WalletWise Team

WalletWise
User Interface (UI) Prototype

Version 1.0

Revision History

Date	Version	Description	Author
28/May/24	1.0	First version of the UI prototype	WalletWise Team

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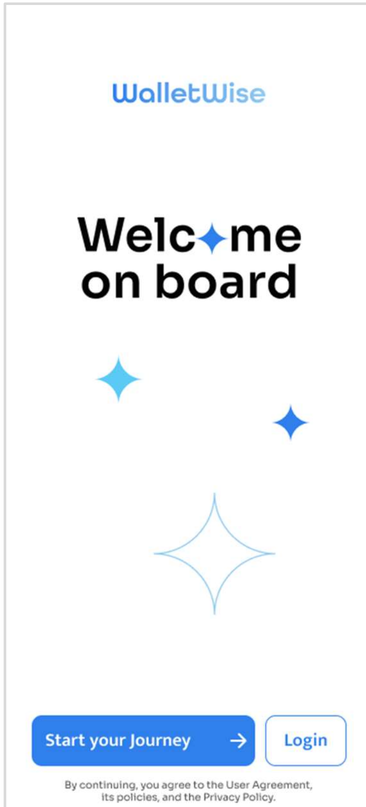
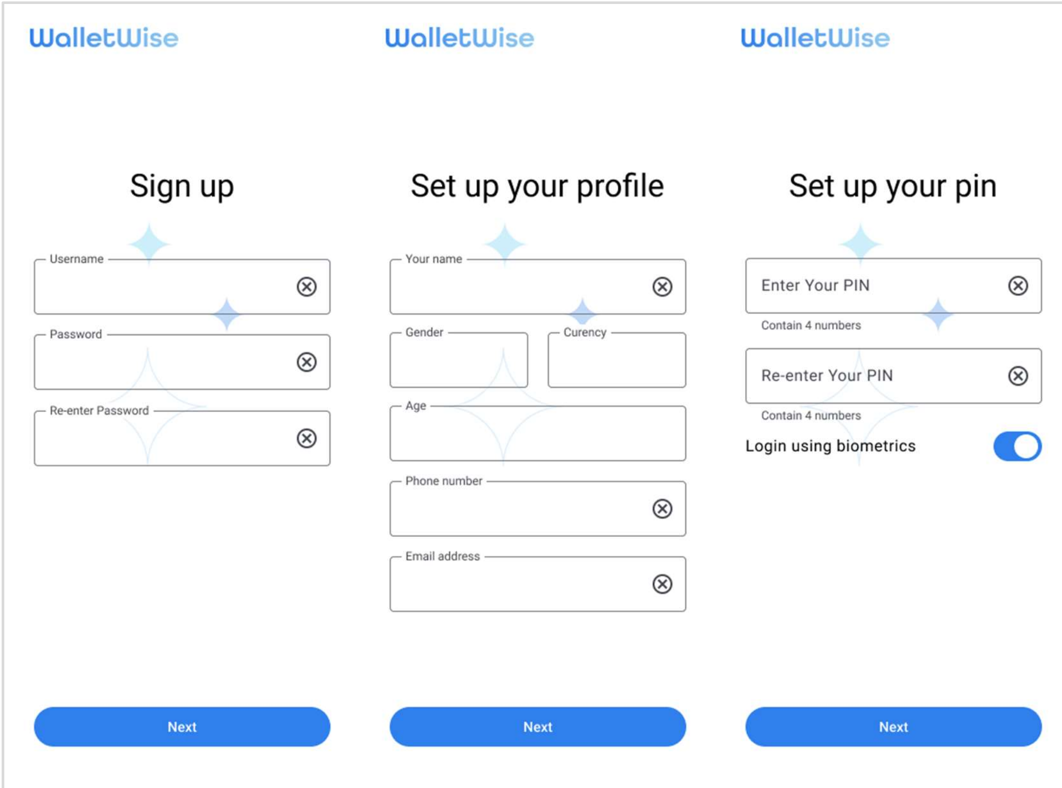
User Interface Prototype

1. Welcome screen



- **Purpose**: The Welcome Screen is the first interface that users encounter when they open the app for the first time on their device. Its primary purpose is to create a positive first impression, guide users through initial setup.
- **Display:** Application logo, welcome text and buttons:
  - Start Your Journey Button: A prominent button labeled "Start Your Journey" to initiate the sign-up process.
  - Sign In Button: A secondary button for users who already have an account to log in.
- **How user can use it**:
  - Start Your Journey:
    - Users tap the "Start Your Journey" button to begin the sign-up process.
    - This action leads them to a registration form where they can create a new account.
  - Sign In:
    - Users who already have an account can tap the "Sign In" button.
    - This action takes them to the login screen where they can enter their credentials to access their account.

