

# 4-Day UX Test

## **Background**

Ed is 41 years old and has his own bicycle repair shop in Great Britain. He repairs the bicycles and takes care of the business management himself. He is already using an invoicing app to send invoices to his customers on the go, but he'd also like to be able to register both his paid and unpaid (future) expenses, so he can have an overview of them and eventually share them with his accountant.

## **Task**

Design a mobile app that allows Ed to organize his receipts, keep track of his expenses and share them with his accountant.

There's not a deadline, but I'd suggest a maximum of 1 week (working week, not holidays) to complete the task.

You can use the weapon of your choice, make up any information that you may need and of course contact me if you need further instructions or if you have any doubts.

**TIP: Read the task very well and focus on what you think is most important, but don't design the whole app.**

## Introduction

My approach to this design challenge was to break it down into three parts. Part 1 will explain my process of research and feature brainstorming, Part 2 will demonstrate my design ideation in the form of sketches, and then in Part 3 I will share a few mockups where I carry my designs into a higher fidelity format.

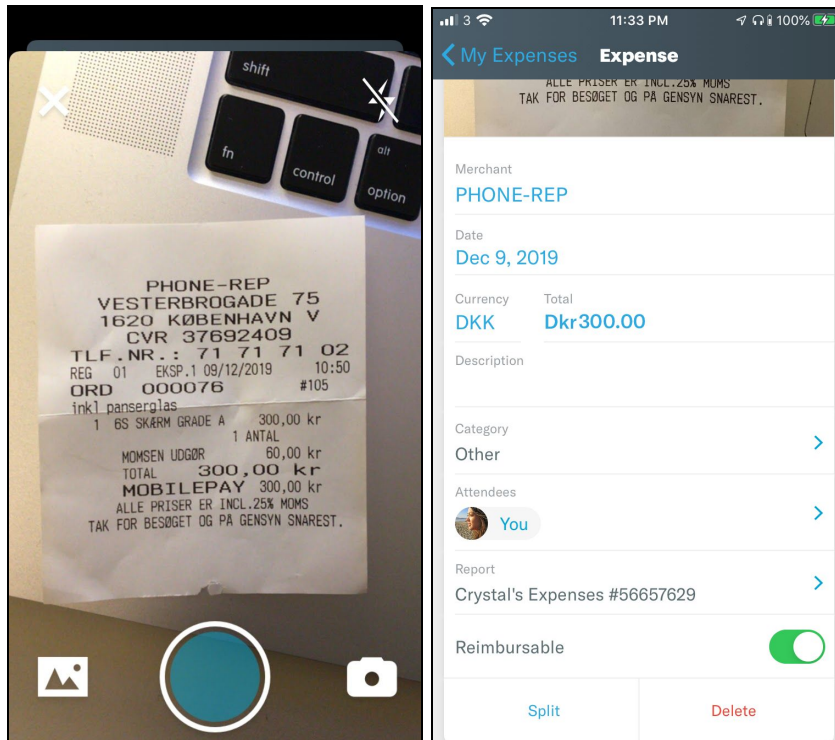
## Part 1: My Process

### **Competitive and Comparative Analysis**

First, I start by observing what is already available and popular on the market. Just last month, Nerdwallet released an article of the 7 best budgeting apps. I downloaded them to test them out. I also tried out some comparable apps such as apps for sharing expenses. Of all the different apps I tried, features from three of them really stood out to me:

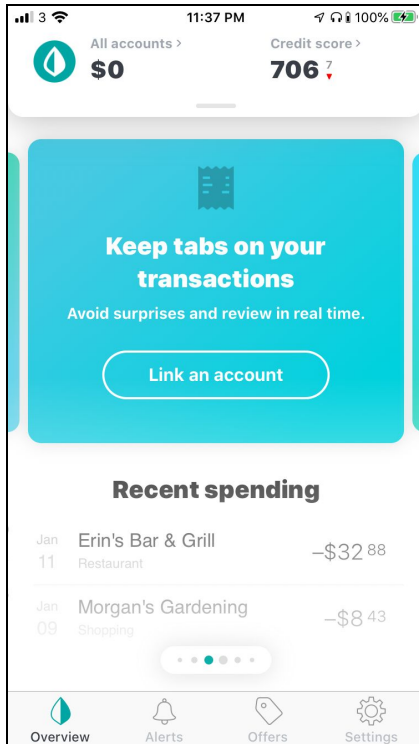
#### 1. *Expensify*

Easy scanning of receipts and extraction of data such as merchant name, date, currency, and expense total.



