



Pre-Launch Proofing Checklist

App: The Getting Ahead Guidebook · v1.3 Tester: ____ Date: ____

How to use this: 1. Pick a device (iPhone, Android, iPad, web/desktop) 2. Write the device on top of a fresh copy 3. Walk through each section. Tick ☒ if good, ☒ if broken, "?" if not sure 4. Add a one-line note for anything that needs polish 5. Hand back to Randy when done

P0 = blocks launch · **P1** = polish before launch · **P2** = backlog



Device under test

Device: _____ (e.g., iPhone 14 Pro, Samsung Galaxy S23, iPad mini, Chrome desktop)

OS version: _____

Screen orientation tested: ☐ Portrait ☐ Landscape

1. First Impression (5 min) — P0

- ☐ App icon looks crisp on home screen (not blurry/pixelated)
- ☐ Splash screen shows logo, doesn't get stuck
- ☐ App opens in under 3 seconds
- ☐ No console errors / red error overlays anywhere
- ☐ All text is readable — no overlapping, no cut-off labels

Notes: _____

2. Sign In & Onboarding — P0

- ☐ Sign up with a new email works
- ☐ Verification email arrives within 2 min
- ☐ "Forgot Password" sends reset email
- ☐ Reset link opens correct page, new password works
- ☐ Log out then log back in — session persists if "Remember me"

Notes: _____

3. Dashboard — P1

- ☐ All numbers load (no perpetual spinners)
- ☐ Month picker changes the data correctly
- ☐ Pull-to-refresh updates the screen

- ☐ Charts/bars render cleanly, no clipping
- ☐ Tapping a category drills into expenses

Notes: _____

4. Money In & Out — P0

- ☐ Add a new Income → shows up immediately
- ☐ Add a new Expense → appears in list
- ☐ Edit an Expense → changes save
- ☐ Delete an Expense → confirms then removes
- ☐ Search/filter expenses works
- ☐ Direct Debits page loads, you can add one

Notes: _____

5. Reserves & Reconciliation — P1

- ☐ Add a new Reserve → monthly target auto-calculates
- ☐ Progress bar fills as you add allocations
- ☐ **New:** Setup hub shows "Reserve Reconciliation" card at top
- ☐ Tap reconciliation card → opens reconciliation page
- ☐ Enter a bank balance → comparison numbers appear

Notes: _____

6. Reports & Printing — P1

- ☐ Print Center opens, shows checkboxes for each report
- ☐ Selecting reports + Print → generates clean PDF
- ☐ Email a report → arrives in inbox correctly formatted
- ☐ Big Picture page loads, allocations balance to zero
- ☐ Cash-flow Forecast shows future months

Notes: _____

7. Categories & Setup — P1

- ☐ Add a Spending Category → appears in dropdowns
- ☐ Add a Vendor Rule → auto-categorizes on next import
- ☐ Helpful Links section opens external sites
- ☐ CSV Import preview shows your columns correctly

- ☐ AI Categorize button fills in missing categories

Notes: _____

8. Receipt Scanning (Camera) — P1 (*iPhone/Android only*)

- ☐ Tap "Scan Receipt" → pre-permission explanation shows FIRST
- ☐ Native camera permission popup appears after
- ☐ Take a photo → app extracts vendor/amount
- ☐ You can edit the AI's guess before saving
- ☐ If permission denied → app shows "Open Settings" button

Notes: _____

9. Subscription (iOS = web only!) — P0

- ☐ **iOS:** Manage Subscription is **HIDDEN** (App Store rule)
- ☐ **iOS:** No Stripe checkout buttons anywhere
- ☐ **Web/Android:** Pricing page loads, Stripe checkout works
- ☐ Active subscription shows correctly in drawer
- ☐ Days-left-in-trial counter is accurate

Notes: _____

10. Settings & Account — P1

- ☐ Notifications screen lets you toggle each email type
- ☐ Backups page lists recent backups
- ☐ Manual backup downloads a JSON file
- ☐ Restore from JSON file works
- ☐ Logout completely clears the session

Notes: _____

11. Mobile-Specific (skip on desktop) — P1

- ☐ Touch targets feel right (no missed taps)
- ☐ Keyboard pushes content up (doesn't cover input)
- ☐ Drawer menu opens with swipe from left edge
- ☐ Drawer menu opens with hamburger tap
- ☐ App handles background → foreground transition smoothly
- ☐ Rotation handled gracefully (or locked to portrait, your choice)

Notes: _____

12. Help & Polish — P2

- ☐ Every page has a "?" button in the top-right
- ☐ Tapping "?" opens correct help section
- ☐ "What's New" modal eventually closes / doesn't reappear
- ☐ Loading states show spinners (not blank screens)
- ☐ Error messages are friendly (not raw stack traces)

Notes: _____



Free-form bug list

For anything not covered above. Format suggestion:

[Screen] [Severity P0/P1/P2] What you saw → what you expected

Example:

[Expenses] [P1] Date picker is cut off on left edge of iPhone SE → should be fully visible

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____



Tester Sign-off

- ☐ All P0 items pass
- ☐ All P1 items pass or are noted above
- ☐ Tester is confident app is ready for App Store / Play Store review

Tester signature: _____