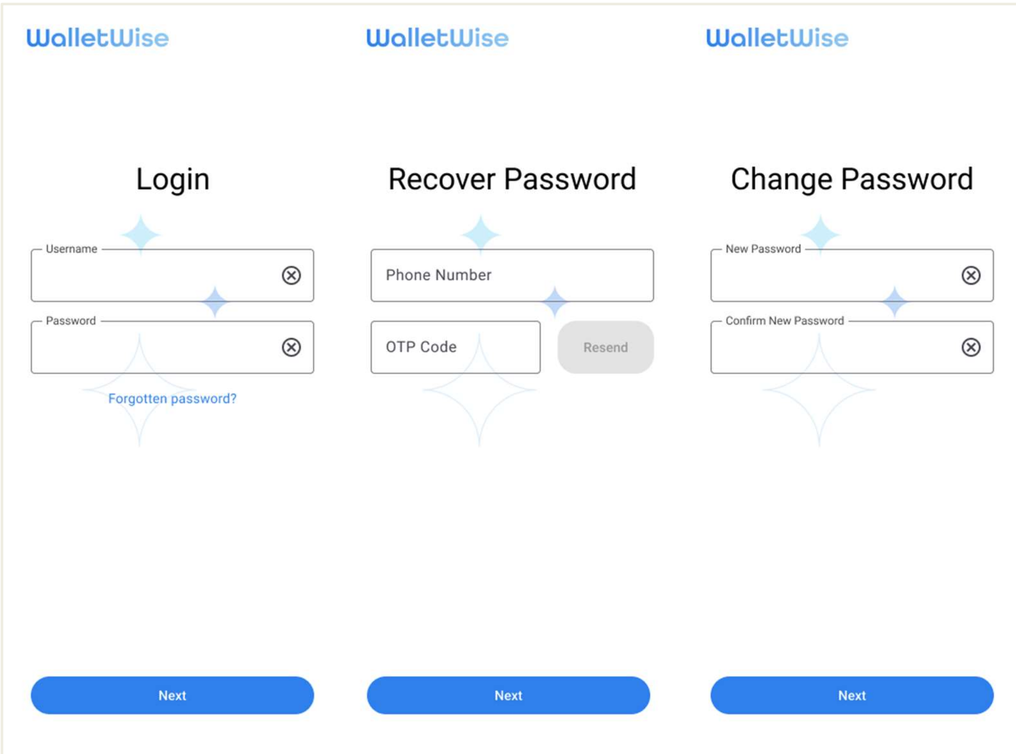
2. Sign up



- **Purpose:** The Sign-Up Process screens are designed to facilitate new user registration by collecting essential information in a structured and user-friendly manner. This multi-step approach ensures that users provide all necessary details while minimizing form fatigue and enhancing the onboarding experience.
- **Display:**
  - Screen 1: Sign Up
    - Username Field: Input field for creating a unique username.
    - Password Field: Input field for creating a secure password.
    - Re-enter Password Field: Input field for confirming the password.
    - Next Button: A button labeled “Next” to proceed to the next step.
  - Screen 2: Set Up Your Profile
    - Name Field: Input field for entering the user's name.
    - Gender Field: Input field for specifying the user's gender.
    - Age Field: Input field for entering the user's age.
    - Currency Field: Input field for selecting the preferred currency.
    - Phone Number Field: Input field for entering the user's phone number.
    - Email Address Field: Input field for providing the user's email address.
    - Next Button: A button labeled “Next” to proceed to the next step.
  - Screen 3: Set Up Your PIN
    - Enter Your PIN Field: Input field for creating a 4-digit PIN.
    - Re-enter Your PIN Field: Input field for confirming the 4-digit PIN.
    - Login Using Biometrics Toggle: An option to enable biometric login.
    - Next Button: A button labeled “Next” to complete the setup.
- **How to use:**
  - Sign Up Screen:
    - Users enter their desired username, password, and confirm their password.

- After filling in the fields, users tap the “Next” button to proceed to the profile setup.
  - Set Up Your Profile Screen:
    - Users provide their name, gender, age, preferred currency, phone number, and email address.
    - After entering the details, users tap the “Next” button to proceed to the PIN setup.
  - Set Up Your PIN Screen:
    - Users create a 4-digit PIN and confirm it.
    - They have the option to enable biometric login by toggling the switch.
    - After setting the PIN, users tap the “Next” button to complete the registration process.

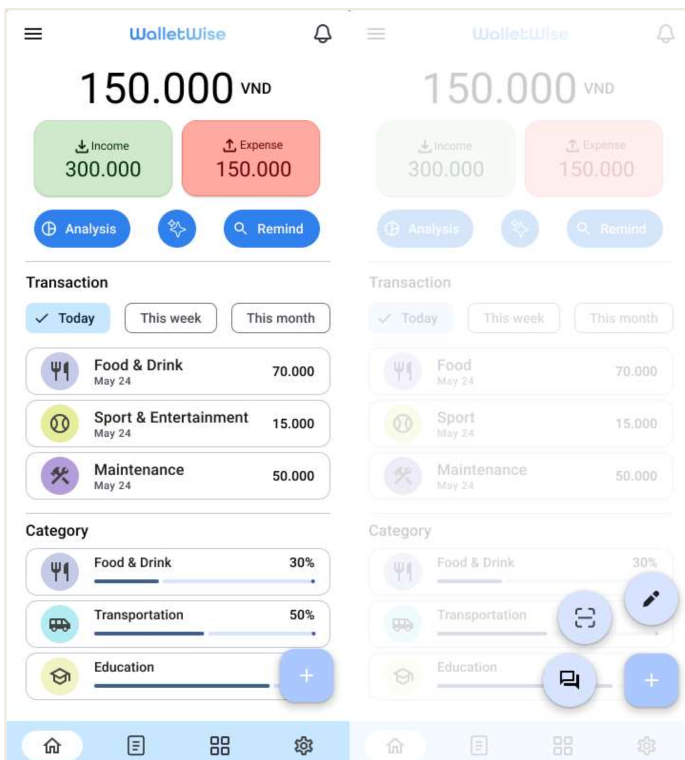
3. Sign in



- **Purpose:** The Login Process screens are designed to authenticate existing users and provide a pathway to recover and reset passwords if needed. This ensures users can securely access their accounts and regain access if they forget their credentials.
- **Display:**
  - Login Screen:
    - Username Field: Input field for entering the user's username.
    - Password Field: Input field for entering the user's password.
    - Forgotten Password Link: A link labeled “Forgotten password?” for users who need to reset their password.
    - Next Button: A button labeled “Next” to proceed with the login process.
  - Recover Password Screen:
    - Phone Number Field: Input field for entering the phone number associated with the account.
    - OTP Code Field: Input field for entering the One-Time Password (OTP) sent to the user's phone.
    - Resend Button: A button to resend the OTP code if the user did not receive it.
    - Next Button: A button labeled “Next” to proceed with the password recovery process.

- Change Password Screen:
  - New Password Field: Input field for creating a new password.
  - Confirm New Password Field: Input field for confirming the new password.
  - Next Button: A button labeled “Next” to finalize the password change.
- **How to use:**
  - Login Screen:
    - Users enter their username and password in the respective fields.
    - If the user has forgotten their password, they can click the “Forgotten password?” link.
    - After entering their credentials, users tap the “Next” button to log in.
  - Recover Password Screen:
    - Users enter their registered phone number to receive an OTP.
    - After receiving the OTP, users enter it into the OTP code field.
    - If the OTP is not received, users can tap the “Resend” button to get a new OTP.
    - Users then tap the “Next” button to proceed to the password reset screen.
  - Change Password Screen:
    - Users create a new password and confirm it by entering it again in the respective fields.
    - After entering the new password, users tap the “Next” button to complete the password reset and return to the login process.