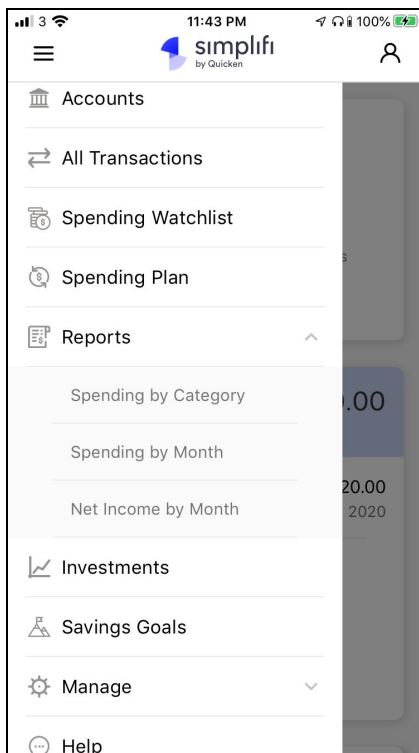
#### 2. *Mint*

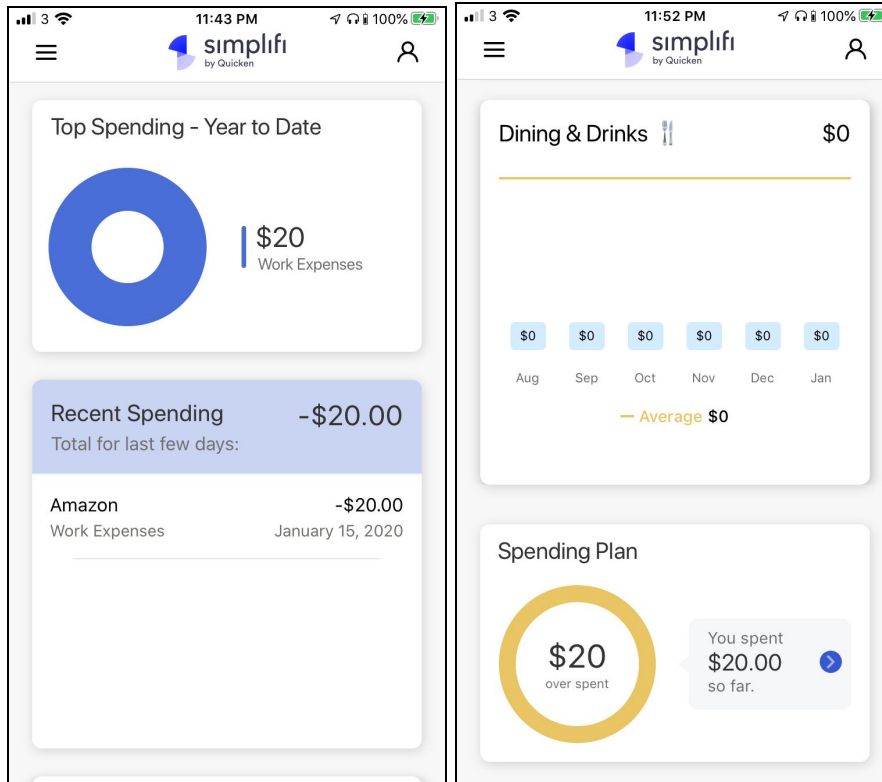
Ability to link bank accounts and extract transactions automatically.



### 3. *Simplifi*

Ability to create reports by category or month. Also nice were informative dashboard widgets for top and recent spending.





In the end, it was clear that the apps that stood out were those that removed the friction of manual data entry (especially the ones that were “smart enough” to auto-fill things like category) and those that gave financial insights using data visualizations.

### ***Feature Prioritization***

Through market research and thinking about the user needs of Ed and his accountant, I came up with a feature list for my expense app. In the end, I decide to remove automatic expense registration in order to reduce the design complexity:

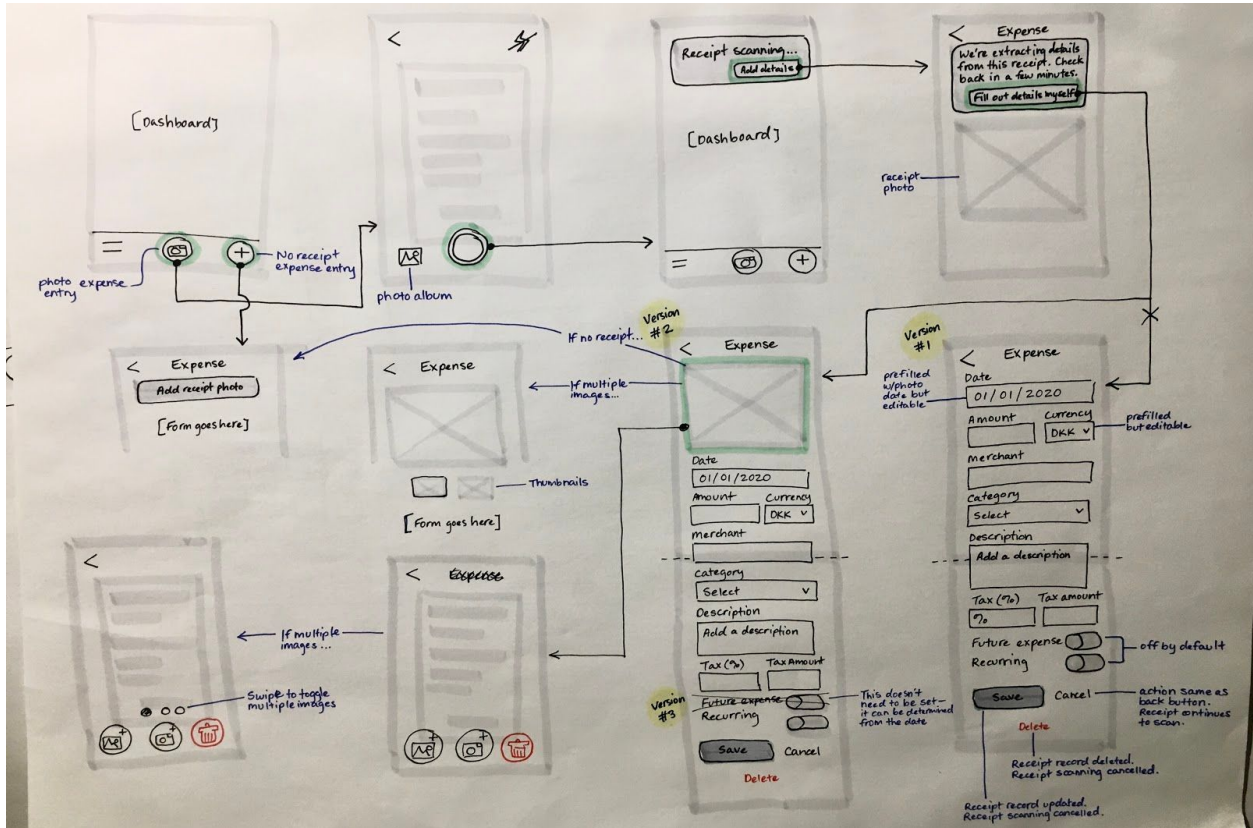
- ***Expense registration***
  - Manual - Both photo and text-based for expenses without receipts.
  - ~~Automatic - Requiring a user to link a bank account.~~
  - Ability to classify as one-time or recurring
  - Ability to classify as paid or unpaid (for future expenses)
  - Ability to tag and categorize expenses
- ***Receipt organization***
  - Receipts viewable as image icons
  - Toggle between flat view or folder view
    - Folder view can be organized by date, category, or merchant
- ***Report generation***
  - Generate reports based on a given date range
  - Export reports in Excel or PDF format
    - Ability to email exported report to accountant

