# In Partial Fulfillment of the Requirements for the Course Software Engineering 1

## **Budge-!T: Personal Expense and Savings Optimizer**

#### Presented to

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#### **PROJECT OVERVIEW**

#### Introduction

Budge-IT is a budgeting tool that simplifies personal financial management for all users. The major objective is to help consumers manage their expenditures, create savings targets, and maintain motivation through rewards. By providing a user-friendly platform, Budge-IT wants to make budgeting less intimidating and more approachable, particularly for young individuals just beginning to handle their expenses, such as college students.

#### **Project Mission and Vision**

#### **Mission Statement**

Our mission is to provide an engaging and user-friendly budgeting platform that empowers users to manage their expenses, set clear objectives, and cultivate smart spending habits. Through practical tools, insightful analytics, and motivational incentives, Budge-IT aims to make financial management accessible, enjoyable, and effective for all.

#### **Vision Statement**

We want Budge-IT to become the preferred budgeting tool for those who wish to take charge of their finances, establish objectives, and maintain financial stability. Our software will be entertaining and easy to use while offering clear insights, practical tools, and incentives to promote conservative spending and saving.

#### Why Budge-!T?

Budge-IT stands out as a complete solution that addresses typical financial issues, including overspending, inadequate savings, and improper debt management. People who wish to gain control over their financial habits with minimal effort and obtain detailed financial information can benefit from its design. Unlike other budgeting programs, which might be too complicated or lack instructional features, Budge-IT finds a balance between simplicity and efficacy.

Budge-IT offers individualized data-driven insights, real-time notifications, and automated spending classification. Budge-IT enables customers to monitor their spending, identify trends, and make educated financial choices. It includes features such as interactive charts, debt management tools, and overspending alarms to help customers attain financial stability.

To summarize, Budge-IT empowers consumers by offering a clear picture of their money, encouraging improved budgeting practices, lowering financial stress, and directing them toward more prudent savings and spending objectives.

## **User Story**

As a Gen Z, I want to evaluate, classify, and decode complicated spending patterns across several costs in order to discover hidden inefficiencies in my financial habits. By improving my monthly budget, better understanding my spending habits, and visualizing patterns using charts and graphs, I will be able to make more informed, data-driven financial choices. In addition, I'd want to configure specific overspending alarms and link several bank accounts to ensure that all transactions are properly documented.

#### PROJECT SCOPE AND PROBLEM

#### **Problem Statement**

- **The Struggle** Many individuals struggle to manage their finances effectively, leading to:
  - Overspending
  - Lack of Savings
  - Poor debt management
- **The Consequences** Financial stress, inefficiencies in personal budgeting, and a lack of control over financial decisions.

#### **Needs Statement**

- Analyze and categorize spending patterns across different types of expenses.
- Uncover inefficiencies in their spending behavior.
- Optimize their budget through insights and visual trends (charts, graphs, etc.)
- Monitor their savings over time, with clear indicators of how they are to their savings goals.
- Users could benefit from a simple financial health score summarizing their financial situation, including savings, debts, and spending habits.

#### **Trade-Offs**

 Creating a tool that is both simple and easy to use while offering deep financial insights and education.

#### **Benchmarks**

- Existing Solutions:
  - ➤ **Mint** Known for basic budgeting and tracking but lacks deep financial insights or educational components.
  - > YNAB (You Need a Budget) Focuses on detailed budgeting but has a steep learning curve.
  - **Personal Capital** Good for investment tracking but is overly complex for general expense management.

#### Solution

- Budge-IT is designed to help users analyze, categorize, and optimize their spending while improving financial literacy."
- Core Benefits:
  - Track and Categorize Automatic categorization of expenses across different accounts.
  - ➤ **Data-Driven Insights** Personalized insights and real-time alerts to guide smarter financial decisions.
  - Visualize Trends Interactive charts and graphs for easy tracking of spending habits and savings progress.
- Outcome Empower users to make better financial decisions, save more, and reduce financial stress.

#### **Functional Testing Metrics**

- **Feature Completeness** Percentage of planned features implemented (e.g., expense tracking, savings goals).
- Functionality Test Pass Rate Percentage of features that pass functional testing without bugs.

#### **Addressing Failure Paths**

- **Data Overload** Users feeling overwhelmed by too much financial data.
- Alert Fatigue Users receiving too many notifications and opting out.
- User Drop-Off Users abandoning the app due to complexity or unclear value.
- When to rollback:
  - ➤ If user engagement drops or critical features like categorization or alerts result in frustration (high opt-out rates).
  - ➤ If metrics show overspending continues despite alerts, a deeper review of the education methods will be triggered.

#### PROJECT FEATURES AND UI/UX DESIGN

#### Logo and Usage Guidelines



The official Budge-IT logo serves as a visual embodiment of our brand, representing efficiency in budgeting and savings management. This logo is essential to our product and must be applied uniformly across all interfaces, marketing, and promotional materials.

#### Letter 'B' with Dollar Sign

The bold, central 'B' that has a dollar sign is the focal point. It is designed for instant recognition; users don't have to think twice when they see it, and immediately know it represents Budge-IT. The dollar sign integrated within the letter is an indicative of financial-involving endeavors within the app. This clarity helps build a strong brand connection at a glance.

#### Color

The dark blue and white color scheme minimizes visual noise and provides contrast, allowing the logo to "pop" without overwhelming. According to Krug's principles, good design doesn't make users pause to interpret, this restrained color palette supports quick comprehension and builds trust.

#### Curved "BUDGE" and "!T"

Placing "BUDGE" and "!T" directly around the "B" gives users context immediately. The typography choice is modern and clean, making it instantly readable and understandable. The slight curvature adds visual interest without compromising clarity, so users get the brand message in seconds no overthinking required.

