

Summary

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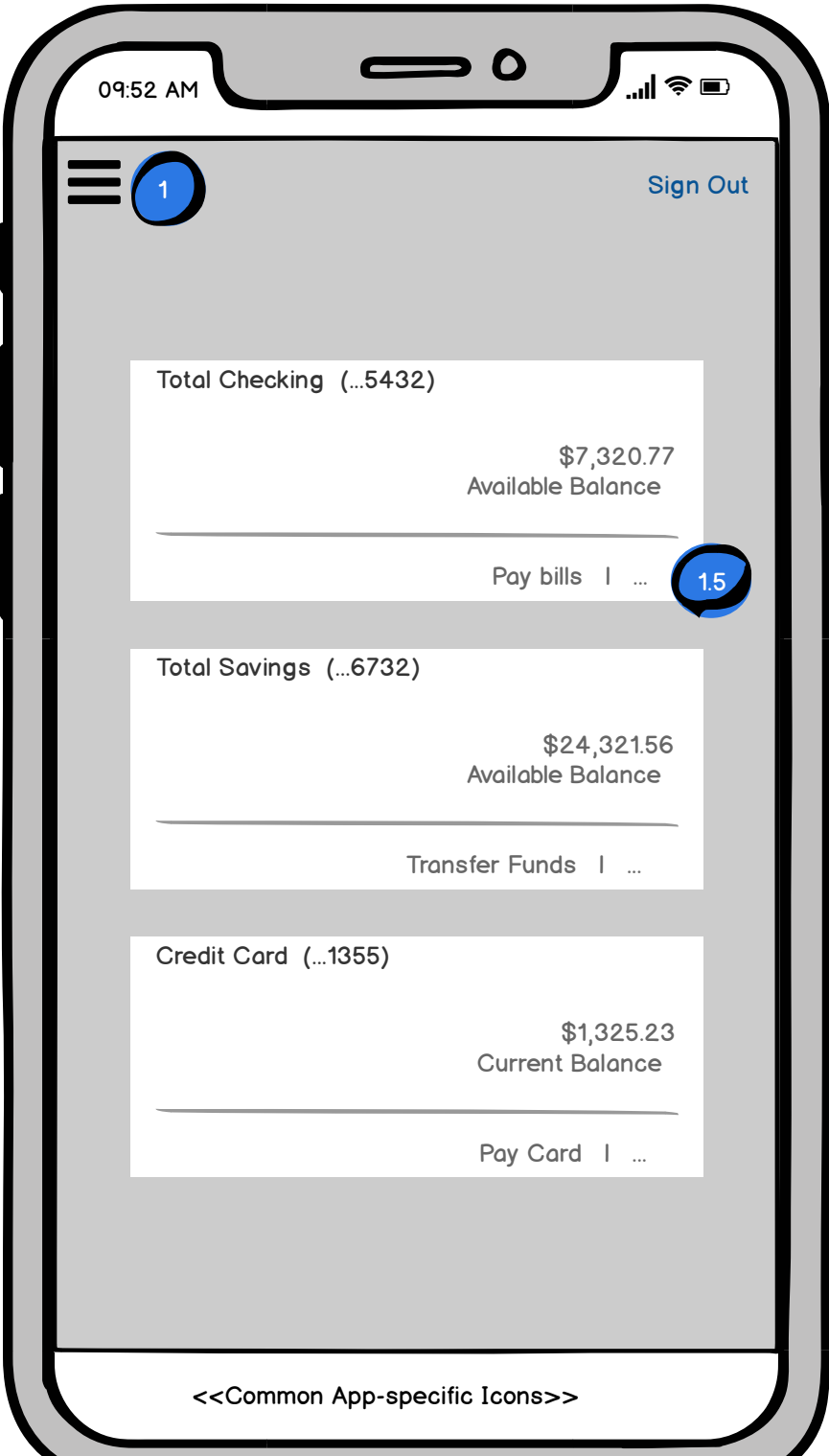
New Features for Banking App

February 21, 2018

Created for possible upgrade to mobile banking app.

While many apps exist to manage finances and budgets, these set of features added to the banking app would make life so much easier. Manage you money where you keep your money!!

