

Round 2 Usability Test Notes/ Observations

Colors match usability problems among users

User #1

- Took a minute to understand the error message when using mobile pay and the pocket does not have enough money in it.
- Wanted to transfer money rather than categorizing a transaction.
- Categorize transaction was not complete.
- Broke rules and told her to categorize a transaction and still avoided the button.
- Pay tabs for expenses on the calendar are too small.
- Text on the categorized transaction confirmation page is small.

User #2

- Pay tab on the calendar needs to be bigger.
- User thought the navigation needed labels.
- When creating a pocket, the user was confused between the difference of adding money to a pocket vs the amount input for the expense toggle.
- First user to assume the expense was not necessarily a pocket.
- Wanted to transfer money out of the pocket to the bank in order to categorize a transaction. THIS METHOD DOES NOT ACCURATELY CAPTURE EXPENSES.
- Wanted to know what happens when a user has multiple transactions that need to be categorized. Did not like the idea of completing the current task flow 5 times if that were to be the case.
- Buttons on the main pay page were too small.
- Had some confusion on the split pay page and didn't know if it would make them panic in a real situation. Needed more awareness of how much was being charged onto the debit card/ second pocket.

User #3

- Did not know what the button 'categorize a transaction' was.
- Payment complete overlay on categorizing a transaction is inaccurate.
- Assumed the plus button at the top was to add a profile.
- Onboarding would be helpful.
- The expense toggles were initially confusing.
- Pay bill button needs more recognition.

User #4

- Split pay has too much info
- Categorizing transactions is still confusing.
- Hard to see the categorize transaction button on the bank page.
- Pay tabs on the calendar are too small.
- Adding money and the expense amount is confusing.
- Small text is too small.

User #5

- Make the pay icon tab on the calendar bigger.
- Could not accomplish categorizing a transaction.
- Wanted to simply transfer the money out of the pocket to the bank to have for available spend. THIS METHOD DOES NOT ACCURATELY CAPTURE EXPENSES.

User #6

- List of pockets on the main pay icon page is overwhelming.
- Provide an option for users to always pay for the remaining balance with the linked debit card when the pocket does not have enough to complete the transaction.
- Move the hold near the reader to the top.
- Label the price paid per pocket more clearly when the user selects to pay the remaining balance with a second pocket.
- Would expect a notification for an uncategorized expense.
- FIRST USER TO FLAWLESSLY COMPLETE THE CATEGORIZE TRANSACTION PROCESS!
- The payment complete overlay when completing a categorized transaction sequence is inaccurate.
- Needs a success indicator when adding a pocket, bank etc.
- Payment tabs on the calendar are too small
- Provide an option for autopay when the expense is toggled. Opportunity for a notification.
- Allow the user to view the account on the account dropdown

