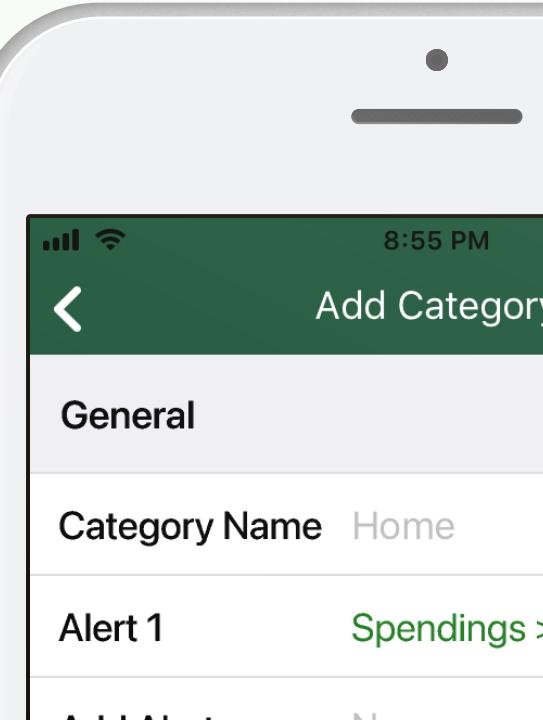
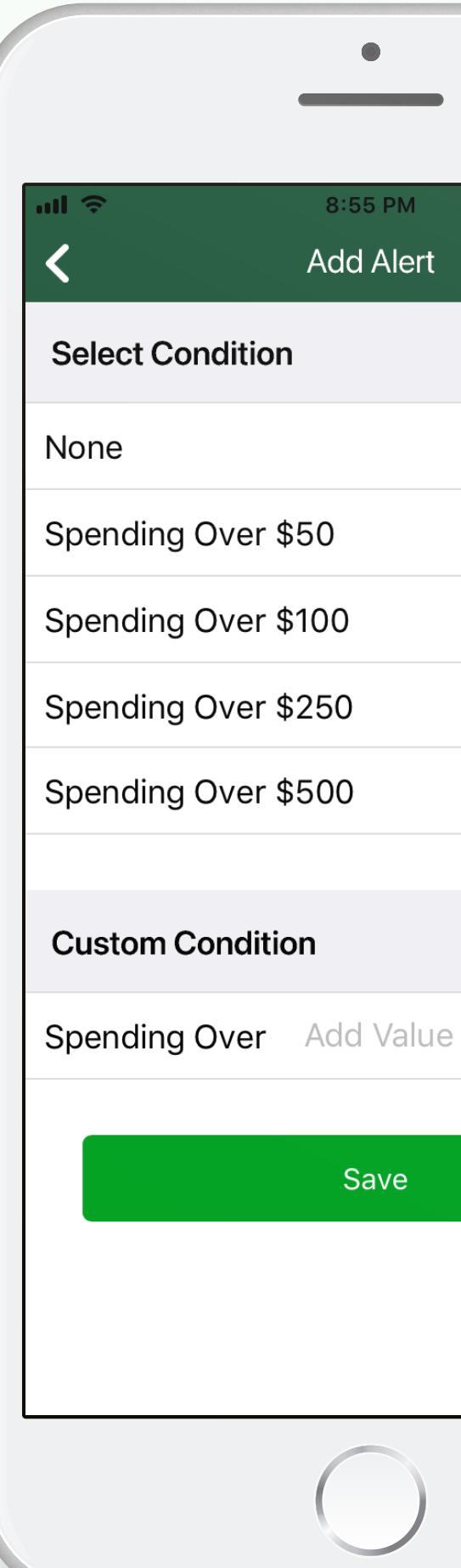
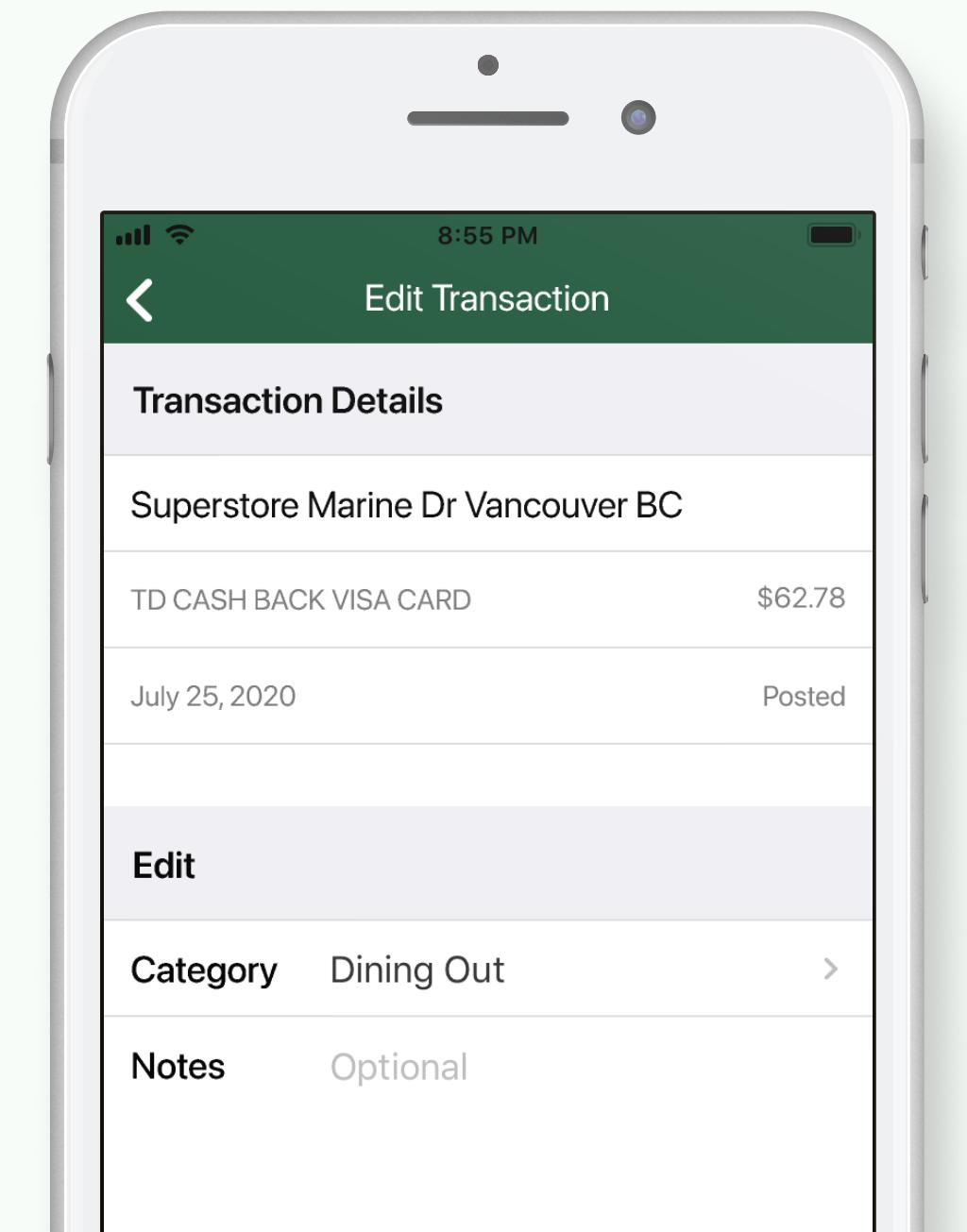
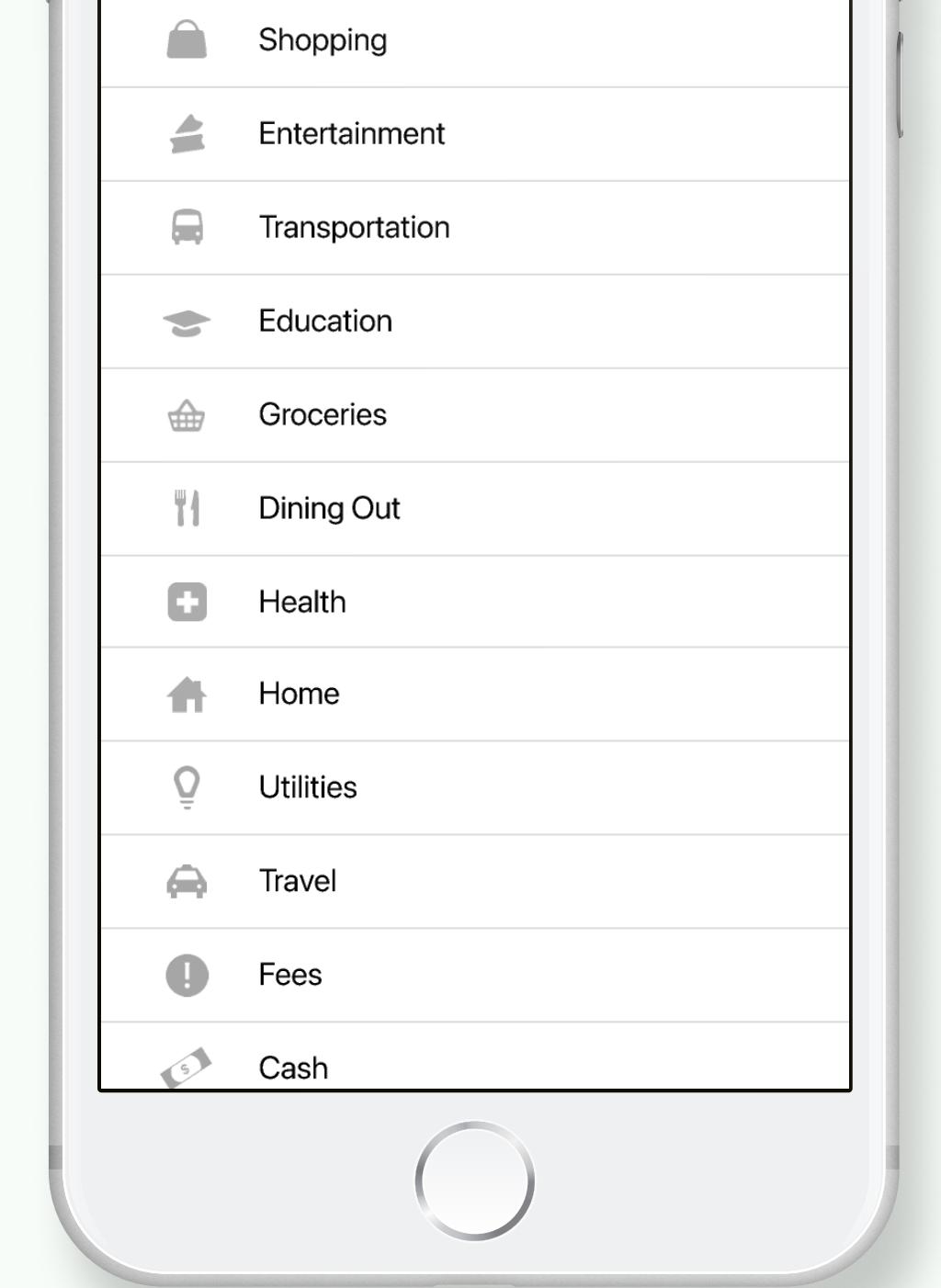
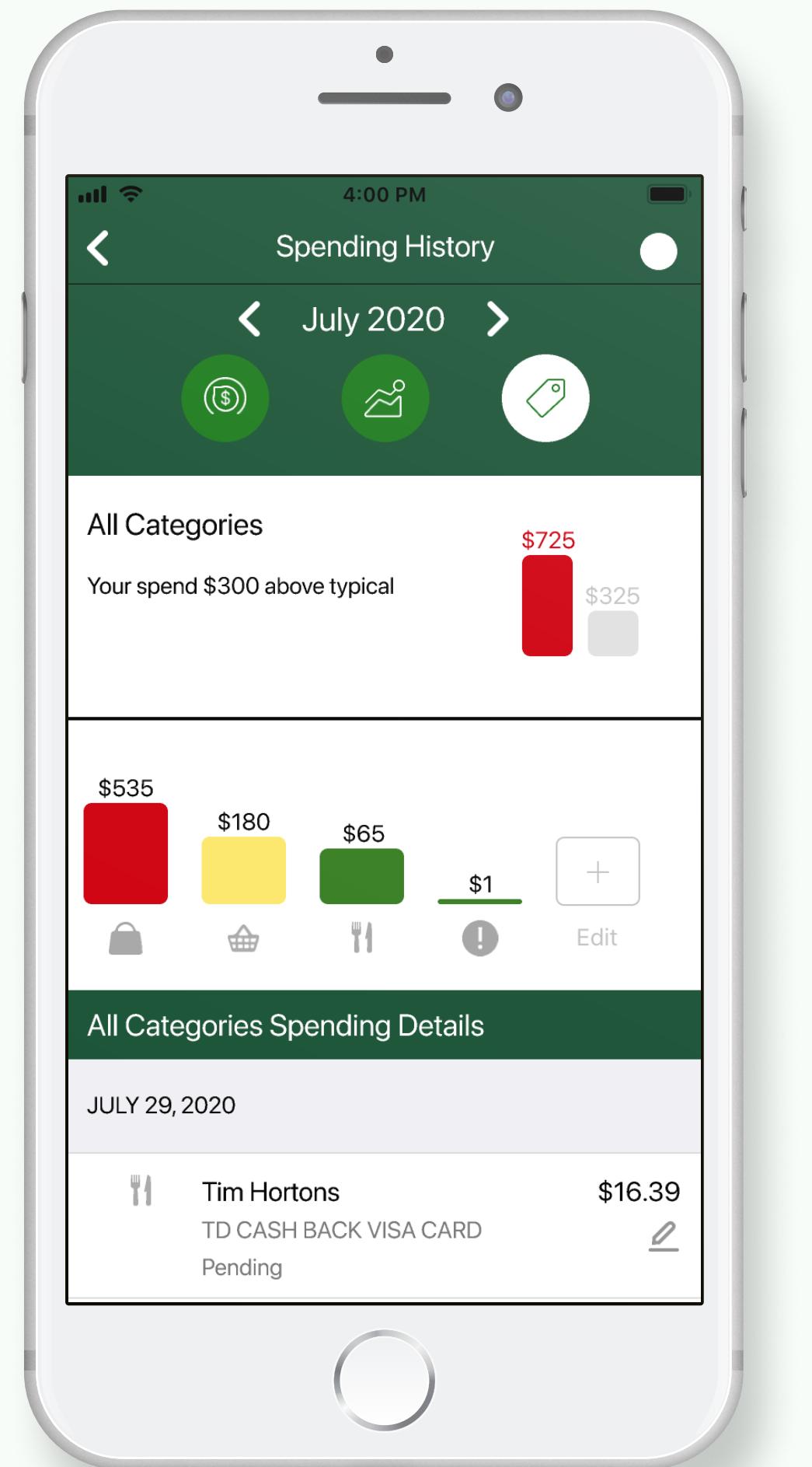