#### **Balance and Symmetry as Intuitive Cues**

The symmetrical white dots create a balanced design, subtly signaling stability and ease of use. Krug would advocate for this balance to make the design intuitive and pleasing without users needing to analyze why it feels "right" it just does.

#### Three-Dimensional Depth as a Metaphor, Not a Distraction

The 3D effect on the "B" is subtle yet powerful, making the logo stand out without becoming flashy. It implies growth, yet it's straightforward, ensuring that users don't have to interpret any complex symbolism. This depth adds visual hierarchy, guiding the eye naturally to the main feature.

#### **Technical Specifications**

File Formats: Available in PNG, SVG, and EPS.

• **Dimensions:** 1000x1000px (for web) and scalable for print.

Color Palette:

Black: #76889F
Dark Blue: #1E385F
White: #FFFFFF
Gray: #D8D8D8

Light Blue Accent: #76889F

• Clear Space: 50px of clear space around the logo.

• **Resolution:** Minimum of 72 DPI for web and 300 DPI for print.

#### **Usage Guidelines**

- Do maintain the original colors and aspect ratio.
- Do use on light backgrounds for maximum visibility.
- **Don't** stretch, distort, or alter the logo.
- **Don't** place the logo too close to other visual elements.

#### **User Research and Personas**

The User Experience (UX) design of Budge-!T focuses on creating an intuitive and engaging interface that simplifies personal finance management for users, especially targeting young adults and Gen Z. The design aims to enhance user satisfaction through thoughtful layouts, clear visuals, and interactive elements.

User Research revealed that users need a straightforward and visually appealing tool to manage their finances. Common challenges include overspending, difficulty tracking budgets, and a lack of personalized insights.

#### 1. User Personas

#### A. Persona 1: College Student (Alex)

- Age: 20
- Goals: Tracks daily expenses, save for emergencies, understand spending habits
- **Pain Points:** Struggles with budgeting, often feels overwhelmed by financial decisions.

#### B. Persona 2: Young Professional (Jamie)

- Age: 27
- Goals: Save for travel, manage multiple income streams, keep track of bills.
- Pain Points: Finds existing apps too complex; desires clear visual insights.

#### 2. User Journey Mapping

The user journey illustrates the steps users take when interacting with Budge-!T, from onboarding to regular usage:

- **A. Onboarding:** Users register by entering their details, guided by an intuitive signup interface.
- **B. Dashboard Overview:** Users are presented with a visually engaging dashboard displaying their financial health and key metrics.
- **C. Setting Budgets**: Users allocate budgets easily through a simple interface with sliders and input fields.
- **D. Tracking Transactions**: Users can input expenses through an easy-to-navigate transaction screen, complete with automatic categorization.
- **E. Goal Setting**: Users set financial goals with visual progress indicators that motivate and guide them.
- **F. Receiving Insights**: Users get tailored insights and alerts to help them stay on track with their finances.

#### 3. Information Architecture

The information architecture is designed to ensure seamless navigation throughout the app:

#### A. Home/Dashboard

- Overview of Financial Health
- Recent Transactions
- Budget Overview
- Quick Access Buttons

## B. Budgets

- Create/Edit Budgets
- Track Spending
- Visual Reports

#### C. Transactions

- Add/Edit Transactions
- View Detailed Transaction History
- Categorization Options

#### D. Goals

- Create/Manage Goals
- Visual Progress Trackers
- Goal Completion Stats

#### E. Settings

- User Profile Management
- Theme and Notification Preferences
- Security Settings

#### 4. Wireframes

The wireframes serve as blueprints for the app's main screens, illustrating key components and layout.

#### A. Main Dashboard Wireframe

- Overview Section: Displays total account balance, recent spending, and savings progress using circular progress bars for visual clarity.
- **Budget Tracking Section:** Features color-coded graphs illustrating budget allocations versus actual spending.
- Recent Transactions Section: A scrolling list of the most recent transactions with quick edit options.

#### **B. Budget Setting Wireframe**

• **Input Fields:** Simple sliders to allocate funds per category (e.g., Food, Entertainment) with instant visual feedback on available budget.

#### C. Goal Tracking Wireframe

• **Goal List:** A visually appealing display of user-defined goals, complete with progress bars and due dates.

#### 5. Visual Design

The visual design emphasizes clarity and engagement through strategic color choices, typography, and iconography:

#### A. Color Palette

- Primary Colors: Soft blues and white for a calming effect.
- **Accent Colors:** Bright yellows or oranges for alerts and important notifications.

#### B. Typography

- Clean, modern fonts for readability.
- Hierarchical text sizes to differentiate between headings, subheadings, and body text.

#### C. Icons

- Consistent, simple icons for intuitive navigation (e.g., money bag for budgets, bell for alerts).
- Iconography matches the overall aesthetic, ensuring a cohesive look.

#### 6. Interaction Design

Interaction design enhances user engagement through responsive and intuitive elements:

## A. Navigation

 Bottom navigation bar for quick access to Home, Budgets, Transactions, Goals, and Settings, ensuring easy movement between screens.

#### **B. Feedback Mechanisms**

- Visual confirmations (like color changes) when actions are completed (e.g., adding a transaction).
- Brief tooltips provide guidance on first-time interactions with new features.

#### C. Alerts and Notifications

• Customizable alert settings allow users to receive notifications about overspending, bill reminders, and goal progress.

## **User Interface (UI) Features**

## 1. Sign-Up Page

- **A. Create Account** This page is designed for users to enter their information.
  - Name The user shall provide their choice of name on this field.
  - **Email** The user will input their email address that will be used to bind and recover their account.
  - **Username** The user will input their choice of username.
  - **Mobile Number** This will be utilized for authentication or verification for extra security.
  - Date of Birth The user will input their date of birth.
  - **Password** The user will provide their password for their account to secure their information.
  - **Confirm Password** This field is for verification of the previous password. The user will manually input their password again to make sure that the characters are matched.
- **B.** Sign Up This button shall proceed to the next page (Login Page) if all fields are filled out correctly and validated.
- **C.** Terms of Use & Privacy Policy By proceeding to sign-up, the user is subjected to agree to the terms of use and privacy policy of the software, which can be read by clicking the text.
- **D. Already have an account?** This text is hyperlinked to redirect users to the Login Page.

