



Mobile Banking App - Mortgage User Screenflows

Shannon Kelly - March 19, 2023

Screenflow set 1 - Welcome, Login, Signup, Password reset flow for a Mortgage customer

Required Screens:*

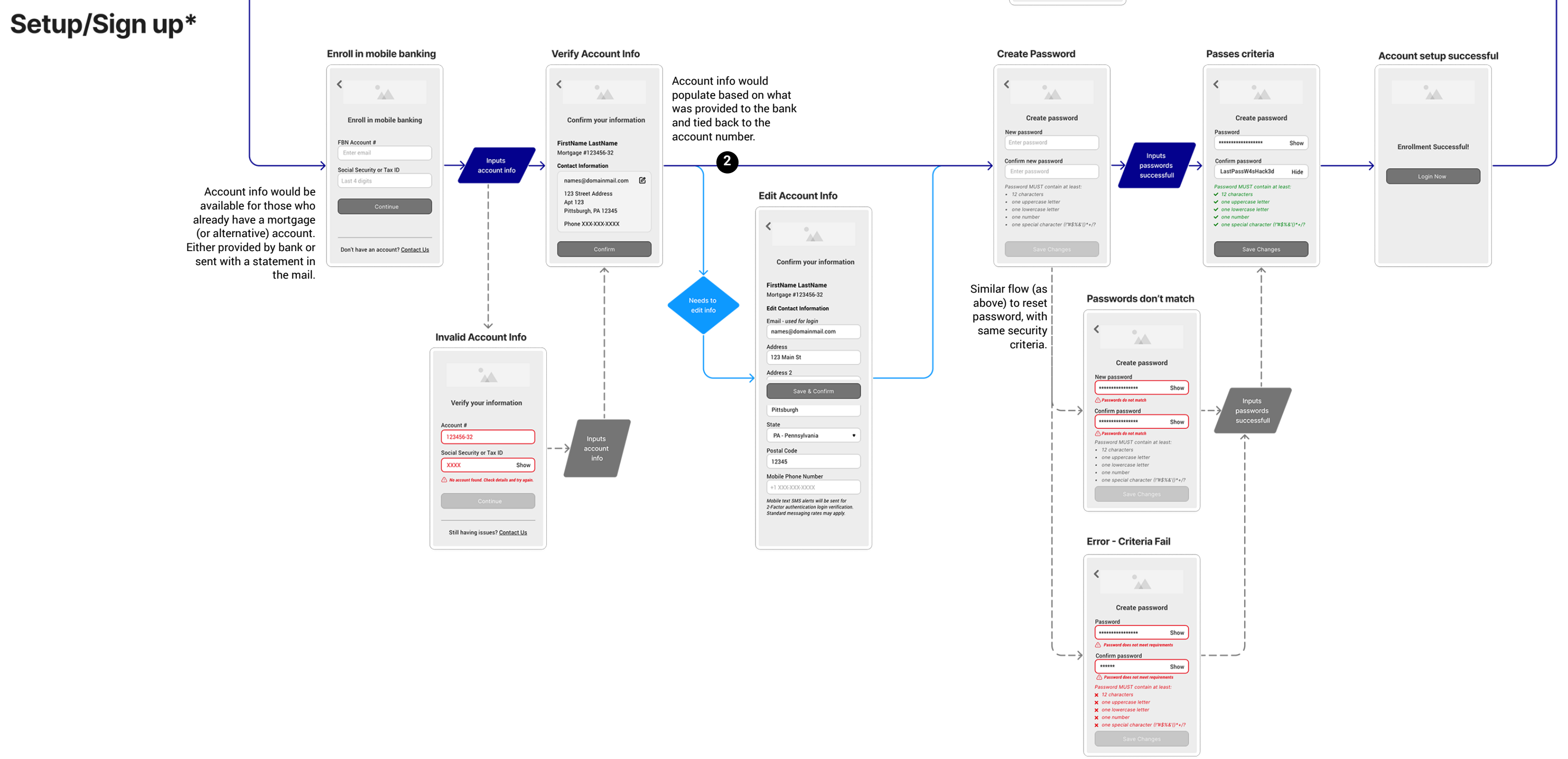
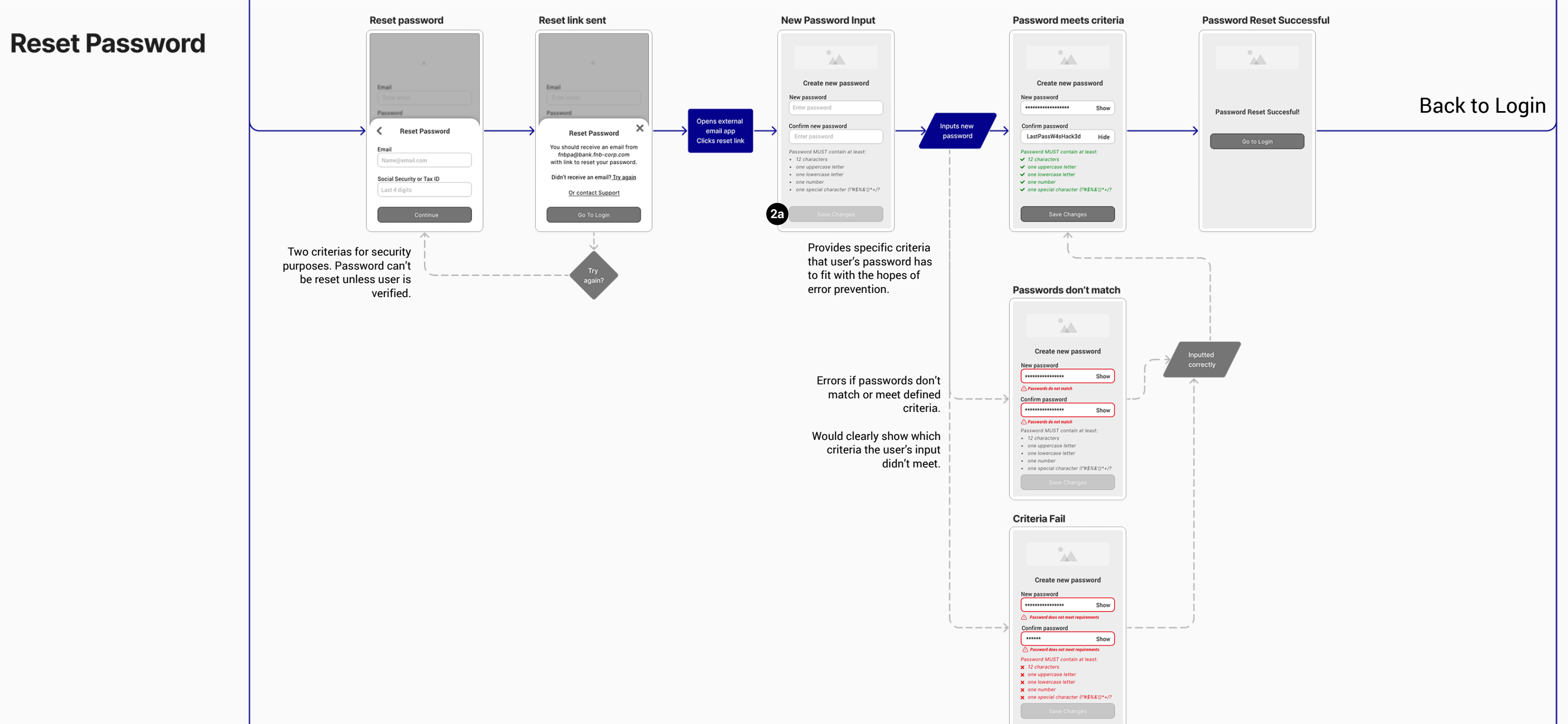
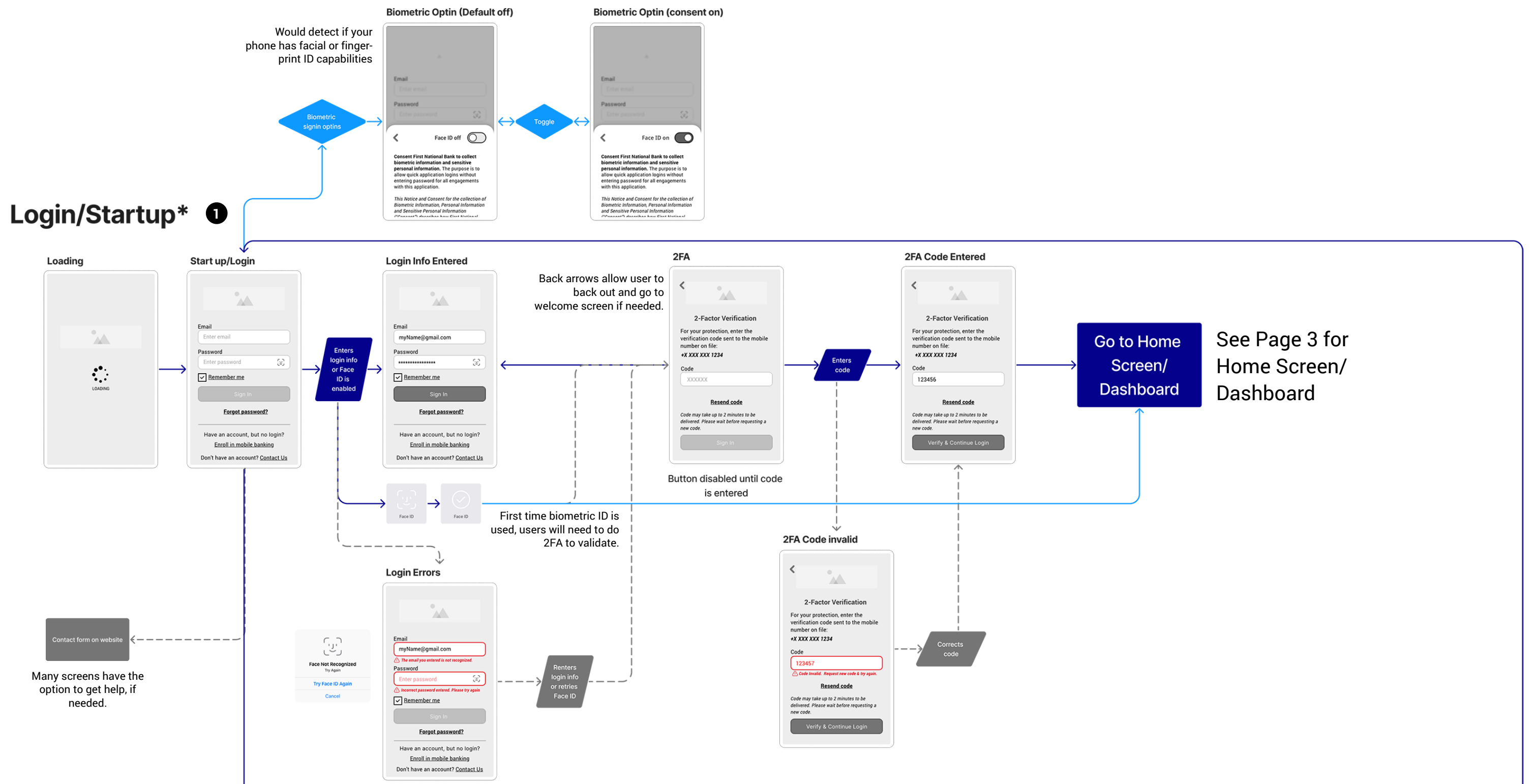
- Sign Up/Register or Set Up
- Login and/or Start Up Screen

