

UX Improvements

Overview

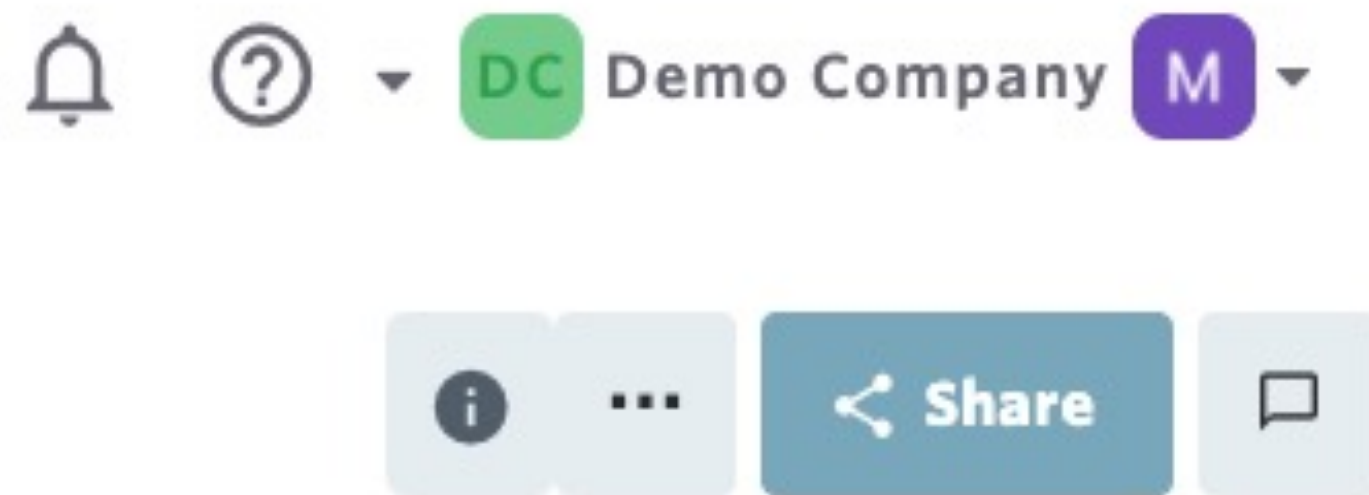
I went through the application section by section and noted all the “quick fix” UX improvements I could find. I took screen shots and added descriptions as to what the issues are. I have also done design improvements which have been shared with the developers. Pending approval they are ready to start implementing the design changes over the next few sprints. These updates, while small will help the overall experience while using the application.

Plans

Plans

Upper Right Nav

The info button blends with the 3 dot menu, also this is an odd spot



Plans

Save Bar

The save bar across the bottom gets lost, consider a modal as a "roadblock"



Plans

Table

Actuals | Forecast are easy to miss and the color differential is not good on bad monitors

ACTUALS	FORECAST
Jul-20	Aug-20
-	-
-	-
-	-
-	-

Plans

Table

Table scroll should be always available

	Feb-20	Mar-20	Apr-20
	-	-	-
	-	Click to scroll	-
	-	-	-
	-	-	-
	-	-	-

Plans

Table (Menus)

Too many actions are hidden, we need to determine primary actions vs "overflow" actions. All primary should be available at all time and not hidden. Also, the expand icon isn't always available and the user has to rollover the "sweet spot" in order to see it.

The screenshot displays a dashboard with three data tables. The top table is titled "Revenue by Account" and lists categories like Revenue, Sales, and Other Revenue. The middle table is titled "Revenue by Product" and lists Revenue \$, MRR, and NRR. The bottom table is titled "Billings by Account". A context menu is open over the "Revenue by Product" table, listing various actions such as "Expand", "Collapse", "Export Excel", and "Enter Fullscreen".

Account	
Revenue	All
Sales	All
Other Revenue	All
Interest Income	All
Unmapped	All

Product	
Revenue \$	
MRR	
NRR	

Account	

- > Expand
- > Expand All
- < Collapse
- < Collapse All
- ✕ Reset row expansion
- 🚫 Hide Rows with Zeroes
- 🚫 Hide Rows without Drivers
- 📄 Export Excel
- 🔗 Enable grid sync
- 🖥 Enter Fullscreen

Plans

Table

When I double clicked the cell it brought up the blue cell below. There is no context for this and it is confusing. On the right (Jan) when a user clicks to sort the column shrinks.




