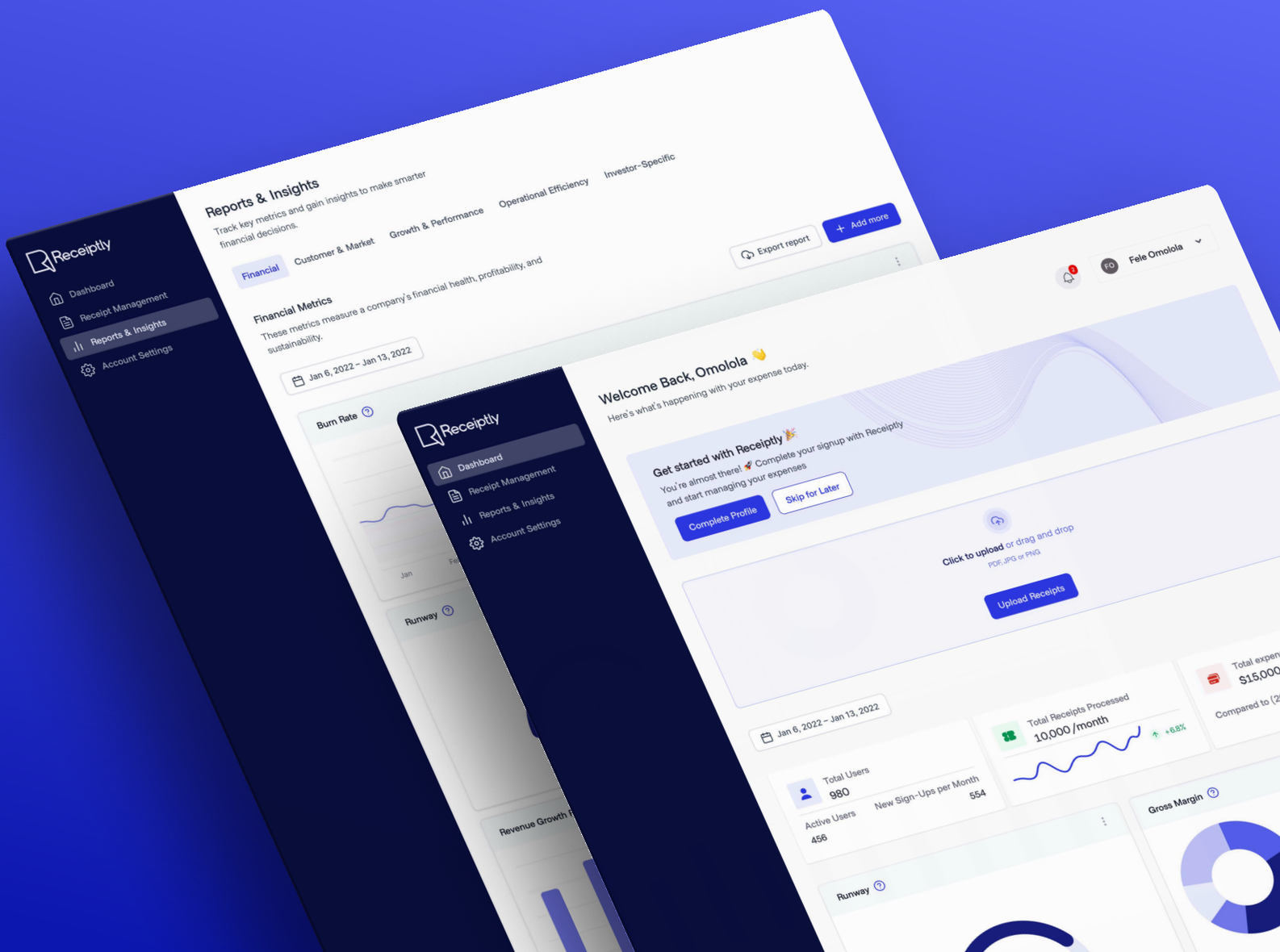
Project Proposal.

By- Team Code & Canvas



Content

1. Project Overview

1.1 Product Overview 04
1.2 Market Analysis 05
1.3 Main Features 06
1.4 Data Visualization 07
1.5 Competitor Analysis 08

2. Design and development plan

1.1 Design Plan 10
1.2 Development Plan 11
1.3 Technologies Used 12

2. Design and development plan

1.1 Personas 19
1.2 Userflows 21
1.3 UI kit & Components 26
1.3 Business Model 29

4. Mockups

1.1 Web and mobile mockups 31

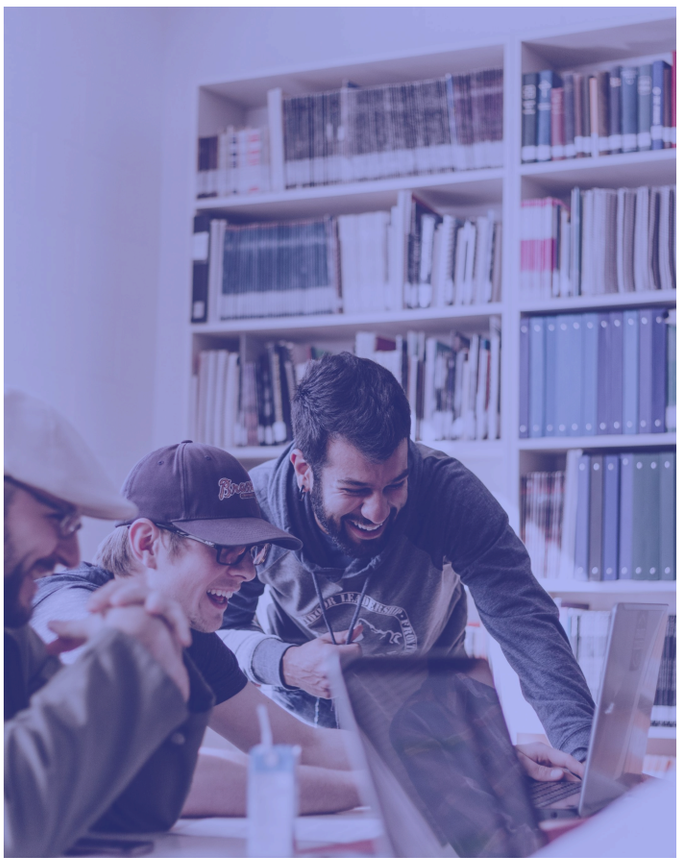
5. About Us

1.1 Meet the Team 35
1.2 Reference 38

Project Overview

Product Overview

Small businesses and startups struggle with expense management, relying on outdated methods that cause errors and slow operations.Receiptly automates the process, capturing and categorizing receipts for easy financial tracking. With AI driven insights and investor ready reports, businesses save time and make better decisions.Designed for seamless use, Receiptly offers quick onboarding, tool integration, and an intuitive interface so founders can focus on growth, not expenses.



What are we about?

Receiptly is a web app designed to help small businesses and startups simplify their expense management process. Managing business expenses can be time-consuming, confusing, and often leads to missed deductions or compliance issues. Receiptly solves this problem by allowing users to capture receipts quickly, categorize expenses automatically, and generate investor-ready reports.

Our mission is to empower startups and small businesses with a simple, affordable, and intuitive solution for tracking their financial health. Receiptly ensures that businesses spend less time on manual bookkeeping and more time growing their company. By providing clear financial insights, we enable businesses to make smarter decisions, reduce financial stress, and stay investor ready.

Market Analysis

The market for small business expense management is rapidly growing. According to recent studies, over 90% of small businesses struggle with manual bookkeeping or using expensive accounting tools that don't fit their needs.

Receiptly is entering this market to offer a simple, affordable, and user-friendly solution designed specifically for small businesses, startups, freelancers, and solo entrepreneurs.

- **Market Size:** Projected to reach $10.3 billion by 2026.
- **Target Audience:** Small business owners, startup founders, freelancers, and consultants.
- **Current Gaps:** Existing tools are too complex or expensive, while manual tracking leads to errors and missed opportunities.
- **Opportunities:** Receiptly offers an affordable, automated solution tailored for small businesses.

Main Features

01

Quick Receipt Capture

Upload receipts via photo, or mobile scanning, reducing manual entry and ensuring easy receipt storage.

02

Smart Expense Categorization

Automatically categorize expenses into travel, food, office supplies, etc., reducing human errors and saving time.

03

Investor-Ready Reports

Generate easy-to-understand financial reports with clear metrics like burn rate, cash flow, and revenue vs expenses.

How do we use data?

Data visualization plays a crucial role in Receiptly, allowing businesses to understand their financial health at a glance. We plan to make data more actionable and easy to interpret through visual insights.
How will we use data in our project? We will collect data from user-uploaded receipts, categorize them, and generate financial insights. This data will provide real-time information on cash flow, expenses, and spending trends.

What is the data set we will be visualizing?

- Receipt data including date, vendor, and amount.
- Expense categories (travel, food, software, etc.).
- Monthly and annual spending patterns.
- Revenue vs. expenses.

How user interact with data.