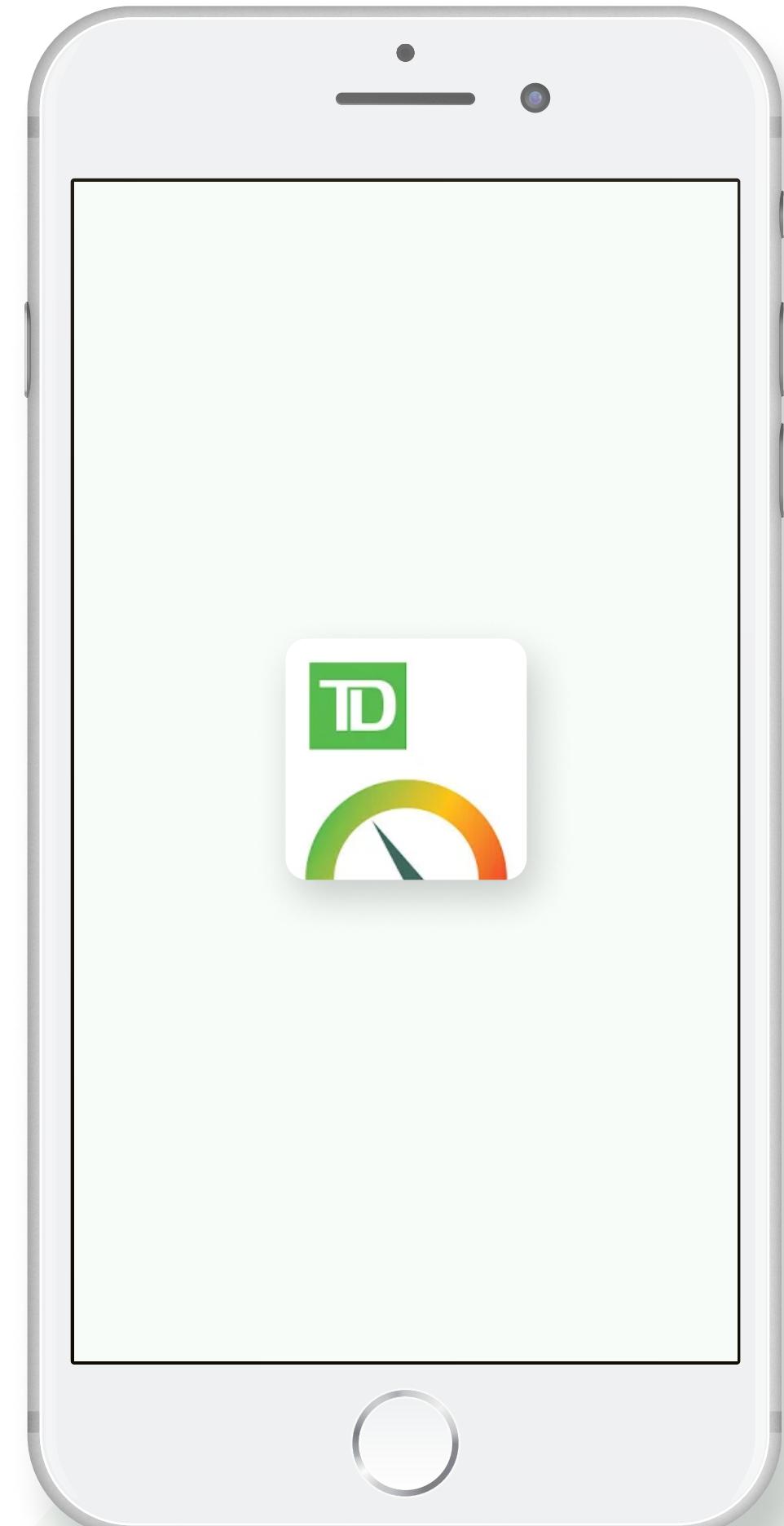
Feature Design.



