

**Hello,  
we are  
Finu.**

Financial Literacy:  
Family  
Finance

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# **Value Proposition**

Collaborative analysis of financial media

# **The Problem**

When dealing with important financial documents, it's difficult to collaborate through text and call.

# **The Solution**

We provide young adults the tools to more effectively seek help from their family through textual, audial, and visual annotation.

# Tasks

**Simple:** Sharing a project with a contact

**Medium:** Creating a new project

**Complex:** Annotating a project

# Revised UI Designs

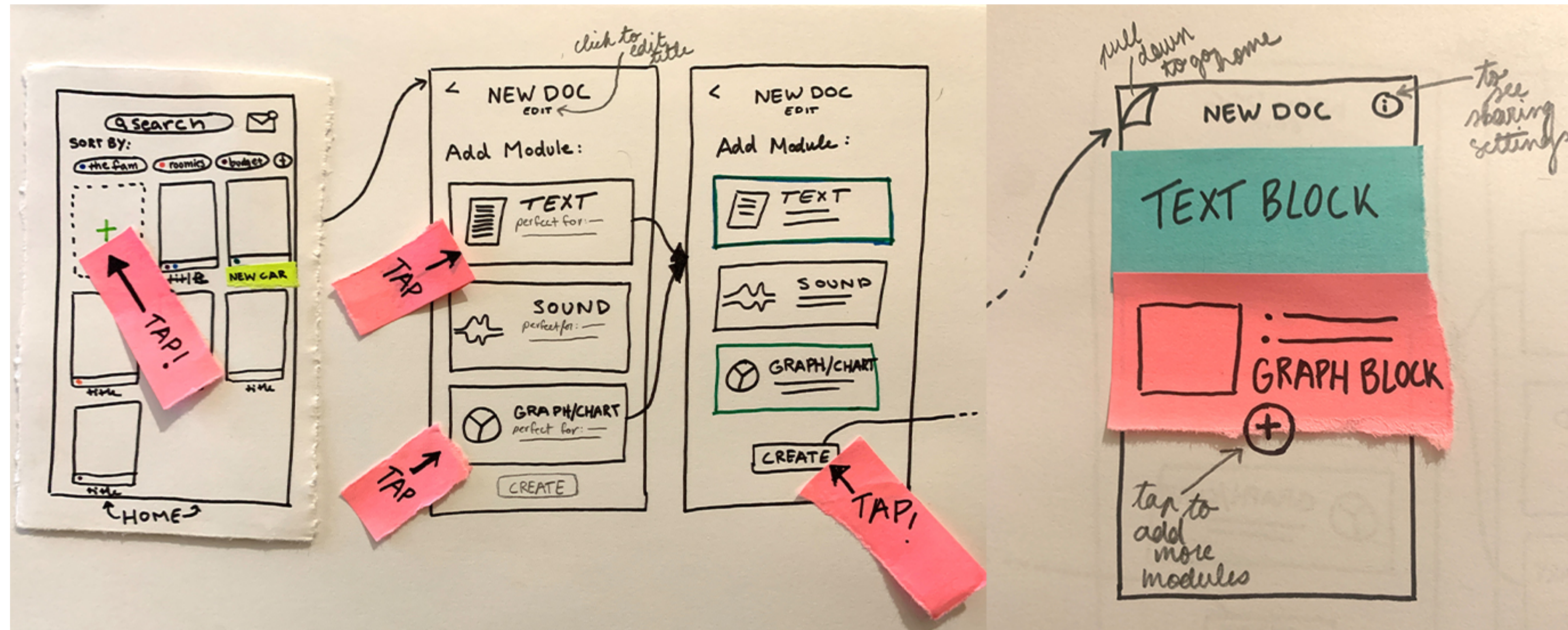
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# Design Change 1: Organizing Groups (Before)

# Design Change 1: Organizing Groups (After)

Instead, we implemented a group button at the bottom right, that users could tap to view the current group of contacts their project was shared with. From this group page, users could also add or remove contacts.