#### 2. Login Page

- **A. Welcome** This page is designed for users to log in with the information they used to create their account.
  - **Username or Email** The user will input their username or email that they used to create their account.
  - Password The user will input their password that they used to create their account.
  - **Login** The Login button shall proceed to the next page (Main Page) if all fields are filled out correctly and validated.
  - **Forgot Password** This text is hyperlinked to redirect users to the Forgot Password Page.
  - Sign-Up This button will redirect users to the Sign-Up Page.

#### 3. Forgot Password Page

- **A. Forgot Password** This page is designed for users to provide the essential information needed to recover their accounts.
  - **Reset Password** This text will provide useful information that may assist the user in recalling the password they used.
  - Enter Email Address The user will enter the email address associated with their account to retrieve and create a new password for their account.
  - Next Step This button will redirect users to the next page (New Password Page).
  - Login This button will redirect users to the Login Page.
  - **Don't have an account? Sign Up** This text is hyperlinked to redirect users to the Sign-Up Page.
- **B. New Password** This page is designed for users to make a new password for their account after email validation.
  - New Password The user shall input the new password for their account.
  - Confirm New Password The user shall input the password again to make sure it matches the characters of the previous field.
  - **Change Password** This button will validate and append the changes in password and reveal a pop-up message.
  - **Pop-up Message** A pop-up window that contains the message of successfully changing the password.

#### 4. Main Page

- **A. Dashboard** A home screen that will display an overall snapshot of the user's financial expenditure and budget including recent transactions, account balances, budget limits, progress toward goals, and upcoming bills.
  - Analysis This section of the dashboard consists of the following:
    - ➤ Interactive Charts and Graphs: Visualize monthly, weekly, or daily spending trends through intuitive charts and graphs (Charts, Graphs, Heat Maps) that help users easily track their expenses.
  - **Transaction** This section of the dashboard consists of the following:
    - ➤ Overspending Alerts Allow users to set custom threshold alerts for overspending in any budgeted category, ensuring they are notified in real time when approaching or exceeding their limits.
    - ▶ Debt Management Feature tracks debts, calculates interest, and helps users create repayment plans. It includes reminders for payments and forecasts debt-free dates, providing essential tools for managing and reducing debt
  - Categories This section of the dashboard consists of the following:
    - ➤ Automated Categorization: Use machine learning algorithms to automatically categorize transactions into predefined categories (e.g., groceries, utilities, entertainment) or allow users to create custom categories for tailored tracking.
- **B. Profile** This is the user's profile, where they can edit their information and modify certain app features.
  - Edit Profile The user can view and change their information such as Username, Mobile Number, and Email Address.
  - Security This section consists of <u>Change Pin</u> where the user can change the pin code of their account, as well as view the Terms and Conditions of the app.
  - **Settings** This section consists of options for enabling or disabling Push Notifications and Dark Theme.
  - **Logout** A pop-up window that contains the message of confirming the user to end their session.

#### Methodology

The Survey Research approach fits appropriately with this paper. Survey research focuses on present events and is quantitative in nature. This type of research is ideal for understanding users' current financial behaviors and analyzing data patterns in real-time. The researchers will divide the survey into three categories: Discretional, Correlational, and Exploratory research types to capture a broad range of insights.

- 1. Discretional Research help collect data on individual spending habits.
- 2. Correlational Research explore the relationships between overspending and other financial behaviors.
- **3. Exploratory Research** uncover new trends in personal budgeting challenges that may not have been anticipated.

By employing this method, the researchers gathered critical quantitative data to create personalized insights for each user. This data will drive Budge-IT's features such as interactive charts, automated categorization, and real-time overspending alerts.

The solution is designed to offer core benefits such as:

- Automatically categorizing expenses across accounts.
- Delivering personalized, data-driven insights to guide smarter financial decisions.
- Offering a dashboard that provides an overall snapshot of users' financial health, including recent transactions and progress towards goals.

To ensure Budge-IT's success, the key metrics are tracked such as user engagement and user satisfaction, using surveys to gather feedback on how well the app is helping users improve their financial literacy.

Finally, the researchers recognized the potential failure paths such as data overload or alert fatigue, and such counteractive mechanisms have been in place to address the problem. If users begin to feel overwhelmed, the app will undergo adjustments on notifications and data presentation to ensure a smoother experience.

In conclusion, Budge-IT is designed to empower users by giving them control over their finances through data-driven insights and with a simple, user-friendly interface. With the help of survey research, constant refinement and optimization will be implemented for the user's experience to help them make better financial decisions, reduce stress, and increase savings.

#### **Dynamic Systems Development Method (DSDM)**

DSDM, or Dynamic Systems Development Method, was developed in the early 1990s by a consortium of companies in the UK, known as the DSDM Consortium.

Dynamic Systems Development Method (DSDM) is an agile project management framework that delivers business value through iterative development. It emphasizes user involvement, collaboration, and flexibility, making it essential for organizations seeking to enhance project delivery and adapt to change.

#### **Key DSDM Principles**

- 1. Focus on Business Needs: The project addresses the need for better personal finance tools, especially for helping young people keep track of their buying and saving habits.
- **2. Deliver on Time:** Budge-IT's features, such as tracking expenses and setting goals, are being built according to a plan to make sure they are delivered on time.
- **3. Collaborate:** Working with users on a regular basis will help us improve standards and make sure our solutions are still useful and easy to use.
- **4. Never Compromise Quality:** Important tools like transaction labeling, real-time alerts, and interactive charts are built with high quality standards in mind.
- **5. Build Incrementally from Firm Foundations:** Budge-IT is being built gradually, beginning with basic features that will be added to and made better based on comments from users.
- **6. Develop Iteratively:** We're dedicated to making the app better all the time by updating it regularly based on what users say and how they like it.
- 7. Communicate Continuously and Clearly: We keep lines of communication open within the team and with partners to make sure we stay on the same page throughout the project.

