Digital Ledger

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Prototype Link: **Digital Ledger**

Digital Ledger is designed specifically to give users the power to control their finances in an intimate, self-managed manner that does not rely on the use of logins, accounts or access to financial institutions that can compromise sensitive information.
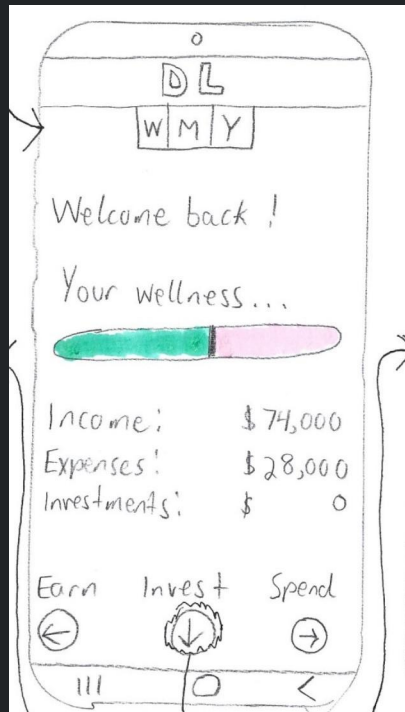
Digital Ledger: Home Screen

At the center and opening page of the Digital Ledger app, is the Home Screen.

User Research / Design Feedback:

1. Users need attractive graphics
2. Users want clear symbols and simple icons
3. Users want options in viewing data

Insights / Main design choices:

- Designed the Home Screen to include a graphic for the user's finance at a glance
- Included prototype functionality to click on the Snapshots to view other pages
- Implemented a number of various viewing styles that allow users to see data that most appeals to them

Digital Ledger: Financial Wellness

From the early paper prototyping stage, a peer responded positively to the use of the term "Wellness" for the app and it became a pivotal design choice to think of the app as a method of self-care.

User Research / Design Feedback:

1. Financial Wellness as a form of self-care
2. The meter graphic was encouraging
3. More attractive navigation

Insights / Main design choices:

- The Financial Wellness aspect became a central focus
- The Meter graphic evolved in design
- A full nav bar was introduced for ease of use

The final variant of the home screen apart from the viewing options is the Snapshot view. More skilled users can utilize this screen setting upon opening the app to view their priority or upcoming recurring expenses at a single glance while viewing financial health.
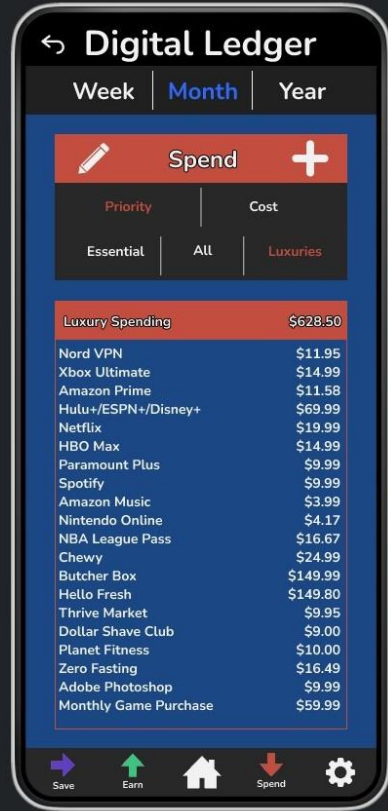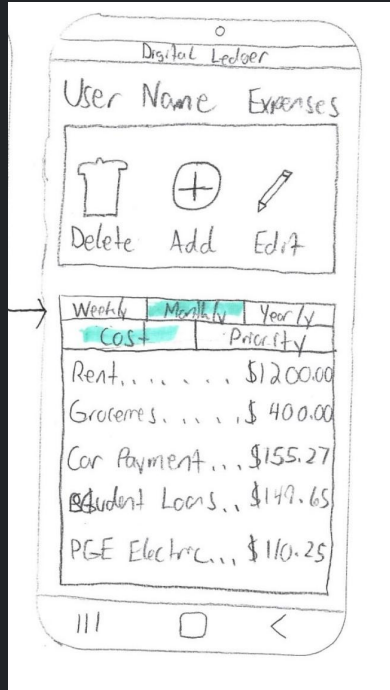
Digital Ledger: Multiple Levels of Skill

A criticism from the early stages was that there was an information overload that would intimidate some users.