Users can manually edit categories, delete receipts, and modify expense tags, with visualizations updating automatically.
They interact with data through a dashboard summary, expense breakdown charts, auto-generated financial reports, and forecasting insights based on past trends.

Competitor Analysis

		Zoho	Expensify	Freshbooks	Easy Expense
Quick Reciept Capture	✅	—	—	—	—
Smart Expense Categorization	✅	✅	✅	✅	✅
Realtime Expense Insights	✅	—	—	—	—

Design and Development Plan.

Design Plan

Week 1-3:

- Concept/Features research
- Personas and UX blueprint

Week 4:

- UX: Final blueprint, Userflow, Wireframe
- documentation
- UI: Design research , UI starter kit (logo, colour
- palette, typography)

Week 5:

- UX: Draft wireframe document review
- UI: UI design system (Behaviour), UI kit

Week 6-7:

- UX: Wireframe document re-define
- UI: Web application mockup

Week 8-9:

- Alpha Releasing and Testing
- Creating Presentation/Promotion/Marketing/
- Proposal Materials

Week 10&12:

- Presentation/Promotion/Marketing/Proposal Materials

Development Plan

Week 1-3:

- Concept/Features research
- Tech plan: technical research (database resources, technologies)

Week 4-6:

- Database design, implementation, connection
- Back-End development
- Web Front-End skeleton

Week 7 - 8:

- Front-End development
- Front-End and Back-End integration and implementation

Week 9:

- Alpha Releasing and Testing

Week 10-13:

- Testing, Debugging and Deploy

Technology Usage

Design

Figma

Photoshop

Illustrator

Development

HTML

CSS

GitHub

Visual Studio

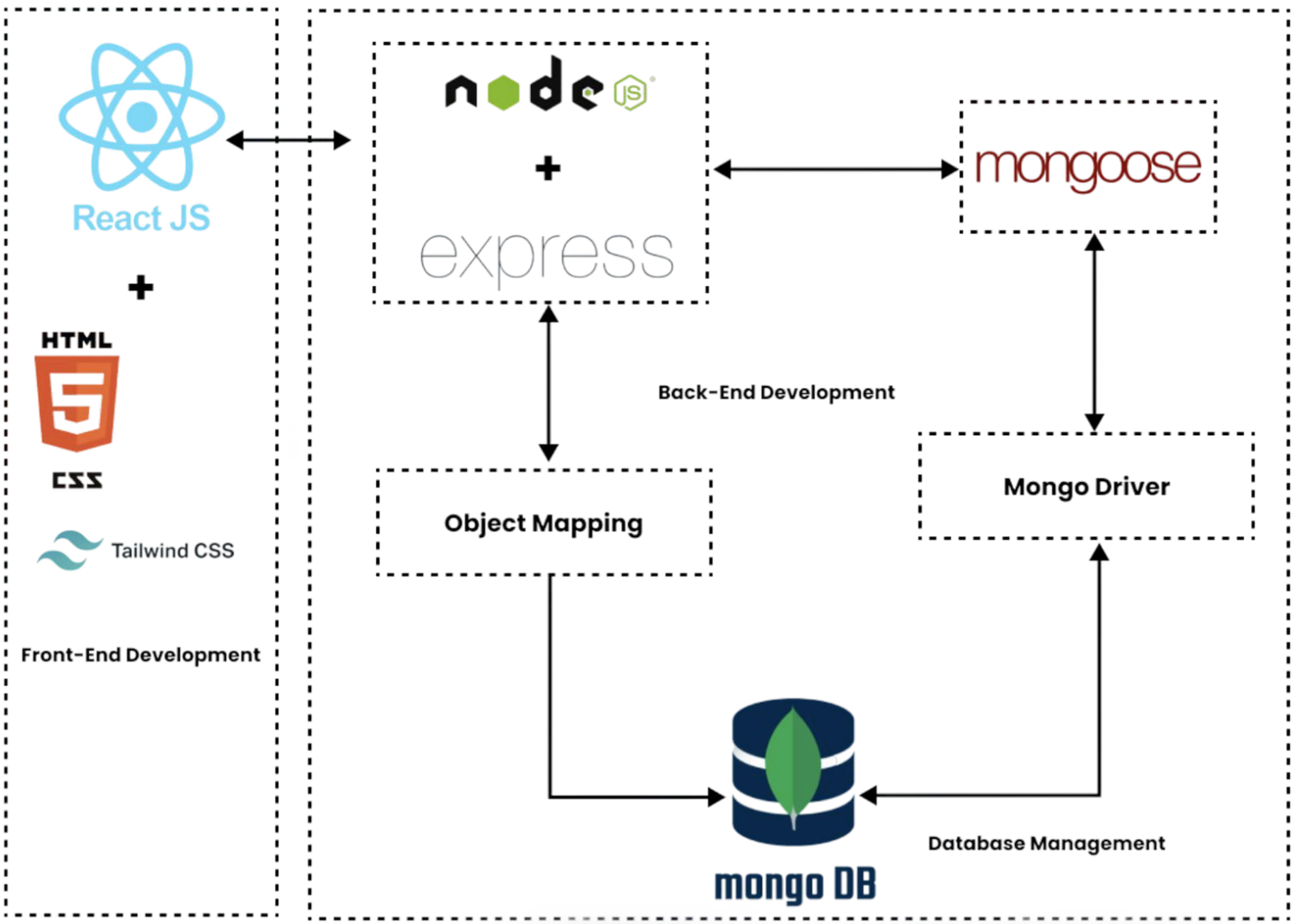
JavaScript

Project management

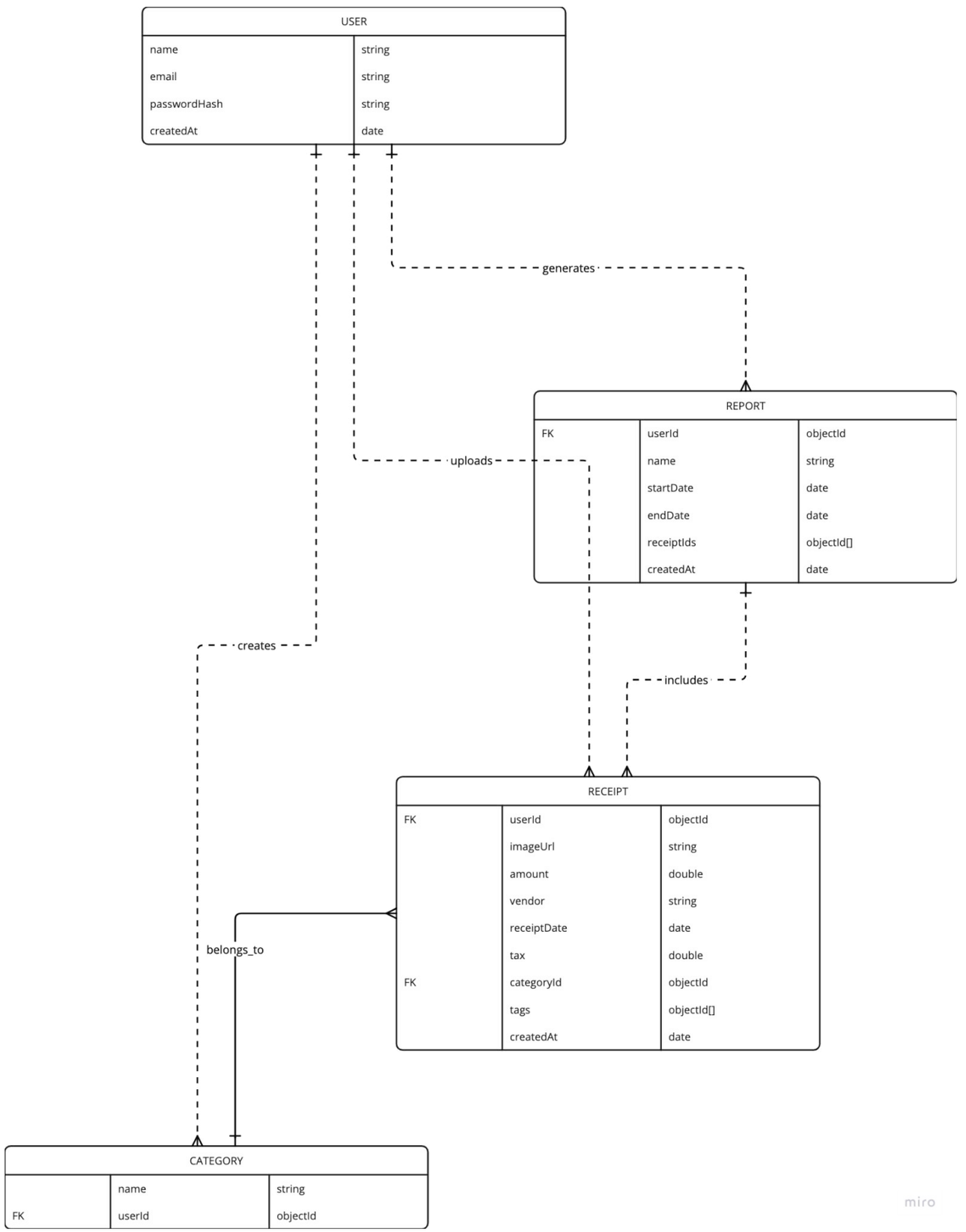
Slack

Jira

Technology Usage

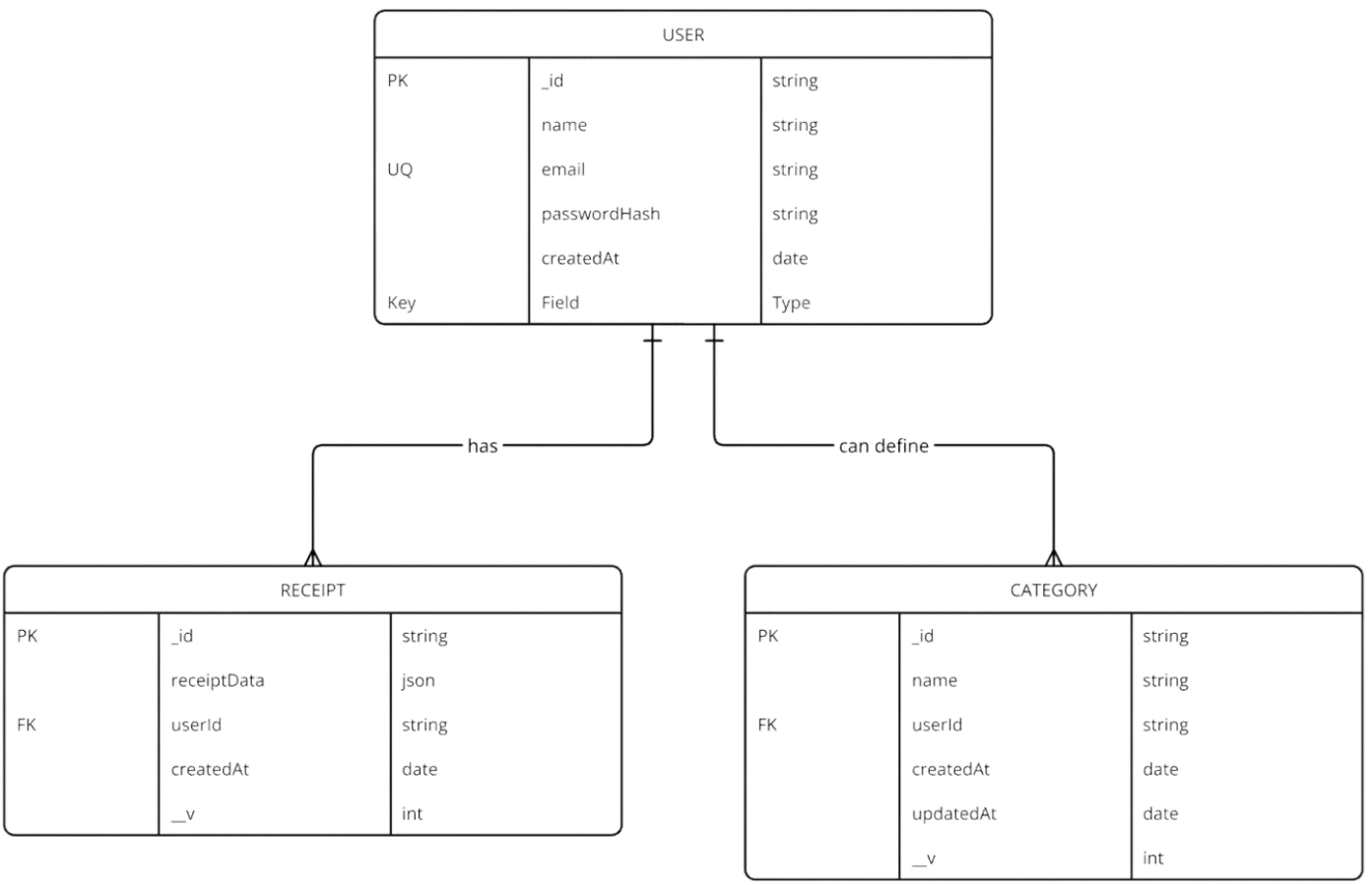


ERD Diagram Model

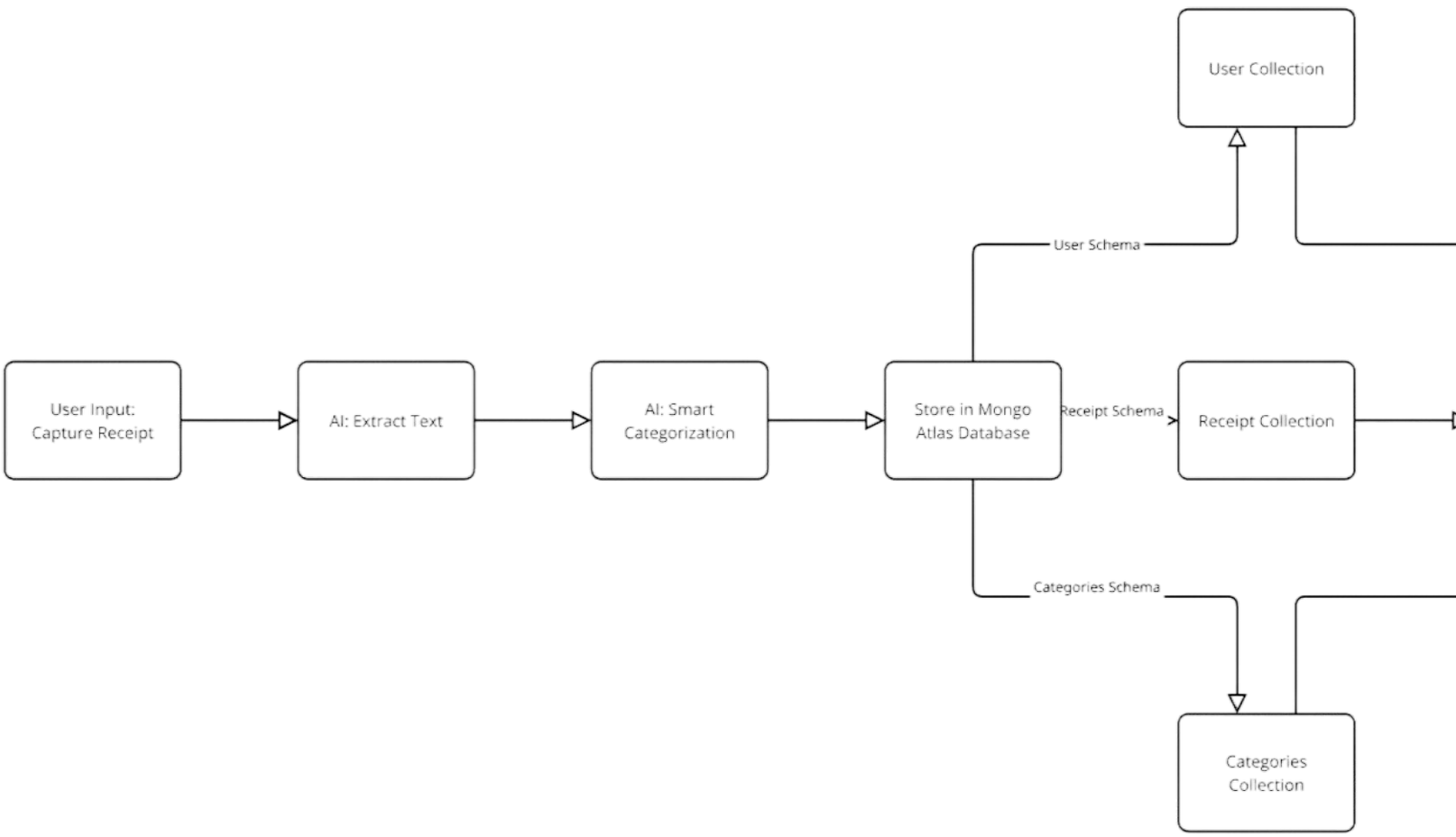


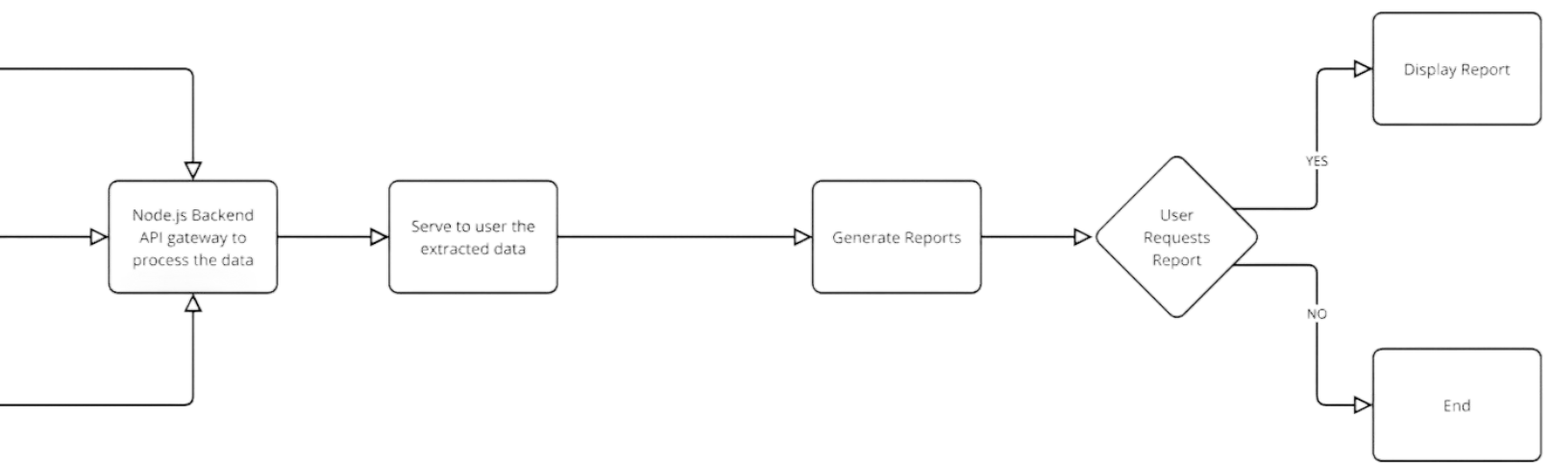
miro

Mongo Atlas DB Schema



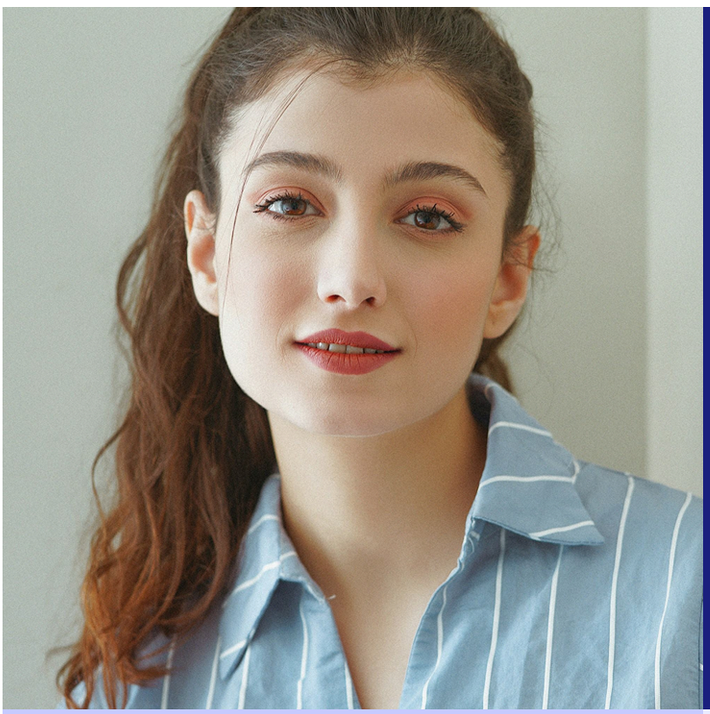
Flowchart Diagram




Node.js Backend API gateway to process the data
Serve to user the extracted data
Generate Reports
User Requests Report
YES
NO
Display Report
End

Design Process.

User Personas - 01



“I manage everything in my boutique, from product selection to customer service, but keeping track of sales, expenses, and inventory with spreadsheets is overwhelming. I rely on my accountant for tax prep, but I need a simpler way to handle daily finances.”

Amy Vaugn

Age/ Gender
29/Female

Location
Poughkeepsie, NY

Occupation
Childcare Specialist

Family Status
Single/No Kids

Goals:

- Scan and organize with ease.