TD MySpend



Brief Heuristic Evaluations



Performed Task

1. Can user easily review their spendings?
2. Are users able to customize the app to their personal spending habits?

Results

Using Nielsen Heuristic

#7 - Flexibility and Efficiency of use

Users are unable to customize the app, other than enabling the notification option.

Additionally, the automation of transactions into categories sometimes are not accurate, but there's no way to fix it.

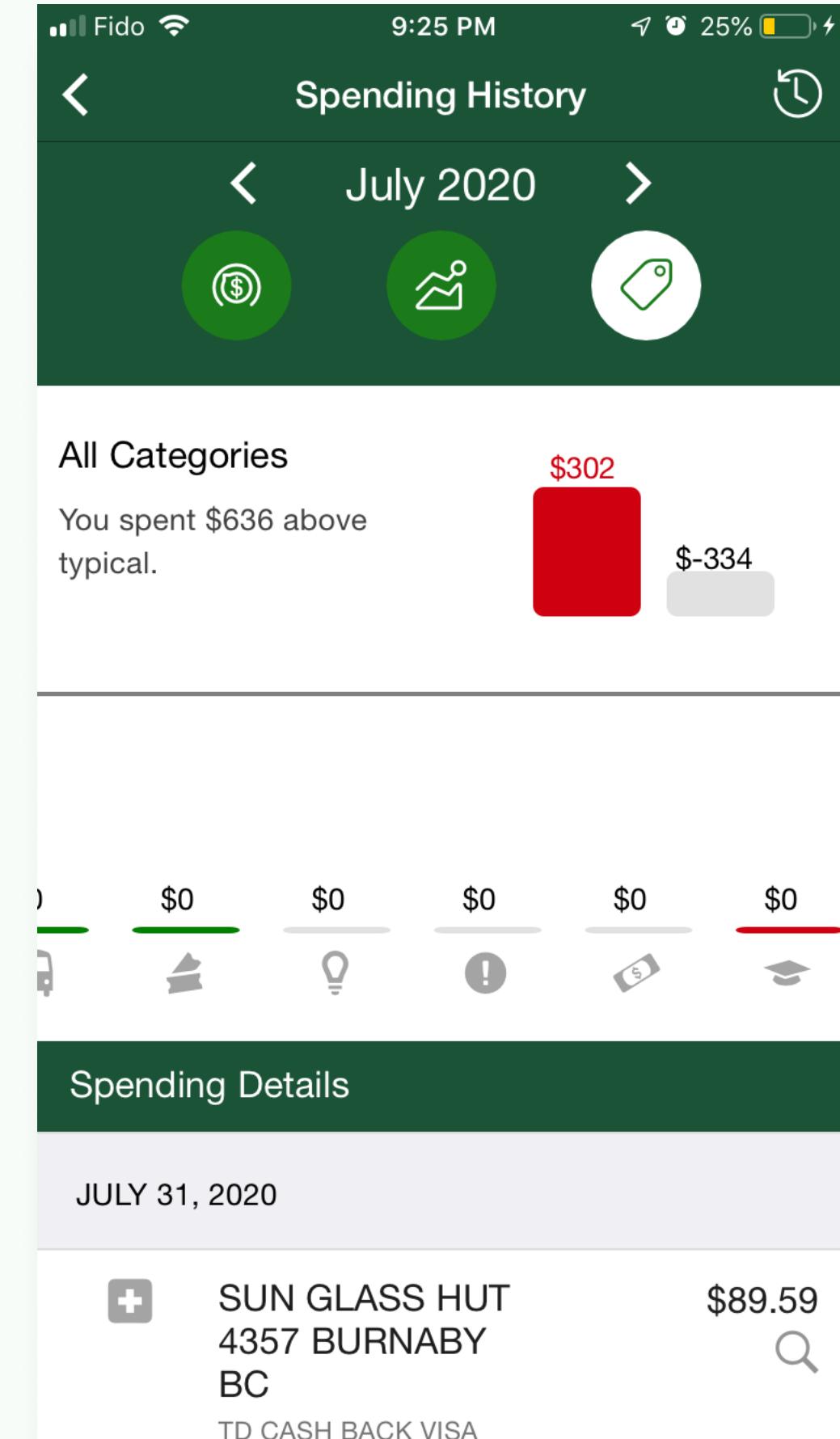
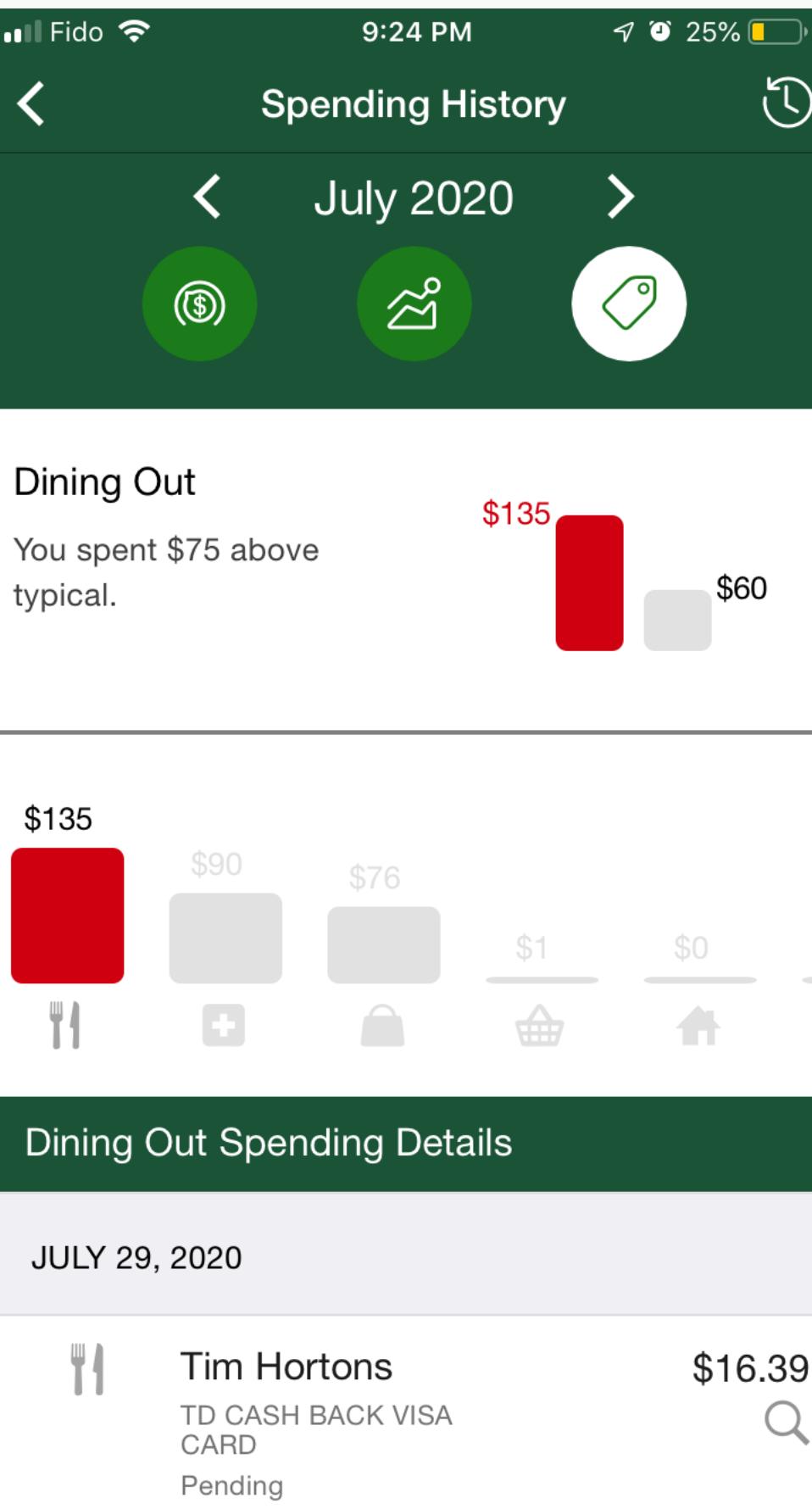
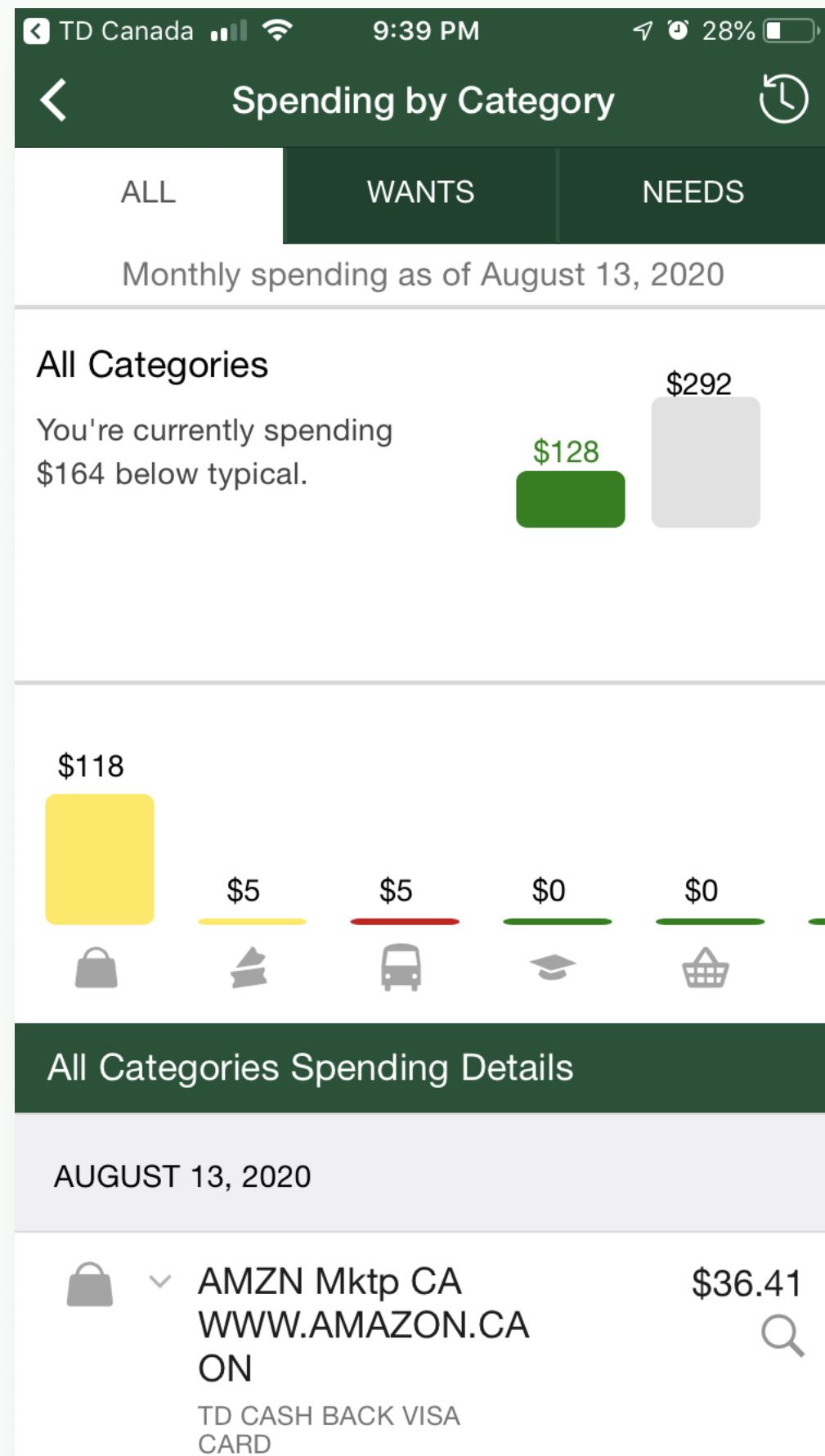
#8 - Aesthetic and Minimalist Design