Revenue by Account ...

Account	Department	↑ Jan-20	Feb-20
Revenue	Unassigned	-	-
Billable Expense Income (38)	Unassigned	-	-
adfasdf	Unassigned	-	-
Billable Expense Income (38)	Unassigned	-	-
Billable Expense Income (37)	Unassigned	-	-
Billable Expense Income (36)	Unassigned	-	-
Billable Expense Income (35)	Unassigned	-	-
Billable Expense Income (34)	Unassigned	-	-
Billable Expense Income (33)	Unassigned	-	-



Plans

Table (Row)

Row actions should be visible and more easily accessible. If we want to put them into a menu structure then the menu should be visible at all times. The current method is difficult to use and implements the wrong icons.

COGS  ...  

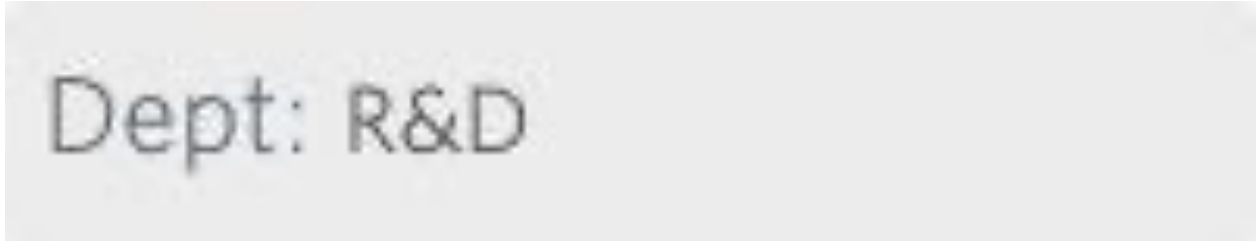
Account	Department	
Revenue	Unassigned	
Sales	Unassigned	
	Unassigned	
	Unassigned	
	Unassigned	
COGS	Unassigned	
Cost of Goods Sold	Unassigned	
Gross Margin \$	Unassigned	
Gross Margin %	Unassigned	

Plans

Department

The department switcher is disconnected from the modules and looks like a disabled button not a context switcher.



Dept: R&D

Plans

Dropdown

- Active (3 of 5), where are the other plans?
- The rollover menu is difficult to find
- The orange line is far from clear that a name is needed, maybe a hint text.

PLAN ACTIVE

Budget_1 ^

Manage Plans ⓘ

Active (3 of 5) ⓘ

POR ★ ⓘ	NAME	ACTUALS PERIOD	FORECAST PERIOD	DESCRIPTION
-	<u>Budget_1</u>	Jan 2018 - May 2018 ▾	Jun 2018 - Dec 2020 ▾	Cloned Budget
★	Test Budget	Jan 2020 - Jul 2020	Aug 2020 - Dec 2021	
☰	-	Jan 2019 - Oct 2020 ▾	Nov 2020 - Dec 2021 ▾	

+ Add New

Archived (0) ⓘ

There are no archived plans

Save Close

Plans

Charts

When a user clicks the charts icon there is a several second delay it feels like the link is broken, perhaps a loader (typing giraffe)

COGS ⓘ ▾ ...   

Income Statement

Account	Department	Jan-18	Feb-18	Mar-18
Revenue	Unassigned	-	-	-
Sales	Unassigned	-	-	-

Plans

Drivers

The way to create drivers is inconsistent. Some has the "Add" button under it and for some, you have to click on the "... " menu

