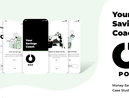


Your Savings Coach

POT

Money Saving App
Case Study

What it is?

Pot is a **money-saving app** designed to **help** users **take control** of their **finances with ease**. It provides a clear overview of savings, spending, and financial goals in a user-friendly and approachable way.

PROBLEM

Many people struggle to track their savings and spending effectively, leading to missed goals and unnecessary stress. Traditional budgeting tools can feel overwhelming or too complex.

SOLUTION

Pot simplifies finances with an intuitive, friendly interface, clear visuals, and smart reminders, making financial management easy and approachable for everyone.

THE VOICE OF POT

Clear, Friendly & Empowering

POT is the...

- Encouraging Coach
- Supportive Friend
- No-Nonsense Guide

Smart advice to help users stay on track with their savings

- Always on track with personalized insights to keep users updated at all times.

USER FLOW

KEY FEATURES

- **Add savings** easily in step on track
- **View total savings** at a glance
- **Track progress** with the option to see insights
- **Receive app messages** for guidance and motivation
- **View income breakdown** by time period and manually add income

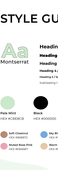
- **Add expenses** quickly and easily
- **Track spending** by category and time
- **See total expenses** at a glance

- **Track all expenses in detail** (amount, date)
- **Filter, search, and sort** for precise and efficient tracking
- **View expenses by time period** for better analysis
- **Receive app insights** to stay updated on spending habits
- **Set a budget** to manage expenses within the category
- **Edit category settings** (change color, delete, modify details)

WIREFRAMES

LOW FIDELITY

MID FIDELITY



USER TESTING

To ensure a user-friendly experience, two flows were tested with potential users: adding savings and filtering expenses. Their feedback helped refine the final design.

TASKS

- Add an Expense
- Manage Spending and Category

The Feedback Highlights...

High-Fidelity Wireframe

Updated Based on Testing

Key Design Directions

- **Creating more space** to reduce visual clutter
- **Preserving user overwhelm** by limiting excessive information
- **Prioritizing key information**, for easy scanning and understanding
- **Maintaining a clean, intuitive design** for a seamless experience

STYLE GUIDE

Montserrat

Heading 1 / Bold 30px
Heading 2 / Black 30px
Heading 3 / Bold 30px
Heading 4 / Bold 20px
Heading 5 / Semibold 18px
Subheading / Regular 18px

Subheading 2 / Semibold 16px
Subheading 3 / Semibold 14px
Body / Regular 16px
Body / Regular 14px
Text Field / Semibold 14
Text Field / Regular 14
Text Area / Regular 14

Pale Mint HEX #C3E8C8	Green HEX #00000	White HEX #FFFFFF	Cloud Grey HEX #EEEBEB	Golden Yellow HEX #FFCC00
Soft Charcoal HEX #3A3A3A	Sky Blue HEX #A0D8EF	Muted Lavender HEX #B8A8D3	Sunset Orange HEX #FF8A65	
Forest Pine HEX #3B4A6B	Warm Beige HEX #E6D7B8	Warm Blush Red HEX #E7B7B5	Golden Sand HEX #E6C9A0	

FINAL SCREENS

Takeaways

Designing Pot was about striking the perfect balance—making finance **approachable and easy**, while maintaining the **seriousness and trust** the topic demands. The challenge was to create a **fresh, engaging experience** without overwhelming the user.

Key lessons learned:

- **Simplify complex financial concepts** without losing clarity or accuracy.
- Maintain a balance between **playfulness and professionalism** in tone and visuals.
- Prioritize **core features**, ensuring the interface remains clean and intuitive.
- Craft a **user-friendly experience** that encourages financial progress without pressure.

This project reinforced my approach to **design—focusing on clarity, simplicity, and usability**—to create meaningful experiences that feel both intuitive and visually engaging.

Illustration credits: StoryBlocks (Flaticon), vectorized and modified in Inkscape and made to resemble Montserrat font.

THANK YOU FOR YOUR TIME

M / UX Designer | EDLIN MONTE