Banking App New Features Frame1

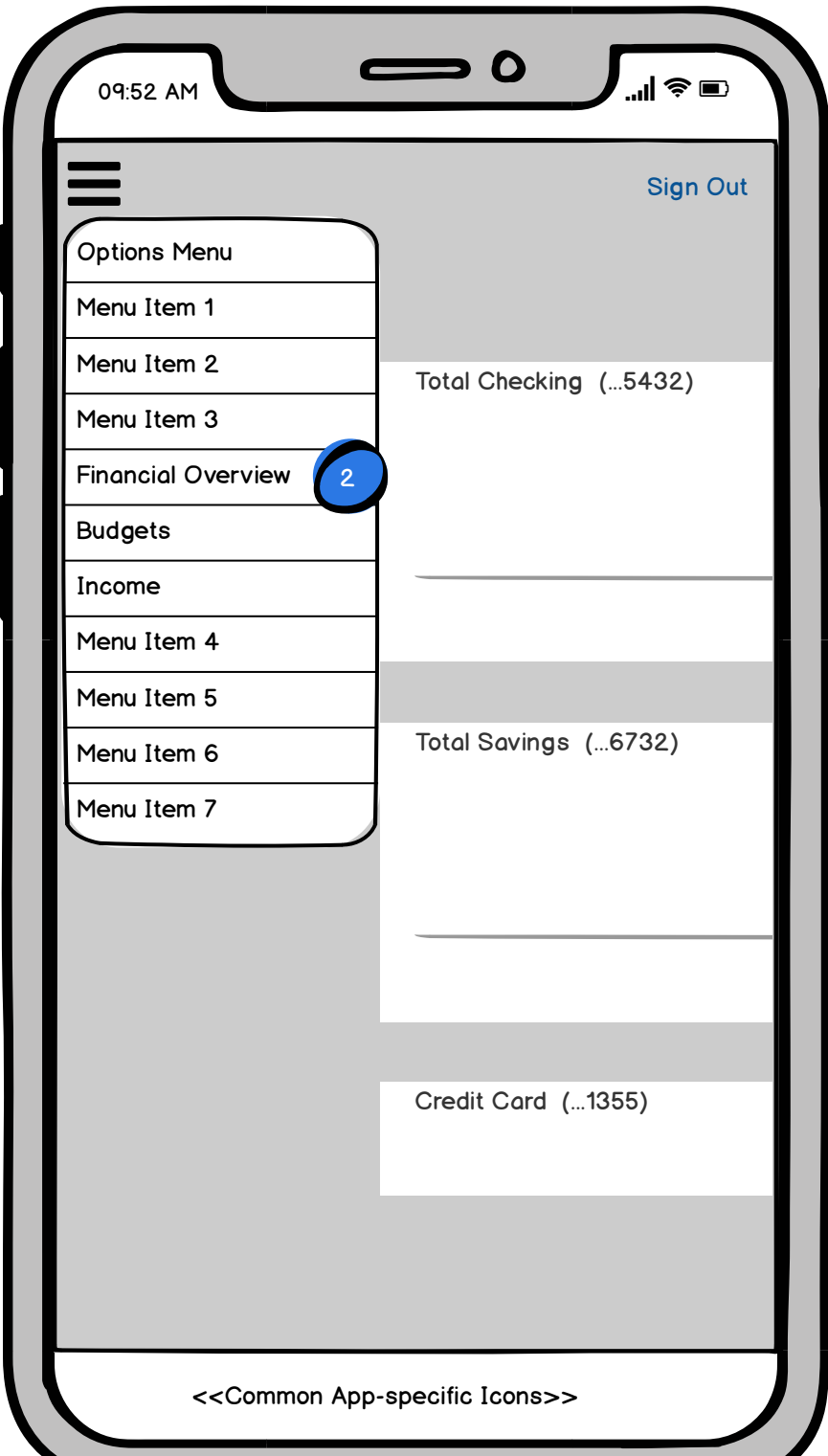


Page Notes

1. Tapping opens the menu, sliding existing content to the right. This occurs each time the menu is tapped.

1.5 Other available options. Would open in an overlay.

