

# Spending Tracker

# **Brief**

To create a web app that will allow a user to track their spending.

# What will this product provide?

A simple overview of displaying all of a user's transactions in a single view.

The ability to enter amounts and edit merchant and category values.

The functionality to search by transaction types and by date.

## Why choose this product?

- Easy to navigate
- Simple to use
- Secure
- Trustworthy
- Professional

# The Market

# Current Market

## Money Tracker

The Money Tracker application provides a comprehensive interface for managing personal finances. It includes a dashboard, reports, transactions, accounts, budgeting, and settings.

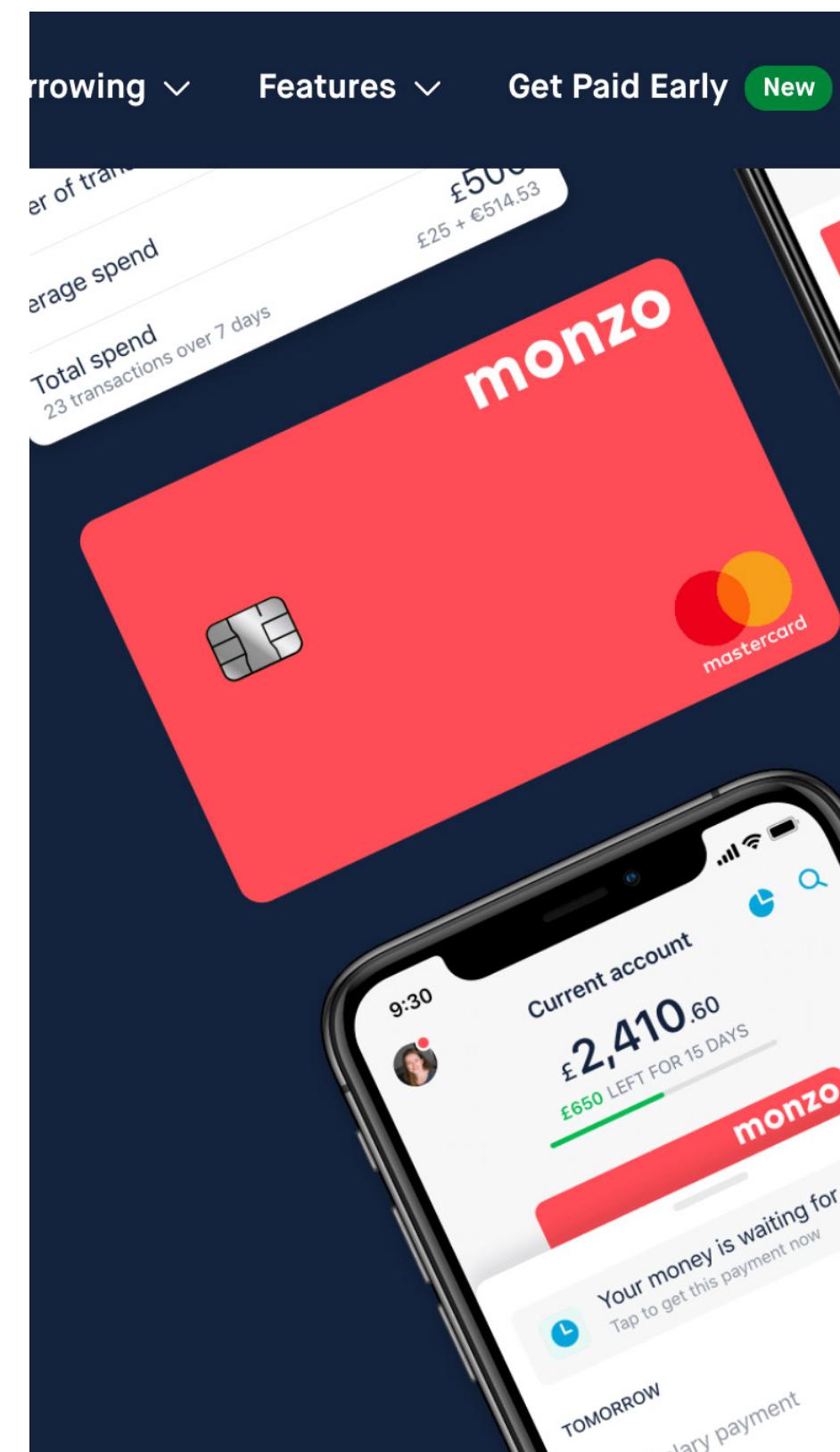
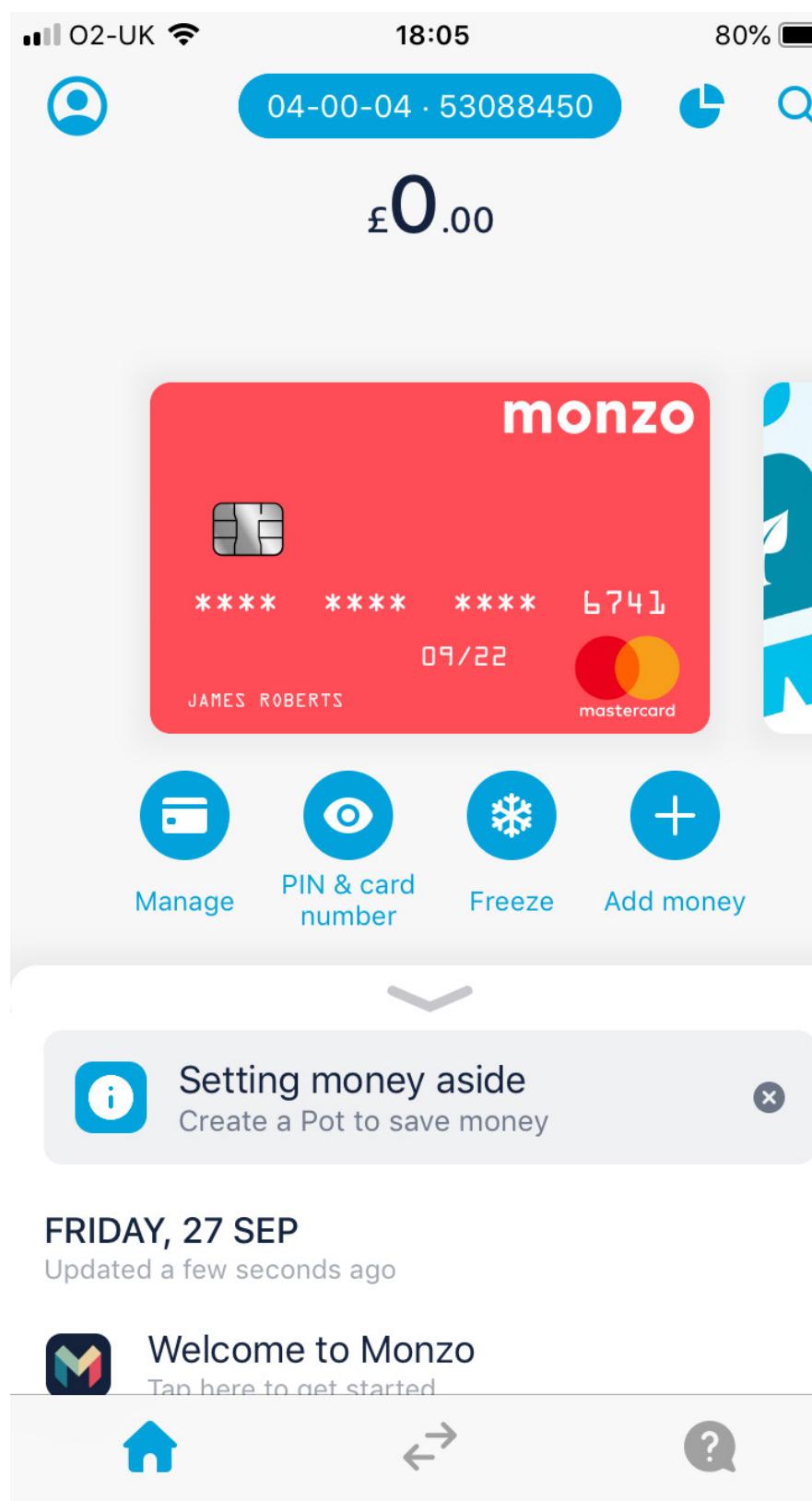
**Reports Page:** This page allows users to generate reports for their financial data. It features a chart showing monthly expenses and income for the year 2019, and a dropdown menu for specifying accounts.