- Track cash flow in real time.
- Keep expenses organized.
- Monitor performance and top sellers.

Challenges and pain points:

- Manual receipt sorting leads to organization challenges.
- Inaccurate tracking disrupts budgeting and forecasting.
- Lack of financial clarity hinders growth decisions.
- Missing receipts delay reporting.
- Manual inventory tracking causes stock discrepancies.

User Personas - 02

"I juggle everything from the kitchen to finances making sure operations run smoothly and customers leave happy."

Maria Stevens

Age/ Gender
35/Female

Location
Coquitlam, BC

Occupation
Culinary specialist

Family Status
Married/with Kids

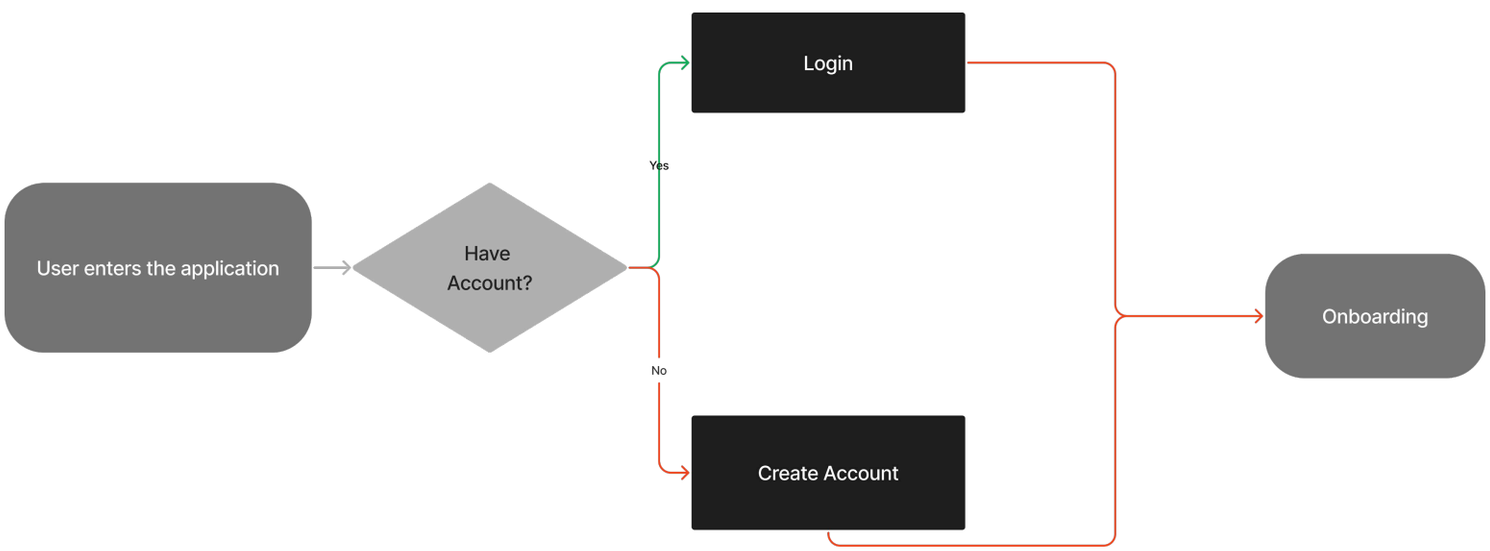
Goals:

- Marina manages daily operations, staff, inventory, and finances at her casual dining restaurant.
- Hands-on in the kitchen and dining area, ensuring smooth operations and customer satisfaction.
- Saves time and focuses on growth by automating tasks.

Challenges and pain points:

- Receipt management is disorganized, causing errors.
- Lack of real-time tracking increases financial risks.
- Disorganized receipts complicate tax prep and audits.