4. Home page

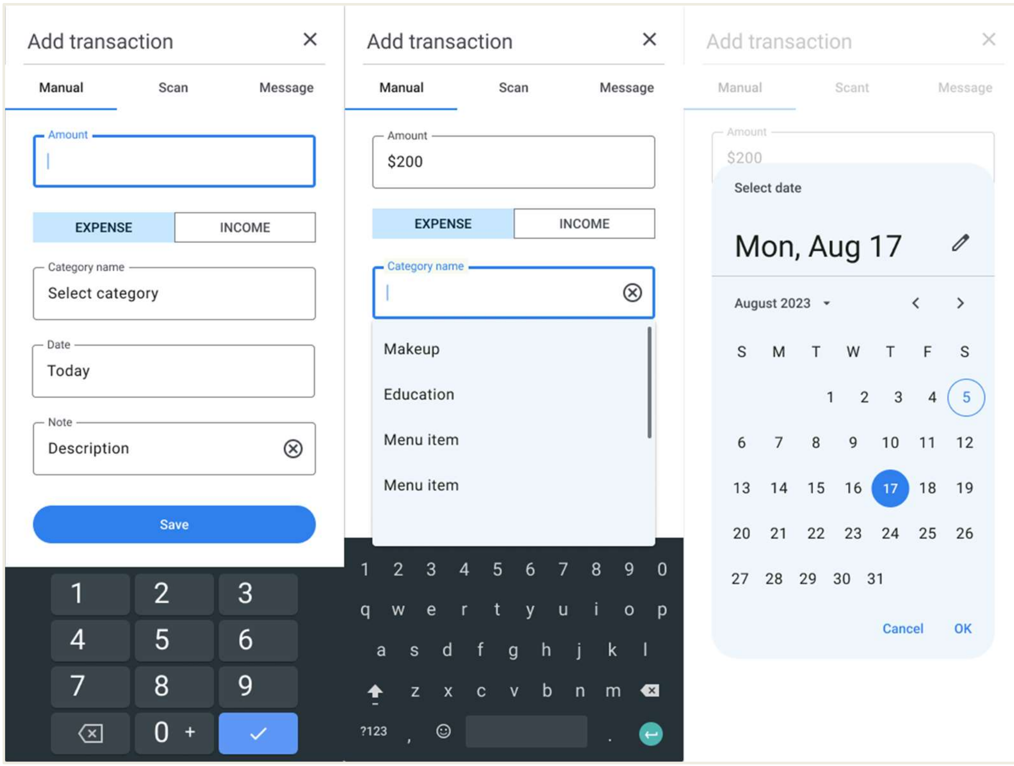


- **Purpose:** The Homepage screen serves as the central hub for users to manage their finances. It provides an overview of their balance, recent transactions, and spending categories. Additionally, it offers quick access to key features and actions, enhancing user experience and financial management efficiency.
- **Display:**
  - Homepage Screen:
    - Navigation Bar: A bottom bar with icons for Home, Transactions, Categories, and Settings to navigate between different sections.
    - Top App Bar: Displays the app logo, a menu icon for additional options, and a

notification bell for alerts.
        - Balance Section: Shows the total balance prominently at the top, with separate indicators for income and expenses.
        - Quick Action Buttons: Includes “Analysis” and “Remind” buttons for accessing detailed financial analysis and setting reminders.
        - Transaction Shortcuts:
            - Tabs for viewing transactions “Today,” “This week,” or “This month.”
            - A list of recent transactions with categories, dates, and amounts.
        - Category Shortcuts:
            - A section displaying spending categories with percentage bars indicating the proportion of spending.
        - Add Expense Button: A floating action button with a plus icon for adding new expenses.
    - Homepage Screen with Expanded Add Expense Button:
        - Expanded Add Expense Button: When the floating action button is pressed, it expands to show three sub-buttons:
            - Manually: Leads to a form where users can manually enter expense details.
            - OCR: Opens a feature allowing users to scan receipts or invoices to automatically extract expense information.
            - Messages: Allows users to add expenses based on SMS or other messages containing transaction details.
- **How to use:**
    - Navigation Bar:
        - Tap on the icons to switch between Home, Transactions, Categories, and Settings screens.
    - Top App Bar:
        - Use the menu icon to access additional options or settings.
        - Tap the notification bell to view alerts and updates.
    - Balance Section:
        - View total balance, income, and expenses at a glance.
    - Quick Action Buttons:
        - Tap “Analysis” for detailed financial analysis.
        - Tap “Remind” to set financial reminders.
    - Transaction Shortcuts:
        - Filter transactions by day, week, or month by tapping the respective tabs.
        - Quickly review recent transactions with category, date, and amount details.
    - Category Shortcuts:
        - Monitor spending distribution across different categories to understand spending habits.
    - Add Expense Button:
        - Tap the floating action button to open options for adding new expenses.
        - Choose “Manually” to enter expense details by hand.
        - Select “OCR” to scan and extract expense details from receipts.
        - Opt for “Messages” to add expenses from transaction messages.