**Dashboard Page:** The dashboard provides a quick overview of the user's financial status. It displays the **NET WORTH** as **35,667.60 USD**. Below this, a table lists various accounts with their current balance in USD, EUR, and JPY. A sidebar on the left contains links to the dashboard, transactions, accounts, reports, budget, and settings.

**New Transaction Form:** This form allows users to add new transactions. It includes fields for the date (29/09/2019), amount (USD), category (Expense, Transfer, Income), and notes. It also includes dropdown menus for the source account (Alice's wallet) and destination account (Social security).

# Current Market

## Monzo



## Starling



# The User

# Who will use this product?

## Jessica

### Demographic

Early 30s

Married with young family

Uses tablet and phone

### Behaviours

Technically proficient

Like to budget and be financially aware

### Needs and Goals

Overview of how much is being spent in each category

Printable financial breakdowns over time that feel more detailed than traditional bank statements

# Who will use this product?

## Ben

### Demographic

Under 30

Single

Uses laptop, tablet and phone

### Behaviours

Frequent spender

Buys a lot of lunch out

Likes tech and gadgets

### Needs and Goals

Wants to check his spending

More interested in visualisation of his financial data

# Who will use this product?

## Sarah

### Demographic

Retired

Formally in financial services

Children and families live near

### Behaviours

Used tech in work before retiring but not as up to date

Understands the financial sector

Has always been financially astute and keen to adopt new methods of keeping up to date with personal finance

### Needs and Goals

A system that looks professional and trustworthy

A system that is easy to engage with and learn.

A system that is initially simple but has functionality that can be expanded upon over time.

# Who will use this product?

## John

### Demographic

Late 40s

Full time employed

Teenage family

### Behaviours

Likes technology but hates “tech”