The overall design of the current app is very cluttered and confusing. Users have to make a few button presses to go into specific categories.

It doesn't make it user friendly.

TD MySpend is a spending tracker for TD customers. It provides users with categories and useful notification of where their money is spent and how users can adjust their spendings.

Examples



These are both looking at "Spending by Category" in the app but are layout differently. It can be a little confusing for users when they approach the different designs, especially something that is heavy on giving the user statistics.

Additionally, useless statistics are not customizable to the users. They are left in the design, making the app feel clutter.

My Feature Design Idea

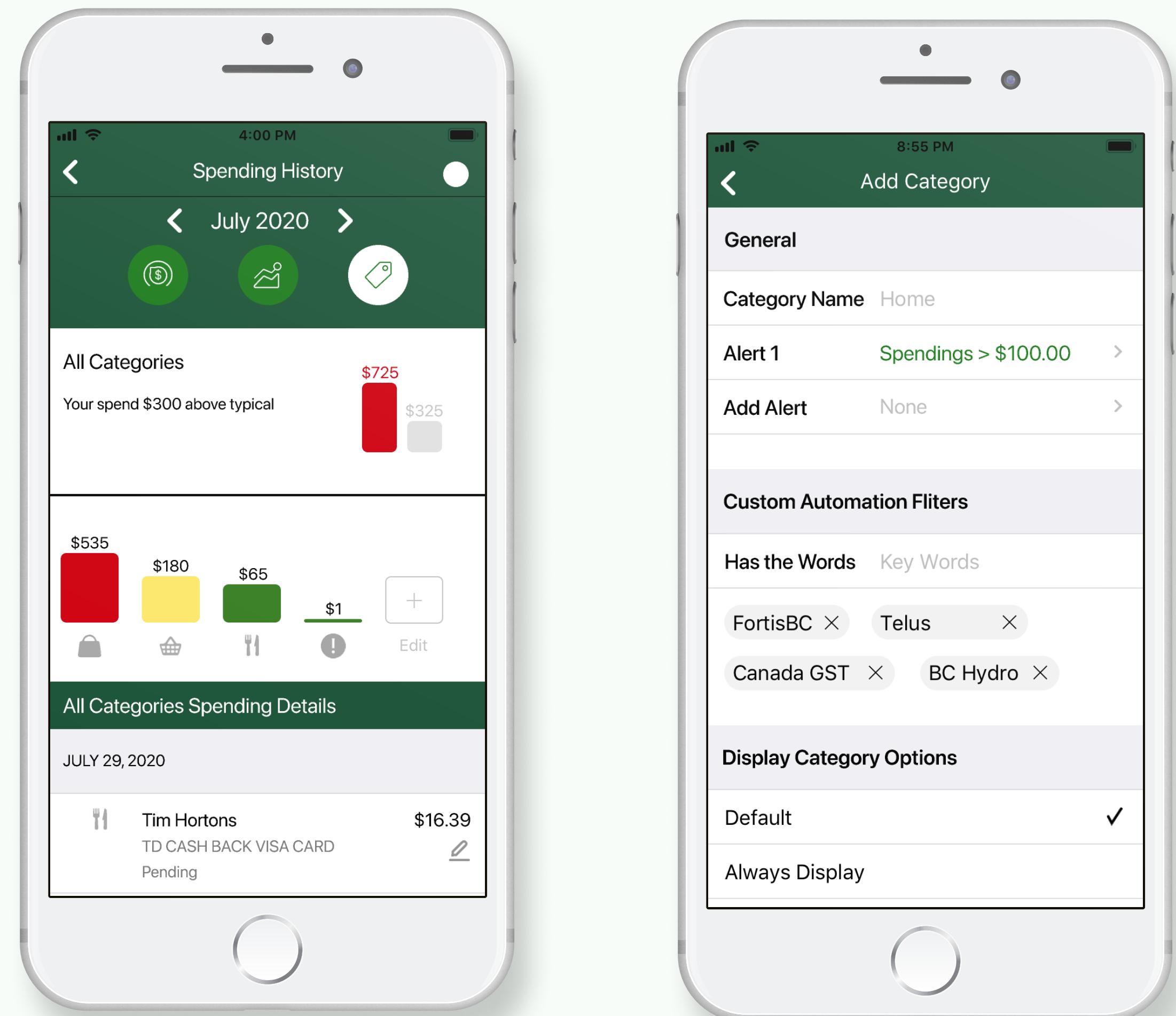
Customize Categories

Allow users to add their spending categories and have them generate keywords that can automatically place future transactions into the custom category.

