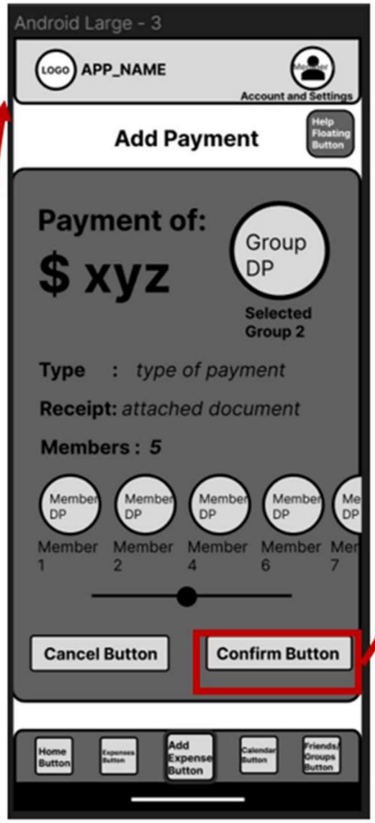
4. Confirm that the payment is done by glancing at their bank balance and expenses table widgets on the dashboard on the "Home Page".

USER FLOW 1

with a different Persona - CONTINUED

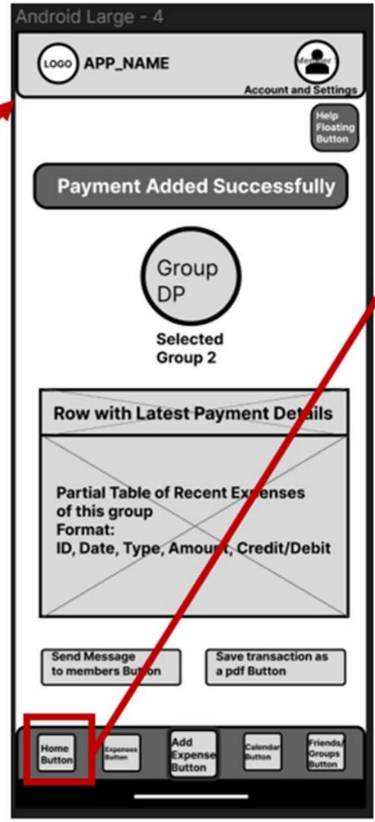


6. ADD EXPENSE PAGE:
Scroll Left-Right to select the group (indicated by thick border), enter the amount and type of bill, attach a receipt and scroll left-right to select the members (indicated by thick border). Click the 'Confirm" button when all details are entered.

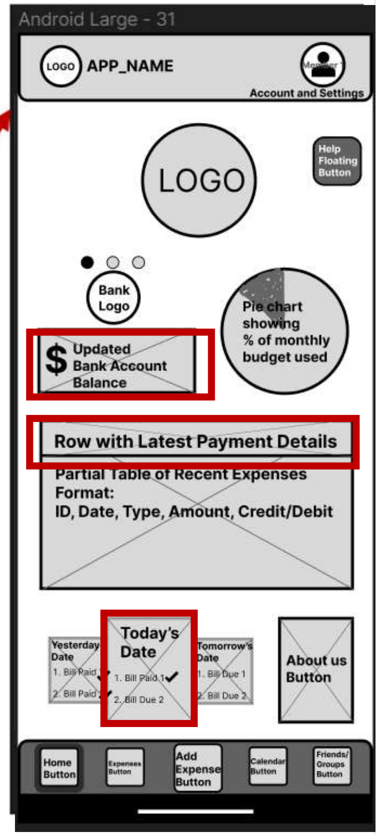


7. ADD EXPENSE REVIEW PAGE:
Review all the previously-entered details (group, amount, type, receipt, members) and click the "Confirm" button again to confirm they are all correct.

8. ADD EXPENSE CONFIRMATION PAGE:
The payment details are added to the expenses table and a confirmation message is seen. If clicked on the "Home" Button...



9. HOME PAGE:
If the "Home" button is clicked, and we look at the Calendar Widget on the Dashboard, the bill is paid (indicated by a tick). The bank balance and expense table shown are also updated.