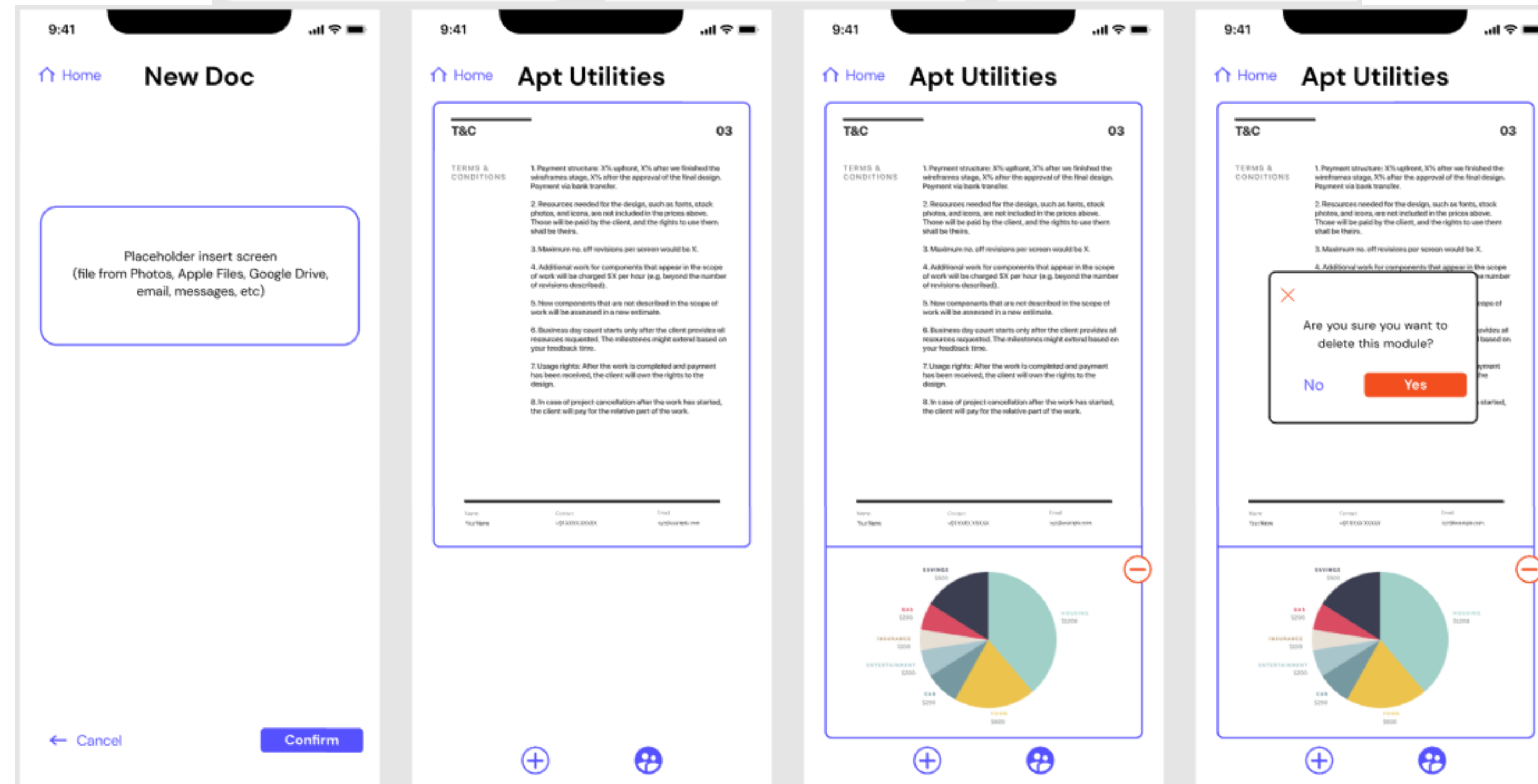
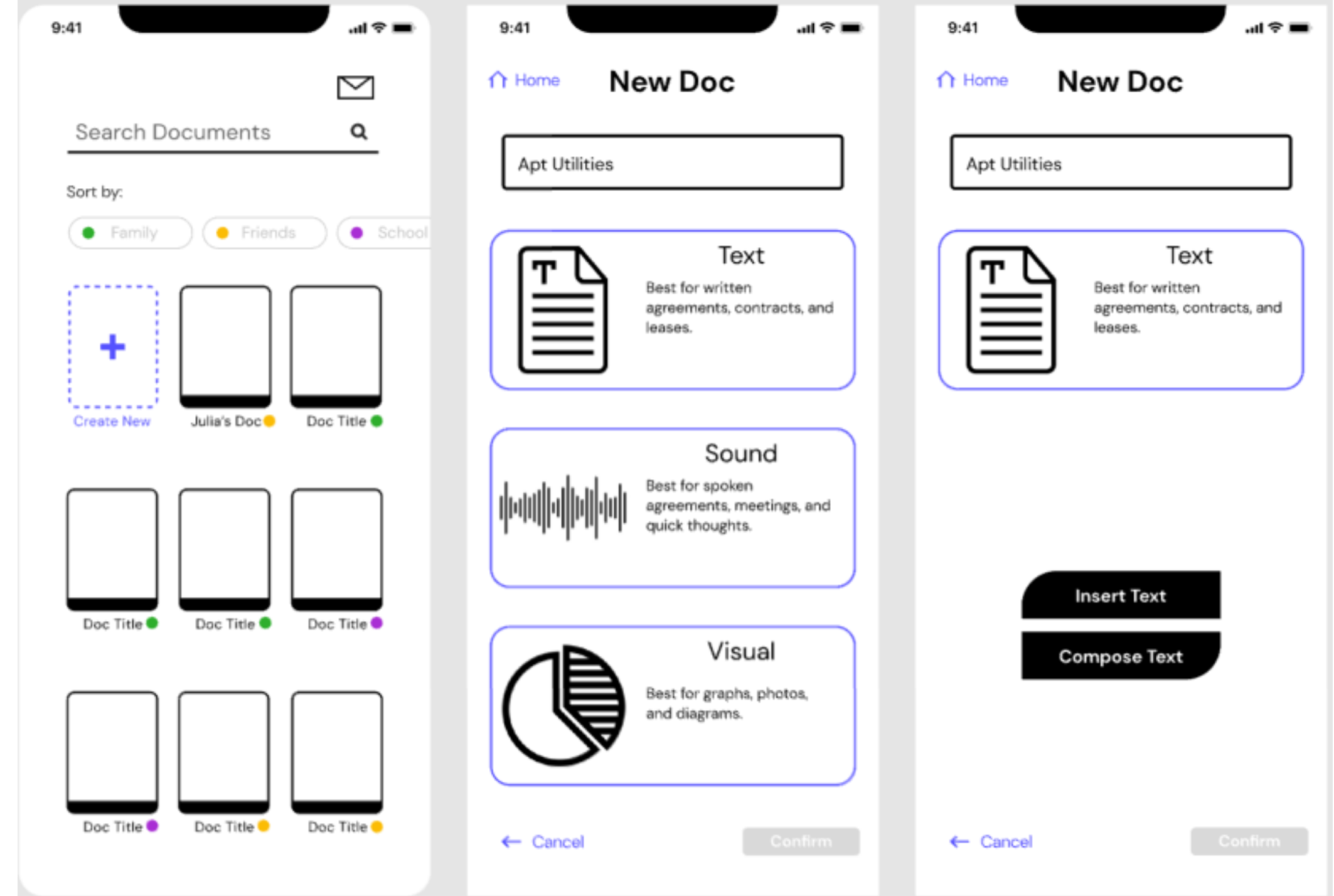
# Design Change 2: Modules (Before)