5. Add expense

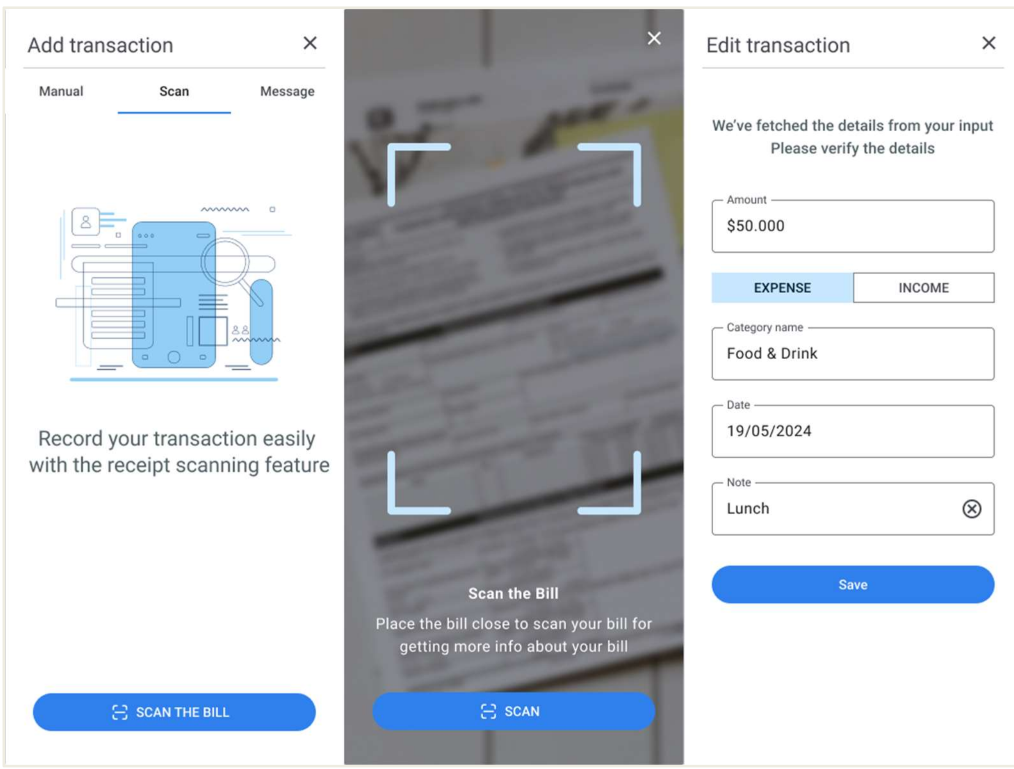
5.1 Add expense: Manual



- **Purpose:** The Add Expense screen allows users to input new expenses.
- **Display:**
    - **Tabs:**
        - **Manual**: Selected by default for manual entry.
        - **OCR**: Option to scan receipts and automatically extract expense details.
        - **Messages**: Option to import expenses from messages.
    - **Filter chip:**
        - **Categorize transaction**: Options: Expense, Income.
    - **Input fields:**
        - **Title:** The screen displays the title "Add transaction".
        - **Amount**: Numeric Input (placeholder: "Enter amount")
        - **Category**: Dropdown List (options: Housing & Utilities, Shopping, Transportation, Education, Savings, Add New Category)
        - **Date:** Date Picker (default: today's date).
        - **Note**: Text Area (placeholder: "Description")
    - **Button**:
        - **Save**: Saves the expense and returns to the Expense List screen
- **How to use:**
    - Select Tab:
        - Ensure the "Manual" tab is selected to input the expense manually.
        - Optionally, switch to the "Scan" tab to scan receipts or the "Message" tab to import expenses from messages.
    - Select Type:
        - Allows users to categorize transactions either as an expense or income. Default: Expense

- Enter Amount:
  - Tap the "Amount" field and enter the amount of the expense.
- Select Category:
  - Tap the "Category" field to open the dropdown list.
  - Select the appropriate category for the expense.
- Set Date:
  - Tap the "Date" field to open the date picker.
  - Select the date the expense was incurred (default is today's date).
- Add Note:
  - Tap the "Note" field to enter any additional details about the expense.
- Save Expense:
  - Once all fields are filled out, tap the "Save" button to add the expense to the Expense List.

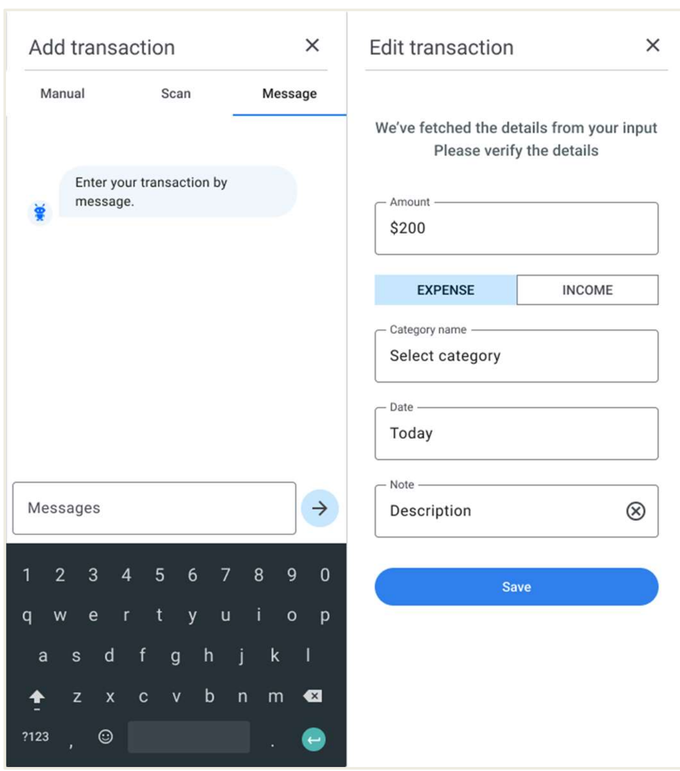
5.2 Add expense: OCR



- **Purpose:** To add an expense by scanning a receipt and automatically extracting details.
- **Display:**
  - **Tabs:**
    - **Manual**: Selected by default for manual entry.
    - **Scan**: Option to scan receipts and automatically extract expense details.
    - **Message**: Option to import expenses from messages.
  - **Filter chip:**
    - **Categorize transaction**: Options: Expense, Income.
  - **Input fields:**
    - **Title:** The screen displays the title "Edit transaction".
    - **Amount**: Numeric Input (placeholder: "Enter amount")
    - **Category**: Dropdown List (options: Housing & Utilities, Shopping, Transportation, Education, Savings, Add New Category)

        - **Date:** Date Picker (default: today's date).
        - **Note**: Text Area (placeholder: "Description")
        - **Type**: Dropdown List (options: Expense, Income, default: Expense).
    - **Button:**
        - **Scan the Bill:** Initiates the receipt scanning process.
        - **Scan:** Captures the image of the receipt.
        - **Save:** Saves the transaction and returns to the Expense List screen if input fields are edited.
- **How to use:**
    - **Select Tab:** Ensure the "Scan" tab is selected to input the expense manually.
    - **Open camera interface:** Tap the "Scan the bill" button: this will open the camera interface of the device.
    - **Scan receipt:**
        - Place the receipt on a flat surface and position it within the camera frame.
        - Tap the "Scan" button to take a picture of the receipt.
    - **Review extracted details:** The app will display the extracted details in the respective input fields. You can review and edit the extracted details if needed to ensure accuracy.
    - **Save**: Press the "Save" button to save the transaction and return to the Expense List screen.

5.3 Add expense: Messages



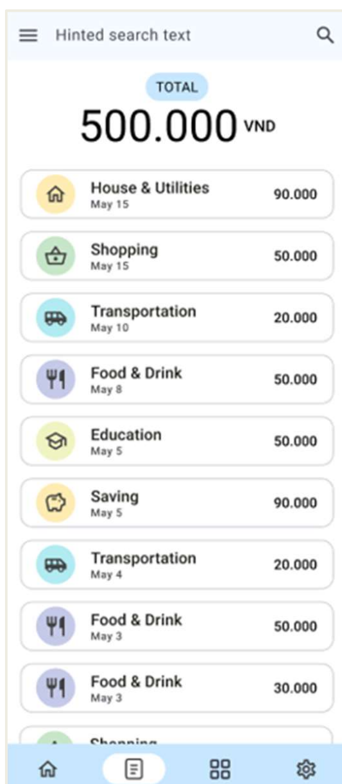
- **Purpose:** To add an expense by sending a message and automatically extracting the details.
- **Display:**
    - **Tabs:**
        - **Manual**: Selected by default for manual entry.
        - **Scan**: Option to scan receipts and automatically extract expense details.
        - **Message**: Option to import expenses from messages.
    - **Filter chip:**
        - **Categorize transaction**: Options: Expense, Income.