Banking App New Features Frame 2 Select Financial Overview

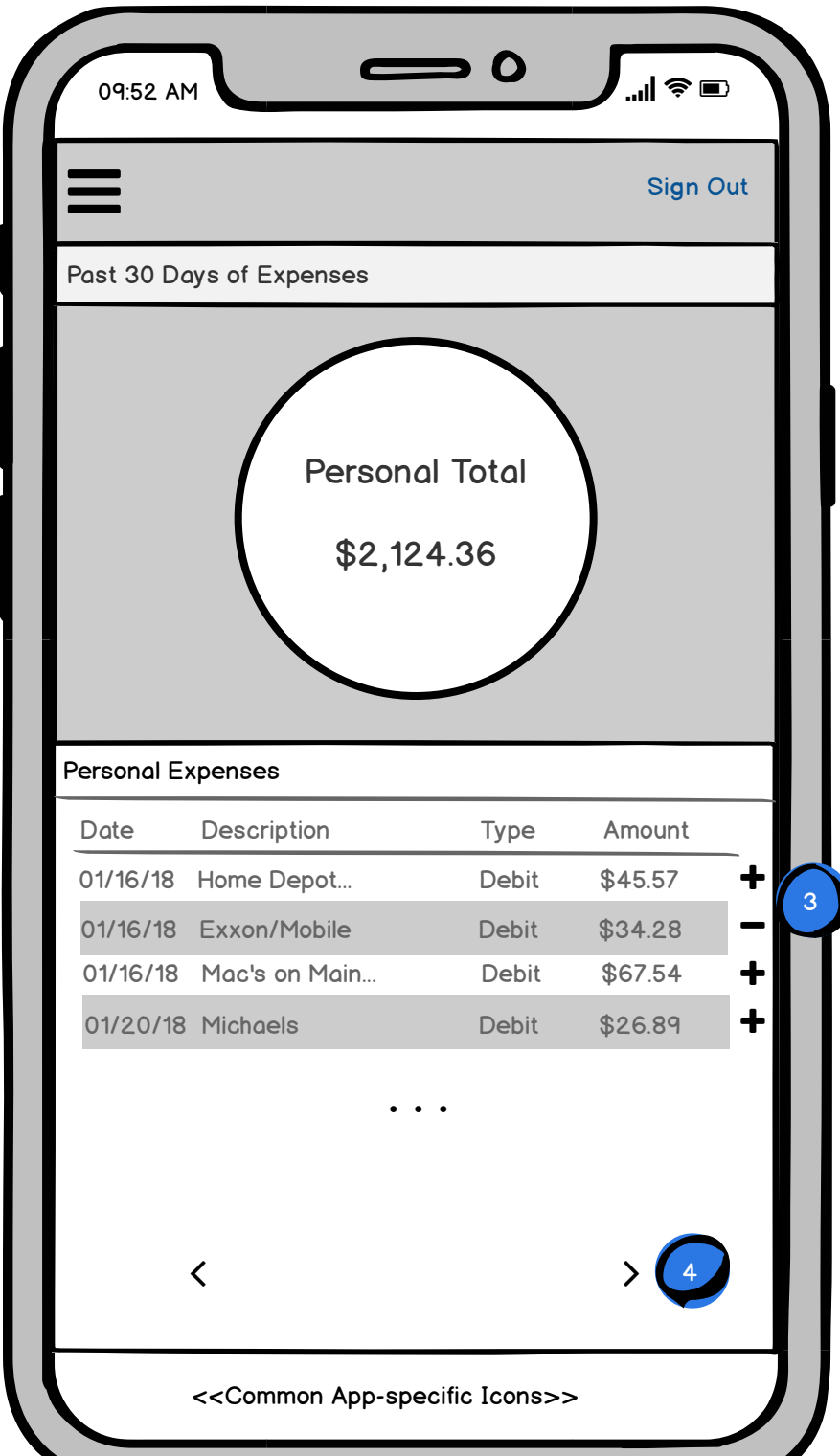


Page Notes

2. Tapping loads the "Financial Overview" page.

NOTE: The options on the Menu are available on any page on which the menu icon exists.