Uses moneysupermarket and price comparison websites

Loves a deal

### Needs and Goals

To view a tracker in the same way as a price comparison site

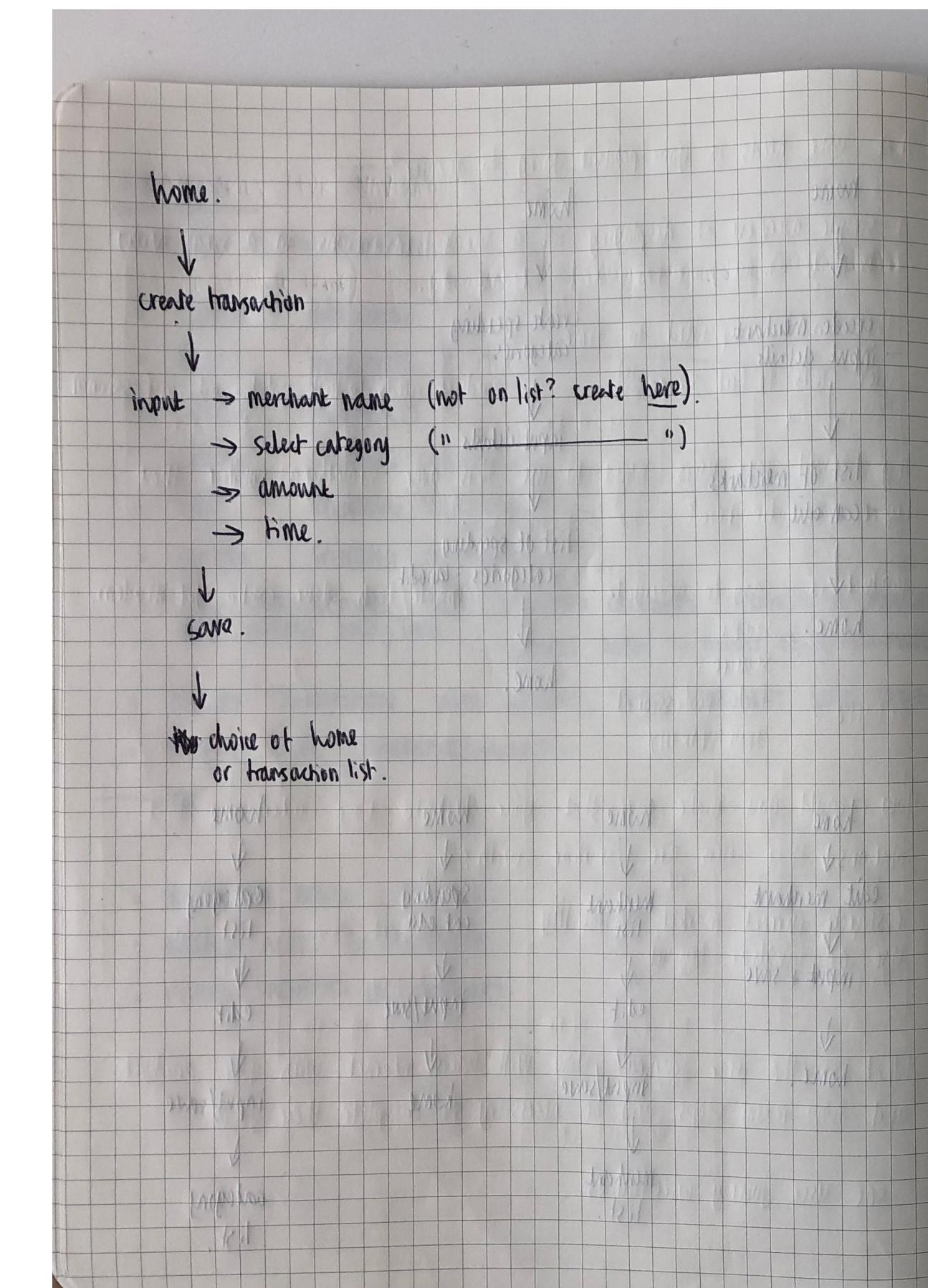
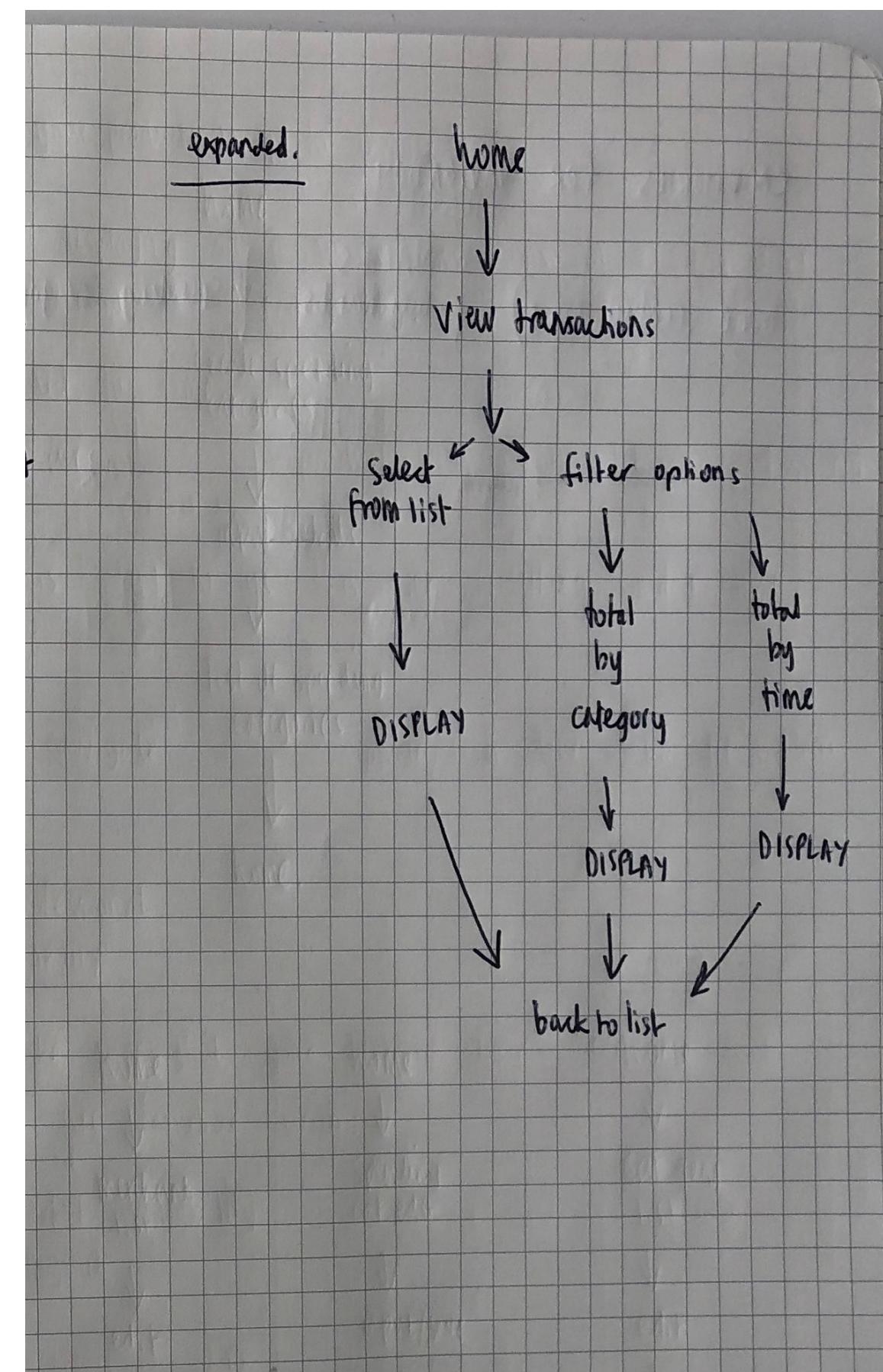
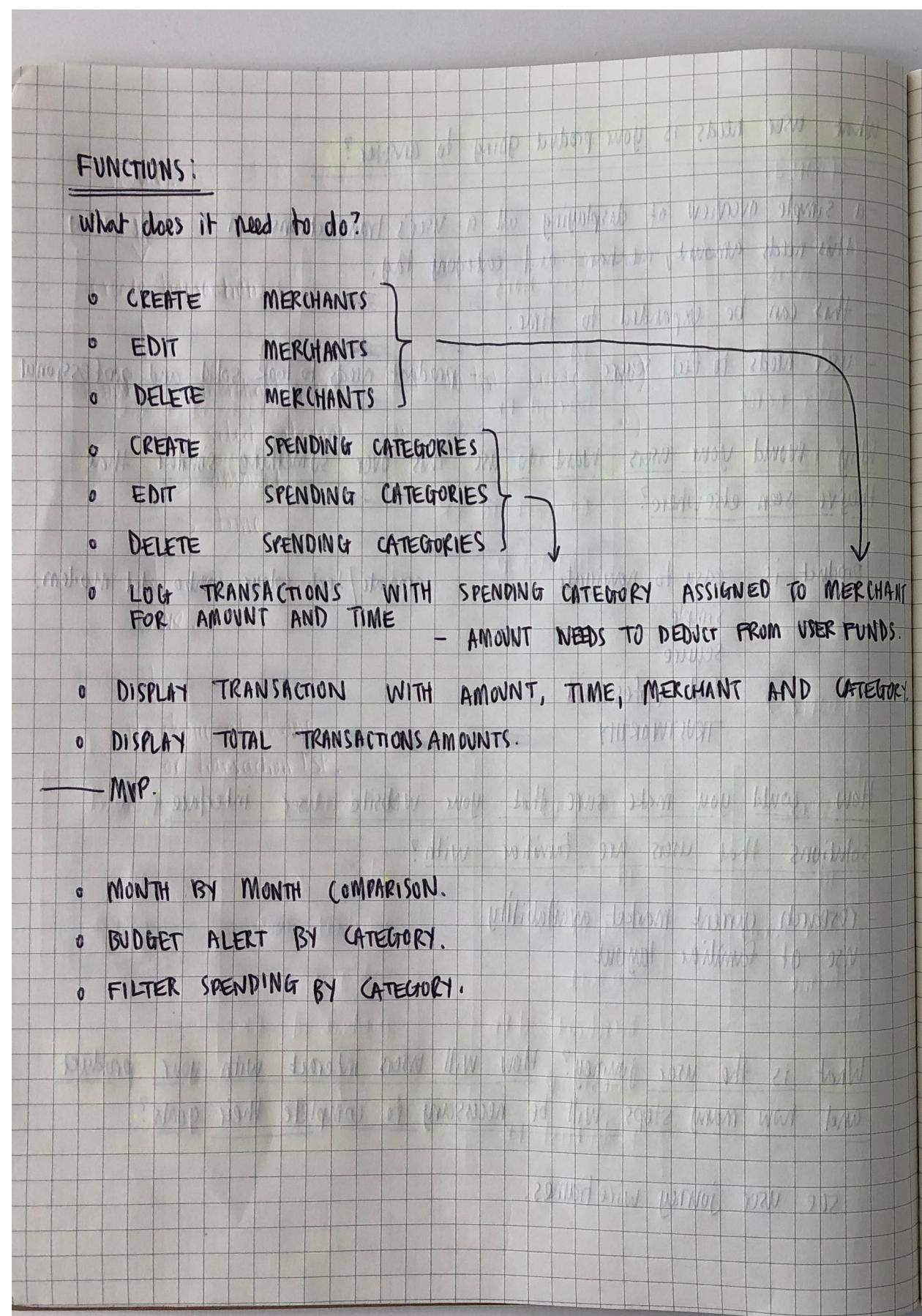
Wants it to be as simple and convenient as possible