- **Input fields:**
  - **Messages**: Text input field to enter the details of your expense message.
  - **Title:** The screen displays the title "Edit transaction".
  - **Amount**: Numeric Input (placeholder: "Enter amount")
  - **Category**: Dropdown List (options: Housing & Utilities, Shopping, Transportation, Education, Savings, Add New Category)
  - **Date:** Date Picker (default: today's date).
  - **Note**: Text Area (placeholder: "Description")
  - **Type**: Dropdown List (options: Expense, Income, default: Expense).
- **Button:**
  - **Send message:** Send the entered message for processing and extraction of expense details.
  - **Save:** Saves the transaction and returns to the Expense List screen

- **How to use:**
  - **Select Tab:** Ensure the "Message" tab is selected to input the expense manually.
  - **Send messages:** Enter the details of your expense in the provided text input field. For example: "Today eat lunch 50k"
  - **Review extracted details:** The app will display the extracted details in the respective input fields. You can review and edit the extracted details if needed to ensure accuracy.
  - **Save**: Press the "Save" button to save the transaction and return to the Expense List screen.

6. Expense list

6.1 Expense list

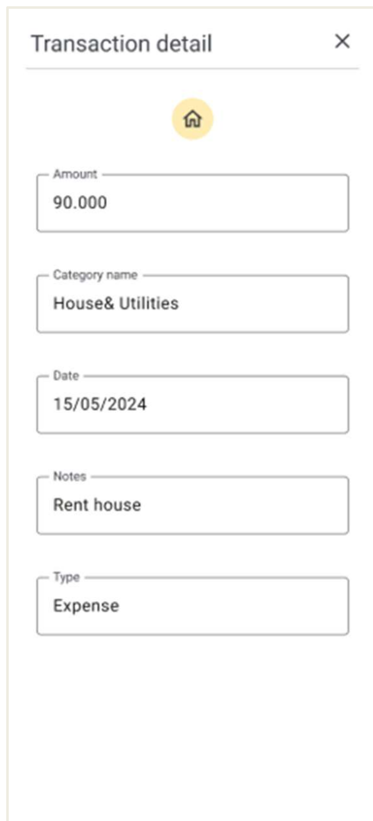


- **Purpose:** The Expense list screen allows users to view a list of their expenses, helping them track and manage their spending effectively.
- **Display:**
  - Search Bar: Allows users to refine the expense list based on date, category, amount.

- Total expenses: The "total" section shows the total amount of money the user has spent during the selected time period.
- Transaction list: The list is sorted by date, with the most recent transactions at the top. Each transaction item includes information: the name of the transaction category, the amount of money spent on each transaction, the date each transaction was incurred.

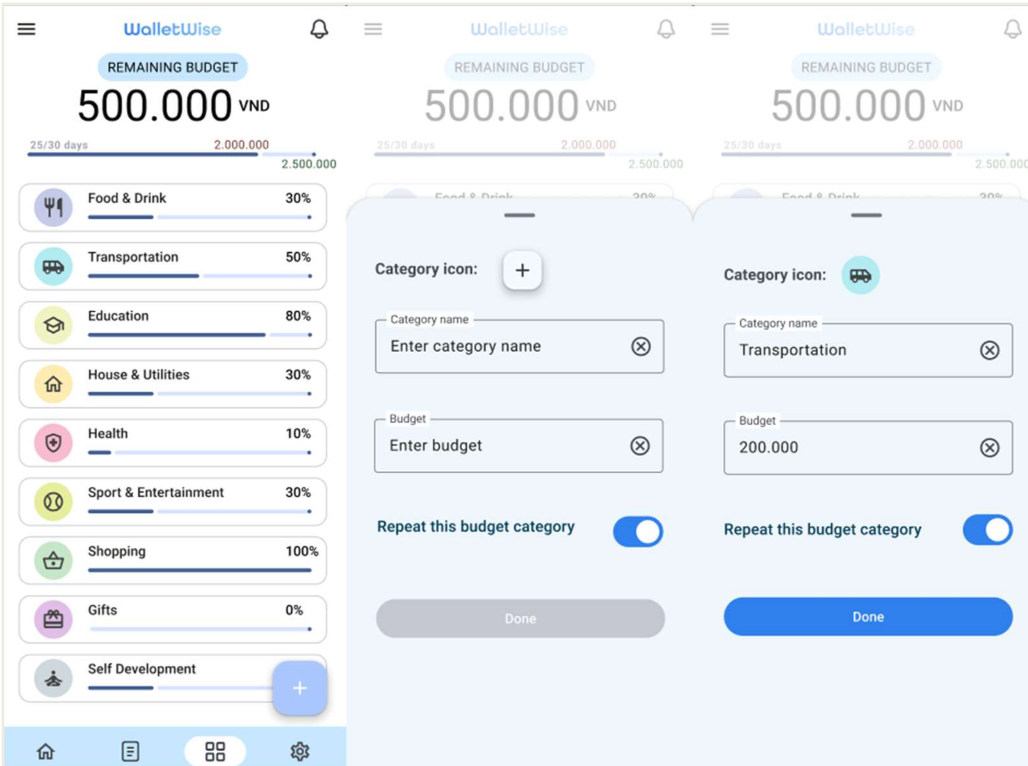
- **How to use:**
  - **View the expense list:** Users can scroll down to view their expense list.
  - **View expense details:** Users can tap on an expense in the list to view details about that expense, including the date, amount, category, and notes (if any).
  - **Filtering transaction using the Search Bar:** By entering keywords by date (e.g., "May 15"), amount (e.g., "50.000"), category (e.g., "Shopping").

6.2 Transaction detail



- **Purpose:** provide users with detailed information about a specific transaction.
- **Display:** displays a different piece of information about the transaction. The information includes the following:
  - Transaction amount: The amount of money that was spent on the transaction.
  - Category: The category of the expense. This can be helpful for tracking spending by category.
  - Transaction date: The date on which the transaction occurred.
  - Notes: Any additional notes that were added to the transaction.
  - Type of transaction.
- **How to use:**
  - The transaction detail screen is typically accessed by tapping on a transaction in the expense list screen.