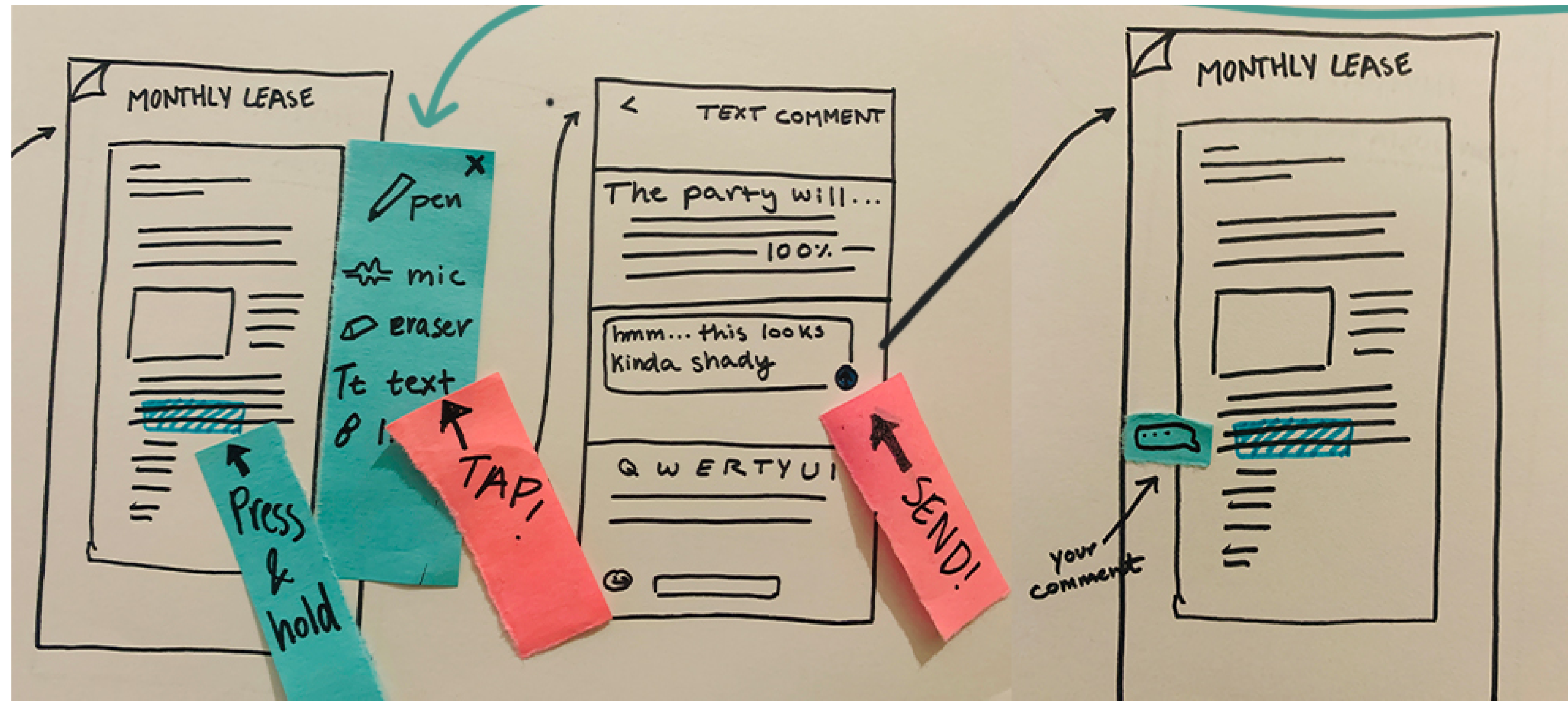
Users pointed out that there was no way to delete modules, and it was unclear whether they were able to insert previous existing media into these modules.

# Design Change 2: Modules (After)

We added intermediate screens during module creation to clarify users' intentions - as to whether they wanted to compose in their new module or import existing media into their module. We also added an icon to delete the module.