COGS ▾ ... 🗨

There are no rows to display

OpEx ▾ ... 🗨

There are no rows to display

Other Income & Expense ▾ ... 🗨

There are no rows to display

Balance Sheet ▾ ... 🗨

There are no rows to display

CapEx Assets ▾ ... 🗨

There are no Assets. **ADD**

CapEx ⓘ ▾ ... 🗨

There are no rows to display

Allocations ⓘ ▾ ... 🗨

There are no rows to display

Staffing ⓘ ▾ ... 🗨

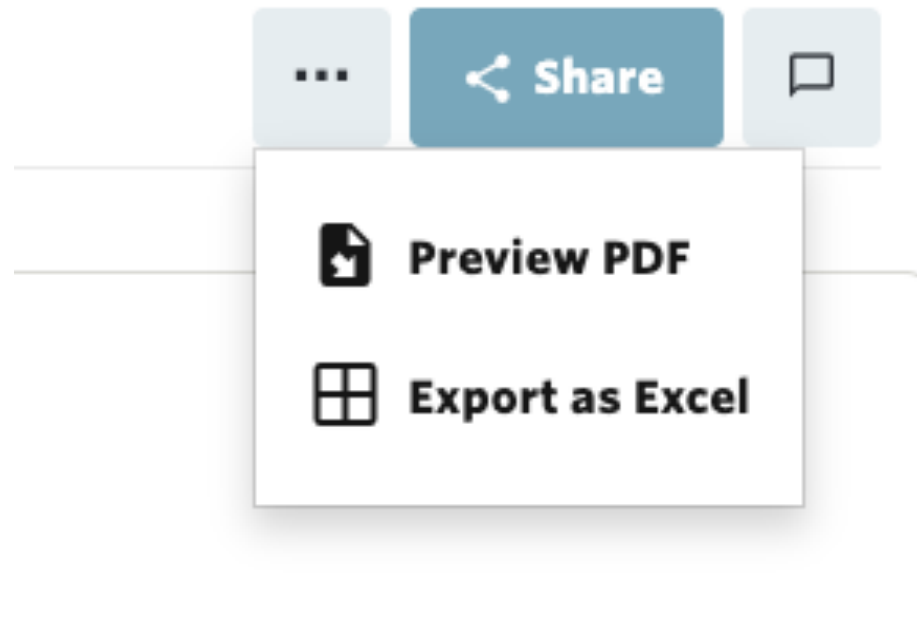
There are no rows to display

Reports

Reports

Upper Right Navigation

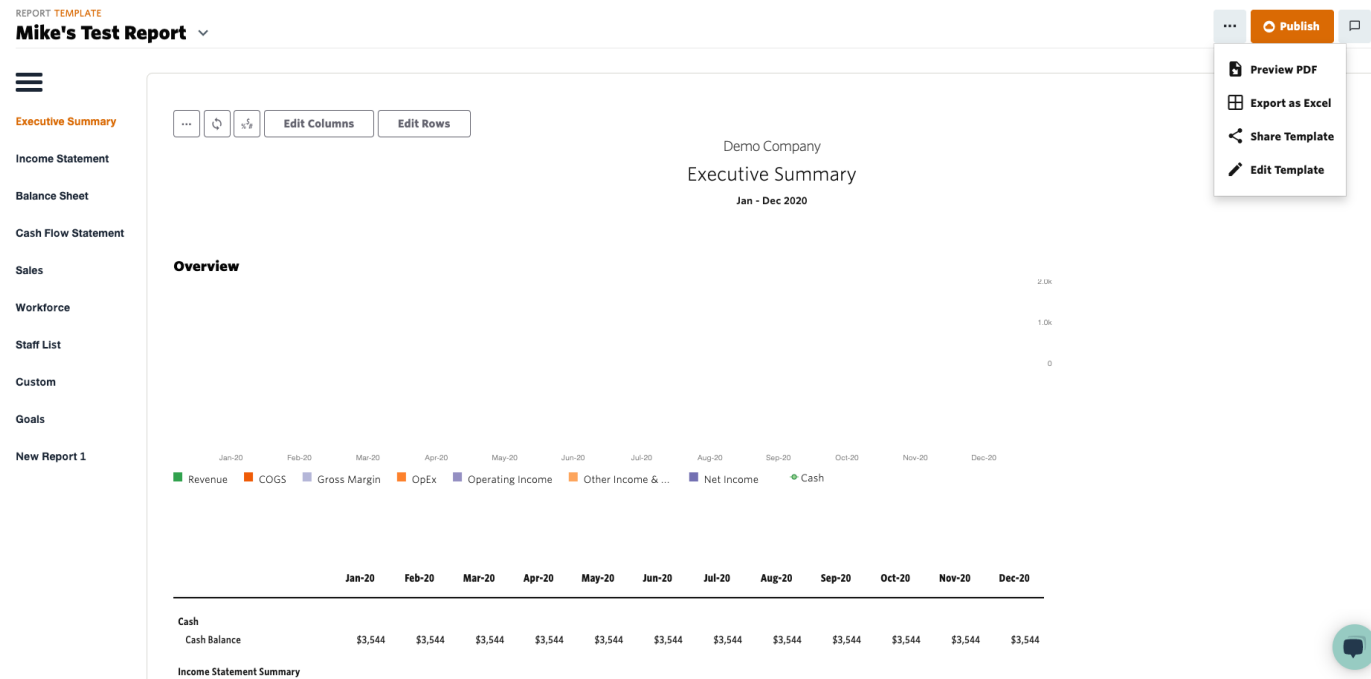
The ... menu actions should not be hidden and should be more readily available.