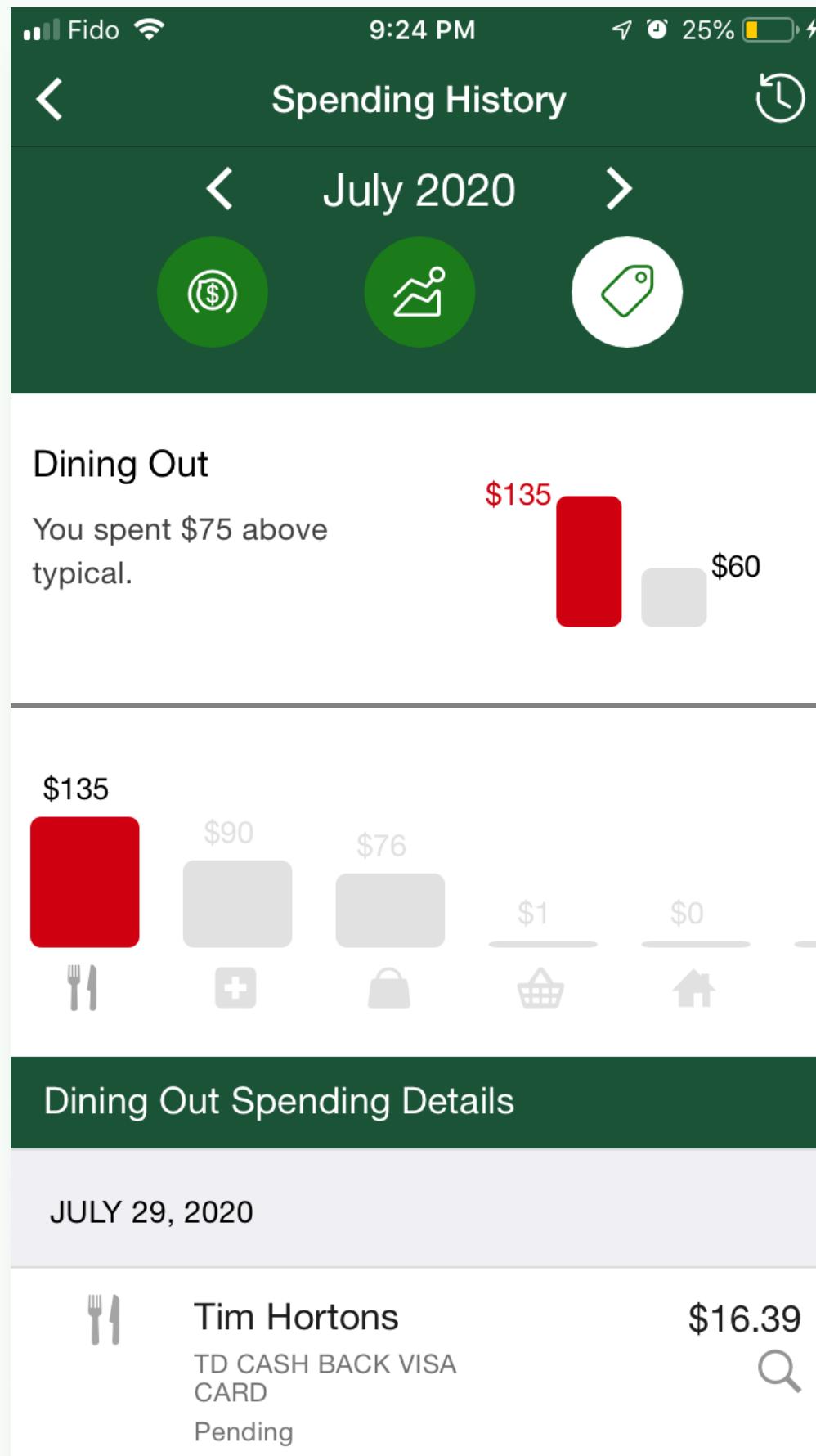
Edit Transaction Details

Allow users to make minor changes, like change the category of the transaction (TD sometimes will get them wrong).

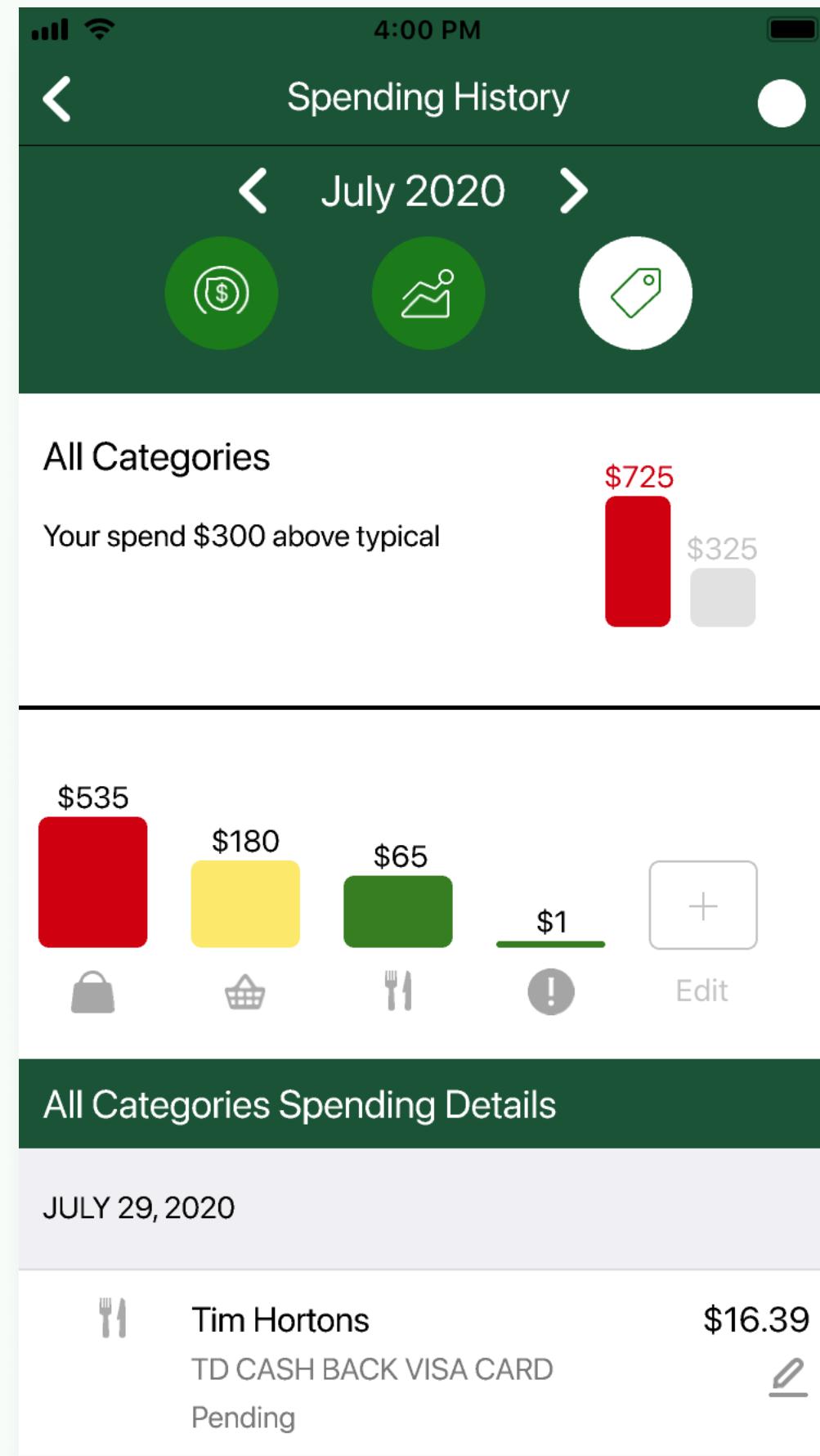
Users can also add notes on transactions for their own reference. It can be especially useful for joint account users.



Let's Take a Look



Before



After

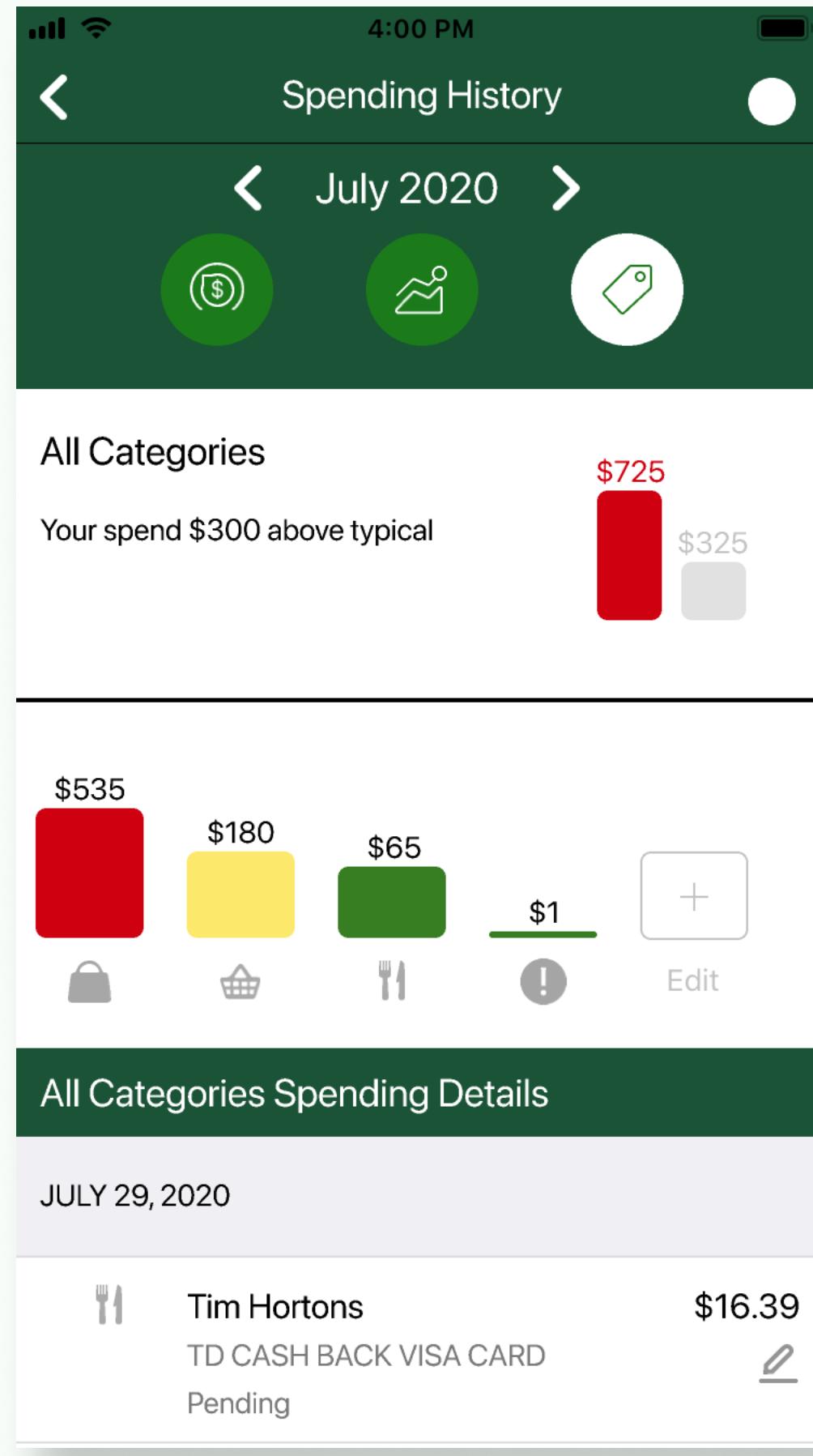
Removing the clutter of any unused categories. The app provides a total of 12 different category topics, but not all will be used every month

However, the edit button can allow users to remove categories or create their own custom categories.