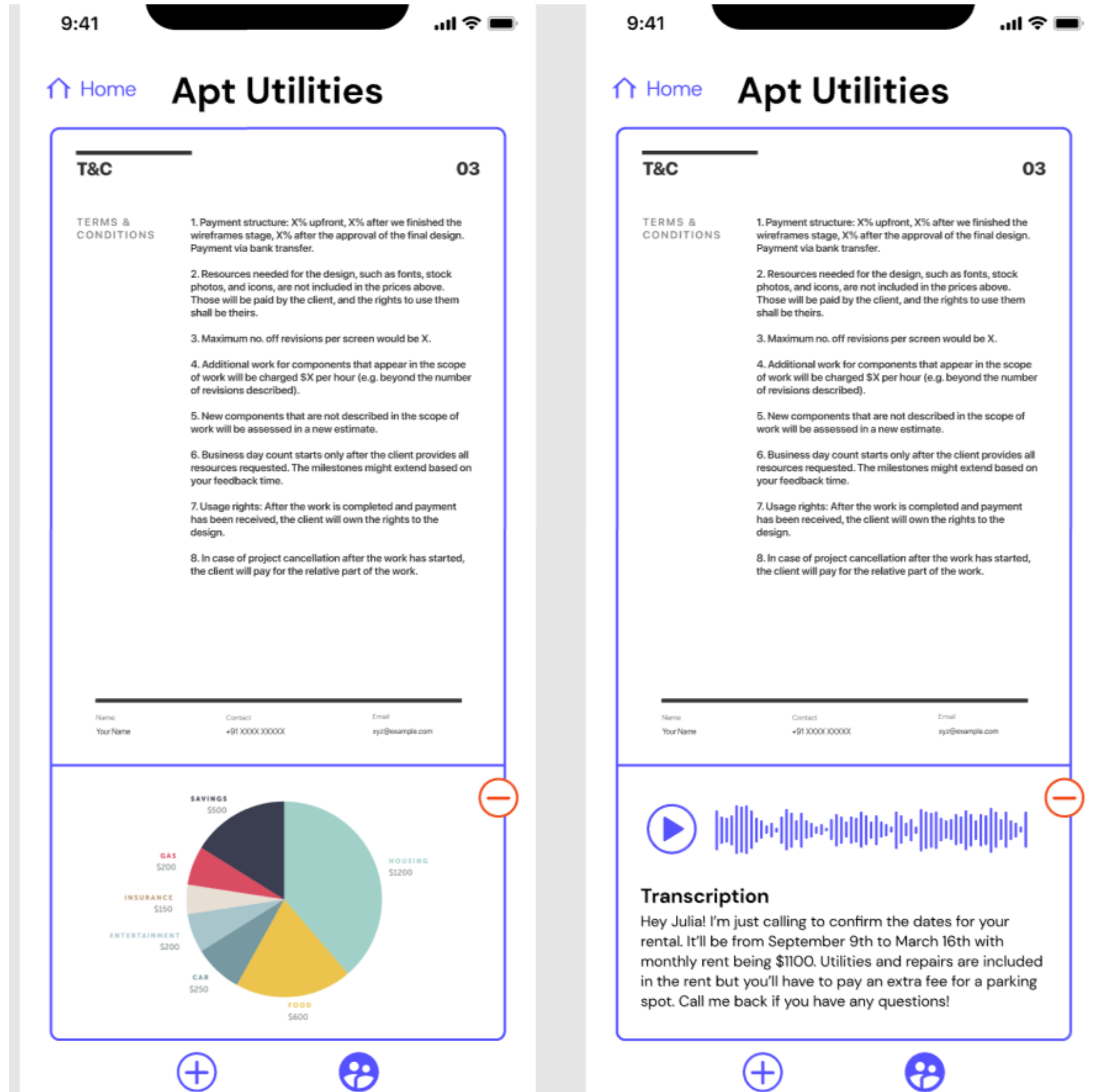


# Design Change 3: Voice (Before)



Although the auditory annotation was one of our main value adds, it was not properly emphasized in the lo-fi prototype. We wanted to make it easier and more intuitive for users to insert non-textual media.

# Design Change 3: Voice (After)



We gave non-textual modules a more pronounced appearance that would draw users' attention. We added a vocal transcription component to the auditory module.