Reports

Upper Right Navigation

The ... menu is very disconnected, the actions should be available and not hidden



Reports

Edit Template

The rollover menu is difficult to access. It also uses the wrong icon for a menu. We should determine what are primary and what are overflow actions.

REPORT TEMPLATE

Mike's Test Report ^

Templates 0 (2 of 16)

NAME	UPDATED	CREATED
All Reports 1	7 months ago	8 months ago
Mike's Test Report	2 months ago	2 months ago

↑ Publish Report

✎ Edit Template

🔗 Share Template

📄 Clone

↕ Move

⊖ Delete

+ Add Template

☁ Save

✕ Close

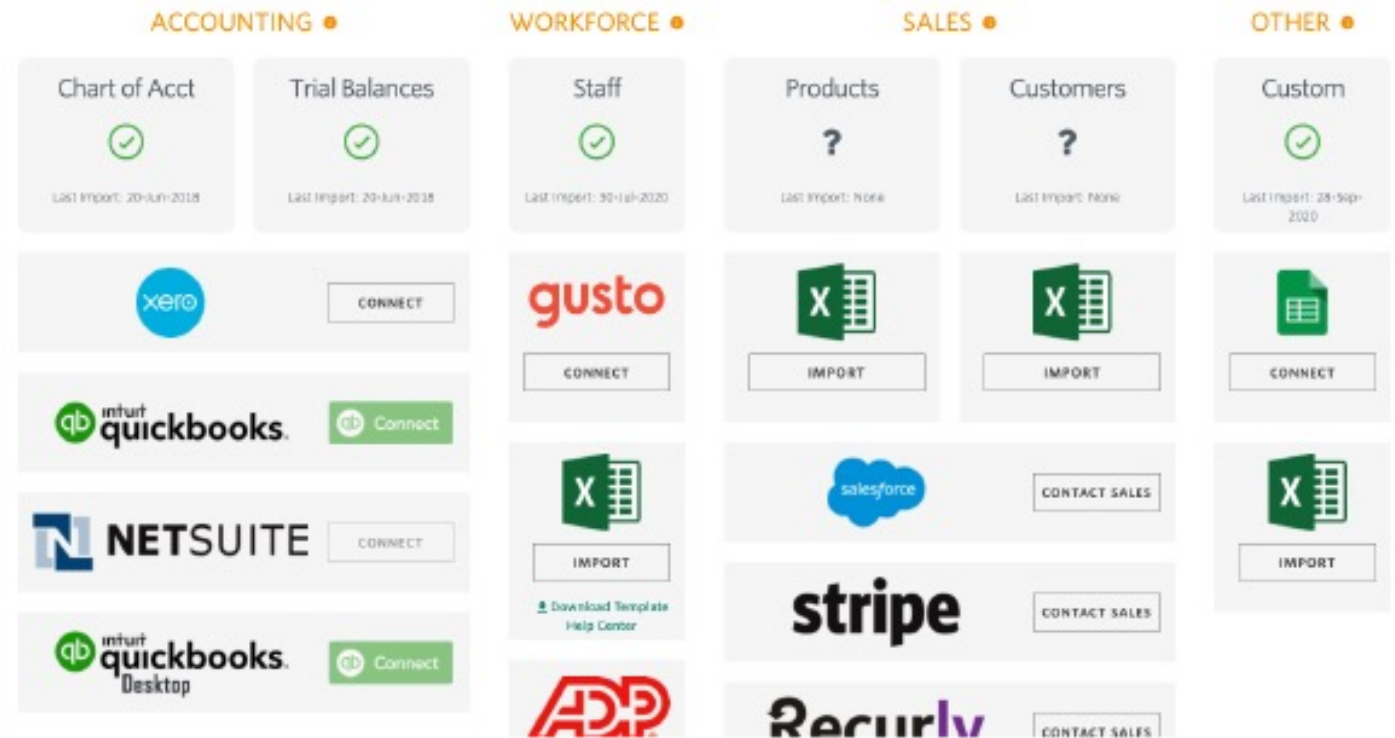
Goals

Setup

Setup

Landing Page

- The page feels very overwhelming, there is no actual flow to it.
- The tiles blend together and the orange column titles are difficult to read and can be confused for links
- The connect buttons look very similar to the inactive buttons
- It is not clear that each section has a sub section (especially Products & Sales)



Setup

Cashflow

With a form set up that is so vertically tall we need to set up "sticky" titles. That way as the user scrolls through they are always aware of which radio button they are selecting

SETUP

Cash Flow ▾

Account Classification

	Operating	Investing	Financing
Assets			
Assets	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current Assets	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bank Accounts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Current Assets	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accounts Receivable	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prepayments	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inventory	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Test	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unmapped	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fixed Assets	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Office Equipment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Less Accumulated Depreciation on Office Equipment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Computer