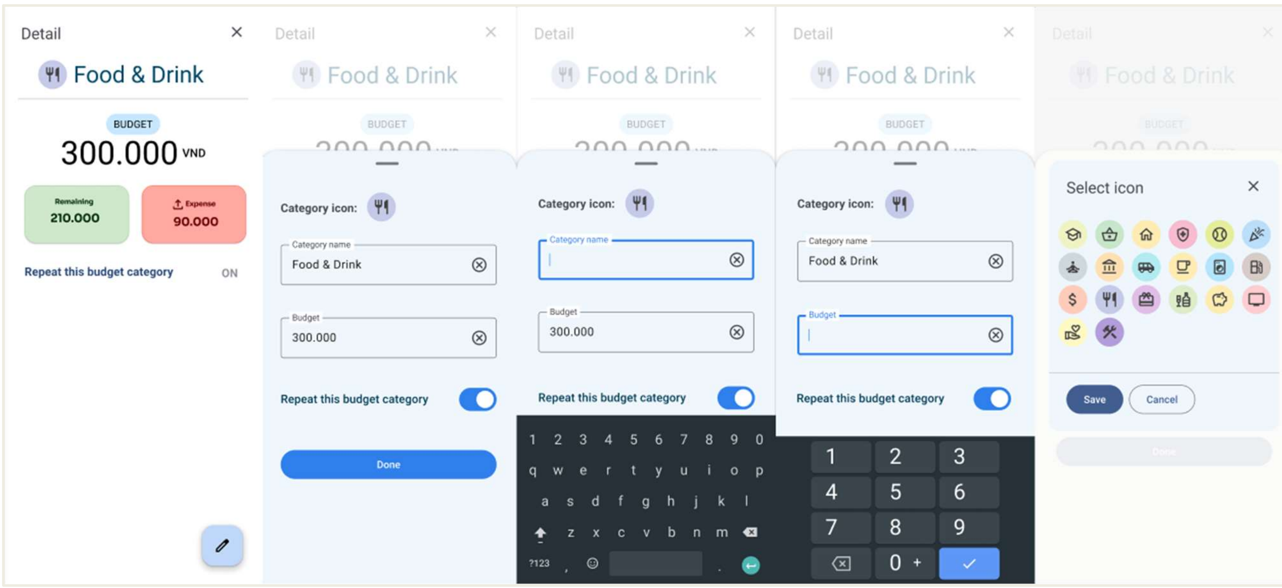
7. Category list and add category



- **Purpose:** This screen allows users to view budget categories and remaining budgets, helping them easily manage and add new budgets as desired.
- **Display:**
  - Category list:
    - Remaining budget: This section displays the user's remaining budget.
    - Ratio bar: Displays the percentage of the budget used, showing the total budget amount and the amount spent within the budget.
    - Category card: Each created budget has a category card displaying the basic information of that budget, including:
      - Category icon: Displays the icon representing the budget category chosen by the user.
      - Category name: Displays the name of the budget category chosen by the user.
      - Percentage: Shows the percentage of money spent within each budget.
    - “Add” button: Add a new category.
  - Add category:
    - Category icon: Allows users to select an icon representing this budget category.
    - Category name: Allows users to enter the name of this budget category.
    - Budget: Allows users to enter the amount for this budget.
    - Repeat this budget category: This feature will repeat the budget monthly without needing to set it up again.
    - “Done” Button: Appears when users have entered all necessary information for this budget category.
- **How to use:**
  - View the category list: Users can scroll down to view their category list.

- Select the category card: Users can select any category card to view details about that budget.
- Add new category: Users can tap the “add” button to add a new budget category.
  - Users can add detailed information for the budget category as desired.
  - Users can toggle the “Repeat this budget category” feature on or off as desired.
  - After filling in all the information for the budget category, users select “Done” to save the newly created budget

8. Details and edit category

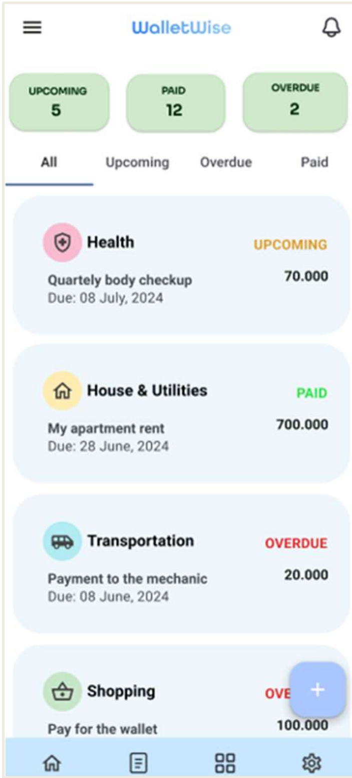


- **Purpose:** This screen displays detailed information about a budget category and allows users to edit the detailed information of the selected budget category.
- **Display:**
  - Detail category:
    - Category icon & Category name: This section displays the icon and category name representing the budget category.
    - Budget: Displays the initial budget set by the user for this category.
    - Expense: Shows the amount spent within this budget.
    - Remaining: Displays the remaining amount of this budget.
    - Repeat this budget category: Displays “ON” if this budget category is set to repeat monthly and “OFF” otherwise.
    - “Edit” Button: Used to edit this budget category.
  - Edit category:
    - Category icon: Allows users to change the icon representing this budget category.
    - Category name: Allows users to change the name of this budget category.
    - Budget: Allows users to change the amount of this budget.
    - Repeat this budget category: This feature will repeat the budget monthly without needing to set it up again.
    - “Done” Button: Appears when users have entered all necessary information for this budget category.
- **How to use:**
  - View detail category: Users can view detailed information about the selected budget category.
  - Select the edit button: Users can select the edit button to modify the selected budget category.

- Users can edit detailed information for the budget category as desired.
- Users can toggle the "Repeat this budget category" feature on or off as desired.
- After filling in all the information for the budget category, users select "Done" to save the edited information.