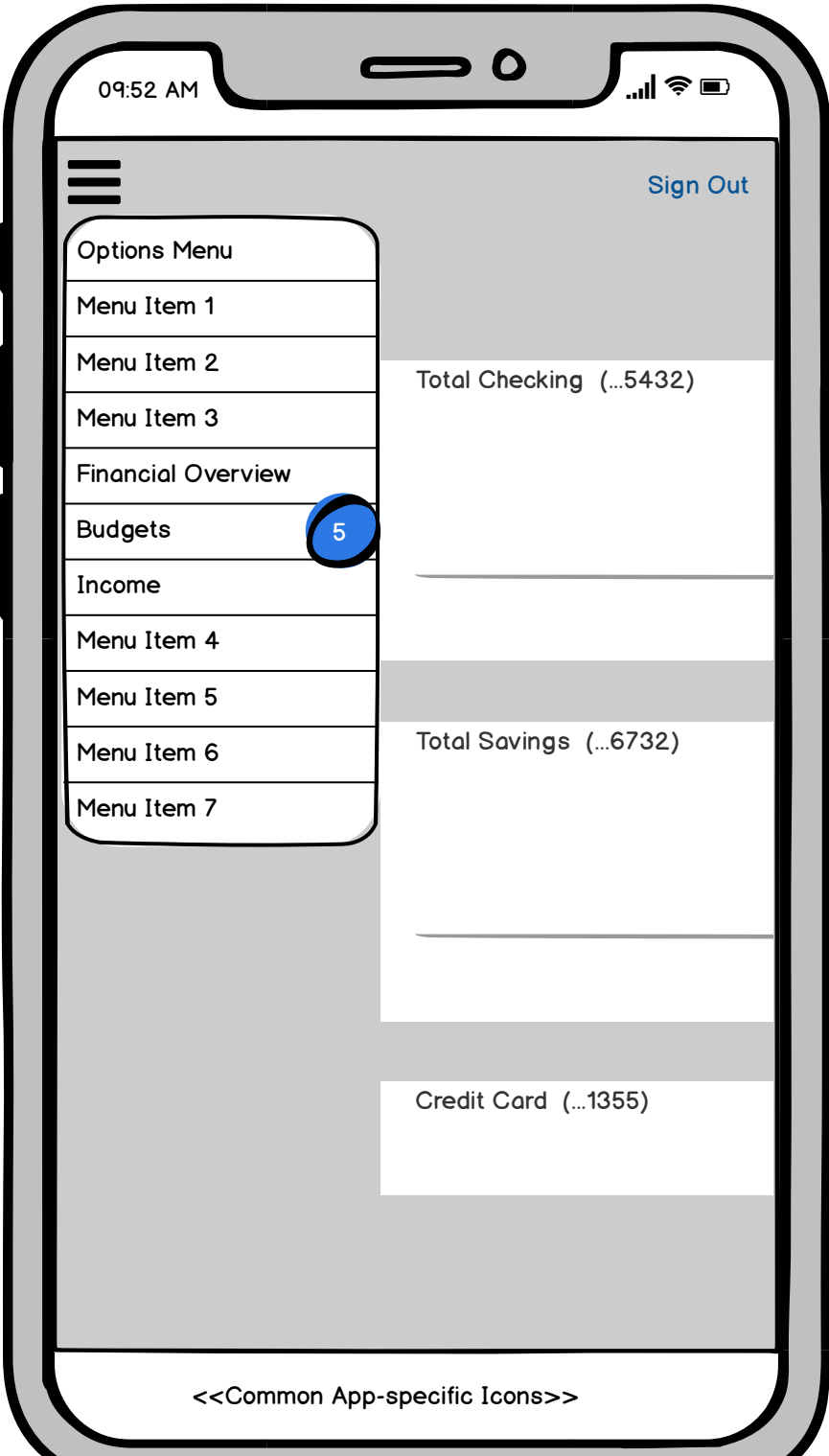
Banking App New Features Frame 3 Expenses 30 Days



Page Notes

3. Allows customer to add/remove from Personal Budget.
4. Tapping paginates to previous/next set of results. Previous is disabled on first page and next is disabled on last page. Only refreshes the Personal Expenses portion of the page. Optionally, could be scrollable rather than paginated.