Equipment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Less Accumulated Depreciation on Computer Equipment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Unmapped	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Other Assets	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unmapped	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Dashboard

Dashboard

Setup

- The vertical orange line makes it feel like 2 different sections and it's far from obvious the left controls the right.
- The two "GO" buttons in the right column look like a proper call to action when in reality they launch a video.
- All the videos have the same opening frame, it is not obvious the videos change
- In the Getting started areas the actions on the right get lost in the "chaos."
- Crossing out completed tasks look like a CSS error not a checklist

Dashboard

Setup

☑ Getting Started (1 / 3)

- ~~Import accounting data~~
- **Set up system**
- Import staffing information

☑ Getting Familiar (0 / 4)

- Create a new dashboard tile
- Share dashboard with a colleague
- Create a simple revenue forecast
- Create an advanced forecast using custom table

1. Review Company Set up **Go**

2. Define Department mapping **Go**








Dashboard

Upper Right Navigation

These actions should not be hidden but should be clearly accesible at all times



-  **Add New Tile**
 -  **Add New Text Tile**
 -  **Add Income Statement Tile**
 -  **Add Balance Sheet Tile**
-
-  **Preview Print**

Dashboard

Whole Dashboard

The dashboard is not responsive, there is a ton of wasted white space on the right side forcing the user to have to scroll instead of taking advantage of the space

DASHBOARD

High Level



Share



Income Statement



Income Statement

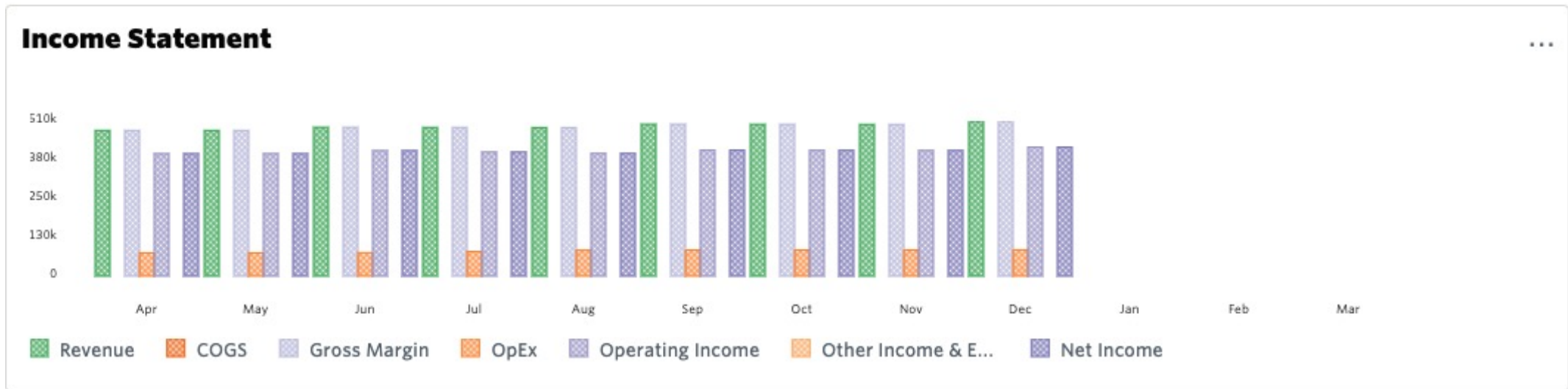


This tile needs to be reconfigured

Dashboard

Edit

The edit and overflow menus are hidden



Dashboard

Edit Modal

There is a pencil in place of the traditional X/close button

The save and cancel buttons are not visible, the user has to scroll to the bottom to see them. Now they don't have an easily accessible escape route.