Project brief functionality

1. Easily and securely sign in, including using Face or Fingerprint ID options.
 - With the addition of 2FA verification, especially those not utilizing biometric login methods.
2. Access account information and change personal information
 - a. Updating passwords

Key

- Main/ideal flow
- Secondary Flow/ Decisions
- Errors, Deletion or Alternative Actions



Screenflow set 2 - Home Dashboard, Account details and Transfer/Pay Tab

Required Screens:*

- Home Screen/Dashboard
- Main Service or Functionality

Project brief functionality

3. Ability to check mortgage balance(s) and download statements.
4. Display payment changes (increases, decreases, overdue)
5. Set up or reconfigure automatic payments.
6. Make extra principal payments (and payoff loans/late fees)
7. Connect to outside banking institutions from which to make payments.

Navigation Bar

Home: Dashboard to see all accounts

Transfer & Pay: Make payments (one-time or recurring), see history and schedule of payments, add and remove external accounts.

Deposit: for checking/saving customers only (doesn't apply to mortgage-only persona)

More: Account & security settings, notifications, & support.

For most internal task flows, navigation bar disappears but the ability to go back or cancel out of a task is always available. This is common within many mobile banking applications (First National's competitors included.)

Key

- Main/ideal flow
- Secondary Flow/ Decisions
- Errors, Deletion or Alternative Actions