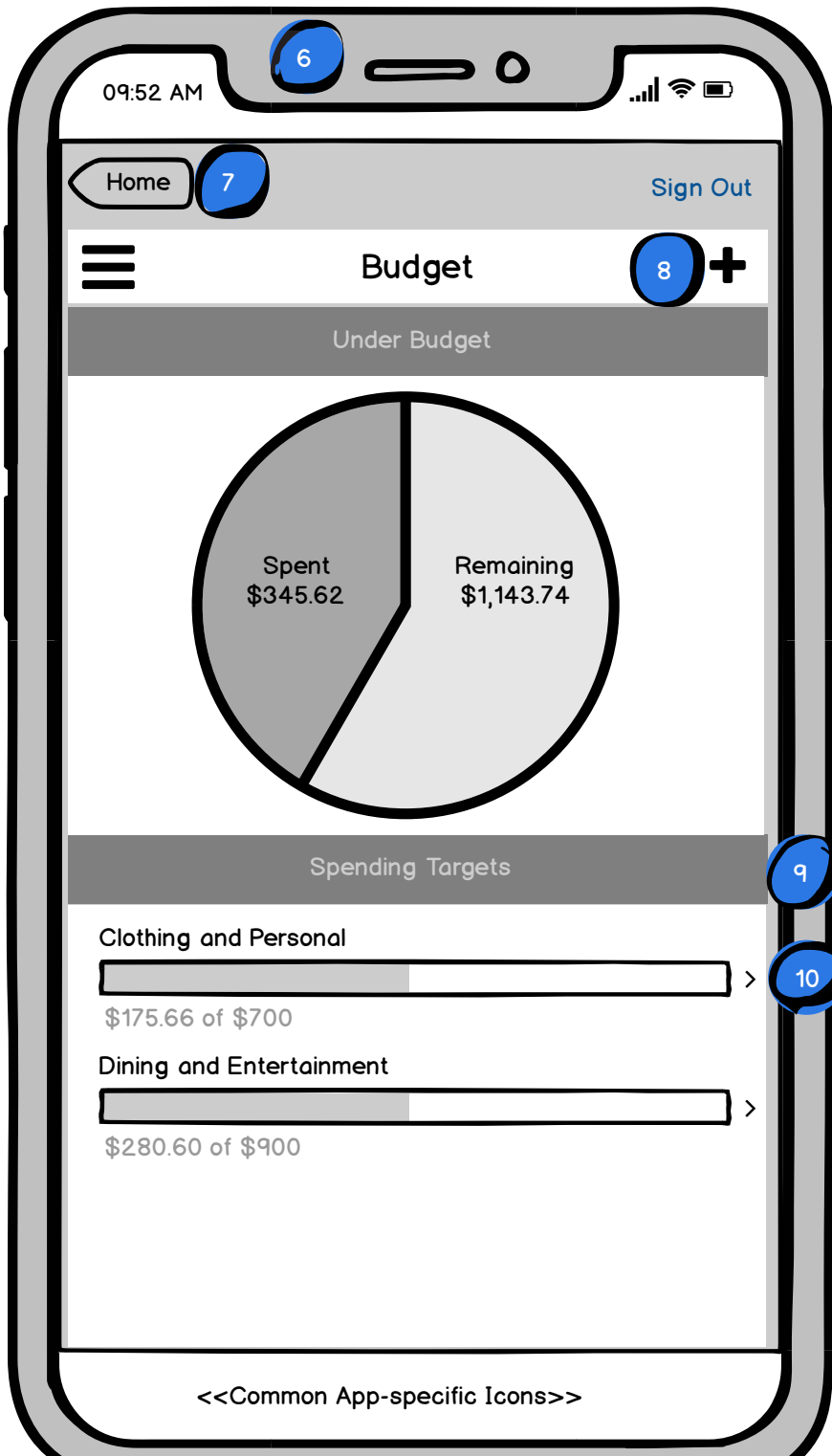
Banking App New Features Frame 4 Select Budgets