#### **Project Phases**

- **1. Feasibility:** We reviewed Budge-IT's sustainability and proved it fits well with the goal of promoting financial literacy.
- **2. Foundations:** Defined basic objectives, gave team roles, and set project timelines.
- **3. Exploration:** Using continuous testing, we've gathered user feedback on core features like cost categories and overspending alerts.
- **4. Engineering:** The focus here is on creating and merging features such as financial reports, transaction tracking, and goal-setting tools.
- **5. Deployment:** Budge-IT will be launched with user support to make training easy, gather comments, and watch performance.

#### Roles in DSDM for Budge-IT

- Project Manager: Coordinates the project schedule, handles resources, and watches progress to ensure that Budge-IT stays on track with its goals and targets.
- Researcher: Collects and analyzes data on user needs, spending habits, and current financial tools to guide the development of Budge-IT's features and functions
- **Programmer:** Develops the app's core functions, including transaction tracking, planning tools, and goal-setting features, ensuring smooth merging and usage.
- **Documenter:** Maintains clear and organized records of project objectives, user feedback, and progress updates, building thorough paperwork for future reference and team alignment.
- Designer: Creates user-friendly layouts and entertaining visual elements for Budge-IT, focused on layout, color schemes, and dynamic components that improve financial management for users.

#### **DSDM Techniques and Tools Applied**

- **Timeboxing:** We set fixed times for the development of key features like cost tracking, planning, and debt management.
- **Incremental Delivery:** Prioritizing key features for earlier versions, starting with tracking and progress reporting.
- **Prototyping:** Creating wireframes and mockups to test UI ideas and gather feedback early.
- **User Involvement:** Actively engaged end-users, especially during Exploration and Engineering, to ensure usefulness.

#### **Advantages and Considerations**

- **Advantages:** Our user-centered method promises faster release of useful features, flexibility, and improved customer happiness.
- **Considerations:** Balancing user interaction with a tight timeline, handling alert tiredness, and ensuring freedom without losing quality.

#### Conclusion

By following DSDM principles, we've kept Budge-IT focused on user goals while providing modest changes based on constant user feedback. Through this iterative approach, the project aims to improve financial awareness with a simple, effective budgeting tool that meets the needs of young people.

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  - F20/slides/CE102 Lec3 Usability.pdf

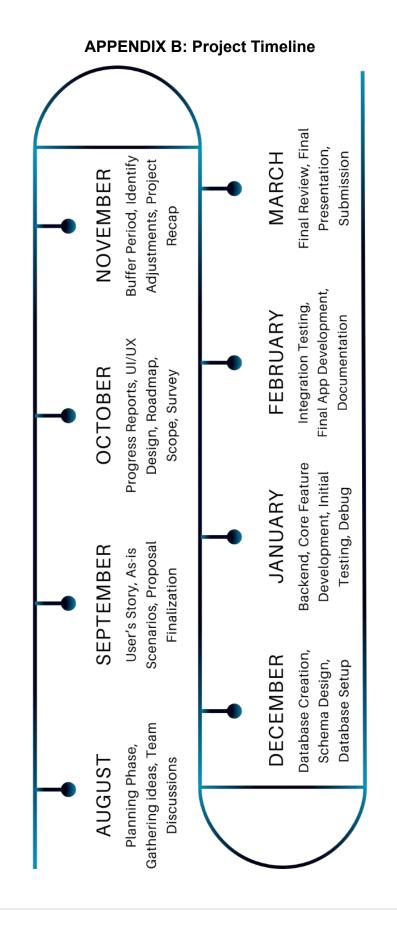
#### **APPENDICES**

## **APPENDIX A: As-Is Scenario**

	BUDGET	PREPARE	RESULT
THINKING	<ul><li>Monthly</li><li>Daily</li><li>Yearly</li><li>Weekly</li></ul>	<ul><li>Cash</li><li>Card</li><li>E-Wallet</li></ul>	<ul><li>Saved</li><li>Overspend</li></ul>
DOING	<ul> <li>Checking</li></ul>	<ul> <li>Checking         Availability</li> <li>List Potential         Expenses</li> <li>Setting Goals</li> <li>Select Budgeting         App</li> <li>Established         Emergency Funds</li> </ul>	<ul><li>Monitor</li><li>Compare</li><li>Adjust</li></ul>
FEELING	<ul><li>Overwhelmed</li><li>Confuse</li><li>Ayoko na moments</li></ul>	<ul><li>Is it Secure?</li><li>Is it Enough?</li><li>Confident</li></ul>	<ul><li>Relieved</li><li>Disappointed</li><li>Yehey!</li><li>Satisfied</li><li>Empowered</li></ul>

## Legend:

 Red – The voted features that require improvement or further attention to meet user satisfaction.



## **APPENDIX C: Logo Resources**

## **Primary Logo Expression**

The primary expression of the logo is in color palette of Gray and Dark Blue with a White 'B' with a dollar sign.



On white

A Budge-IT Standard logo on a white background is the primary use of logo.



## On imagery

A Budge-IT Standard logo may also be used over imagery placed with consideration of the image content and contrast. The circular outline in this case is always black.

## **Secondary Logo Expression**

The secondary expression of the logo is in gray circular outline and gray hues for documentation.