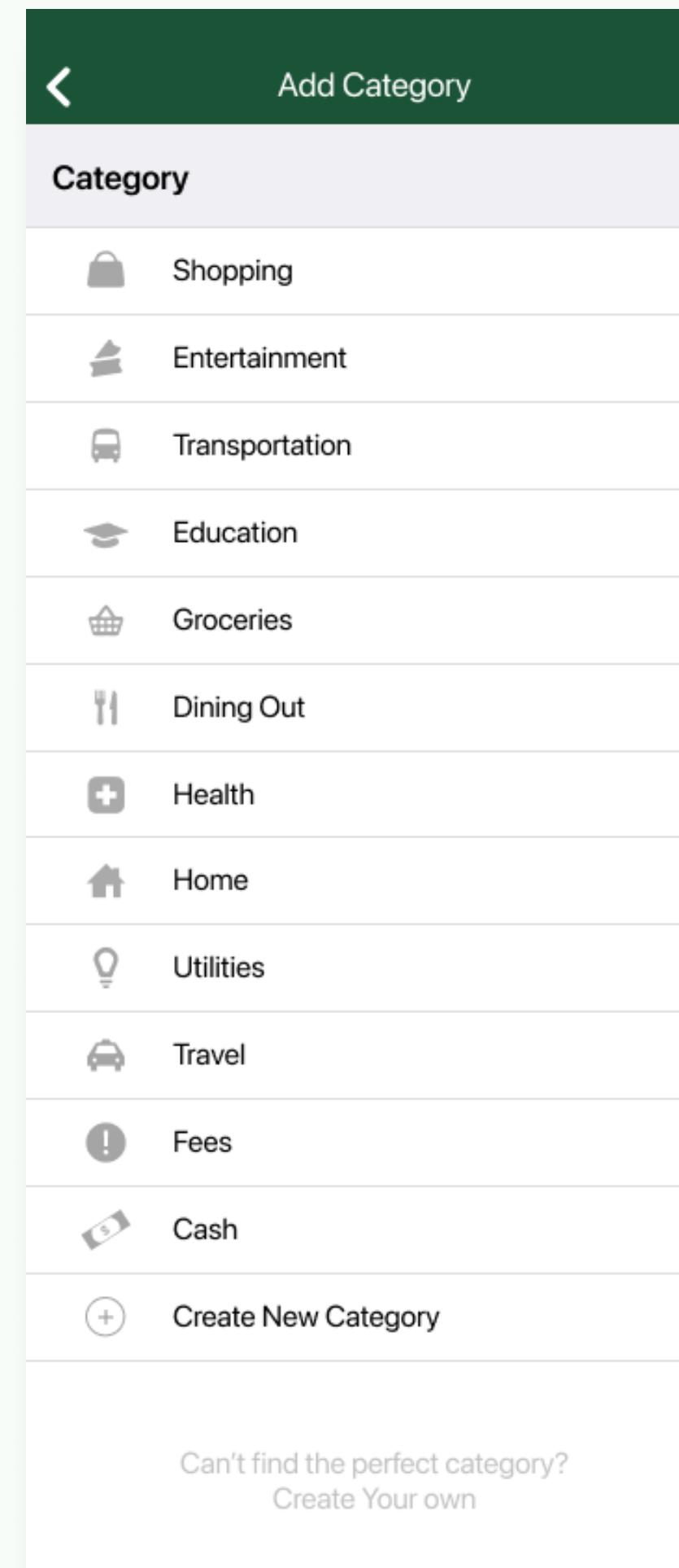
The current app uses a magnifying glass icon that doesn't do much besides expanding the card slightly.

With the edit option, users can edit minor things in each transaction or notes for their reference.

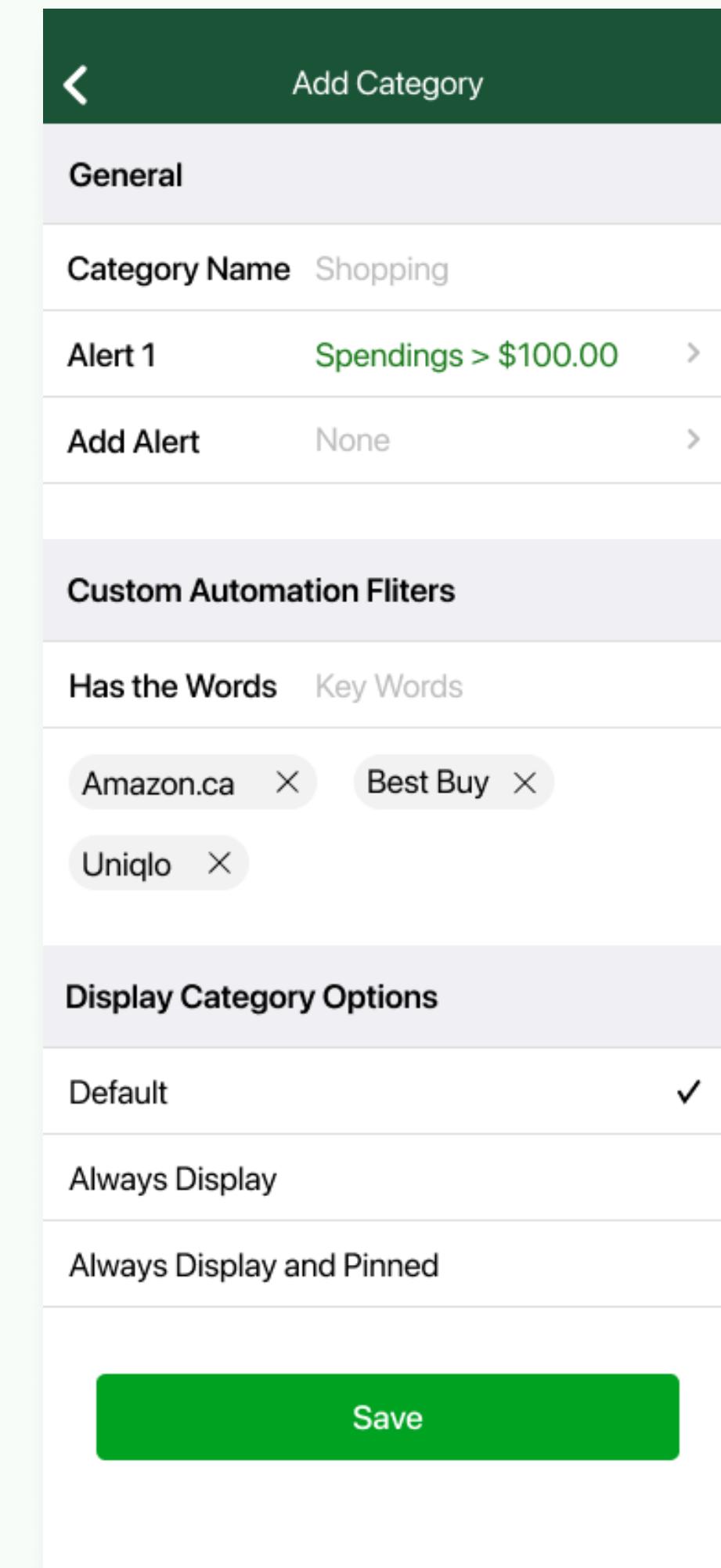
Let's Take a Look



Wireflow



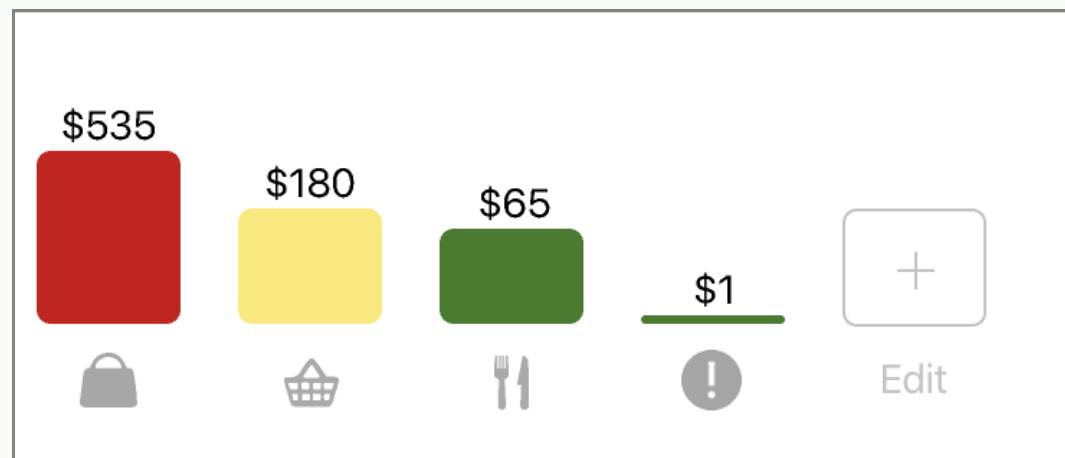
"Edit" allows users to make custom changes bar graph of spending categories.