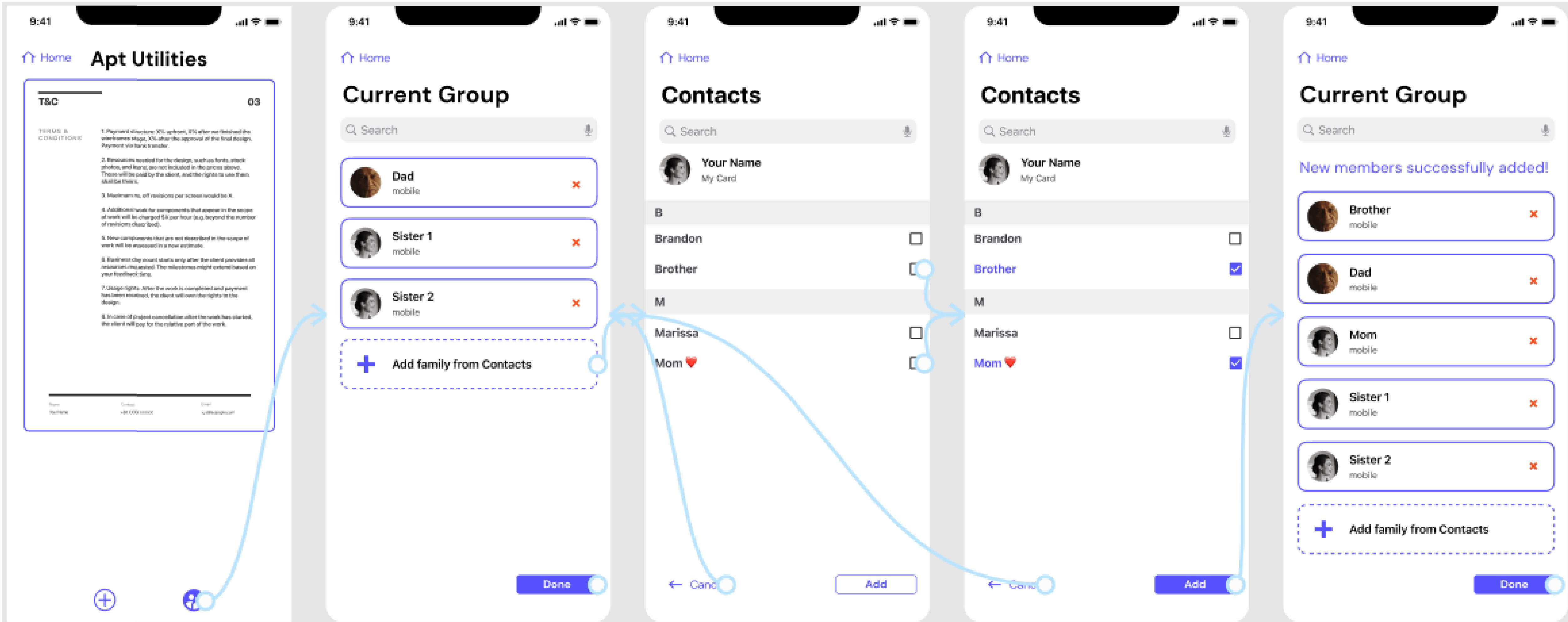
# **Task Flow**

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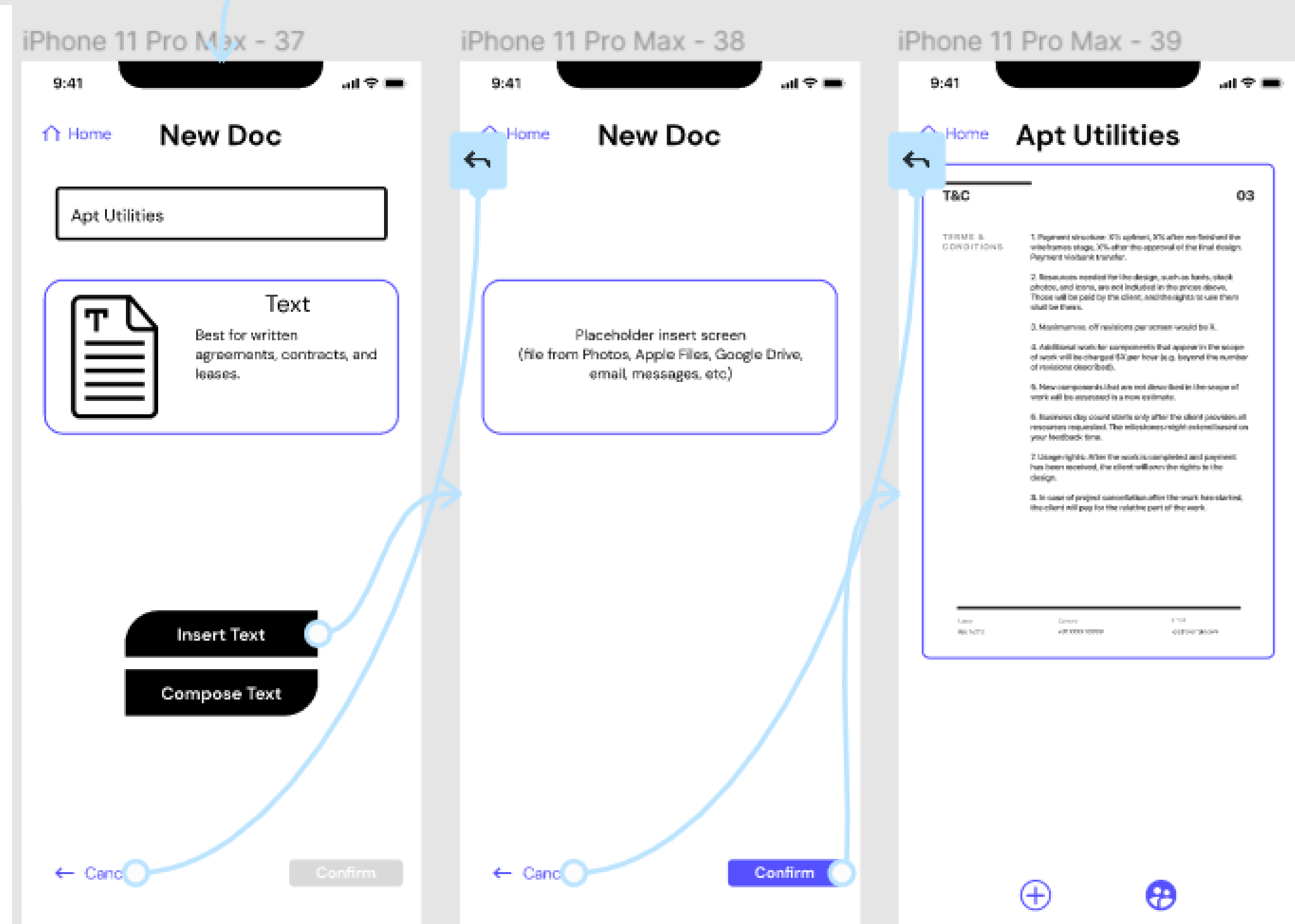
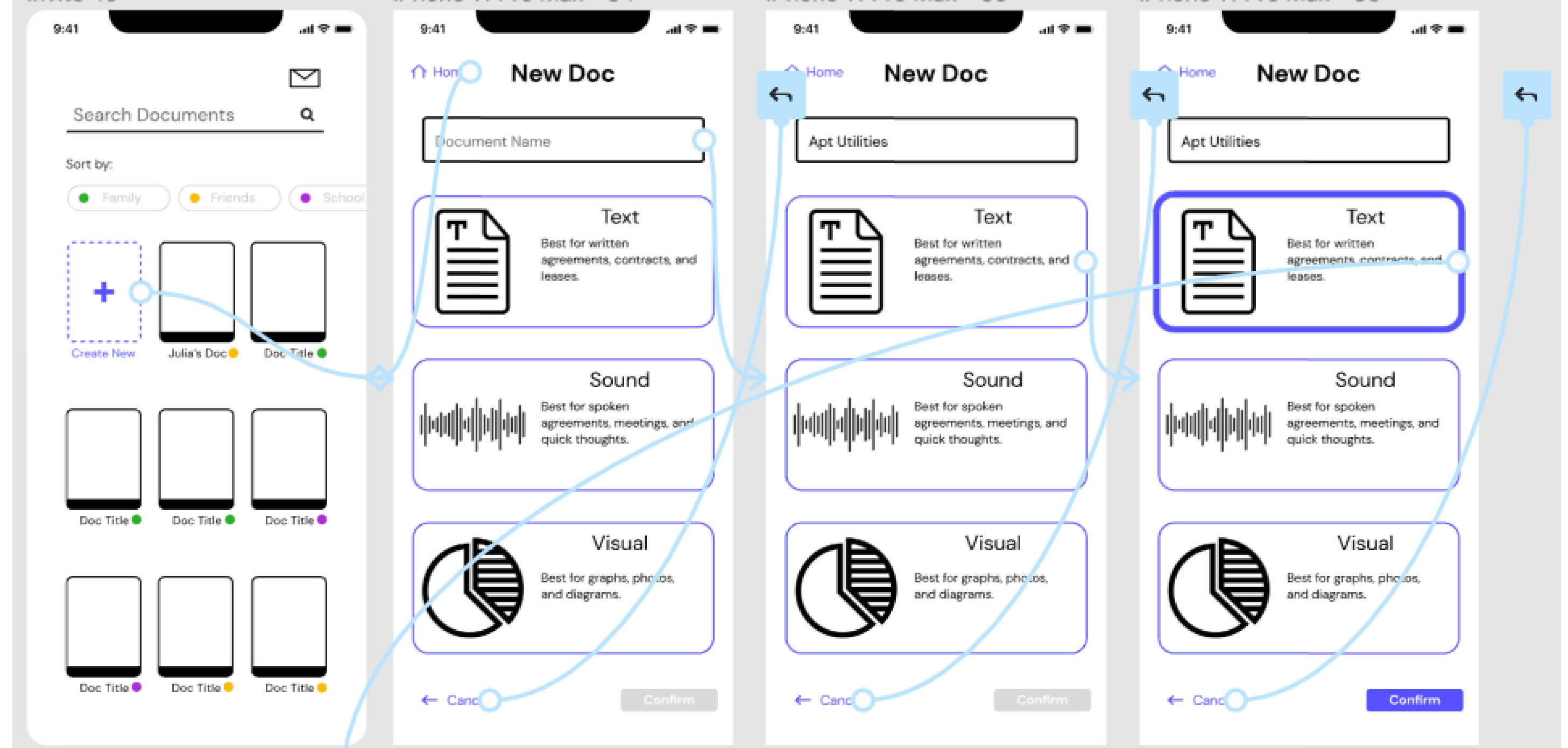
# **Storyboards**

