UI Design for QBO UGC

abhishek chakraborty
136330004, Interaction Design
IDC, IIT Bombay

Declaration

I declare that this written submission represents my ideas and experiences in my own words. I also declare that I have adhered to all principles of academic honesty and integrity and have not misrepresented or fabricated or falsified any idea/data/fact/source in my submission. I understand that any violation of the above will be cause for disciplinary action by the Institute and can also evoke penal action from the sources which have thus not been properly cited or from whom proper permission has not been taken when needed.

Abhishek Chakraborty
136330004, Interaction Design
IDC, IIT Bombay

Acknowledgment

I had a very profound experience while working with Intuit for my internship. Throughout my internship I've met various people, got to learn a lot of things from the insights that they have gained through their experience.

The objective of the internship was to do collaborative work in a corporate industry and get some idea how things are usually done in offices, which I believe I have satisfactorily gained. My main interest lied in software UI design and I can say I got that satisfactorily through Intuit.

I would like to thank Mr. Raaj and Mr. Ravi Krishna Pudi for giving me the opportunity to intern with Intuit, India Development Centre and also guiding me throughout the period of internship.

Apart from them the following people are to be thanked for guiding and helping me throughout the internship:

- Ravi Krishna Pudi (Interaction Designer) again, for being my guide and mentor.
- Sushma Padmanabhan (Product Manager), for her open mindedness during brainstorming sessions at the huddle rooms.
- Praveen Singh, Sanyam Aggrawal and Jayanth Saimani (all of them software developers) for their questions and invaluable inputs during the presentation and knowledge sharing sessions.
- Deepa Bachu (Director), for being the leader that she is and for motivating me to excel.
- I would also like to thank IDC, IIT Bombay for facilitating my internship with Intuit.

Contents

About Intuit

Intuit is a software company based in the US that makes financial and tax preparation softwares for small and medium businesses (SMBs), accountants and individuals. Its headquarters are in Mountain View, California. Intuit was founded in 1983 by Scott Cook and Tom Proulx in California.

The popular products of Intuit are QuickBooks which is an accounting software for SMBs, and Quicken and TurboTax which are personal finance softwares.

About QBO and QBO UGC

QuickBooks is an accounting software package developed and marketed by Intuit. There are Basic and Pro versions of the software including other industry-specific versions, with workflow processes and reports designed for each of these business types.

QBO

QuickBooks have mainly two editions, the QuickBooks Desktop (QBDT) which is a software package which has to be installed in the system and only then can it be used, and the QuickBooks Online (QBO), which is an online version of QuickBooks and Intuit is providing it as Software as a service (SAAS).

QBO UGC

QBO had been launched in France recently and the QBO User Generated Content team had been setup whose main purpose was to gather contributed data from the users (and non-users as well) such as invoice formats, Chart of Accounts (COAs), billing formats, tax rates etc. so as to save a lot of legwork when the product is launched in other countries as well.