On black

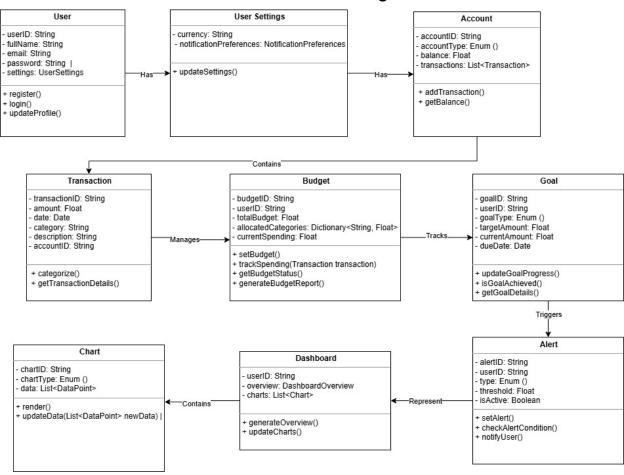
A Budge-IT with gray ciruclar outline logo on a black background is the secondary use of logo.



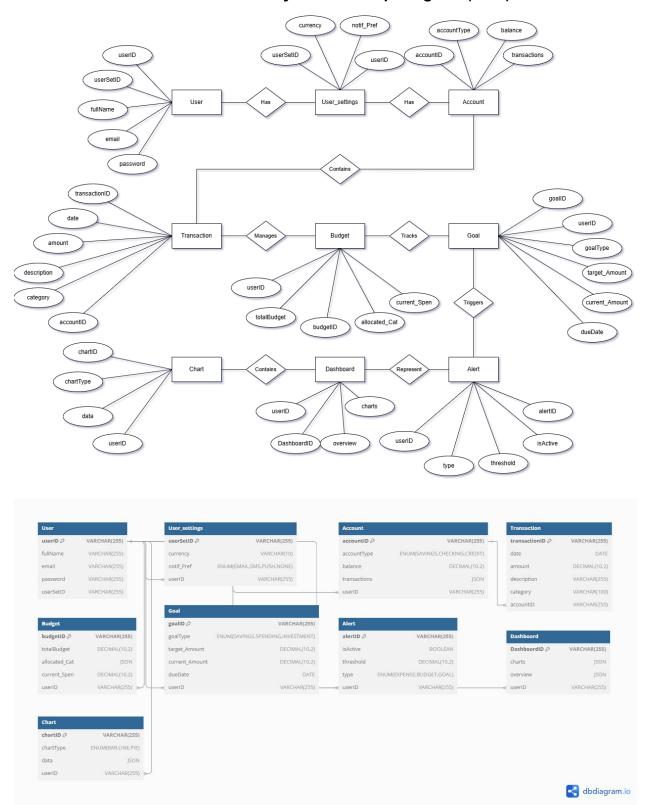
## On printed documents

A Budge-IT with gray hue logo on printed documentation is the secondary use of logo.

## **APPENDIX D: UML Diagram**



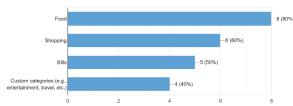
## **APPENDIX E: Entity-Relationship Diagram (ERD)**



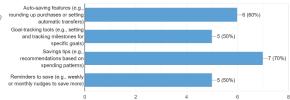
## **APPENDIX F: Survey Results**

## **Content Preferences for Budge-IT**

1. How would you prefer to categorize your expenses in Budge-!T?

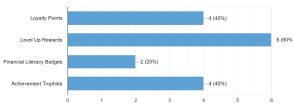


2. How would you want Budge-!T to help you save for big purchases or life goals?



3. If Budge-!T had a feature that rewards you for staying within budget, what kind of rewards would appeal to you?



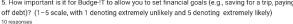


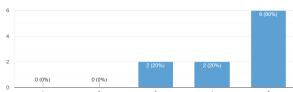
4. Based on your purchasing patterns, would you find it useful if Budge-!T provided tailored budgeting advice or insights?



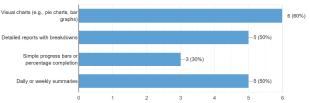


5. How important is it for Budge-!T to allow you to set financial goals (e.g., saving for a trip, paying off debt)? (1-5 scale, with 1 denoting extremely unlikely and 5 denoting extremely likely)



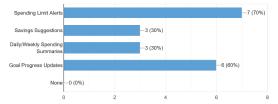


6. How would you prefer to see your financial progress in Budge-!T?

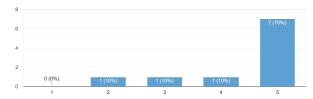


7. What kind of alerts or notifications from Budge-!T would you like to receive to help you stay within your budget?

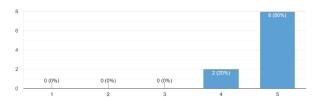
#### 10 responses



8. Would you prefer to have the option to set a custom PIN or password for added security in addition to your account login credentials? (1-5 s...xtremely unlikely and 5 denoting extremely likely)

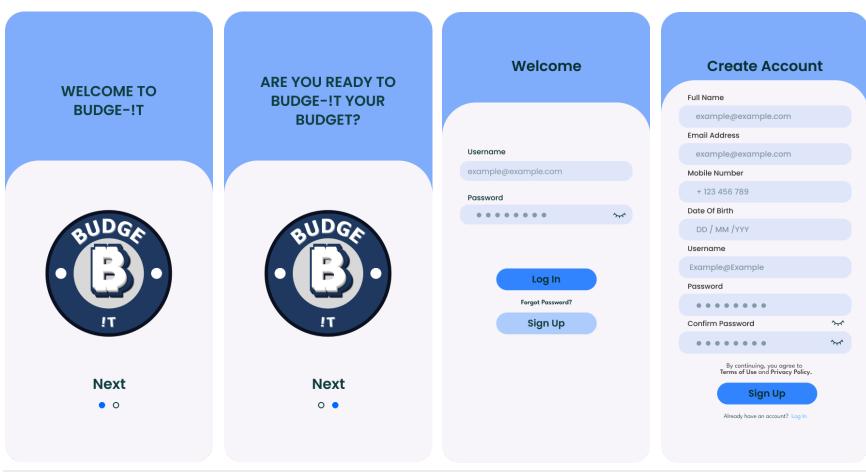


9. How likely are you to recommend Budge-!T to a friend or colleague? (1–5 scale, with 1 denoting extremely unlikely and 5 denoting extremely likely)