USER FLOW 2

Part 1: John Baker's Perspective

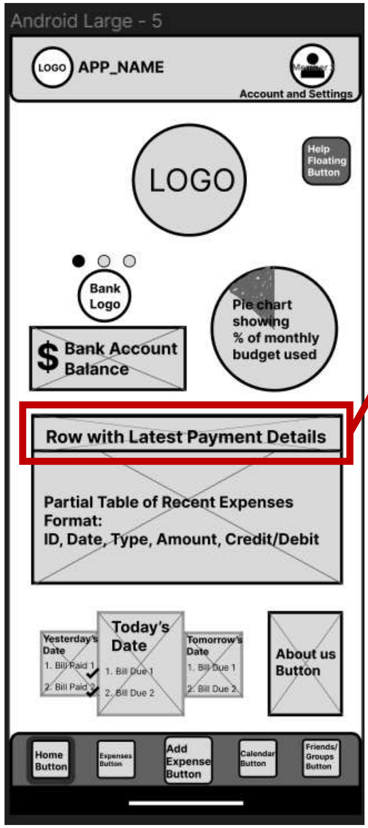
User Goal: Edit a payment's details in which Alex Singh (flatmate) added John Baker as a member by accident, since they were in hurry to add the payment due to their busy schedule.

Persona: John Baker, a fellow flatmate, who is cautious and takes their time looking at finer details.

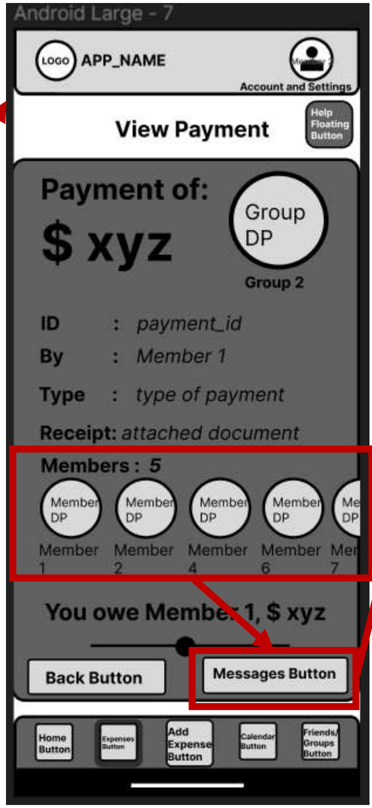
Tasks: 1. Notice that a new payment has been added and review the details of it

2. Notice that they (John Baker) have been added as a member for that payment by mistake

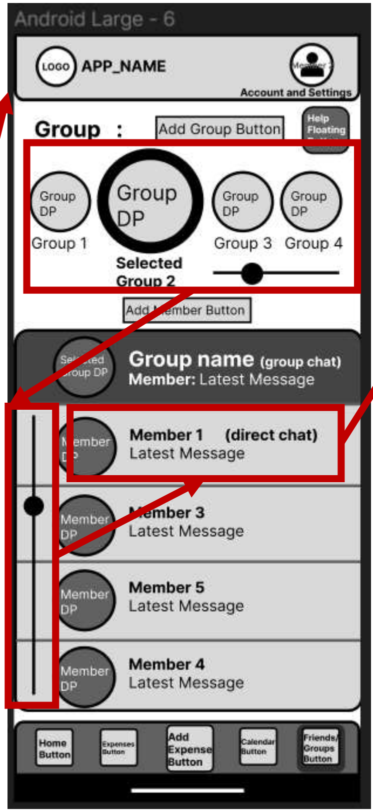
3. Notify and message the person who made the payment (Alex SIngh) with the attached payment so that they can act on it.



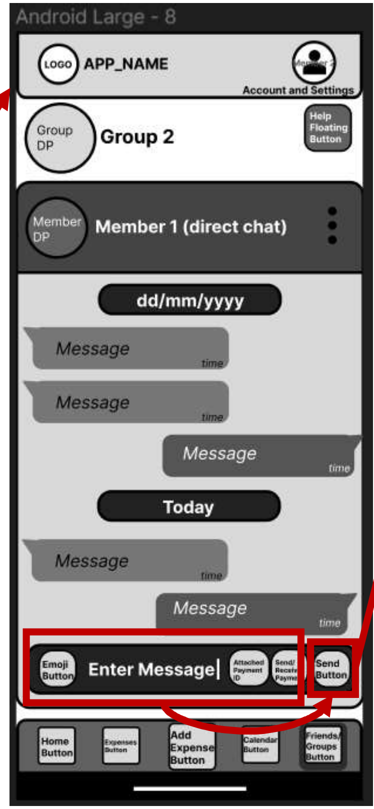
1. HOME PAGE:
See the latest payment details row on the expense table widget on the dashboard on the homepage and press on it.