User Research / Design Feedback:

1. Overwhelming information
2. Options for viewing data by user
3. Further navigation options by clicking snapshots

Insights / Main design choices:

- Snapshot information kept present

- For the more skilled user, the snapshots were kept as a view option

- The snapshots were included as navigation options in prototype
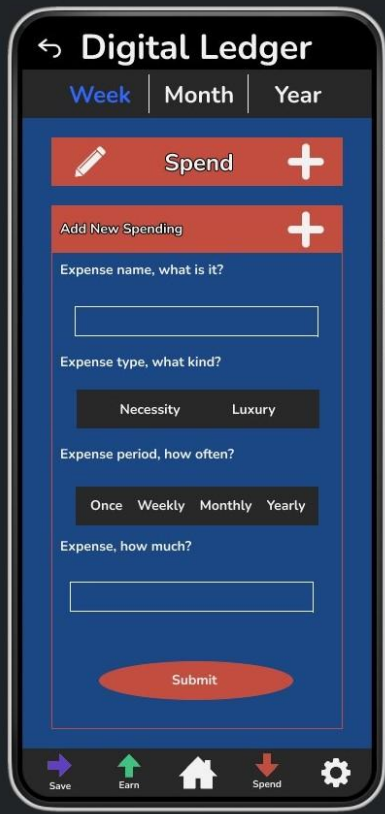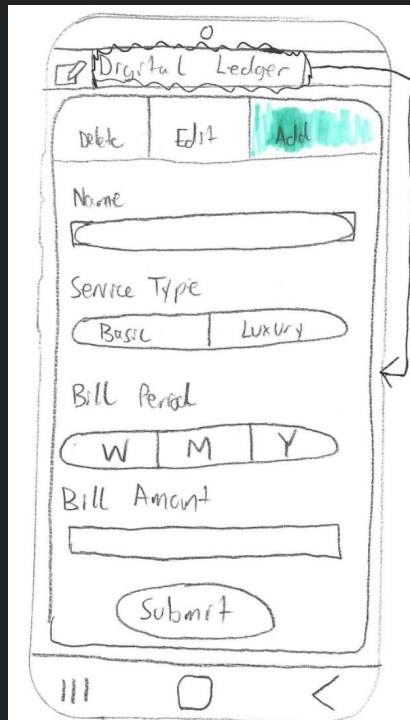
Digital Ledger: Depth without Clutter

Information offered to the user is highly desired to showcase the scope of the offerings the app has but it was desired by peers that the application be more appealing and professional.

User Research / Design Feedback:

1. Confusing informatics
2. Utilization of screen space
3. Simplified settings changes

Insights / Main design choices:

- Streamlined offering with more emphasis on data in a simplified manner

- Stronger use of screen space for holding information

- Clickable settings at user's fingertips
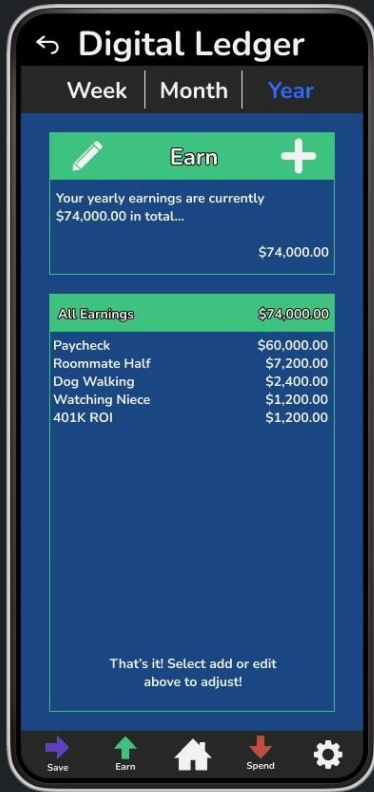
Digital Ledger: Wide Appeal

A peer commented during an early design stage that they could not find a way to add a one-time purchase on the expense screen. While not a foresaw functionality, it was a great opportunity to serve a wider user base.