Page Notes

5. Tapping loads the "Budgets" page.

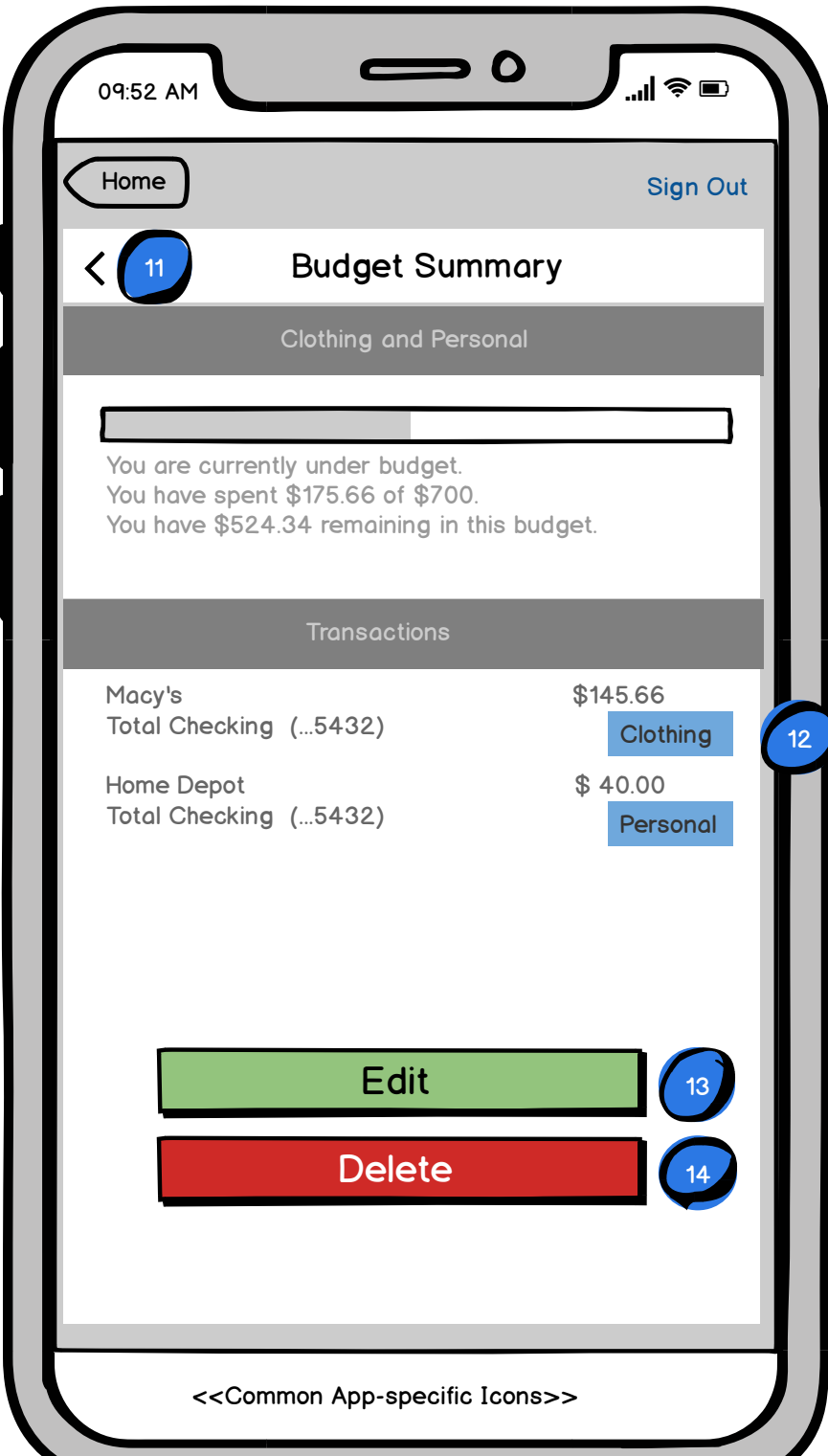
Banking App New Features Frame 5 Budgets



Page Notes

6. If no Budgets are set up, the customer will be guided through the information pages to set up specific budgets by selecting categories to include in the specific budgets, for example, a budget could be set for personal spending, a separate budget for bills, a separate budget for entertainment, etc., each with a specific target spending limit. Once the budgets are set, notifications can be sent via email, SMS, or both when approaching or going over the set limits. The customer would also select the account for which the budget will be used.
7. Note: the menu icon is moved down in order to place a "Home" button at the top for easy access to return to the home page.
8. Allows customer to add a new budget, which will step through the new budget setup.
9. A line item is displayed for each budget that has been setup.
10. Tapping opens the "Budget Summary" page.