Wants an overview to see what he has saved

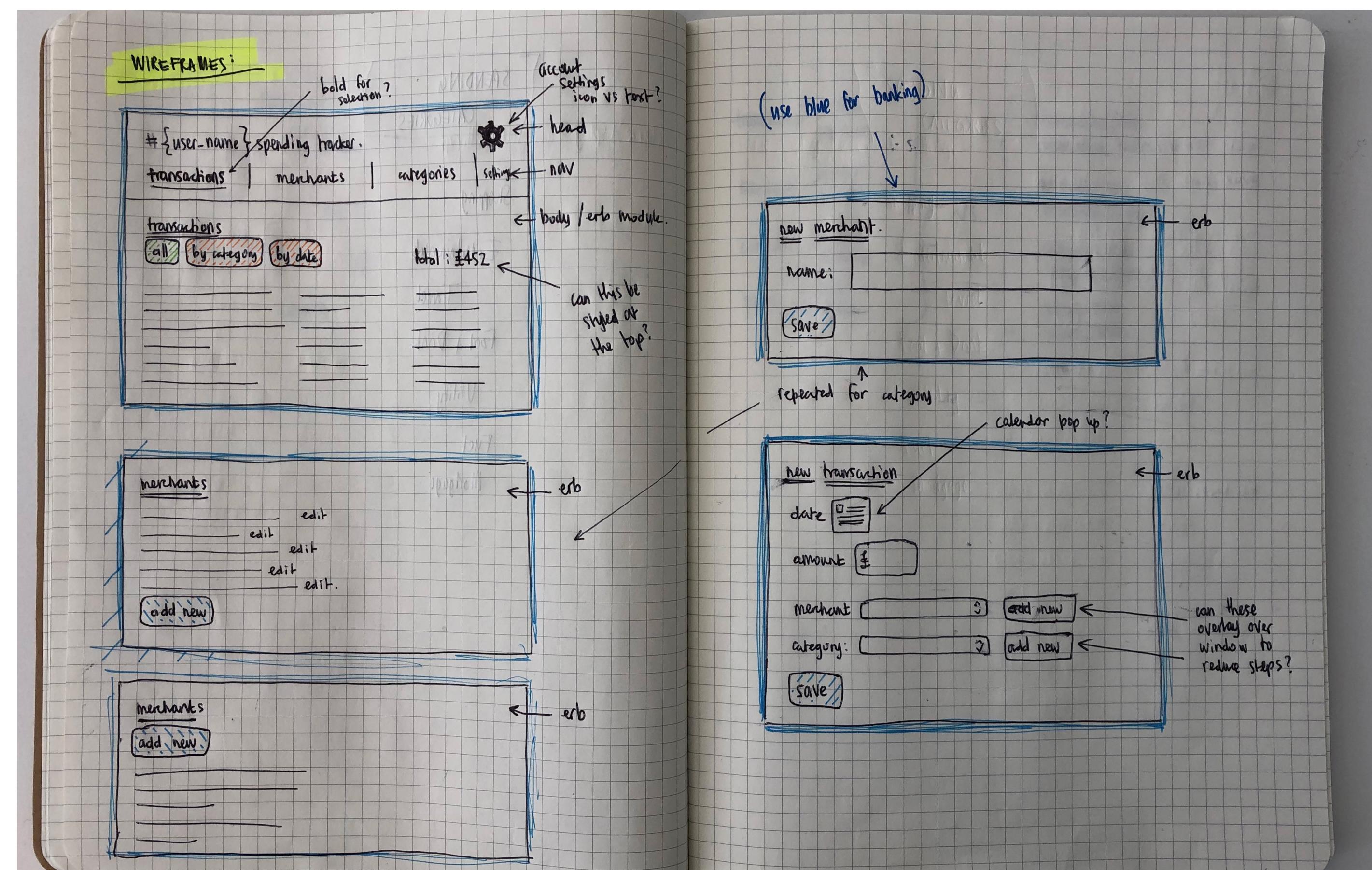
