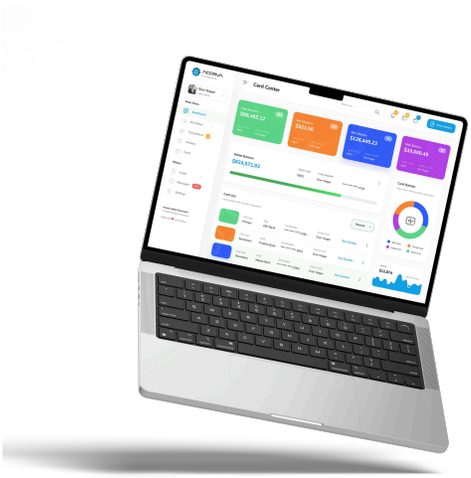
Accriva

Business finance management tool

Full Case Study

Duration:

2 Weeks UX/UI Design & Prototyping,
4 Weeks for Cross-Platform App Development



Product Overview

Accrivo is a modern business finance management platform designed to simplify financial operations for startups, SMEs, agencies, and enterprise teams. The platform helps businesses monitor cash flow, manage invoices, track expenses, analyze performance metrics, and collaborate across departments from a single unified dashboard.
The goal of Accrivo is to reduce financial complexity and transform complicated financial data into clear, actionable insights.

Responsibility

- UX/UI Design
- Dashboard Developer
- Testing & Launch

Tools

- Figma
- Figjam
- React Native
- Tailwind CSS
- Node.js
- Apple HealthKit / Google Fit APIs

Problem Statement

Many businesses struggle to manage financial operations efficiently because existing finance tools are overly technical, visually outdated, and difficult to navigate. Business owners and finance teams often waste time switching between multiple platforms for expense management, reporting, invoicing, and performance tracking.

Goals

- Simplify business finance management workflows.
- Improve visibility into company financial health.
- Reduce manual financial tracking and reporting.
- Create a modern and user-friendly dashboard experience.
- Increase productivity through centralized tools.

Development Process

Conducted stakeholder interviews and analyzed user pain points related to financial management systems. Studied market trends, competitor products, and business workflow requirements. Defined the core product features, target audience, user journeys, and information architecture. Prioritized dashboard usability and data accessibility.Created low-fidelity wireframes followed by detailed high-fidelity UI screens. Reviewed usability with potential users and refined navigation, chart readability, and workflow efficiency based on feedback. Built reusable components and established consistent spacing, typography, and color systems.Prepared responsive dashboard designs, design documentation, and scalable UI assets ready for development handoff.

Understand

User Research
User Interview
Competitve Analysis

Define

User Personas
Empathy Map
User Journey

Ideate

User Flow
Information Architecture

Design

Wireframe
Hi-Fi Designs
Prototype

Development

Feedbacks
Conclusion
Future Concept

Deploy

Feedbacks
Conclusion
Future Concept

Observations

75%

The research and testing phases revealed that users strongly prefer simplified dashboards with visual summaries rather than cluttered financial interfaces.

60%

Businesses rely heavily on real-time reporting to make operational decisions, which makes data hierarchy and readability extremely important.

Pain Points

1. Complex Financial Tracking

Users struggle to manage transactions, invoices, and reports across multiple disconnected tools.

2 Confusing Dashboards

Traditional finance dashboards contain excessive data and poor organization, making it difficult to locate important information.

3. Lack of Real-Time Insights

Businesses often rely on outdated reports, limiting their ability to make informed financial decisions quickly.

User Research

Research was conducted among startup founders, finance managers, accountants, and operational teams to understand their daily workflow challenges. Most users expressed frustration with managing multiple tools for invoicing, expense tracking, payroll, and reporting.
Users wanted a centralized platform that could simplify financial processes while still providing detailed insights. Key expectations included fast navigation, customizable reports, visual dashboards, automation, and secure collaboration.
The research also revealed that users value simplicity over complexity. Instead of overwhelming tables and technical financial terms, users preferred clear metrics, visual indicators, and intuitive interactions.

Unique Features

Accrivo includes a range of intelligent and user-focused features designed to improve financial management efficiency. The platform offers real-time financial analytics, smart expense and invoice management, automated reporting and forecasting, and interactive data visualization tools. It also supports multi-user collaboration, KPI monitoring, financial goal tracking, customizable widgets, and secure role-based access systems. These features work together to create a flexible and scalable finance management experience for modern businesses.