Userflow - *Login*



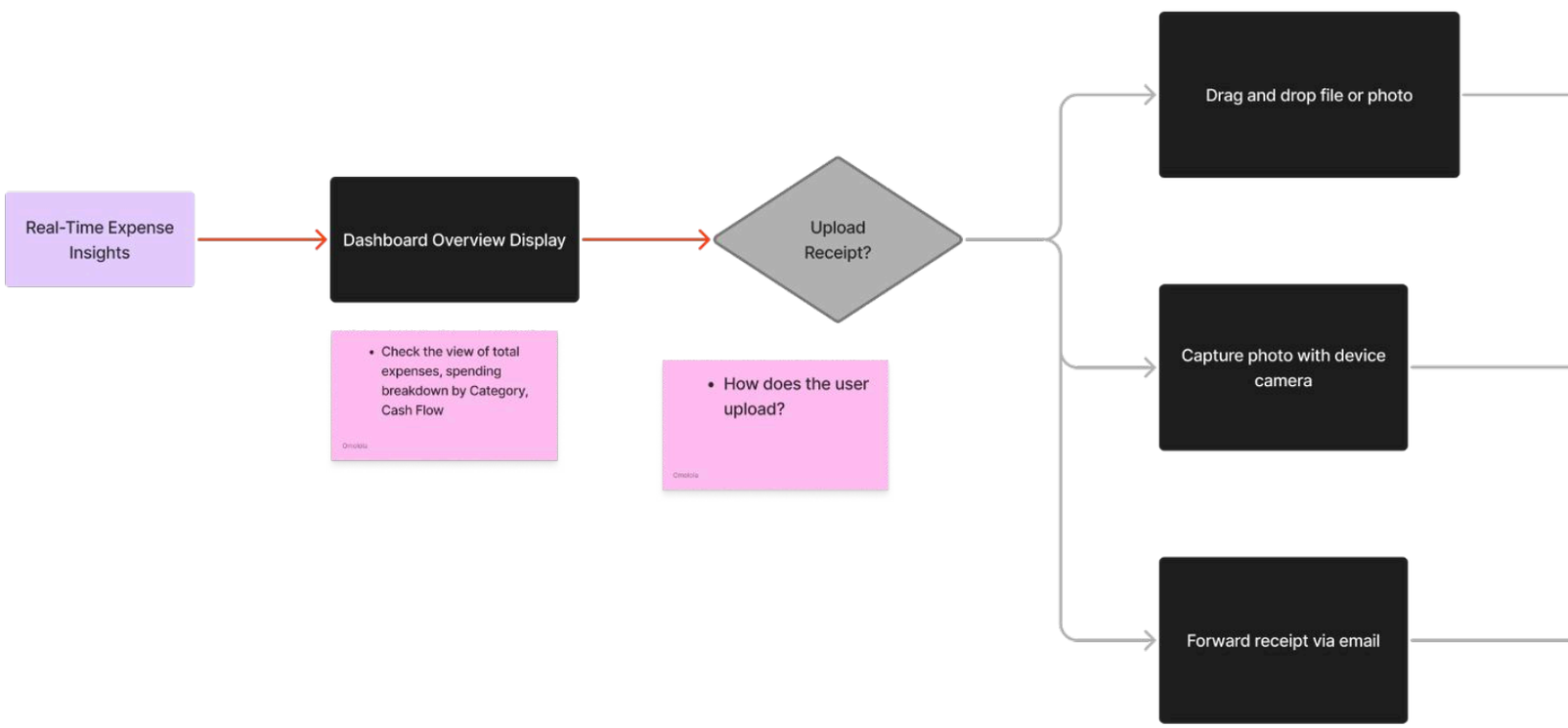
Receiptly's user flow is designed to be quick and straightforward for small and medium-sized business owners. The process starts with an easy registration and a brief onboarding tutorial.

Once set up, users can upload receipts by snapping photos, uploading files, or forwarding emails. The app automatically extracts data using OCR, while AI suggests expense categories.

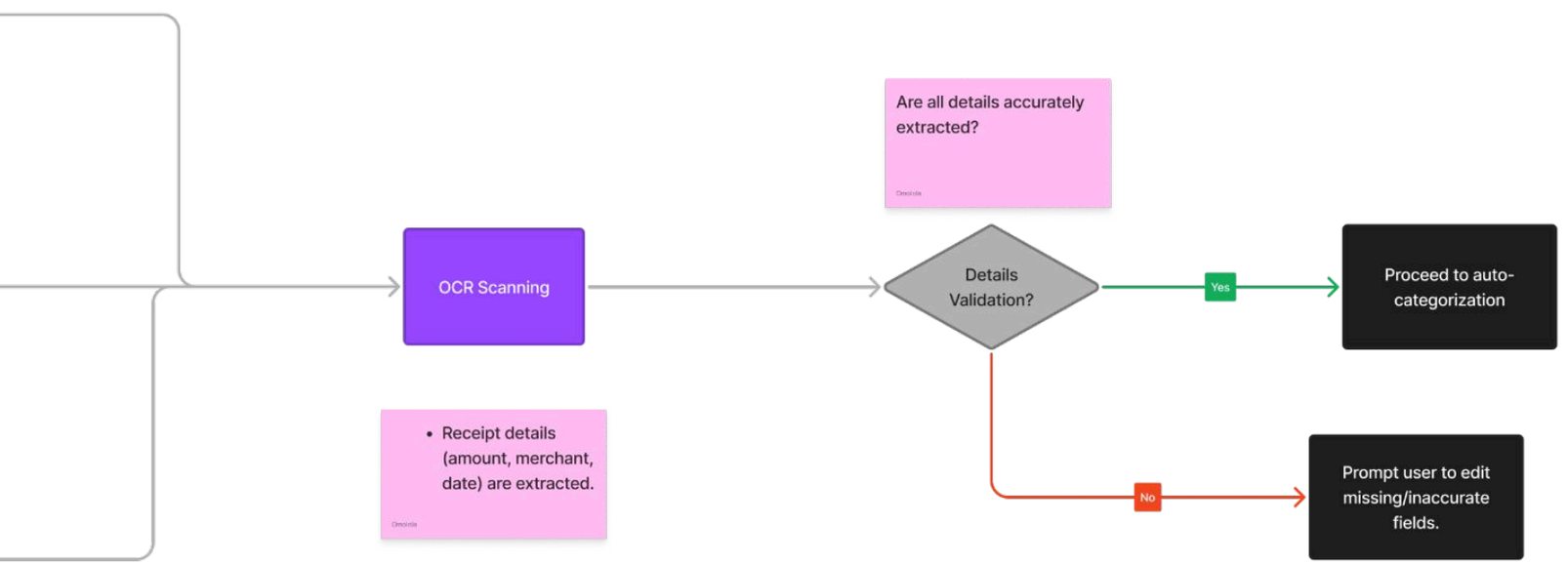
Users can review and adjust the data, adding custom tags as needed. The dashboard offers real-time insights with charts and key metrics, and the "Reports" section lets users generate and download personalized financial summaries.

For added convenience, users can integrate payment platforms and manage settings directly within the app. In-app support is also available for assistance at any stage.

