ALISA

Task Analysis & User Flow

PlutoPay

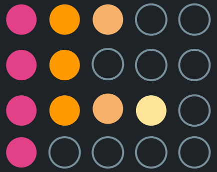
ALISA, 36

The Adventure Seeker

Albuquerque, NM
Engaged, Travel Nurse and Part-time Online Math Tutor
Has a twin sister

Technology

INTERNET
MOBILE APPS
DESKTOP
EARLY ADOPTION



Objective

Schedule Payments and track wedding-related receipts

User Story

As a person overwhelmed with wedding planning, **I want to** schedule my payments to our wedding vendors and track receipts using PlutoPay **so that** I can stay organized and stay on top of my installment payments and keep record of wedding expenses.

Information Gathering

What is it that's prompted my persona to begin the task?

She schedules a payment because she does not want to worry about missing an installment payment to one of her wedding vendors. She wish to keeps track of her receipts are for organization and proof of payment so they are all in one place and just to keep track of how much this wedding is costing them as a couple.

What will tell the persona that their task is finished?

Successful payments to vendor on the date she predetermined and seeing all wedding transactions in one folder for easy access anytime and anywhere.

What information does the persona already know about the process?

Scheduling a payment is the same as her regular checking account. Tracking receipts is new but a necessity.

What additional information does the persona need to know to complete the task?

Vendor information (account number, phone number, email etc) tied to their payment account. Difference between tagging a receipt and putting a receipt in a folder.

What tools will the persona need to complete the task?

Internet access is needed for any payment or remittance. A calendar to double check correct date.

Entry Point

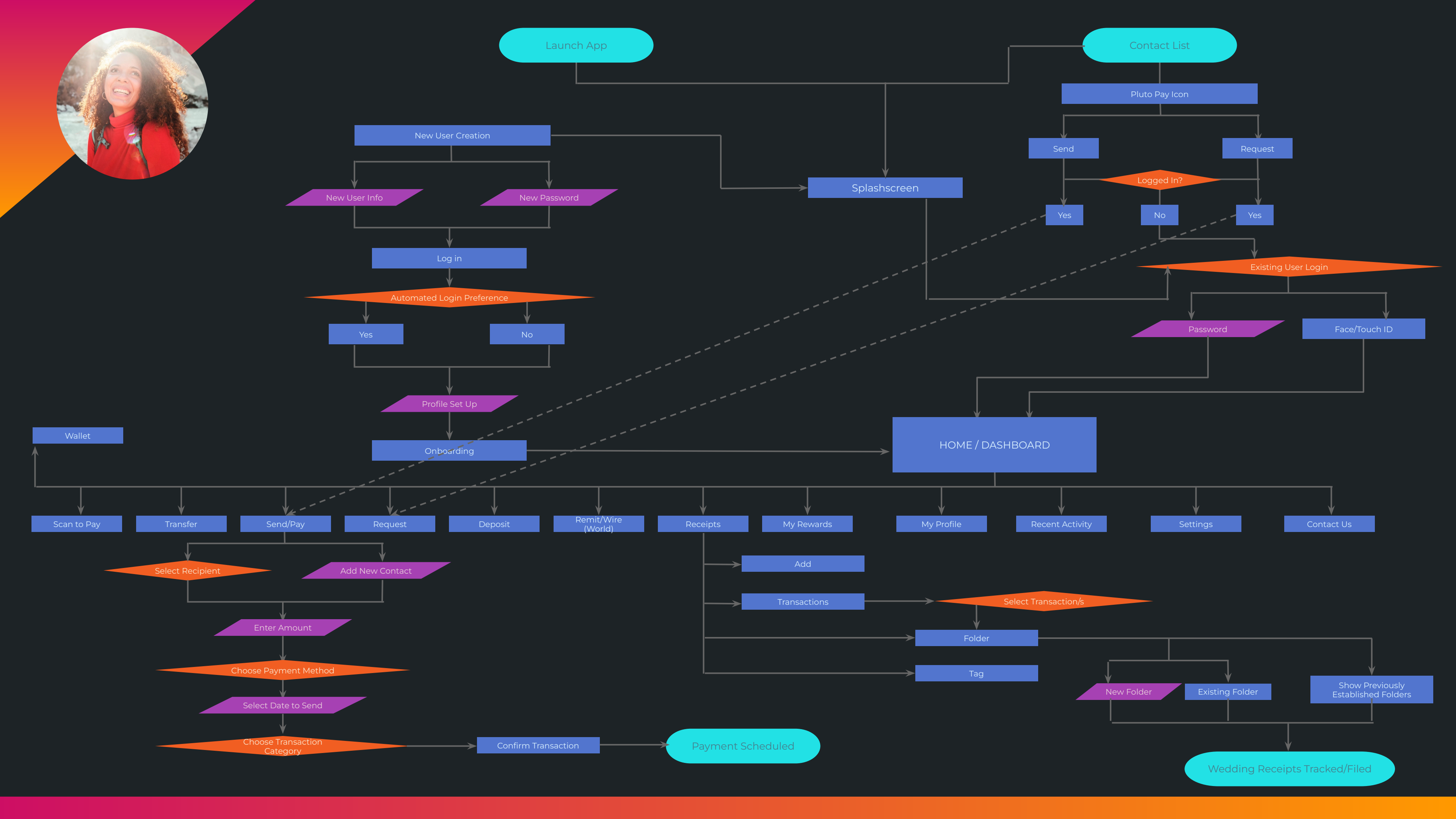
Open app

Success Criteria

Scheduled payments sent on desired date & receipts saved

Task Flow

1. Open app or go to website and log in
2. Sign in with email and password or via Face ID or other biometric methods
3. From the homepage dashboard, navigate to and select the *Send* icon
4. Select recipient or add a new contact
5. Enter amount
6. Select which account to pay with
7. Choose the date to send
8. Click on optional *Transaction Category* dropdown and *Wedding* from previous transactions
9. Confirm Transaction by pressing send
10. Navigate to and select receipts icon
11. Press *Wedding* folder and view current wedding receipts thus far


Launch App
Contact List
Pluto Pay Icon
Send
Request
Logged In?
Yes
No
Yes
New User Creation
New User Info
New Password
Splashscreen
Log in
Automated Login Preference
Yes
No
Existing User Login
Password
Face/Touch ID
Profile Set Up
Wallet
Onboarding
HOME / DASHBOARD
Scan to Pay
Transfer
Send/Pay
Request
Deposit
Remit/Wire (World)
Receipts
My Rewards
My Profile
Recent Activity
Settings
Contact Us
Select Recipient
Add New Contact
Add
Transactions
Select Transaction/s
Enter Amount
Folder
Choose Payment Method
Tag
New Folder
Existing Folder
Show Previously Established Folders
Select Date to Send
Choose Transaction Category
Confirm Transaction
Payment Scheduled
Wedding Receipts Tracked/Filed