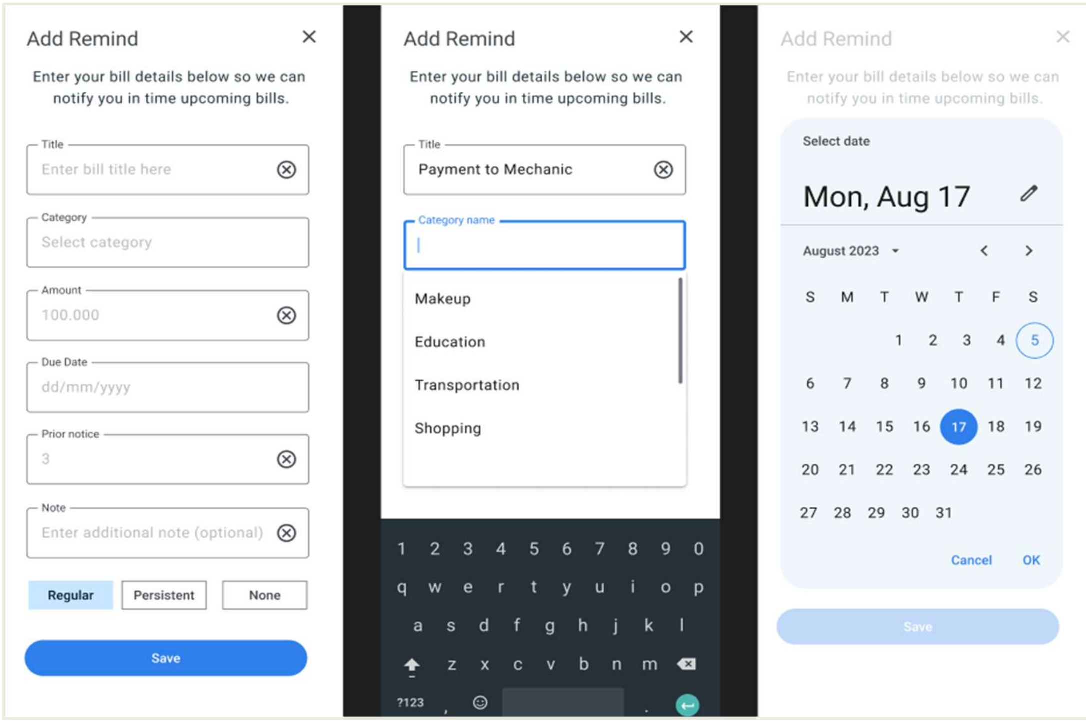
9. Remind

9.1 Overview Remind



- **Purpose:** display a list of upcoming and overdue bills and payments categorized by their status.
- **Display:** The screen displays a list of bills, along with the following components:
  - Tabs:
    - All: Selected by default. This tab shows all reminders, regardless of their status. It includes paid, overdue, and any other reminders that have been created.
    - Paid: This tab displays reminders for items or bills that have already been paid.
    - Overdue: This tab lists reminders for items or bills that are past their due date.
    - Upcoming: This tab shows reminders for items or tasks that are due in the near future.
  - Remind list:
    - Category: A label indicating the category of the bill or payment.
    - Description: A brief description of the bill or payment.
    - Amount: The total amount due for the bill or payment.
    - Due Date: The date by which the bill or payment is due.
    - Status: includes PAID, OVERDUE, UPCOMING.
  - "Add" button: This button allows users to add a new remind.
- **How to use:**
  - **View the remind list**: Users can scroll down to view their remind list.
  - **Add a remind:** Users can tap on the "Add" button to add a new expense. When they tap the "Add" button, a form will appear for them to add.

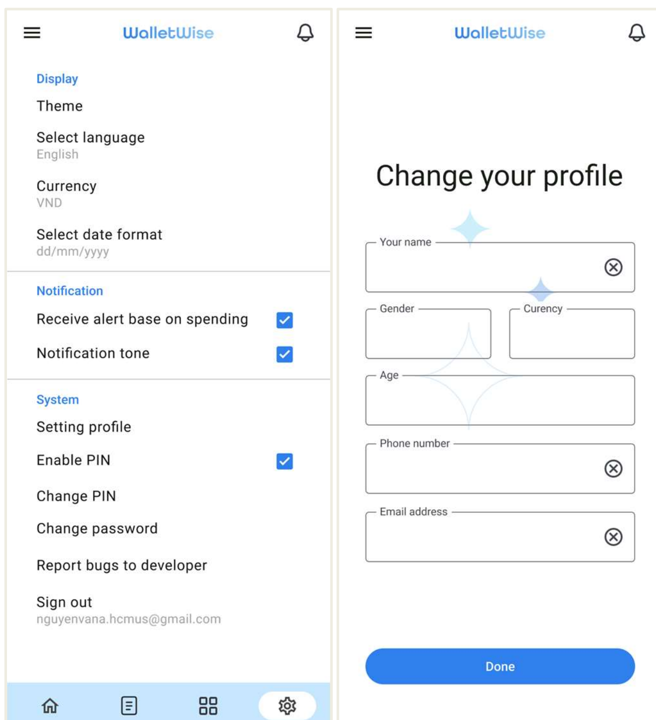
9.2 Add Remind



- **Purpose:** The screen allows users to add a new remind.
- **Display:**
  - Input fields:
    - Title: title of the bill.
    - Amount: Numeric Input (placeholder: "Enter amount")
    - Category: Dropdown List (options: Housing & Utilities, Shopping, Transportation, Education, Savings, Add New Category)
    - Due Date: Date Picker (default: today's date).
    - Prior notice: Numeric Input.
    - Note: Text Area (placeholder: "Description (Optional)")
  - Tabs:
    - Regular: the notification will appear at regular intervals, such as daily, weekly, or monthly.
    - Persistent: the notification will appear at regular intervals, such as daily, weekly, or monthly
    - None: no notifications will be sent.
  - Button:
    - Save: Saves the remind and returns to the Overview Remind screen.
- **How to use:**
  - Select Tab:
    - Select the type of notification you want to receive
  - Enter Title:
    - Tap the "Title" field and enter the title of the remind.
  - Enter Amount:
    - Tap the "Amount" field and enter the amount of the bill.
  - Select Category:

- Tap the "Category" field to open the dropdown list.
- Select the appropriate category for the remind.
- Set Date:
  - Tap the "Date" field to open the date picker.
  - Select the date by which the bill or payment is due.
- Enter Prior notice:
  - Tap the "Prior notice" field and enter the number of days in advance you want to receive a notification.
- Add Note:
  - (Optional) Tap the "Note" field to enter any additional details about the remind.
- Save Remind:
  - Once all fields are filled out, tap the "Save" button to add the expense to the Expense List.

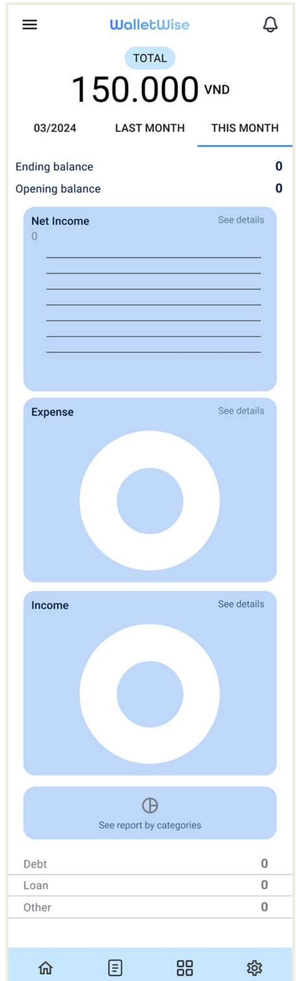
10. Setting



- **Purpose:** The Setting screen is designed to allow users to customize and manage their app experience. It provides options for display preferences, notification settings, and account security.
- **Display:**
  - Top App Bar: Features the WalletWise logo, a menu icon for additional options, and a notification bell for alerts.
  - Display Options Field: Users can select the theme, language, currency, and date format.
  - Notification Settings Field: Options to receive alerts based on spending and to change the notification tone.
  - System Settings Field: Allows users to update their profile, enable/disable PIN, change PIN, change password, and report bugs to the developer.
- **How to use:**
  - Select Theme:
    - Tap on the “Theme” option.