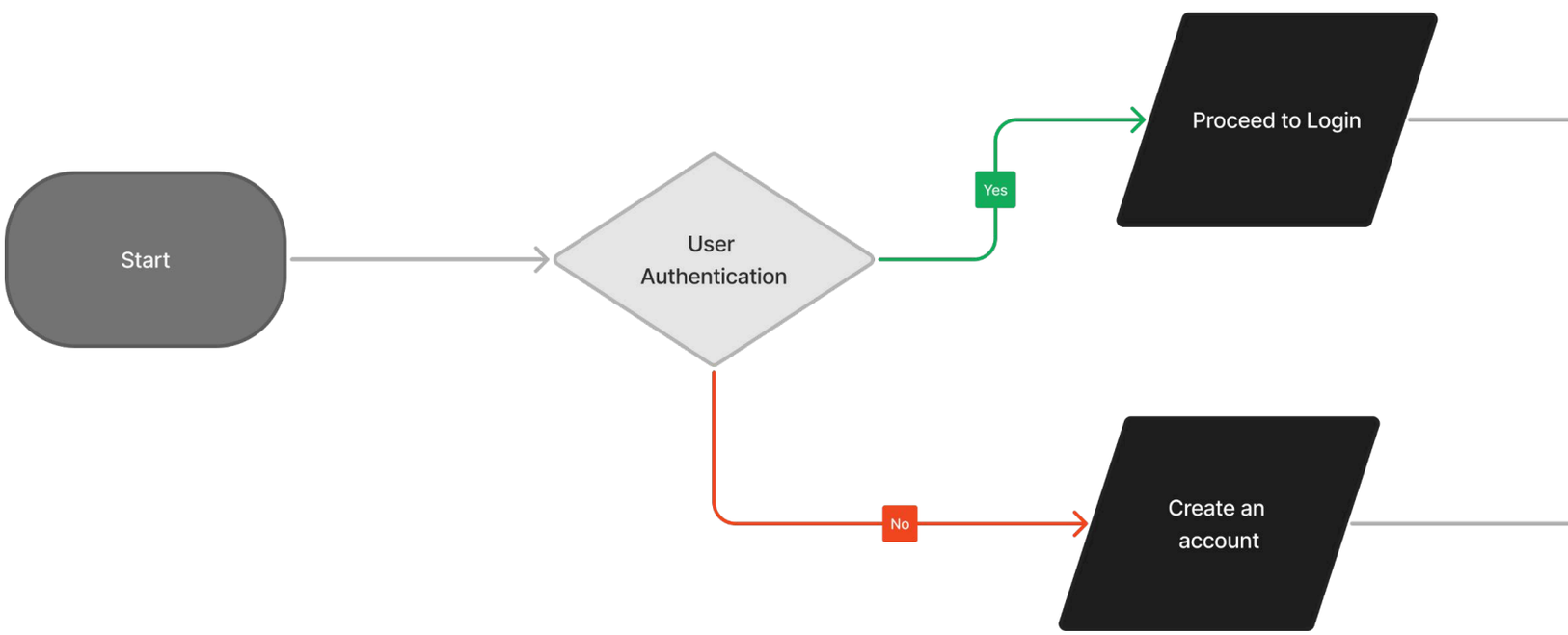
Userflow -*Receipt Upload*



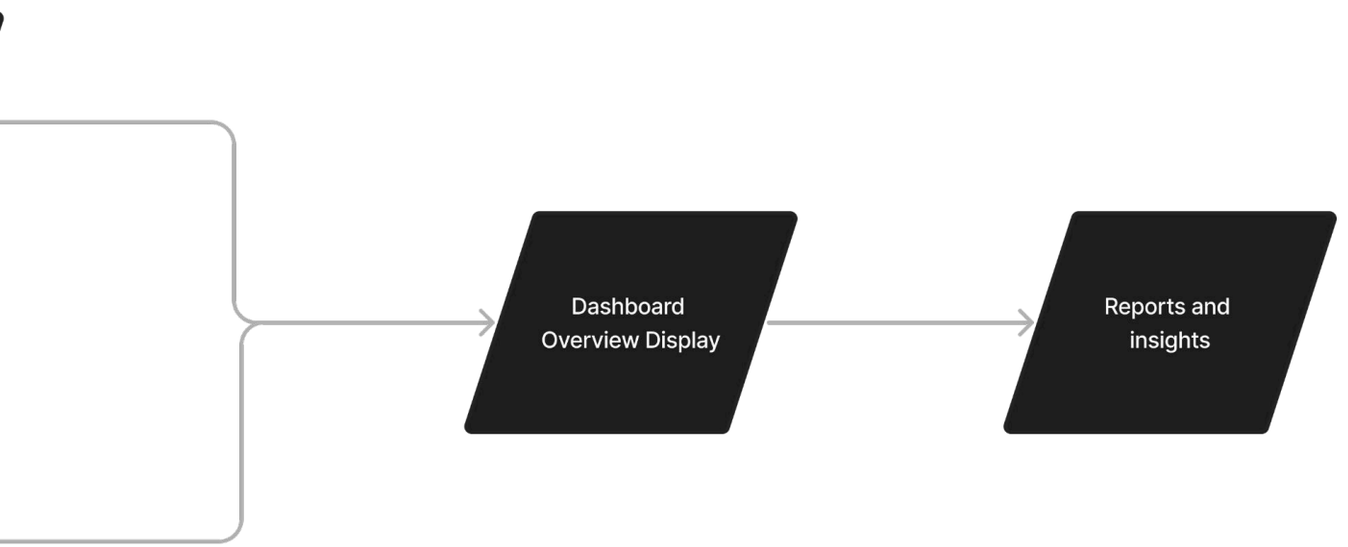
Userflow -*Receipt Upload*



Userflow -*Financial Insights*



Userflow -*Financial Insights*



UI Kit & Components

Accent colors

Brand Colors

Receiptly deep blue (Primary)

#2E39E6

Receiptly light blue (Secondary)

#EBFFF6

Typography

Metro Sans

Metro Sans is a Grotesque typeface with personality. It bridges the gap between the stern terminals of a Swiss Neo-Grotesque, and the smooth curves of a modern day Geo-Grotesque.

Light
Regular
Medium
Semibold
Bold

Aa

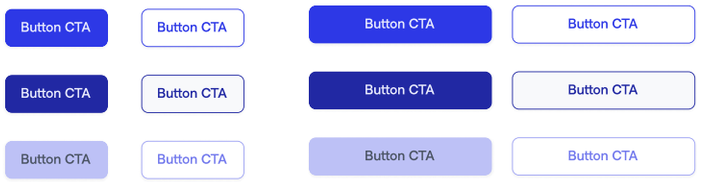
Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn
Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz

01 02 03 04 05 06 07
08 09

Iconography

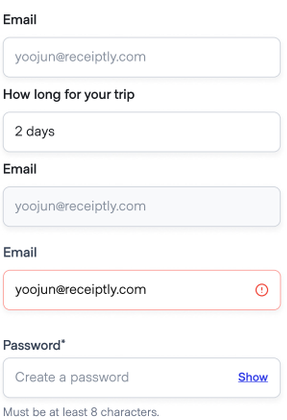
Logo

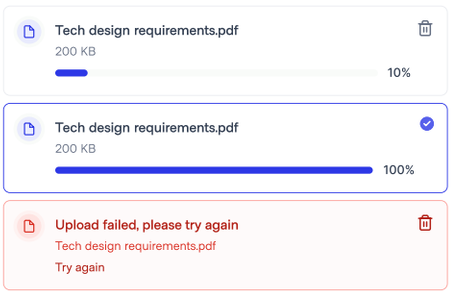
Buttons



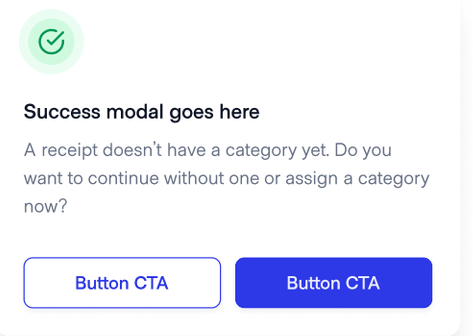
Radio Buttons

Input fields

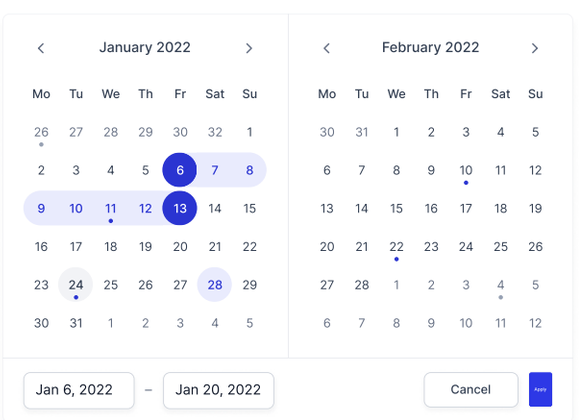




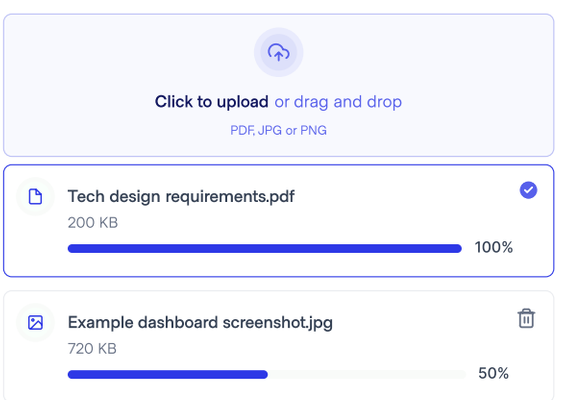
Modal



Date Picker



Upload Sequence



Business Model

Choose the plan that suits you. Start free with basic features, then upgrade to get unlimited categorization, detailed reports, and advanced tools as your business grows. Whatever plan you pick, Receiptly makes managing finances simple.

Starter (Free)

Free

Solo entrepreneurs & small businesses testing the platform

- Limited (up to 20 receipts/ month)
- 10 AI-powered tries
- Basic reports and insights
- Up to 3 users

Popular

Growth plan

$19 per month

Growing startups managing finances efficiently

- Unlimited receipt uploads
- Unlimited AI expense categorization
- Standard reports and insights
- Up to 10 users

Scale plan

$49 per month

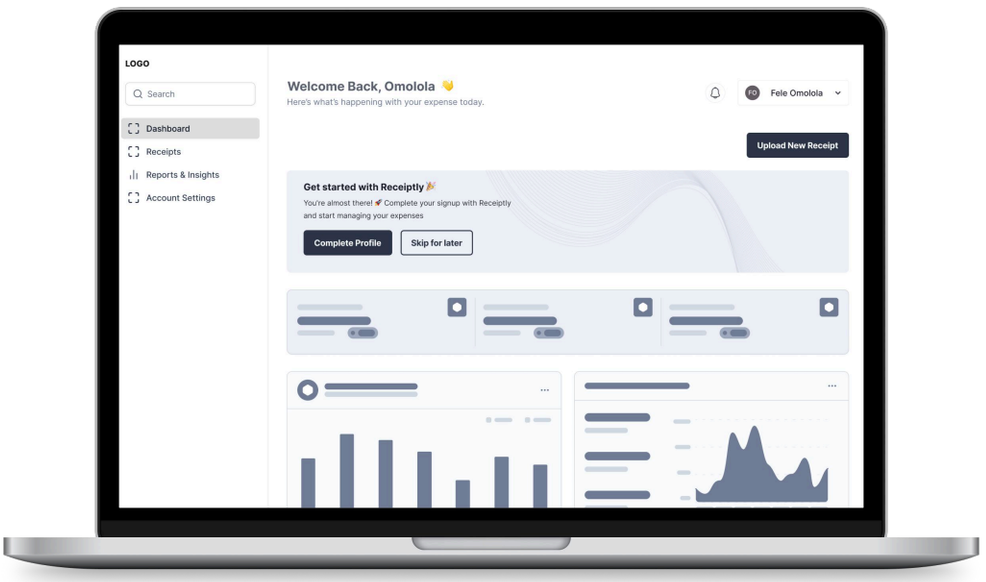
Scaling businesses that need advanced automation & insights

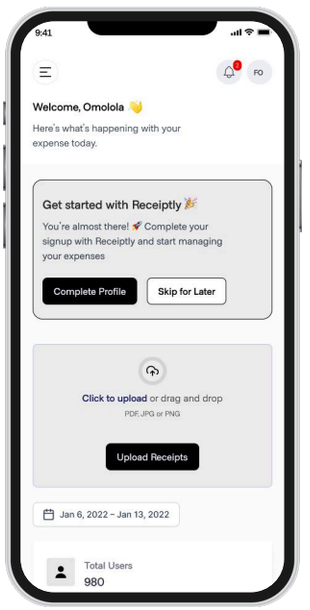
- Unlimited receipt uploads
- Unlimited AI expense categorization
- Advanced insights & forecasting
- Unlimited user access
- AI-driven alerts
- Dedicated account manager

Mockups.