Pre-determined categories from the TD app have fixed names, but users can add different custom automation, alerts and have the category always showing regardless.

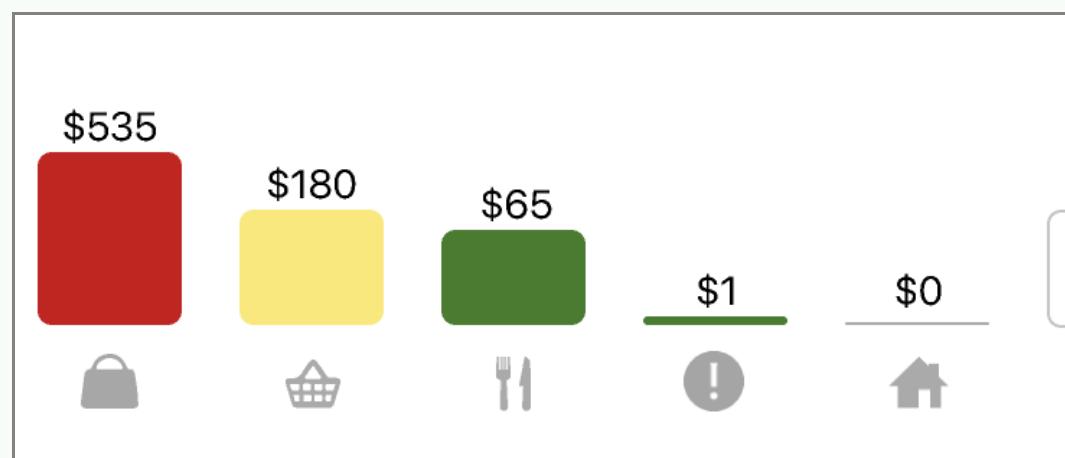
Let's Take a Look

How will it change the look?



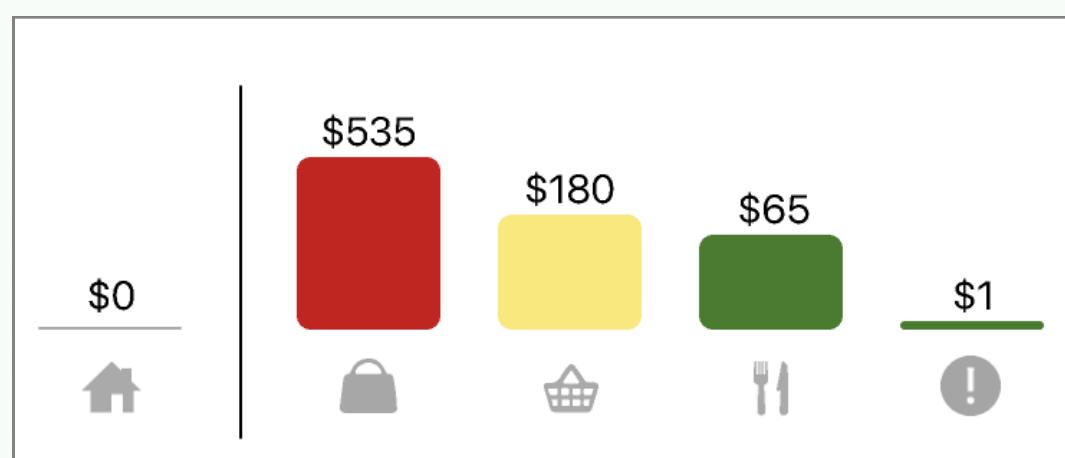
"Default"

If the category does not have any data that month, then it will not show up in the graphs.



"Always Display"

Even there are no transactions in the category; it will show up after all the occupied categories.



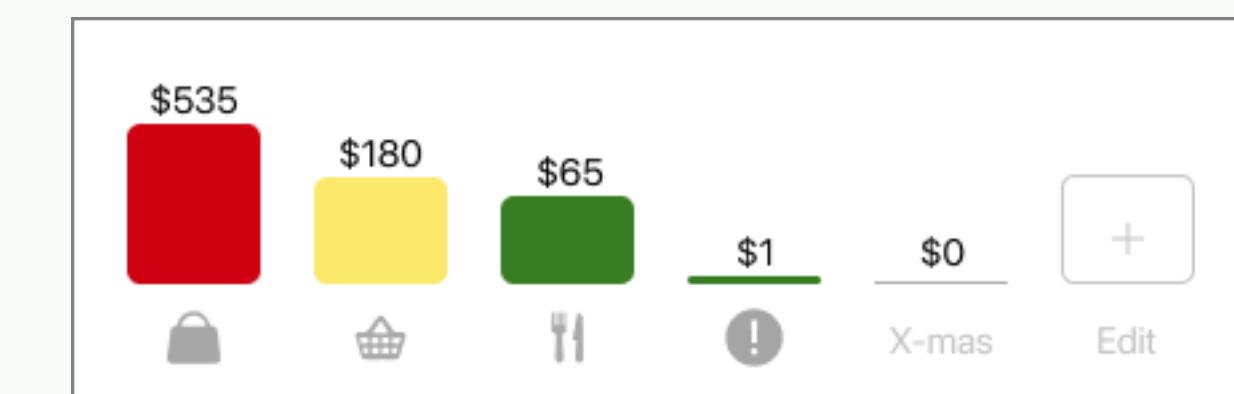
"Always Display and Pinned"

The category will always be the first thing that shows up.

What about custom categories?