User Research / Design Feedback:

1. No functionality to add single expense
2. Streamlined Add Spending Screen
3. Consistent language

Insights / Main design choices:

- Implemented 'Once' spending period

- Utilized toggle buttons and kept white space

- Used uniform language for user recognition

Across all screens, the terminology for the Digital Ledger application evolved to be more precise, simpler and uniform across the Navigation Bar and all pages within the application. The hope was for a simplistic and cohesive product for the user.

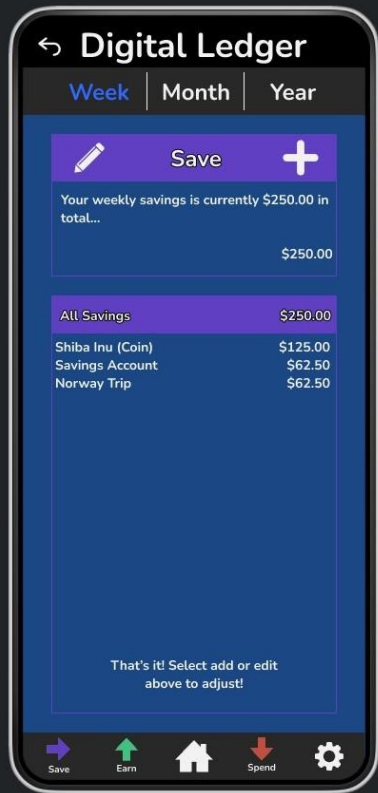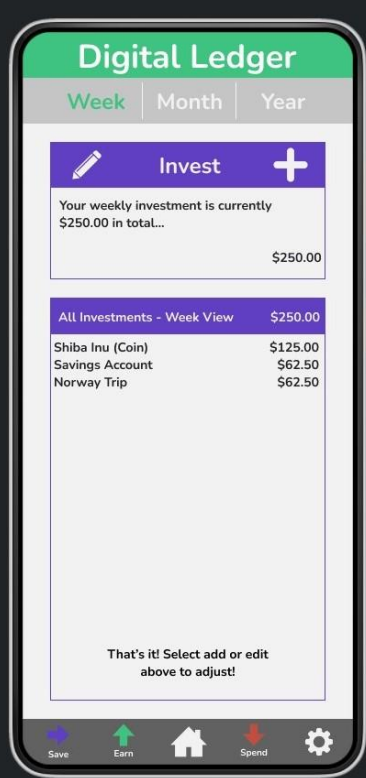# Digital Ledger: Consistency Upgrade

A reviewer mentioned that the Heuristic #4 Consistency and Standards was in violation with the way the application currently was presented.

User Research / Design Feedback:

1. Consistency in Page labels
2. Consistency in Nav Bars
3. Standards of Uniformity

Insights / Main design choices:

- Page labels modified to reflect shorter, more actionable phrases

- Nav Bar labels kept to match page labels

- Implemented the terminology into the full page usage (Earnings, Expenses, etc.)

Digital Ledger: Improved Color Palette

A peer mentioned that while the aesthetics of the first digital iteration were pleasing, the lack of color in the greys made for an, in other words, drab appearance of the application.