Target Audience

Startups

Small & Medium Businesses

Finance Teams

Agencies & Enterprises

Empathy Map

Says

- I need a simpler way to manage finances.
- I want real-time updates without manual reporting.
- o ur current tools feel outdated and confusing.
- I need an app that looks as premium as the smartwatch I bought.

Thinks

- Financial data should be easy to understand
- Automation can save time and reduce errors
- Teams need better collaboration systems
- I feel guilty every time this app sends me a push notification.

Does

- Tracks expenses manually
- Uses multiple software platforms
- Creates reports frequently
- Monitors cash flow regularly

Feels

- Frustrated by complicated interfaces
- Overwhelmed by financial data
- Concerned about business performance visibility
- Motivated to improve operational efficiency

User Persona

NAME: Michael Carter

AGE: 34

EDUCATION: B.S. in Computer Science

JOB: Full-Stack Developer

LOCATION Singapore

HOBBIES: Gaming, cycling,

Bio

Michael manages daily financial operations for a growing company. He frequently monitors revenue, expenses, invoices, and performance metrics. He values speed, accuracy, automation, and clean dashboard experiences.

Personality

- Analytical
- Detail-oriented
- Easily fatigued by l
- Goal-driven

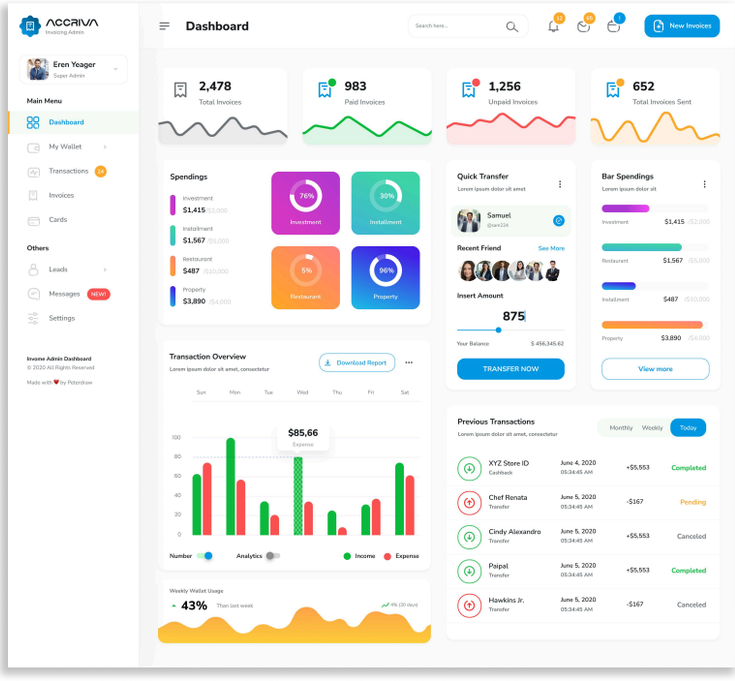
Pain points

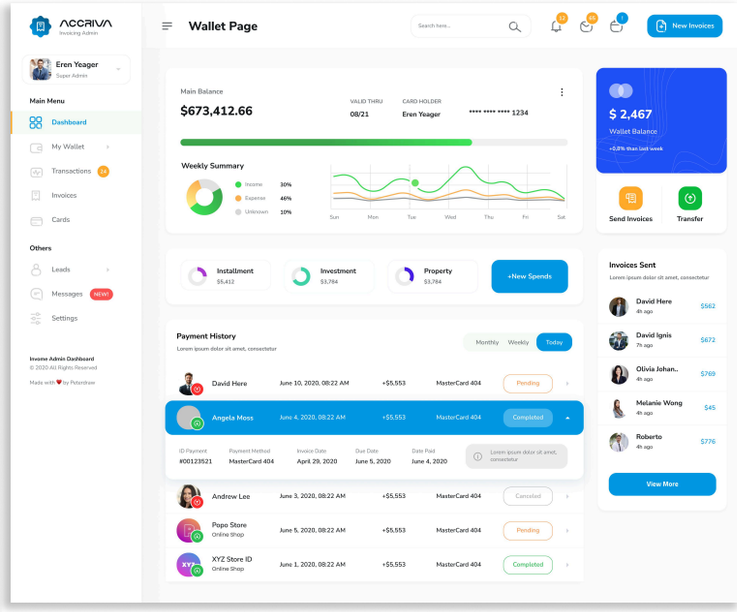
- Complex trading interfaces
- Poor mobile experience
- Confusing analytics dashboards