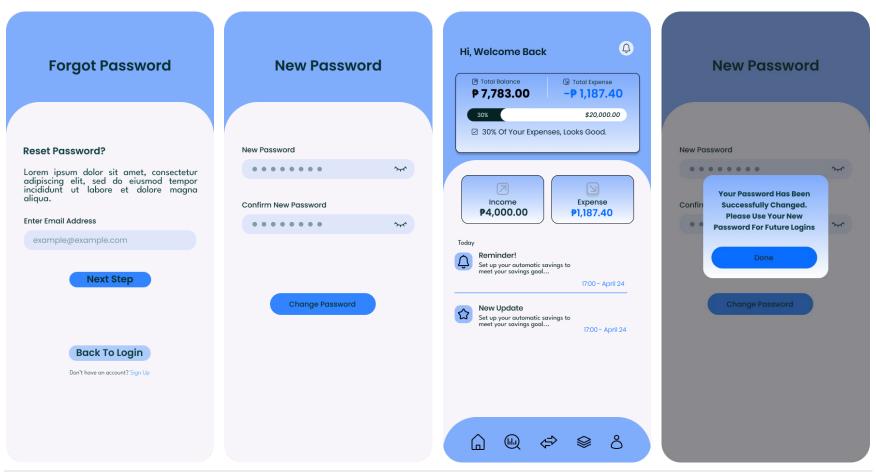


## APPENDIX G: User Interface (UI) Mock-up Resources

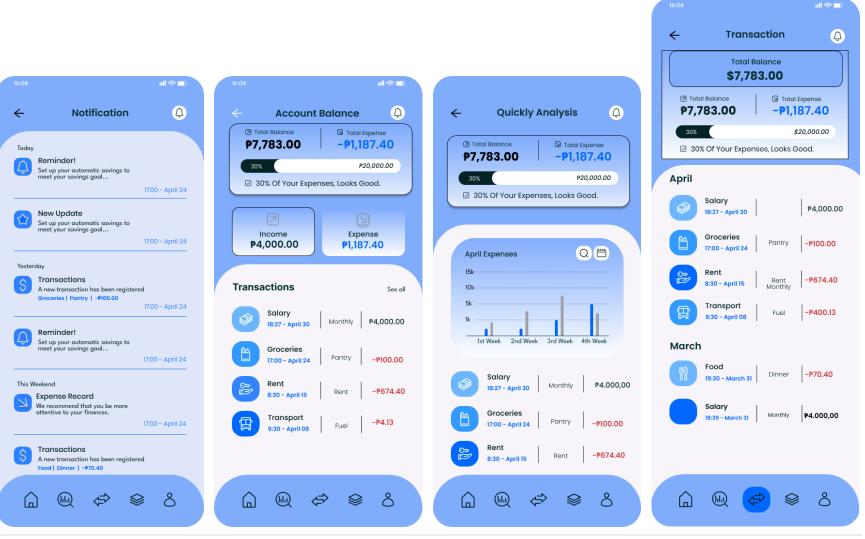
## Onboarding, Sign-up, and Login Interfaces



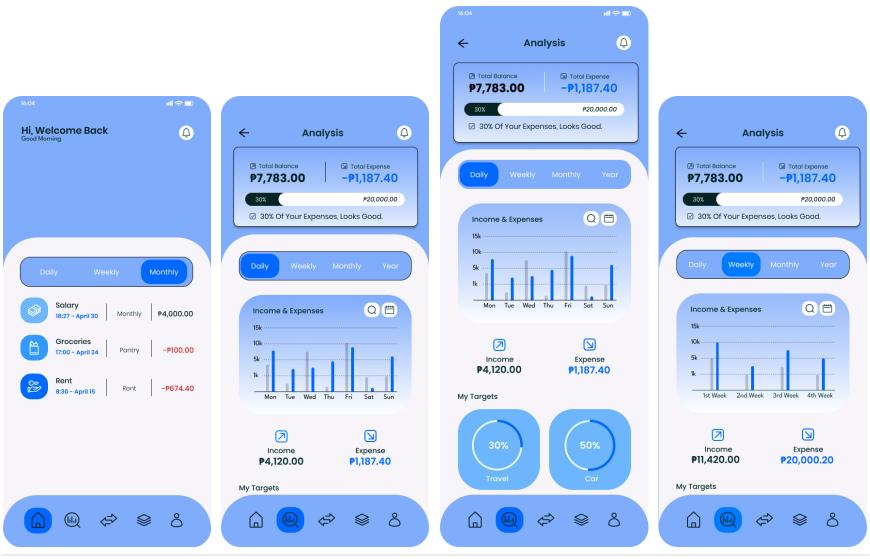
## Forgot Password, Home, and New Password Interfaces