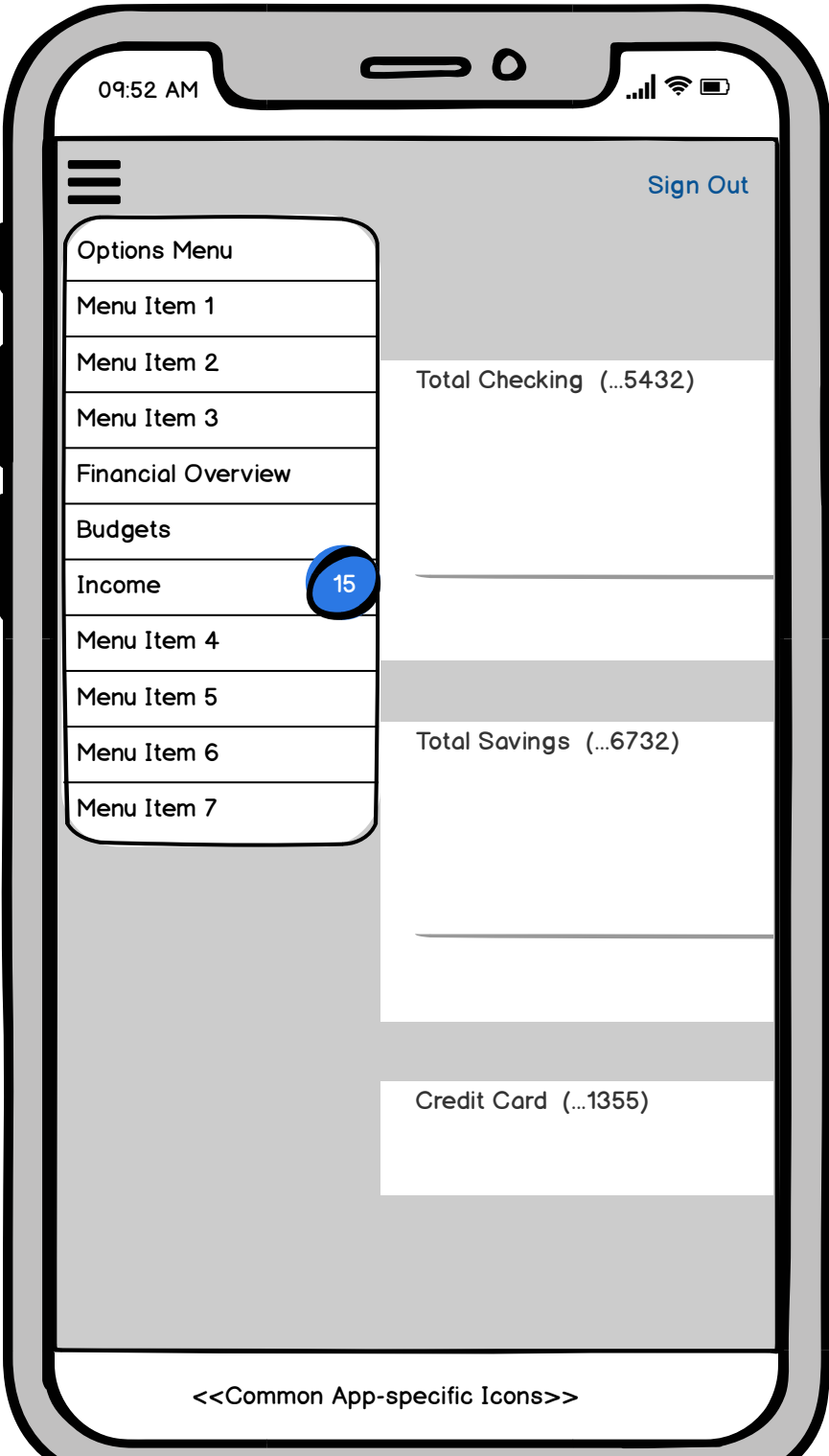
Banking App New Features Frame 6 Budget Summary



Page Notes

11. Tapping returns to the "Budget" main page.
12. Budget category.
13. Edit allows the customer to change or add budget categories.
14. Delete allows the customer to delete a budget category. In the case of multiple categories listed, the "Delete" page allows the user to select which category to delete.