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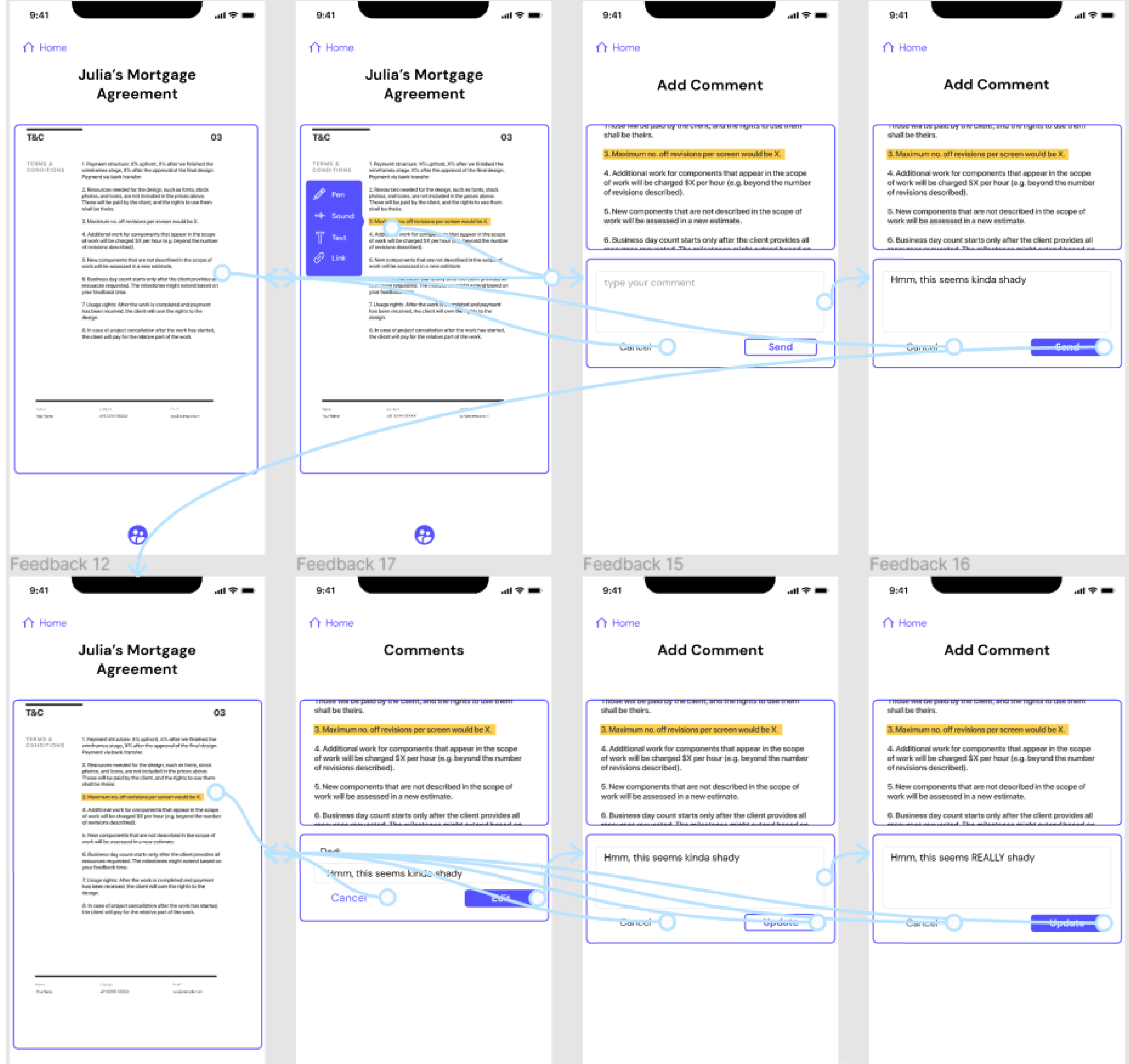
# Sharing a Project Task Flow