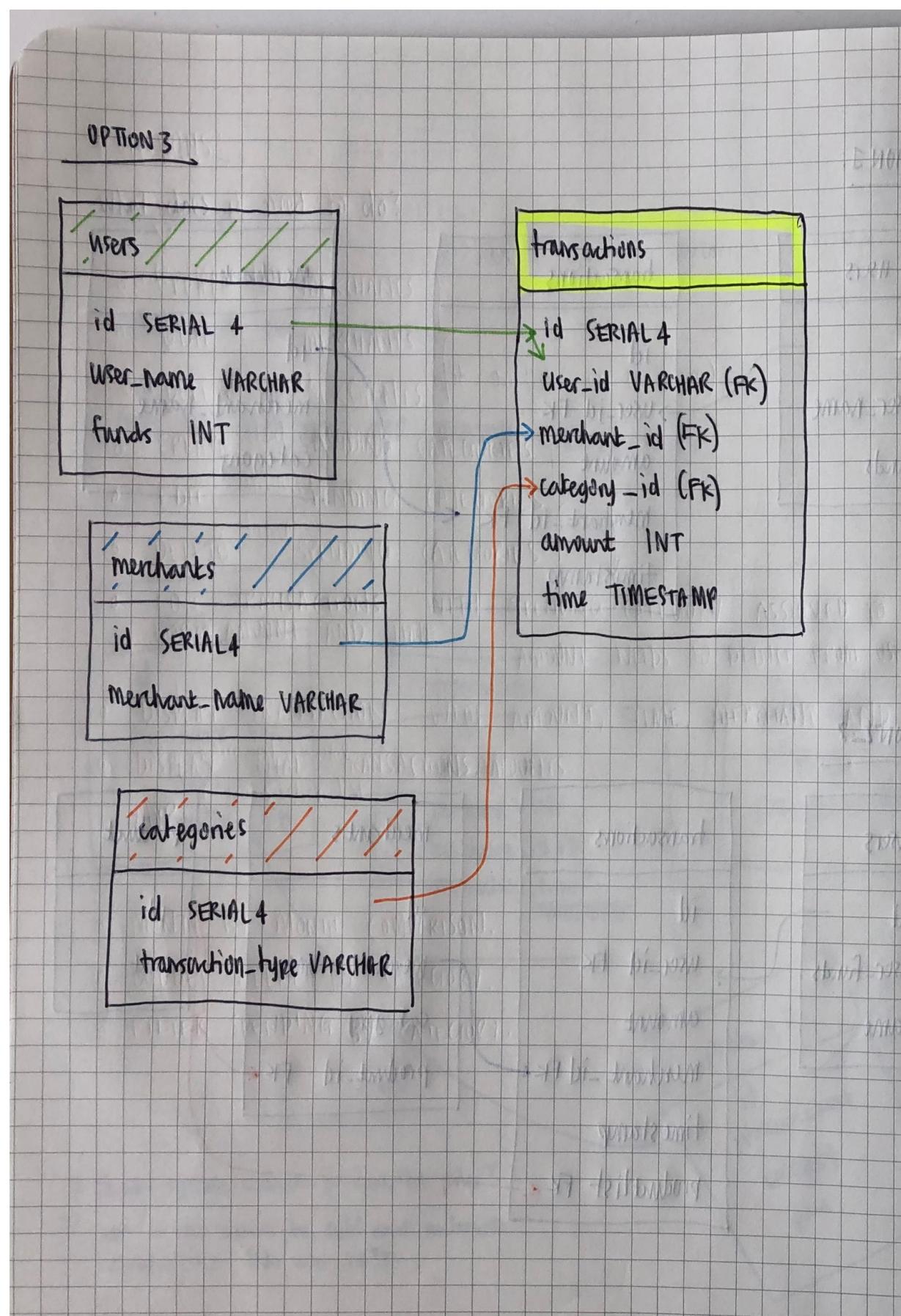
Wants to compare his spending month by month