Income Statement

SERIES: Income Statement

SOURCE: Budget_1 | COMPARED TO: None | PERIODICITY: Monthly | RANGE: -6 | +6 Months

PREVIEW

Income Statement

Revenue, COGS, Gross Margin, OpEx, Operating Income, Net Income

ZERO ROWS FORMATTING: Hide Zeroes

DISPLAY: Revenue (All), COGS (All), Gross Margin (All), OpEx (All), Operating Income (All), Other Income & Expense (All), Net Income (All), Cash

DATA

	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
Revenue	\$477,089	\$477,093	\$487,513	\$487,015	\$486,542	\$497,593	\$497,160
Sales	\$477,036	\$477,039	\$485,960	\$485,462	\$484,989	\$494,540	\$494,110
Other Revenue	\$ 53	\$ 53	\$ 1,553	\$ 1,553	\$ 1,553	\$ 3,053	\$ 3,050

Global Issues

Global Issues

Save/Cancel

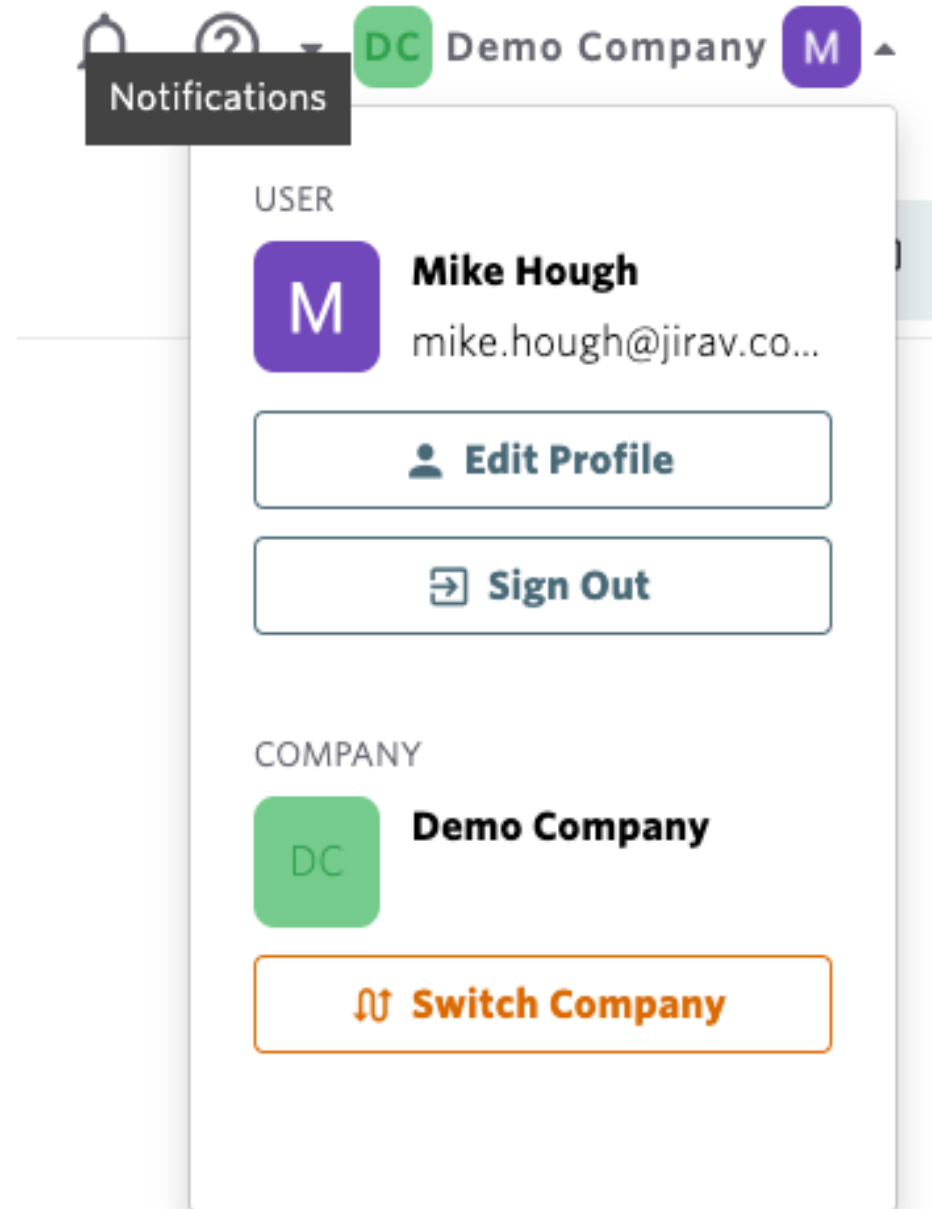
Inconsistent Button Formatting



Global Issues

Upper Right Navigation

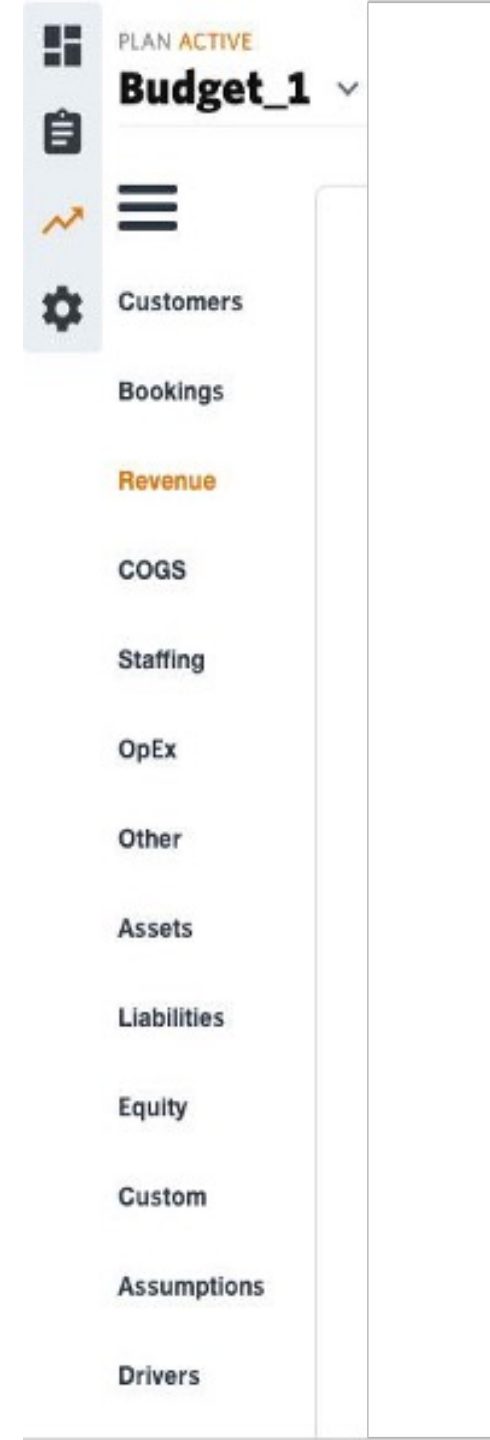
The two different colored squares made me think there were supposed to be two separate dropdowns.



Global Issues

Menu

- The menu structure lacks a visible hierarchy. When I was first introduced to the app I had no idea what was going on
- The left primary navigation relies entirely on icons and rollovers. Icons should never be a primary menu, they are good for secondary actions or highlight a menu
- The left primary navigation relies entirely on icons and rollovers. Icons should never be a primary menu, they are good for secondary actions or highlight a menu



Global Issues

Menu (continued)

- In this image, it's the plan section. It was not clear that "Budget_1" was a plan. Also, the "PLAN ACTIVE" is confusing. I haven't found another state other than "ACTIVE."
- The hamburger menu icon is wrongly used here. The icon is not meant to be an expandable/collapseable icon, it s meant to be a primary menu icon.