# Creating a Project Task Flow



# Annotating a Project Task Flow



# Tools and Methods

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# Design & Prototyping Tools

## Figma for both UI and Prototyping

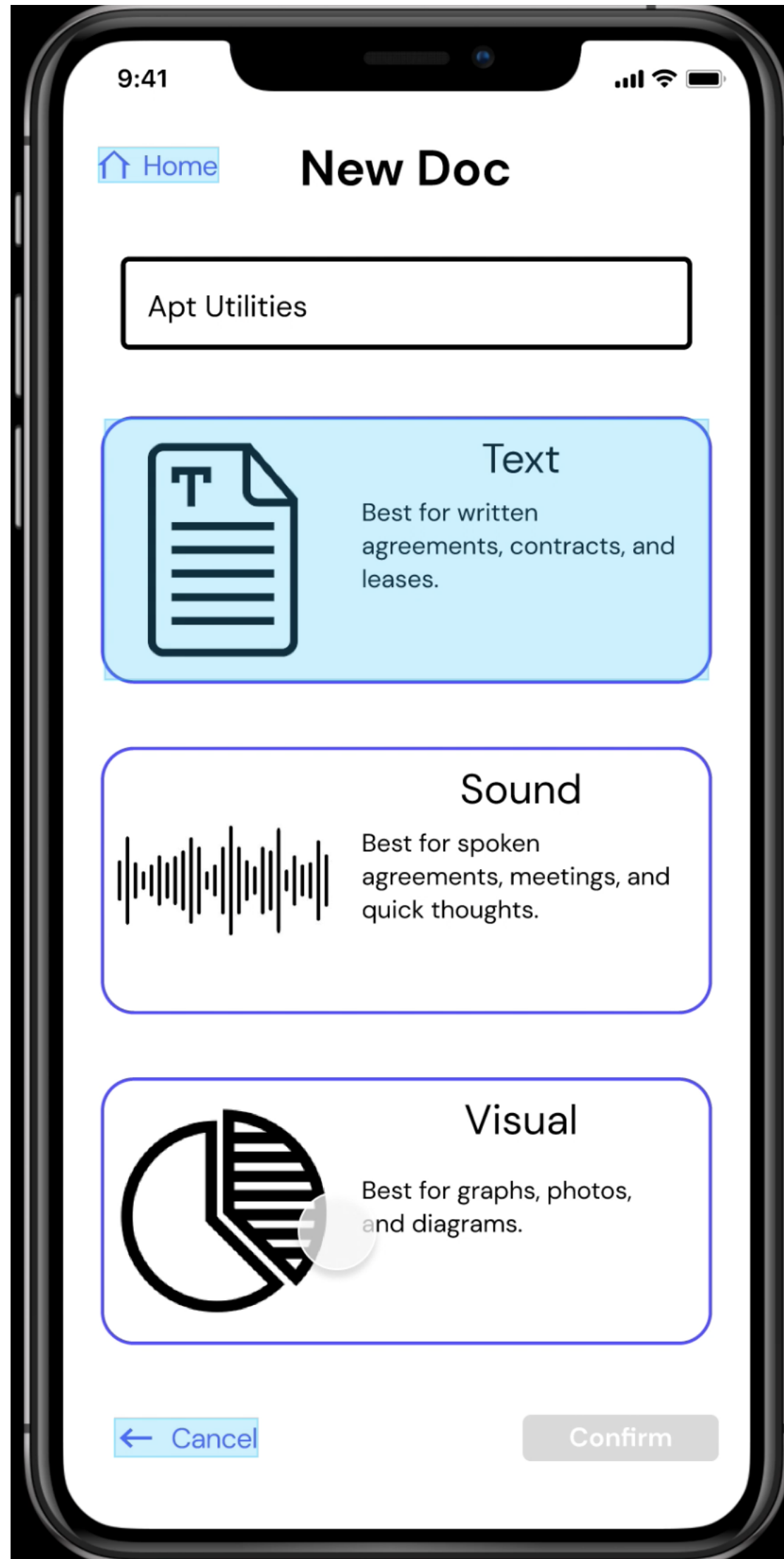
### Pros

Super great for collaborative design work at scale. Also, prototype interactions were easy enough to learn on the go.