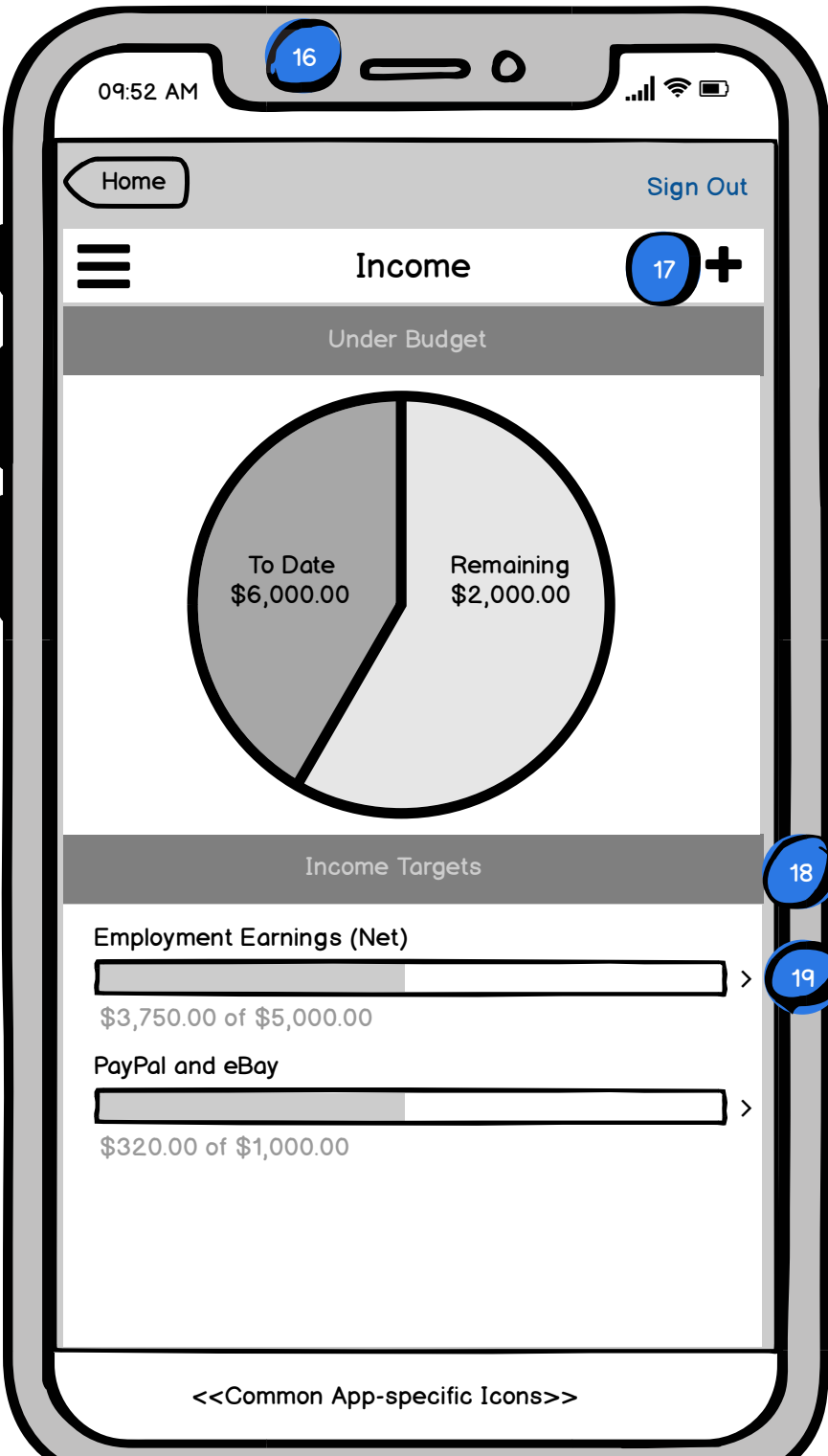
Banking App New Features Frame 7 Select Income



Page Notes

15. Tapping opens the "Income" page.

Banking App New Features Frame 8 Income



Page Notes

16. If no Income sources are set up, the customer will be guided through the information pages to set up specific income sources by entering an income source and expected amount, such as an employment paycheck and a PayPal account. Once the incomes are set, notifications can be sent via email, SMS, or both based on the customer's preferences. The customer would also select the account to which the income will be assigned.

17. Allows customer to add a new "Income" source, which will step through the new income source setup.

18. A line item is displayed for each income source that has been setup.

19. Tapping opens the "Income Summary" page. (Not shown in this set of wires, would be similar to the "Budget Summary" page.)