2. VIEW EXPENSE PAGE:
Sees that they are a member involved in the payment and that they owe Member 1 (Alex Singh) some money (which should not be the case). Press the Messages Button to discuss with Alex about this.

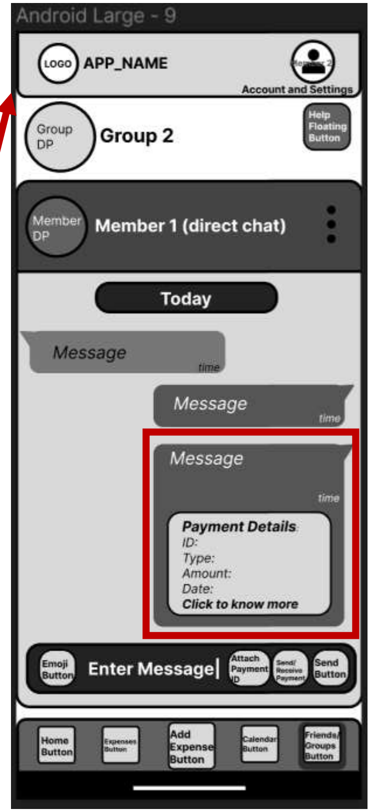


3. FRIENDS/GROUPS (MESSAGES) PAGE:
Is taken to the Messages page with the correct group pre-selected. They scroll up or down and select the chat of the Member they want to message to resolve the issue with.



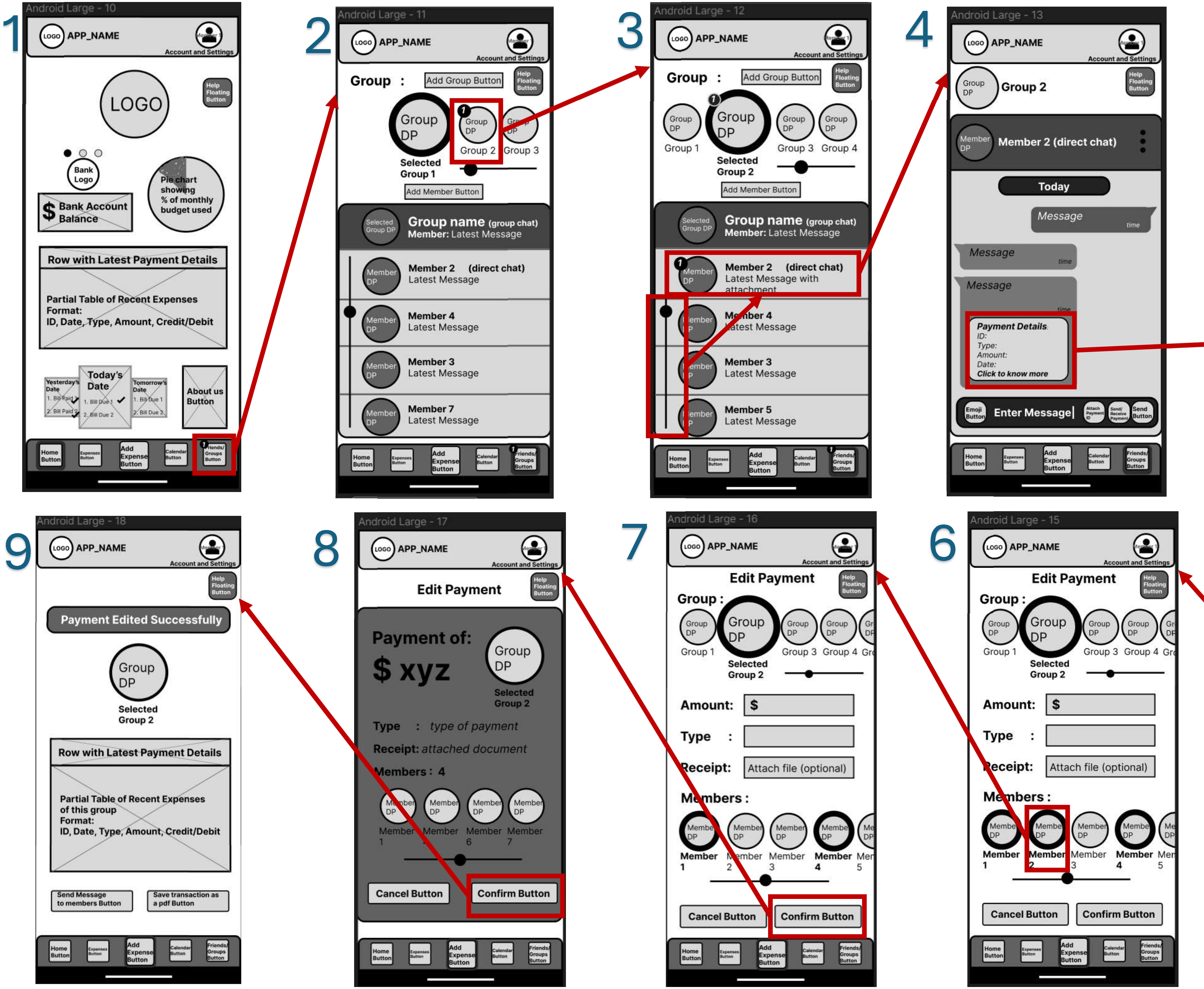
4. INDIVIDUAL CHAT/MESSAGE PAGE:
Type a valid message explaining the situation, with the payment details attached and send the message by pressing the Send Button