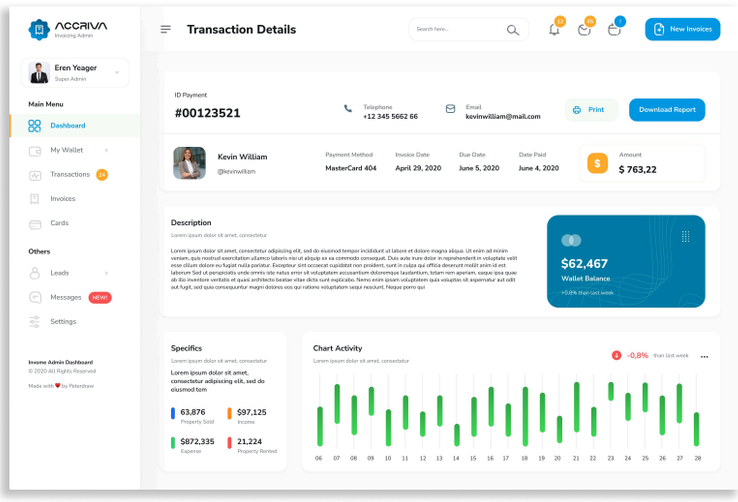
Goals

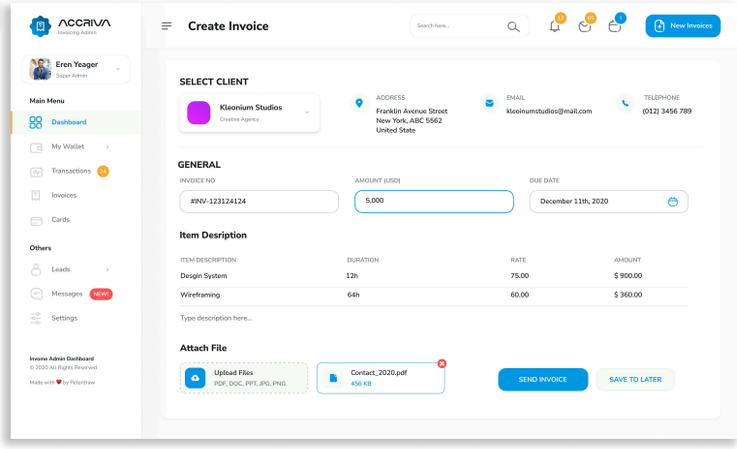
- Grow long-term crypto investments
- Track portfolio performance easily
- Use a secure and reliable platform