    - Select the desired theme from the available options.
    - The app will save your selection and redirect you to the Overview Reminder screen.
- Select language:
    - Tap on the “Select Language” option.
    - Browse through the list of languages.
    - Tap on the preferred language to select it.
    - The app will update its language settings to your selection.
- Select currency:
    - Tap on the “Currency” option.
    - Scroll through the list and tap on the desired currency (e.g., VND).
    - The app will apply the selected currency to all financial data.
- Select date format:
    - Tap on the “Select Date Format” option.
    - Select your preferred date format from the list.
    - The app will update the date format throughout the app according to your choice.
- Enable “Receive Alert Based on Spending” feature:
    - Tap on the checkbox next to “Receive Alert Based on Spending” to enable or disable the feature.
    - A checkmark will appear when the feature is enabled, and will be removed when disabled.
- Active “Notifications Tone” :
    - Tap on the checkbox next to “Notification Tone” to enable or disable the notification sounds.
    - A checkmark will appear when the notification sounds are enabled, and will be removed when disabled.
- Setting profile:
    - Tap on the “Setting Profile” option.
    - Update your profile information such as name, gender, age, phone number, and email address.
    - Tap the “Done” button to save changes.
- Enable PIN:
    - Tap on the checkbox next to “Enable PIN” to enable or disable the PIN.
    - Enter PIN screen will appear when the the Enbale PIN are enabled, and will be removed when disabled.
- Change PIN:
    - Tap on the “Change PIN” option.
    - Enter your current PIN.
    - Enter and confirm the new PIN.
    - Save the changes to update your PIN.
- Change password:
    - Tap on the “Change Password” option.
    - Enter your current password.
    - Enter and confirm the new password.
    - Save the changes to update your password.
- Report bugs to developers:
    - Tap on the “Report Bug to Developer” option.
    - Fill out the form or email with details of the bug or issue.
    - Submit the report to notify the developers.
- Sign out:
    - Tap on the “Sign Out” option.
    - Confirm the sign-out action if prompted.
    - The app will log you out and return you to the login screen.

11. Analysis

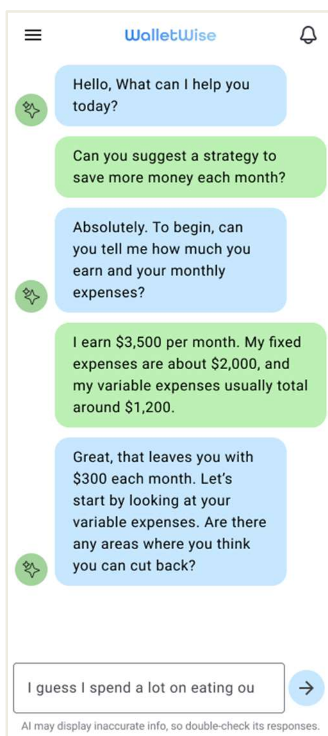


- **Purpose:** The Analysis screen is designed to provide users with a comprehensive overview of their financial status, including income, expenses, and overall balance. It helps users track and analyze their financial activities.
- **Display:**
  - Total Balance: Displays the total balance for the current and previous month in the selected currency (VND in this case).
  - Net Income: Shows a graphical representation of the net income for the selected period.
  - Expenses: Visualizes the total expenses with an option to see detailed breakdowns.
  - Income: Visualizes the total income with an option to see detailed breakdowns.
  - Detailed Reports: Options to see detailed reports categorized by debt, loan, and other financial activities.
- **How to use:**
  - Total Balance: The total balance is shown prominently at the top of the screen. Users can see their financial status at a glance.
  - Date Selector:
    - Tap on the date selector to choose between options such as “Last Month” and “This Month.”
    - The screen will update to show financial data for the selected period.
  - Ending Balance: The ending balance is displayed in the upper part of the screen under the total

balance. Users can view their financial status at the end of the selected period.

- Opening Balance: The opening balance is displayed next to the ending balance. Users can see their starting financial status for the selected period.
- Net Income:
  - View the net income section to see a graphical representation of earnings minus expenses.
  - Tap on “See details” to get a more detailed breakdown of net income.
- Expenses:
  - View the expenses section to see a graphical representation of total expenses.
  - Tap on “See details” to get a more detailed breakdown of expenses, including categories and specific transactions.
- Income:
  - View the income section to see a graphical representation of total income.
  - Tap on “See details” to get a more detailed breakdown of income, including sources and specific transactions.
- Detailed Reports by Categories:
  - Tap on “See report by categories” to view detailed financial reports categorized by type (e.g., debt, loan, other).
  - Review each category to understand how different types of transactions affect your overall financial status.
- Graphical Representations: The graphical charts in the net income, expenses, and income sections help users visually understand their financial trends.
- Detailed Breakdowns: By tapping on “See details,” users can access more granular data, helping them identify specific areas of spending or income.
- Balance Information: The opening and ending balance sections help users track how their financial status changes over time.

12. Chatbot



- **Purpose:** The Chatbot Assistance screen is designed to provide users with interactive, AI-driven support for their financial inquiries. It aims to facilitate personalized financial guidance and assistance in a conversational format, enhancing user engagement and satisfaction.
- **Display:**
  - Top App Bar: Features the WalletWise logo, a menu icon for additional options, and a notification bell for alerts.
  - Chat Interface:
    - Displays a series of messages exchanged between the user and the chatbot.
    - Messages are color-coded to differentiate between user inputs and chatbot responses.
  - Input Field:
    - A text box at the bottom of the screen where users can type their messages or queries.
    - Includes a send button (arrow icon) to submit the message.
  - AI Disclaimer: A note indicating that the AI may display inaccurate information and suggesting users double-check its responses.
- **How to use:**
  - Top App Bar:
    - Tap the menu icon to access additional settings or options.
    - Use the notification bell to view alerts and updates.
  - Chat Interface:
    - View the conversation history between the user and the chatbot.
    - Follow the chatbot's guidance and instructions based on the conversation context.
  - Input Field:
    - Type queries, requests, or responses in the text box to interact with the chatbot.
    - Press the send button to submit the input and continue the conversation.
- By leveraging the Chatbot Assistance screen, users can receive immediate, personalized financial advice and support, making financial management more accessible and user-friendly.