5. INDIVIDUAL CHAT/MESSAGE PAGE:
The Message with the Payment Details attachment is sent and the member (Alex Singh) must read it to edit the payment details and remove John as a member



USER FLOW 2

Part 2: Alex Singh's Perspective



Details on next page based on the wireframe numbers

USER FLOW 2

Part 2: Alex Singh’s Perspective – CONTINUED

Persona: Alex Singh who has a very busy schedule and wants to get jobs done fast

1 **HOME PAGE:**
Notice that there is a new message notification bubble on the Friends/Groups Button and Press it

2 **FRIENDS/GROUPS (MESSAGES) PAGE:**
Scroll Left-Right to select the Group whose DP has a notification bubble

3 **FRIENDS/GROUPS (MESSAGES) PAGE:**
Scroll Up-Down to select the Member whose DP has a notification bubble

4 **INDIVIDUAL CHAT/MESSAGES PAGE:**
Notice the latest message sent by them mentioning that you have done an incorrect payment and click on the payment details attachment to view further details

5 **VIEW PAYMENT PAGE:**
Observe the complete payment details and notice that indeed you have added Member 2 (John Baker) by mistake. Click the “Edit Payment” Button to correct the mistake.

6 **EDIT PAYMENT PAGE:**
Unselect Member 2 (John Baker) as a member for the particular payment by pressing on their DP in the Members section of the payment details.

7 **EDIT PAYMENT PAGE:**
Confirm these changes (removed John Baker as a member of the payment) by pressing on the “Confirm” Button

8 **EDIT PAYMENT REVIEW PAGE:**
Review the new details of the payment and confirm them by pressing on the “Confirm Button”

9 **EDIT PAYMENT CONFIRMATION PAGE:**
The payment details are edited in the expenses table and a confirmation message is seen.

USER FLOW 3

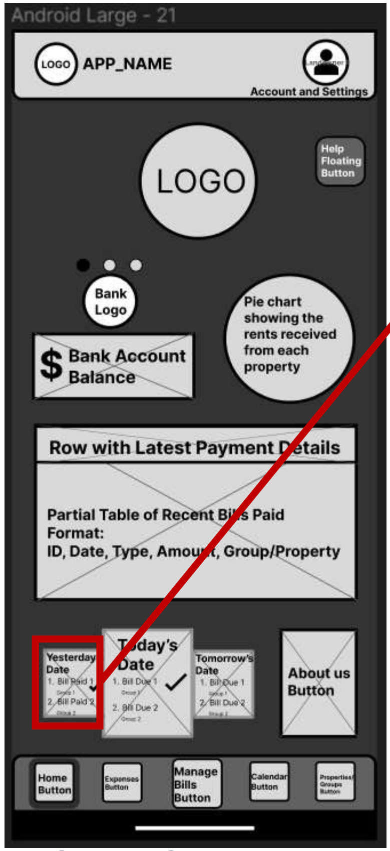
User Goal: Remind a group of tenants to pay an overdue bill and add a late penalty to it.