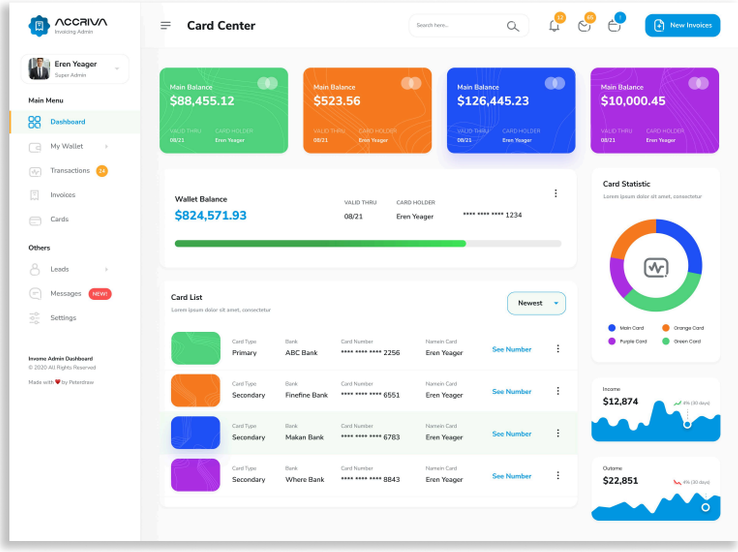
High-fidelity Design

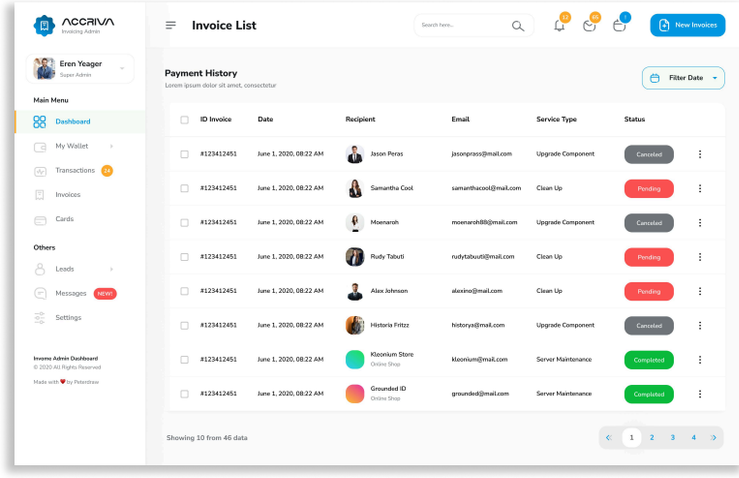












Style Guide

Color Palette

Primary Color

#896CFE

Secondary Color

#E2F163

Shades

Shades

Tints

Typography

Aa

Font

Montserrat

Aa **Montserrat** Bold

Aa **Montserrat** Semibold

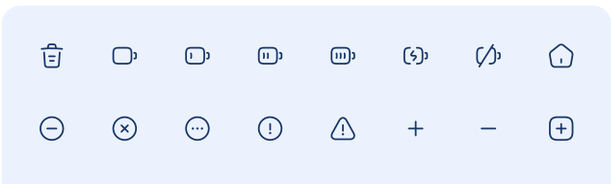
Aa **Montserrat** Medium

Aa **Montserrat** Regular

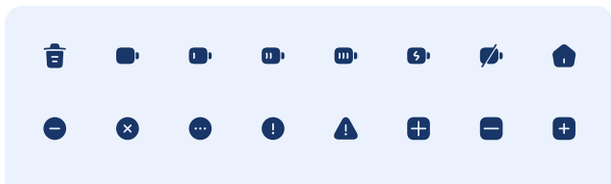
Name	Font Size	Line Height
Heading 1	**24 px**	**36 px**
Heading 2	**20 px**	**28 px**
Body - Large	18 px	24 px
Body - Regular	**16 px**	**24 px**
Body - Small	14 px	22 px
Caption	12 px	16 px
BUTTON	**16 px**	**24 px**

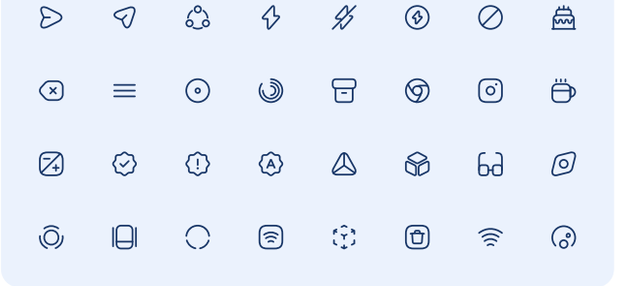
Iconography

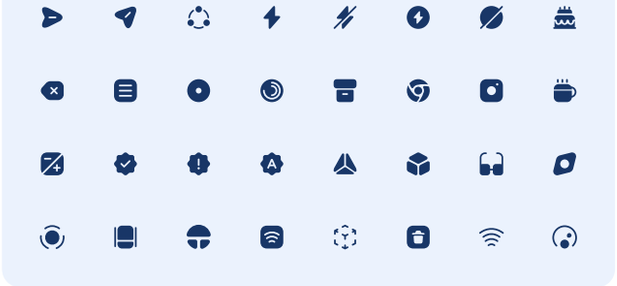
Outline



Bold







Key Takeaways

The Accrivo project demonstrated how thoughtful UX design can simplify complex financial operations. By focusing on usability, visual hierarchy, and intuitive workflows, the platform transforms complicated financial data into accessible business insights.

The project also highlighted the importance of research-driven design decisions. Understanding user frustrations and workflow behaviors helped shape a dashboard experience that feels modern, efficient, and scalable.

Accrivo successfully combines functionality, analytics, automation, and visual clarity into a cohesive finance management solution designed for modern businesses.

Roadmap

The future roadmap for Accrivo focuses on expanding the platform into a more intelligent and scalable finance management ecosystem. The first phase includes launching the core dashboard experience with analytics, invoicing, and expense management features. In the next phase, the platform will introduce AI-powered forecasting, automation workflows, and smart financial recommendations to improve decision-making efficiency.

Future development will also focus on expanding collaboration tools, third-party integrations, and advanced reporting capabilities for growing businesses and enterprise teams. Mobile applications and cross-platform synchronization are planned to provide users with seamless access across devices. Long-term

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