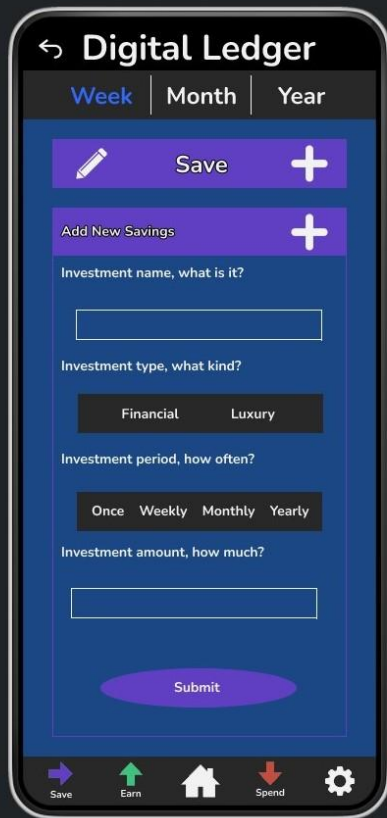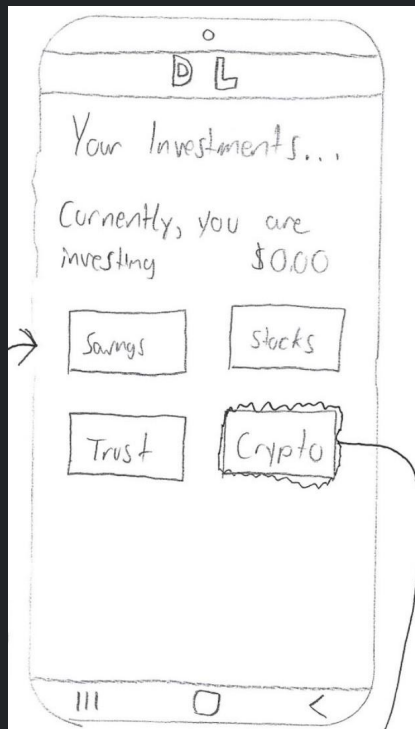## User Research / Design Feedback:

1. More vibrance through color
2. Less neutral palette
3. Color Coding modification

Insights / Main design choices:

The inclusion of a UI approved dark blue made for a more pleasing aesthetic to the eyes.
The omittance of the shades of grey reduce eye strain and improve color efficiency.
The 'Digital Ledger' green was retired and kept to only the income screens in the final prototype.
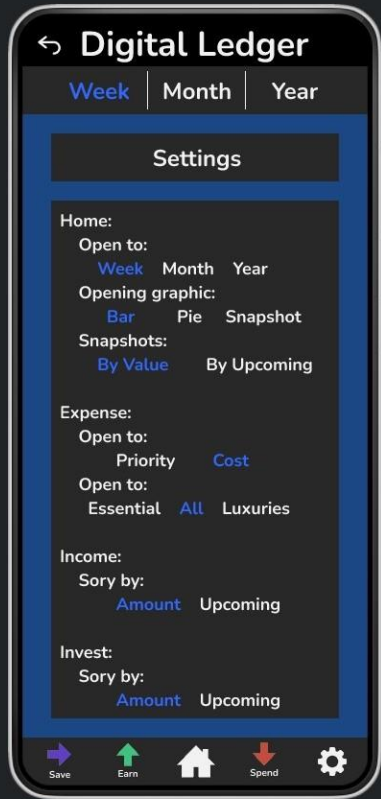
Digital Ledger: Investment Health

A comment from a user study showed that an individual felt pressured to invest with the paper prototype.

User Research / Design Feedback:

1. Pressure to invest
2. Too many investment options
3. Multiple screens to invest

Insights / Main design choices:

- The investment screen was left to resemble the 'Spend' and 'Earn' screens

- Investment options simplified to financial (stocks, crypto, etc.) and luxury (vacations, luxury purchases)

- Adding new 'Invest' screen simplified

Digital Ledger

Week Month Year

Settings

Home:
 Open to:
  Week   Month   Year
 Opening graphic:
  Bar   Pie   Snapshot
 Snapshots:
  By Value   By Upcoming

Expense:
 Open to:
  Priority   Cost
 Open to:
  Essential   All   Luxuries

Income:
 Sory by:
  Amount   Upcoming

Invest:
 Sory by:
  Amount   Upcoming

Save   Earn   Home   Spend

While not the most exciting screen to display, the settings screen showcases the wealth of important features that users have in their repertoire to modify, view and manage their expenses in real time. This screen is paramount to a complete UX.

Digital Ledger: User Preferences

Many users reported they wished for a wealth of options that went beyond the original scope. The answer to this was to provide essentially every possible way to track finances possible.

User Research / Design Feedback:

1. Time Period Selection
2. Graphic Selection
3. Expenses that matter

Insights / Main design choices:

- Time period selection bar kept consistent throughout app

- Option to select any of offered graphics to display at startup

- Choice of which expense filters display