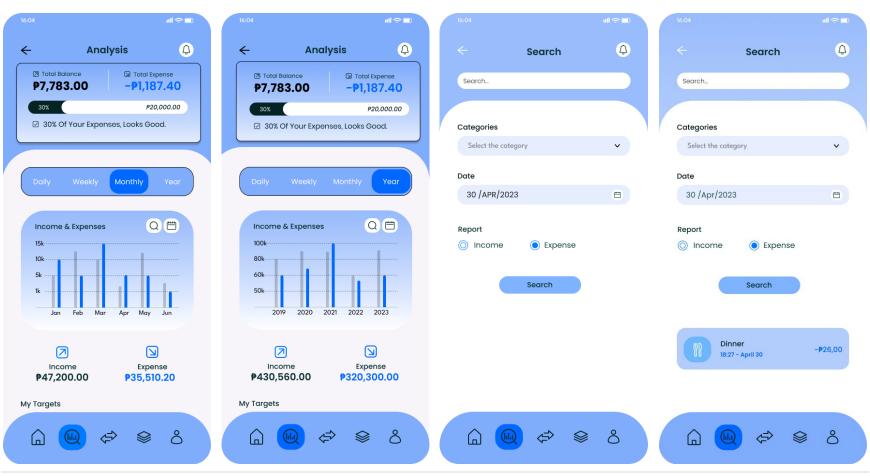
## Notifications, Balance, and Analysis Interfaces



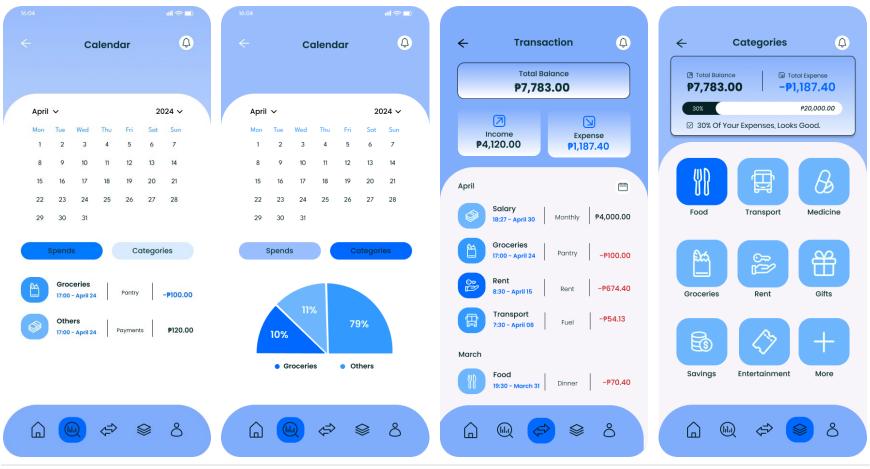
## Home, Daily, and Weekly Interfaces



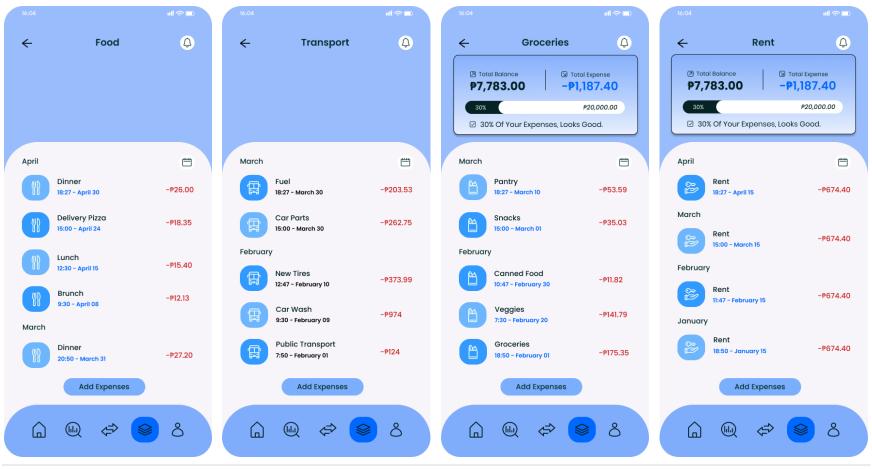
## Monthly, Yearly, and Search Interfaces



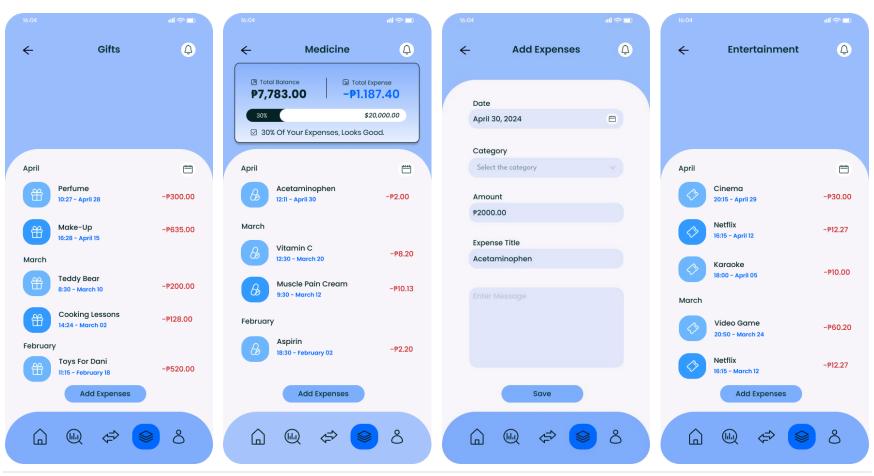
## Calendar, Transactions, and Categories Interfaces



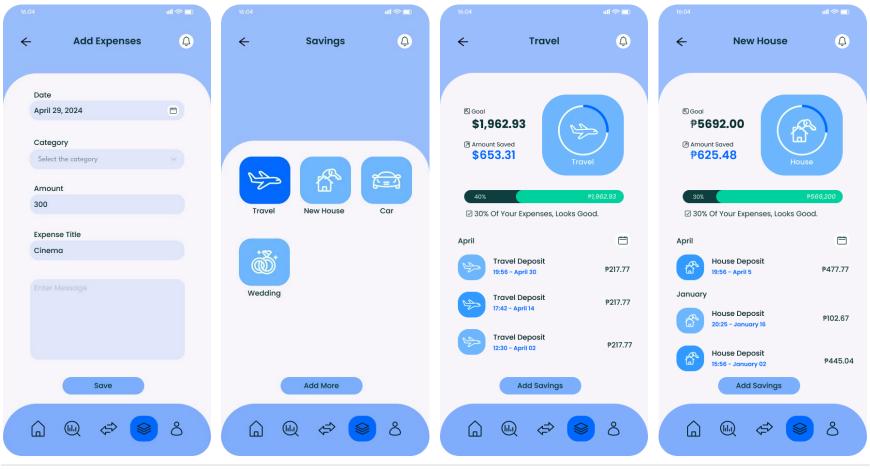
## **Groceries, Transportation, and Rent Interfaces**