Persona: Trevor Smith, a flat owner, who expects their tenants to pay bills like rent regularly

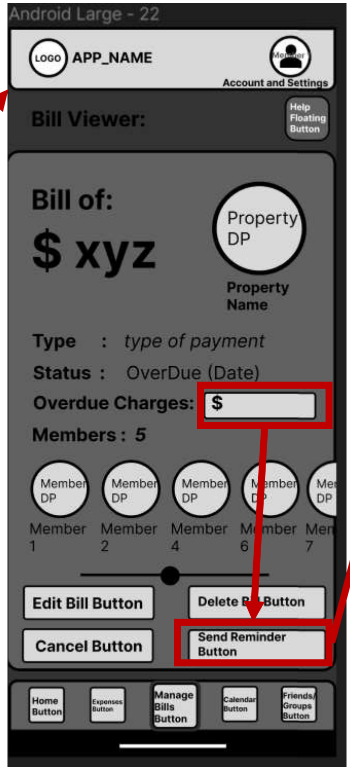
Tasks: 1. Notice that a bill is overdue (due the day before) from a Group on the Calendar Widget on the dashboard, press on it and view the bill details

2. Enter the late penalty amount and send a reminder message to the group with an attachment of the bill

3. When the bill is finally paid, notice that the bill has been paid on the same Calendar Widget on the dashboard

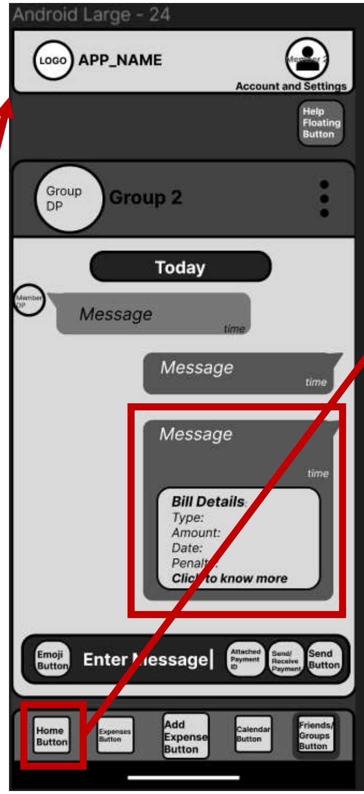


1. HOME PAGE:
See on the Calendar Widget on the dashboard that a particular group has not paid a bill due the day before (indicated by no tick). Click on the bill ID to view more details



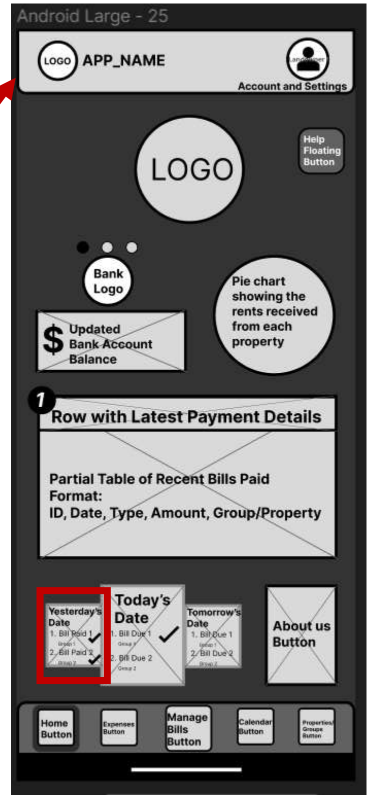
2. VIEW BILL PAGE:
View the details of the unpaid bill and enter a late penalty. Press the "Send Reminder" Button to send a message to all the related group members to encourage them to pay the bill along with the penalty.

3. GROUP CHAT/MESSAGES PAGE:
Enter the message and attach the bill as a reminder for the group to pay it and send it using the "Send" Button.



4. GROUP CHAT/MESSAGES PAGE:
The message is sent in the group chat so that all the members can get reminded to pay the bill

After Bill is paid



5. HOME PAGE;
When the bill is paid, the calendar widget on the dashboard shows a tick beside the bill indicating that it is paid.