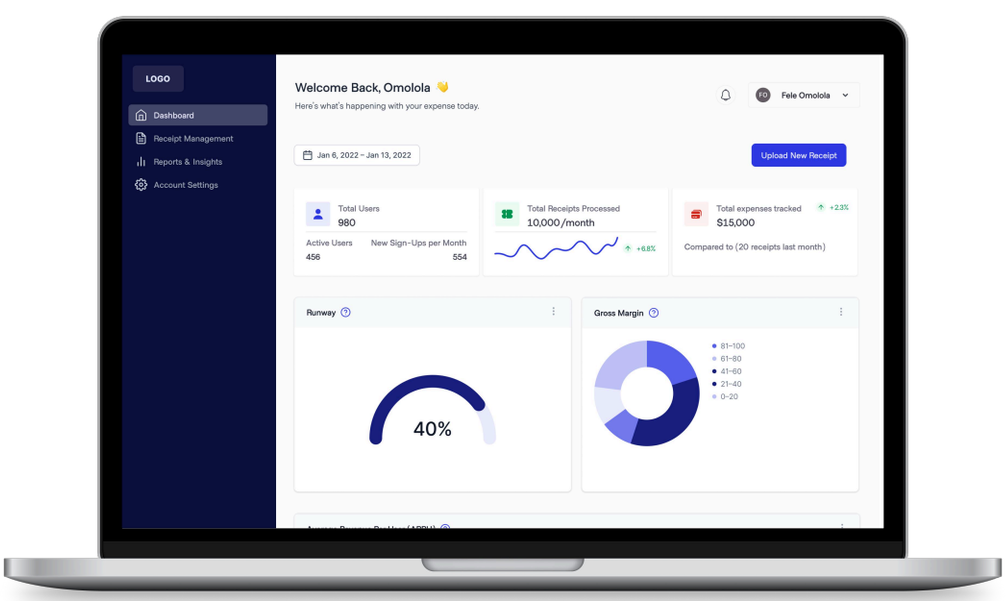
Dashboard

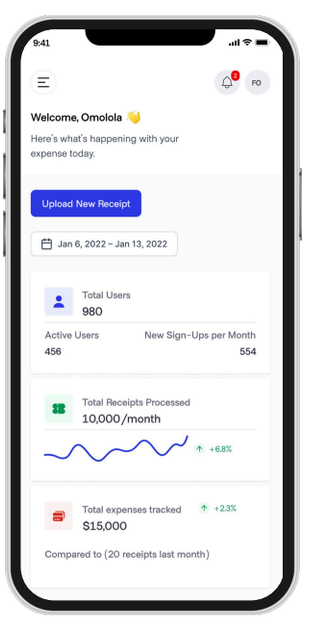
Low fidelity





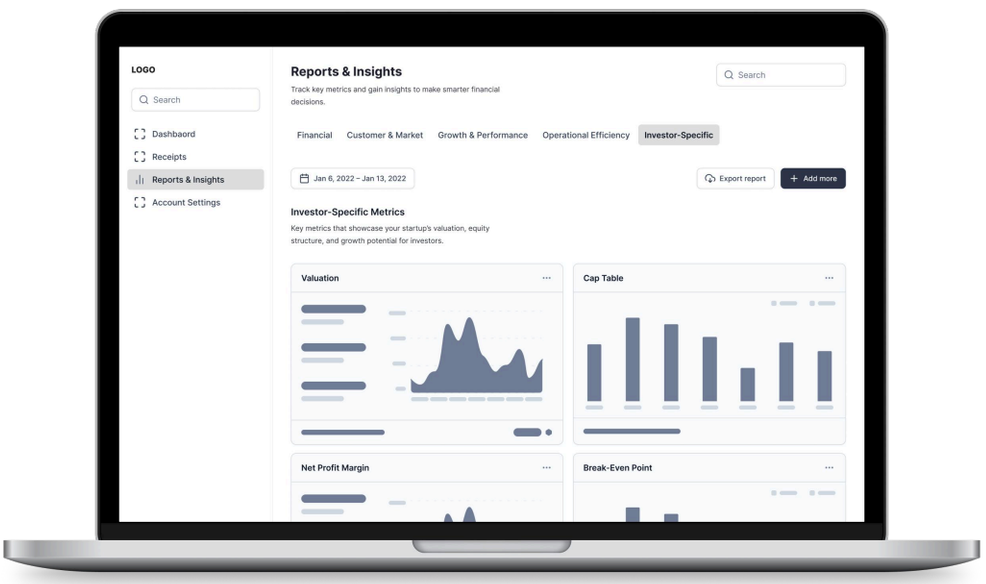
High fidelity

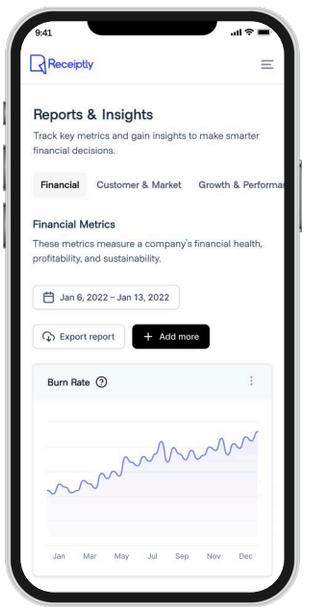




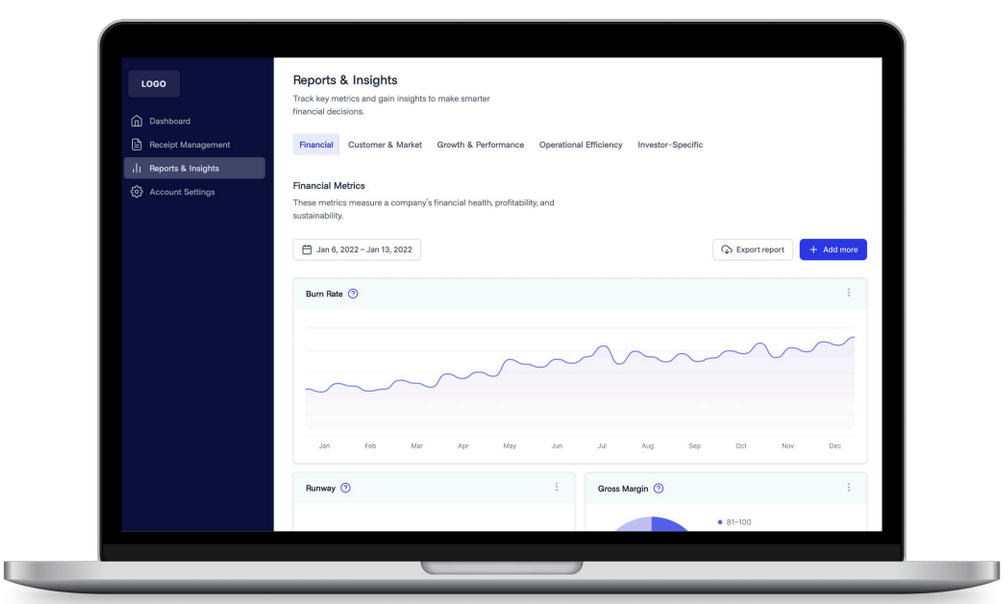
Reports & Insights

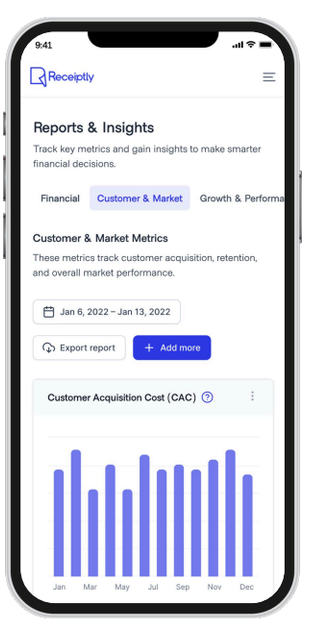
Low fidelity





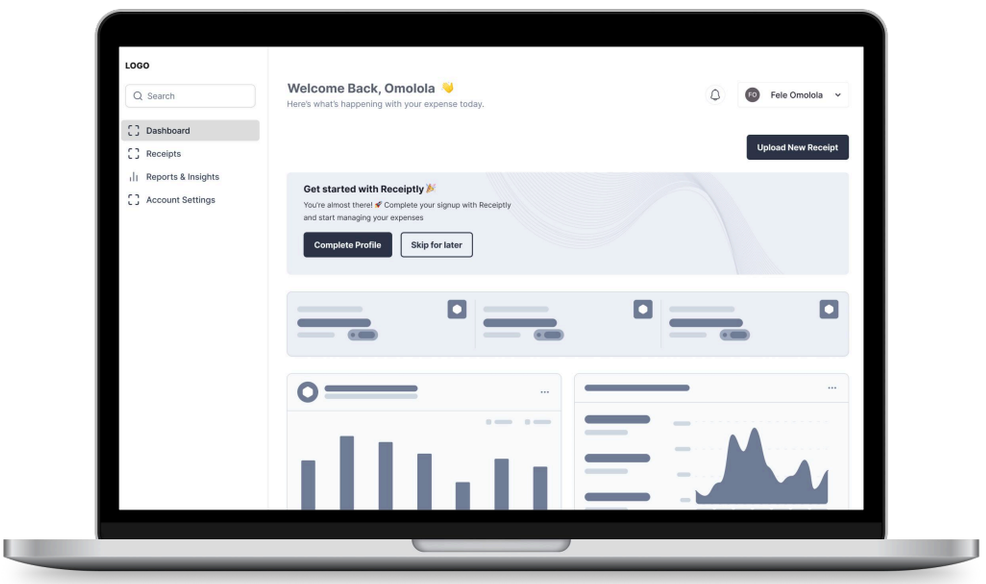
High fidelity

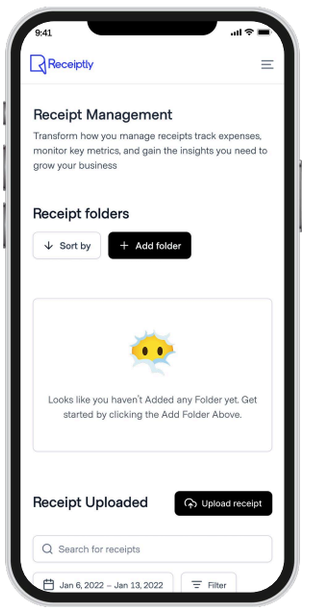




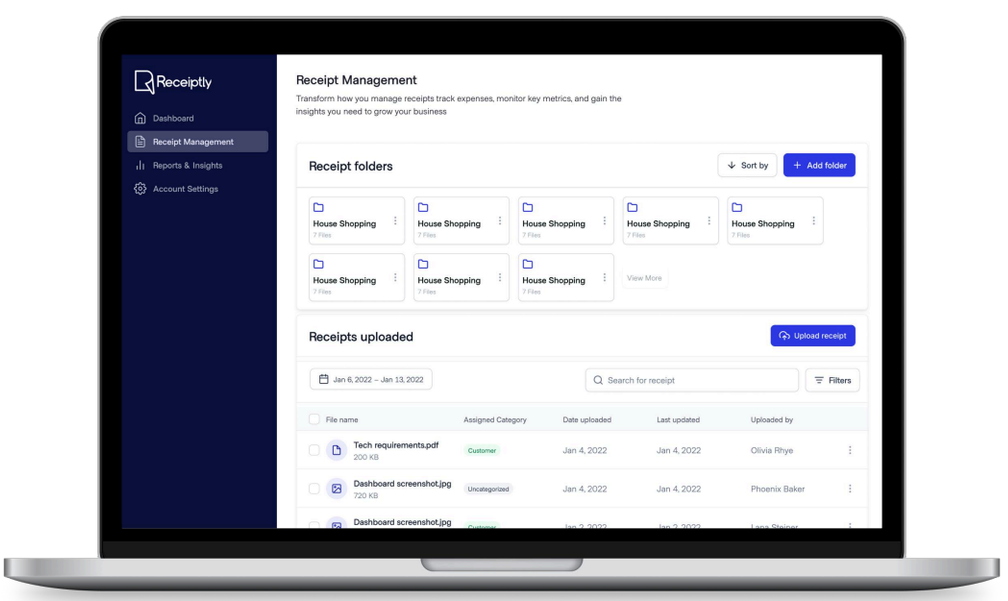
Receipt Management

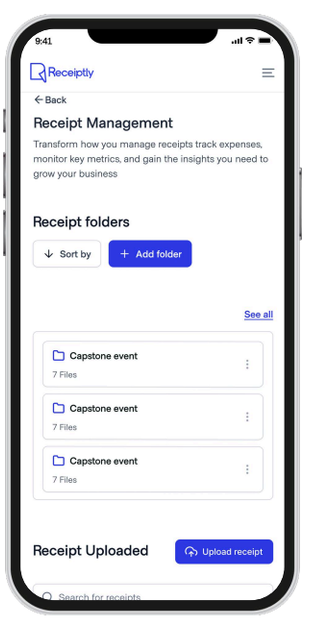
Low fidelity





High fidelity





About Us.

Meet the Team - *Designers*

Omolola Fele

Project Manager/ UX Designer

Omolola led a team of seven and three interns to develop a retail management system (BOOOSTA). She focuses on user-centered solutions that align with business goals and oversees research, design, and testing.

in/fele-omolola/

Aitanun Daniel Oseremen

Lead Product Designer

As Design Lead, Reme has five years of startup experience, guiding teams in branding, UI kits, and polished deliverables. He ensures a cohesive design process that aligns with business goals and enhances user experience.

in/danielaitanun/

Attaur Rahman

UI/UX Designer

Attaur, an experienced Steel Design System Analyst Engineer, has transitioned into the field of design. In this project, his analytical skills and technical expertise contribute to UI/UX design, helping create efficient solutions and optimizing user experience.

in/atta-rahman-/

Carla Beatriz dos Santos

UI/UX Designer

Carla has experience in both business and beauty fields. Now, as a designer on the team, she leverages her background to enhance user experiences. In this project, she collaborates with other designers and is responsible for design-related tasks.

in/carlabeatrizd/

Meet the Team - *Designers*

Jan Kristine Oducayen

UI/UX Designer

Jan is a former Art Director with experience in advertising and events production, as well as a former contractor for Canva. Her diverse background allows her to create compelling visual identities that strengthen the project's branding.

in/jankristine/

Sukhdeep Kaur

UI/UX Designer

Sukhdeep has experience in computer applications, development as an intern in India, and the business world. In this project, she is responsible for all UI/UX-related tasks, leveraging her diverse background to enhance user experience and design efficiency.

in/sukhdeep-kaur1997/

Yoonju Lee

UI/UX Designer

Yoonju has five years of experience as a negotiator and has now transitioned into design, applying her psychology background to create intuitive designs. In this project, she collaborates with designers and handles design tasks to ensure a smooth user experience.