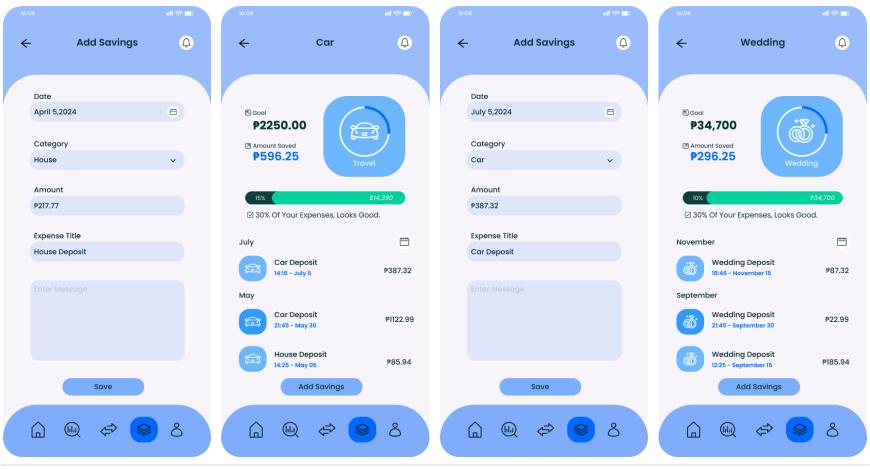
## Gifts, Medicine, and Entertainment Interfaces



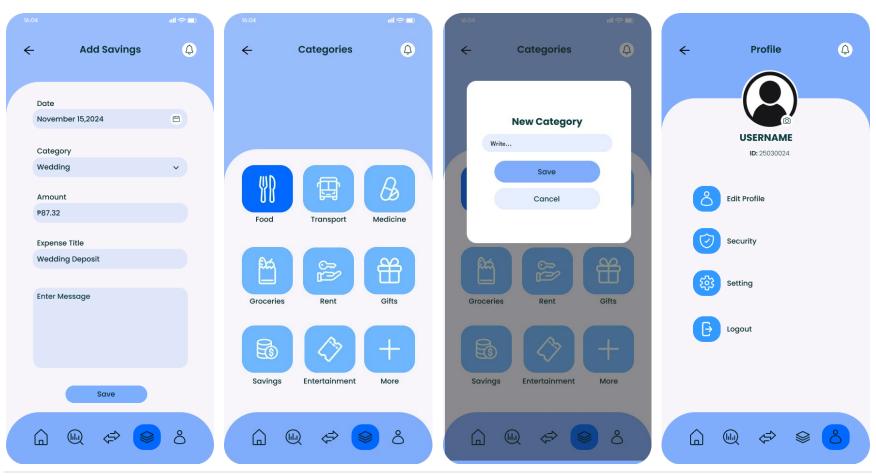
## Savings, Travels, New House Interfaces



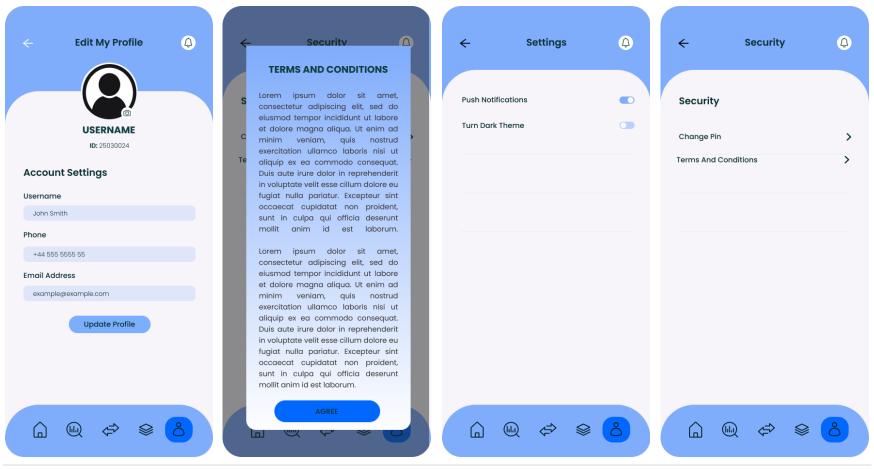
## **Car Expenses and Wedding Interfaces**



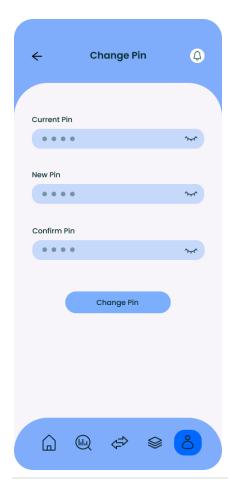
## Categories, New Categories, and Profile Interfaces



## **Edit Profile and Security Interfaces**



## Terms & Conditions, Change Pin, and Log Out Interfaces

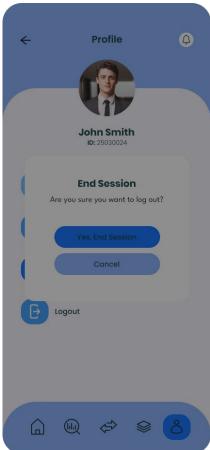


#### **TERMS AND CONDITIONS**

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## Confirm, End Session, and New Category Interfaces