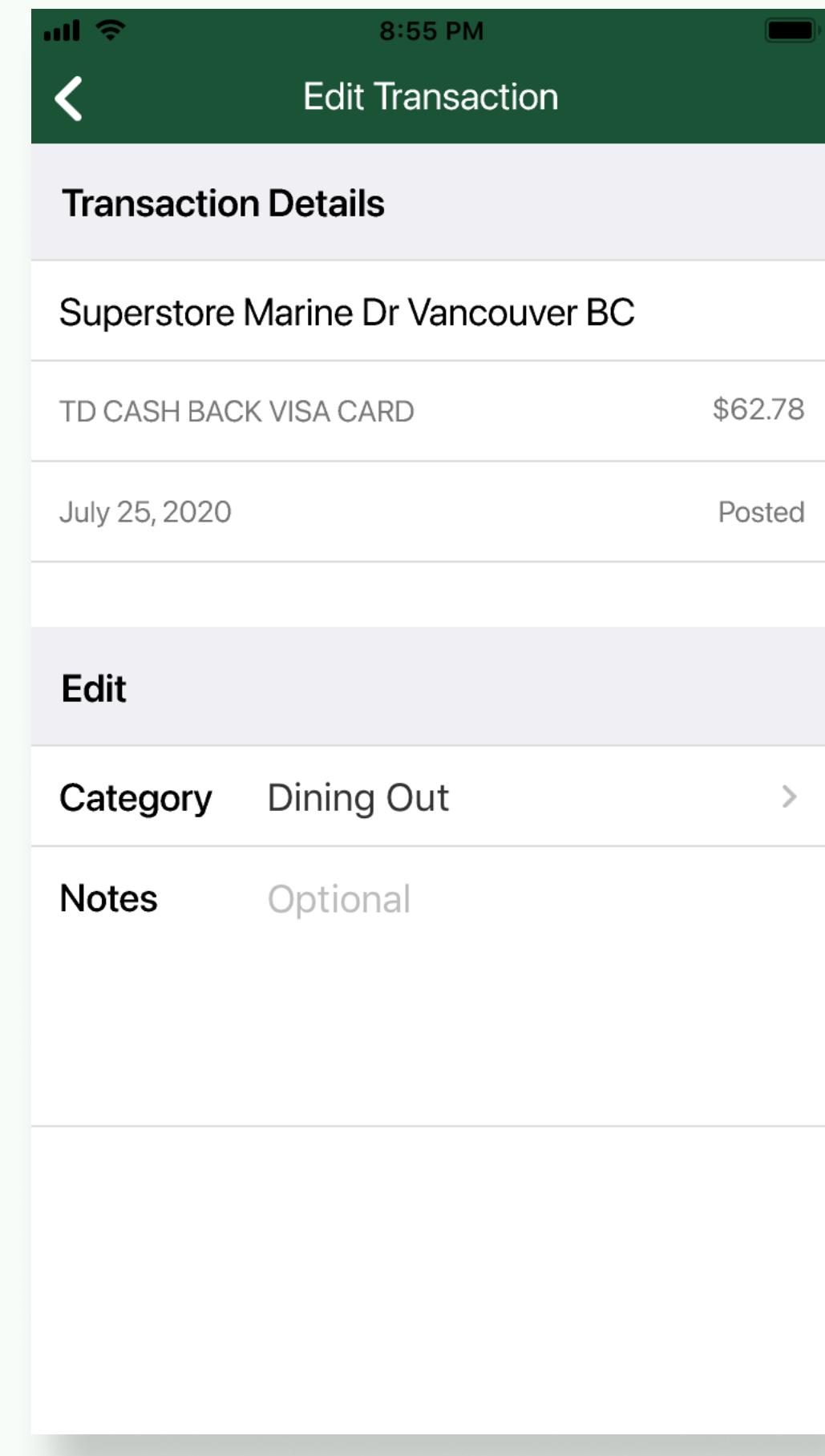
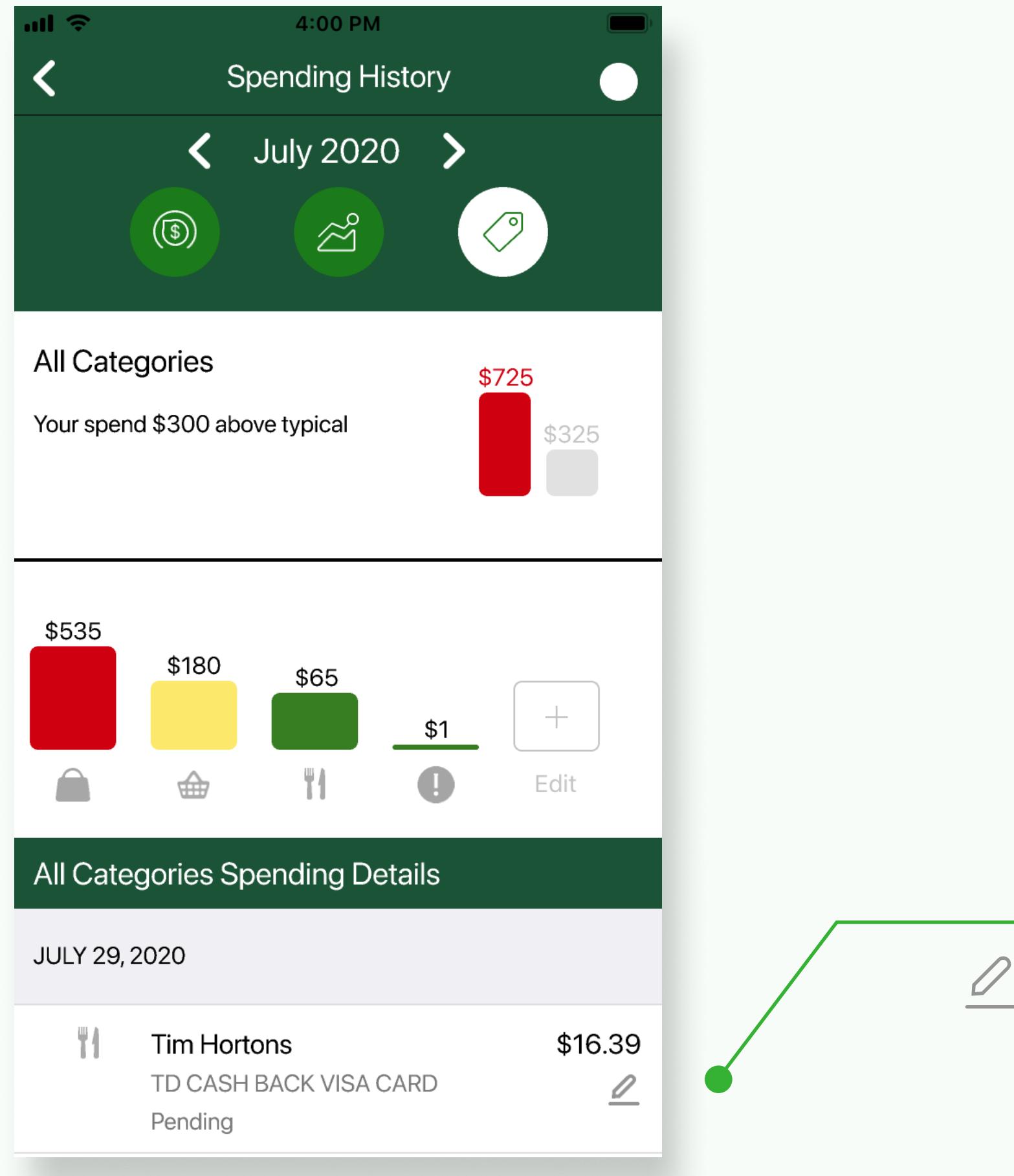
A screenshot of a "Create New Category" dialog. It includes sections for General (Category Name: Christmas Shopping, Abbreviation: X-mas), Custom Automation Filters (Has the Words: Key Words), Display Category Options (Always Display is checked), and Choose Parent Category (Wants, Needs). A green Save button is at the bottom.

Generally, it will have similar features as the traditional categories.



To replace the icons in graph view, I decided to make an abbreviation as creating a library of icons may limit the options.

Let's Take a Look



Editing Transactions

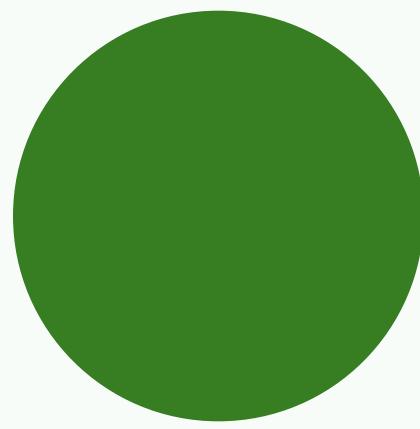
How much can the users edit?

Typically the official transaction details can not be edited, but users can change the category of spending and add notes to their transaction.

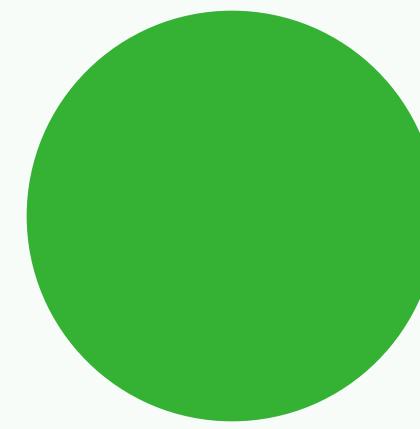
I've interviewed a few friends that use the app about inaccurate categorizing. It occasionally happens, and currently, there is no way to edit it. This feature can allow users to edit transaction categories easily.

Styleguide

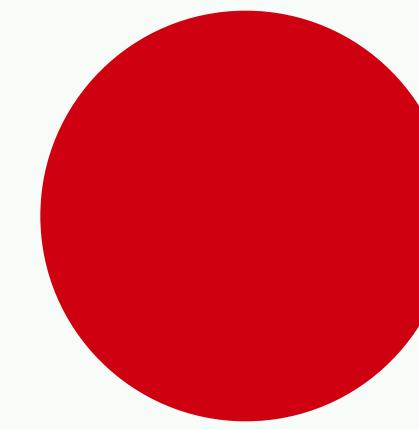
Colour



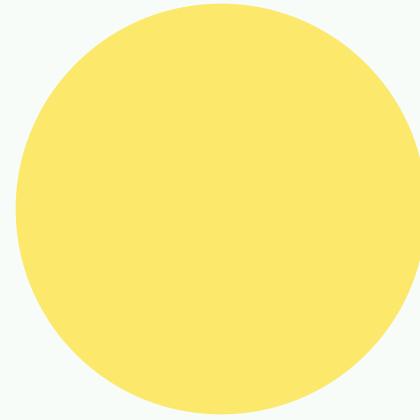
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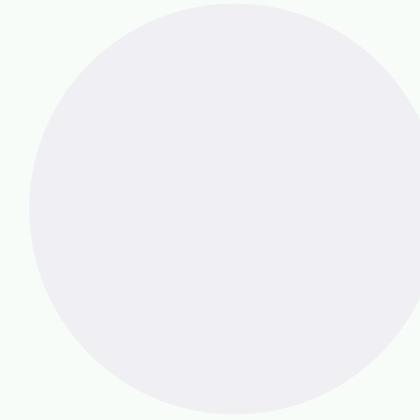
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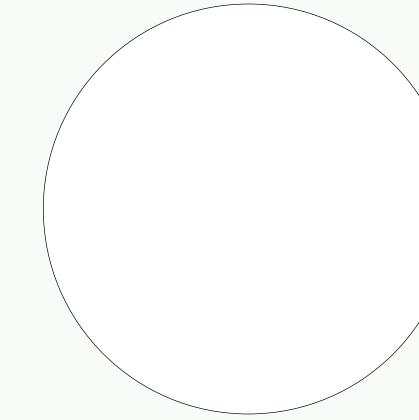
#CF000F



#FCE86A



#EFEFF4



#FFFFFF

Components

Heading Titles

List Option Cart

Button

Fonts

SF Pro Display Regular

SF Pro Display Semibold

Reference

<https://www.nngroup.com/articles/ten-usability-heuristics/>

<https://apps.apple.com/ca/app/td-myspend/id1088406064>

Tools: Figma and Protopie

Note: I chose to use iPhone 8 because it is my operating phone and it was easier to better test and visualize the design of my feature to the existing app.

Prototype: <https://cloud.protopie.io/p/aa1eed0055>

If you want to test the prototype, only some categories will have the full function of editing.

Thanks!