USER FLOW

for "Help" while doing any other task like Tasks 1,2 or 3
(It can be an intermediate task when doing either of the other tasks)

User Goal: Understand how a particular feature in the app works (get help) to finish a task OR to gain extra knowledge on budgeting

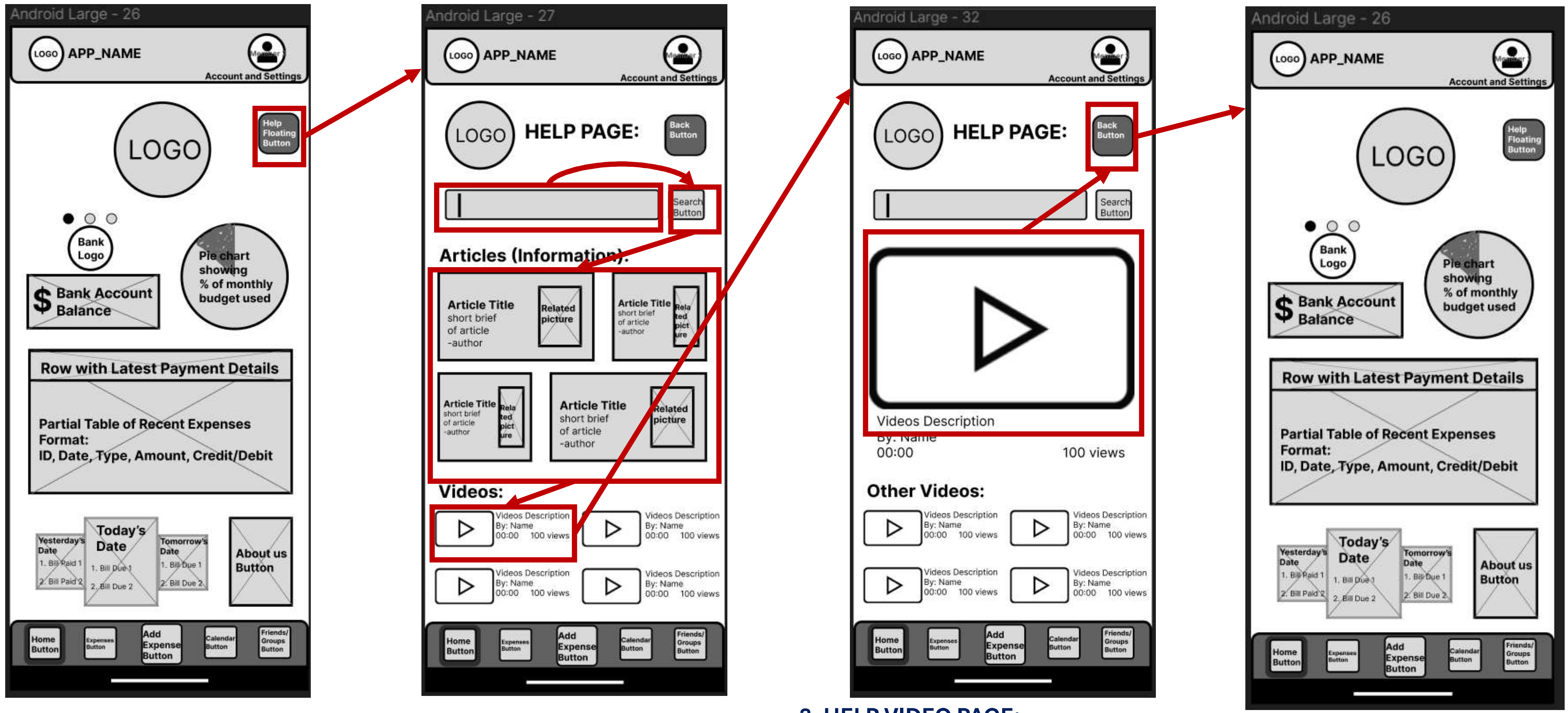
Persona: John Baker, a fellow flatmate, who is cautious and takes their time looking at finer details

Also, **financial experts** as a stakeholder who would want to ensure that financing information is accurate and **technical staff** as a stakeholder who would want the customer to use the application properly.

Tasks: 1. Press the "Help" floating button from any page

2. Search for the required topic and look at related articles or videos to gain information/help on that topic

3. Once the help is done, easily go back to the page/task they were on/trying to do.



1. HOME PAGE:
Click on the Help Floating Widget to receive advice on finance or help about using the application

2. HELP PAGE:
Search for information on a topic by entering text in the textbox and pressing the search button. Receive information in terms of articles or videos. Click on a video to get interactive information.

3. HELP VIDEO PAGE:
Watch a video by a professional financial advisor on budgeting or by a technical staff member to do tasks in the app. Click on the "Back" button to resume the task on the page you were initially.

4. HOME PAGE:
Back to the Home Page or the page you were on so that you can continue the task after learning new information.