in/yoon-ju-lee/

Meet the Team - *Developers*

Ryan David

Lead Developer

Ryan worked as a full-stack developer for an outsourcing company, primarily handling fintech projects. He also took on freelance work, ensuring APIs functioned properly while building and maintaining web pages and features.

in/ryan-david-33043355/

Nicole Menchero

Fullstack Developer

Nick previously served as a Ship Officer and Marine Superintendent, managing the daily operations of vessels under his supervision. He ensured compliance with international maritime regulations, provided operational support, and optimized ship performance and safety.

in/nicole-paolo-menchero-549994311/

Yoshiki Katayama

Fullstack Developer

Yoshiki comes from a background in the service industry, where he honed his problem-solving skills, attention to detail, and ability to work under pressure. Now, he's eager to grow as a web developer, diving into technologies like React and Next.js.

in/yoshiki-katayama-a739402b0/

Reference

Illustrations:

Quick Receipt Capture

https://storyset.com/illustration/receipt/cuate

Smart Expense Categorization

https://storyset.com/illustration/manage-money/cuate

Investor-Ready Reports

https://storyset.com/illustration/data-report/cuate

Images

Front and back page: Priscilla Du Preez

https://unsplash.com/photos/three-men-laughing-while-looking-in-the-laptop-inside-room-XkKCui44iM0

Market Analysis: S O C I A L . C U T

https://unsplash.com/photos/3-women-sitting-on-chair-in-front-of-table-with-laptop-computers-r0saAQNjEjQ

Data visualization: Stephen Dawson

https://unsplash.com/photos/turned-on-monitoring-screen-qwtCeJ5cLYs

Front and back page: Priscilla Du Preez

https://unsplash.com/photos/three-men-laughing-while-looking-in-the-laptop-inside-room-XkKCui44iM0

Persona 1: behrouz sasani

https://unsplash.com/photos/woman-in-blue-and-white-stripe-button-up-shirt-1B22UBPK1Pw

Persona 2: Troy wade

https://unsplash.com/photos/smiling-woman-in-blue-and-black-plaid-shirt-dYgyzxlHJ58

Special Thanks

We are deeply grateful to our instructors for their unwavering support, patience, and guidance. Your belief in us has been a source of strength, pushing us to learn, grow, and strive for excellence. You have been there every step of the way, answering our questions, challenging our ideas, and encouraging us when things got tough. Receiptly wouldn't be what it is today without your dedication and mentorship. From the bottom of our hearts, thank you for always being there, for inspiring us, and for making this journey truly meaningful.