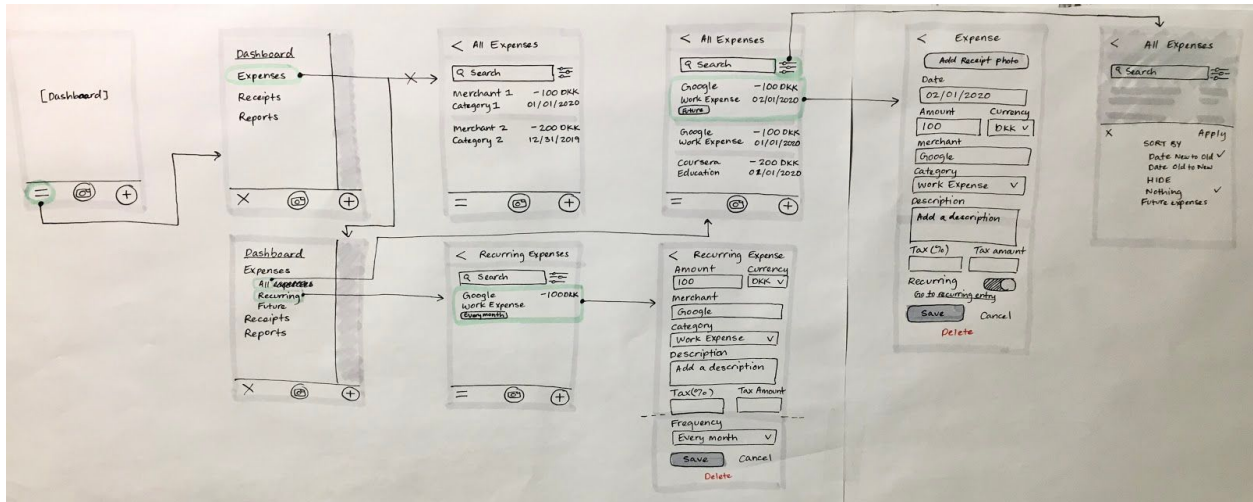
- *Dashboard*
  - Top spending
  - Recent spending
  - 6-month spending breakdown for a category
    - Ability to toggle category
  - Forecasted expenses for next month

- Ability to toggle category

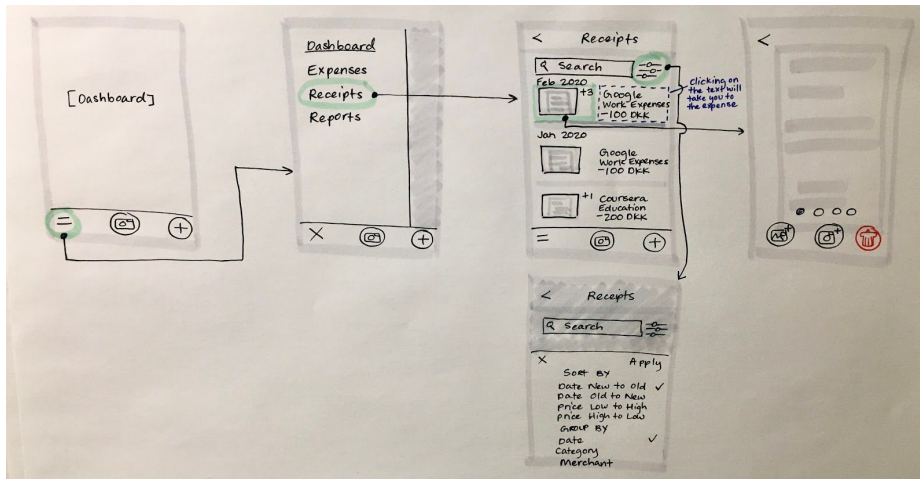
### Expense registration

### **Expense registration**

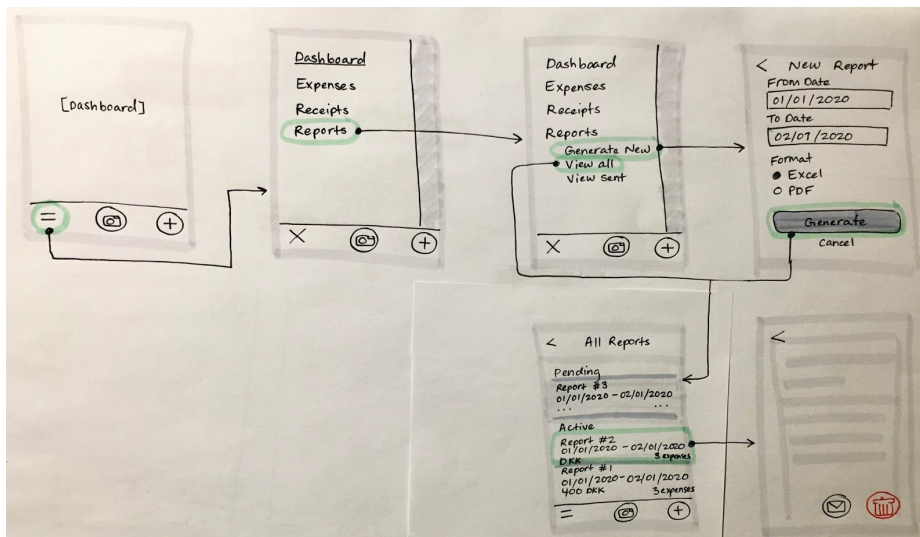




## Receipt organization



## Report generation





Part 3: Mockups