# User Journey & App Design

# User Journey



# Database & Wireframes



# Colour Palette

Blue

Red

Soft White

White

# Spending Tracker

[TRANSACTIONS](#)[MERCHANTS](#)[CATEGORIES](#)[USER SETTINGS](#)

# Keep an eye on your spending

[CHECK YOUR  
TRANSACTIONS](#)

# Spending Tracker

[TRANSACTIONS](#)[MERCHANTS](#)[CATEGORIES](#)[USER SETTINGS](#)

## Transactions

[+ LOG NEW TRANSACTION](#)**TOTAL = £2092**

TRANSACTIONS FROM: dd/mm/yyyy

TO: dd/mm/yyyy

SEARCH

BY CATEGORY: Select Category

SEARCH

## Your Transactions:

Date	Merchant	Category	Amount
Sun 29 Sep 2019	Perk	Travel	£ 699
Sun 29 Sep 2019	Apple	Entertainment	£ 400
Wed 02 Oct 2019	Perk	Food and Drink	£ 150
Tue 29 Oct 2019	Velocity	Food and Drink	£ 122
Tue 01 Oct 2019	Perk	Lunch	£ 599
Wed 02 Oct 2019	Perk	Lunch	£ 122

# Spending Tracker

[TRANSACTIONS](#)[!\[\]\(b0ba827d2a487ec829cbd8e604d56e0e\_img.jpg\) MERCHANTS](#)[!\[\]\(f42f75e81f61fd5f9f313cac09f9aa39\_img.jpg\) CATEGORIES](#)[!\[\]\(c7143b06b3915be2311cf128bb2424aa\_img.jpg\) USER SETTINGS](#)

## Merchants

[!\[\]\(6d4cdef06d803dcd63aa9aa8840a2ace\_img.jpg\) CREATE NEW MERCHANT](#)[PERK](#)[EDIT](#)[DELETE](#)[VELOCITY](#)[EDIT](#)[DELETE](#)[APPLE](#)[EDIT](#)[DELETE](#)[BANK OF SCOTLAND](#)[EDIT](#)[DELETE](#)[SONY](#)[EDIT](#)[DELETE](#)

Thank you