### Cons

Challenging to create similar screens (visually) with multiple collaborators designing different screens. Also, there are limitations to how advanced interactions can get.

# Limitations & Tradeoffs




Scrolling through input was not available and there were many spots with pre-filled inputs due to being unable to store memory.

No traditional on-boarding or tutorials were available.

Voice annotation is key to our concept, however, it is impossible to truly do in Figma. As such we had to make it look like there was a way to record, with pre-filled audio clips.

There were a large number of possible permutations (filters enabled, order of modules, contacts added, etc.) thus we were unable to implement all of them

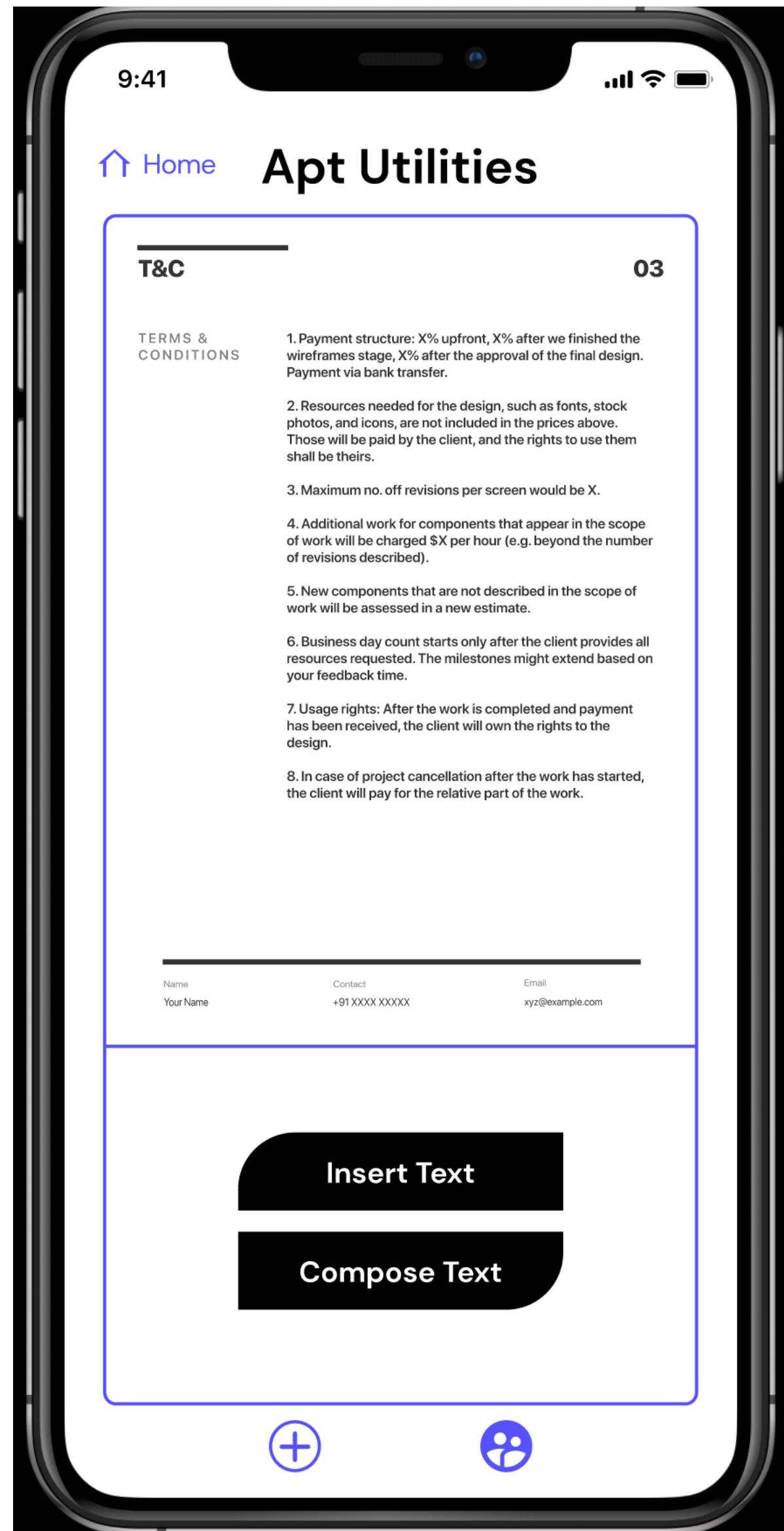
# Wizard of Oz Techniques



**Transcription**  
Hey Julia! I'm just calling to confirm the dates for your rental. It'll be from September 9th to March 16th with monthly rent being \$1100. Utilities and repairs are included in the rent but you'll have to pay an extra fee for a parking spot. Call me back if you have any questions!

Although we would like our product to have automatic audio transcription, it would be immensely difficult to implement an NLP nonetheless beyond the scope of a med-fi prototype.

# Hard Coded Features



When adding to a document, the user isn't able to actually upload a file or input text/sound/visuals. That was preset and they would simply press one button in Figma and it would appear as if they uploaded a file.

We also had to make text-input a hard encoded feature as there were limitations to this feature in Figma.

# Figma Proto Link:

<https://www.figma.com/proto/0jnNe1AsxMW1f1KLGHEYHoz/Finu?node-id=444%3A735&viewport=-2398%2C2966%2C0.5&scaling=contain>