Approach
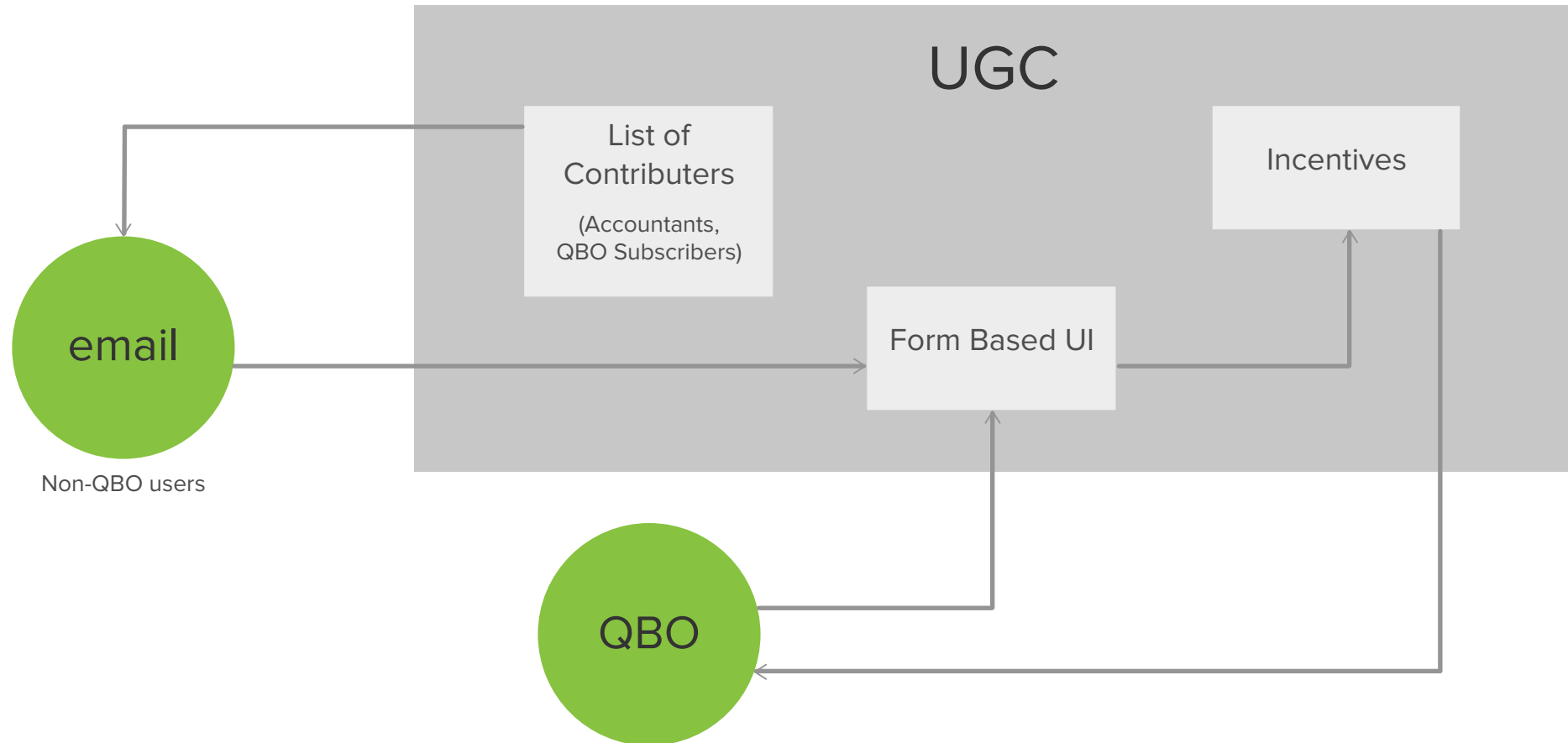
Workflow Mockups

Design Brief:

To design clickable mockups of workflows of the share experience. The mockups maybe hand drawn or paper prototypes. The whole process needs to complete within 4 steps. These were to be tested with the users to communicate the idea of how we are planning to approach UGC.

These mockups were done on paper first and then was done in Balsamiq to make them clickable and more engaging so that one doesn't have to be present to explain it to them.
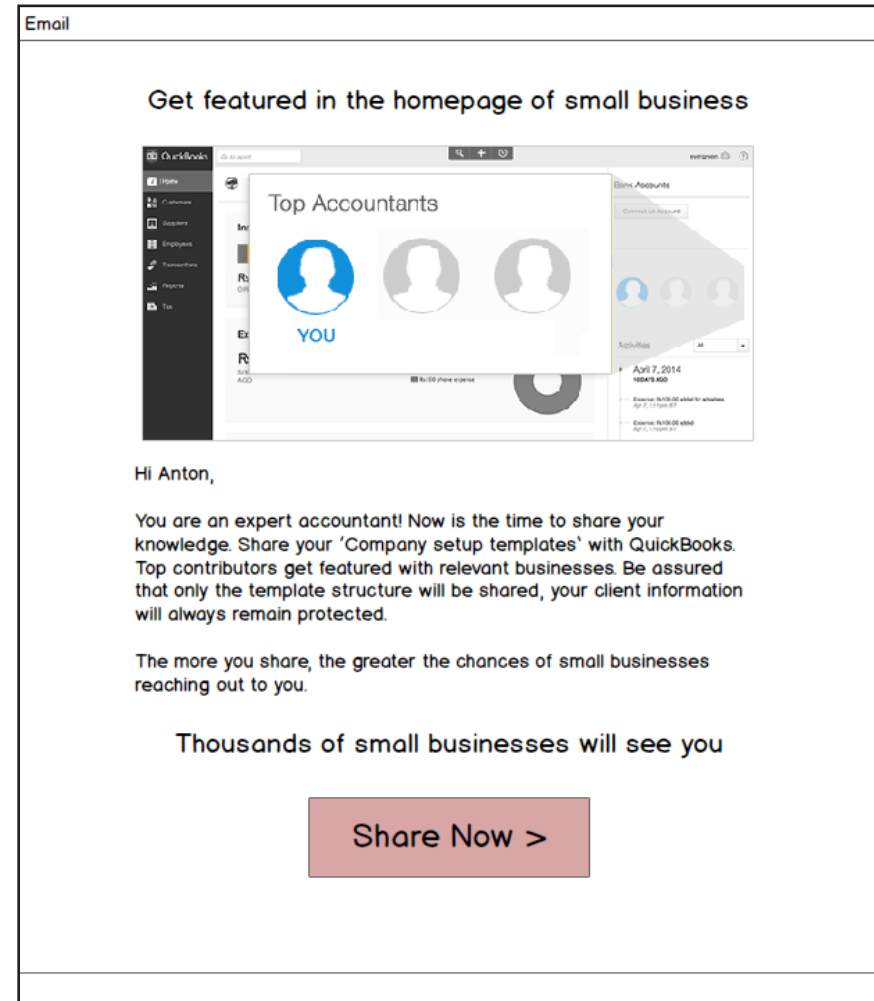
Screen 1: email is sent with a share button

Workflow Mockups Contd.
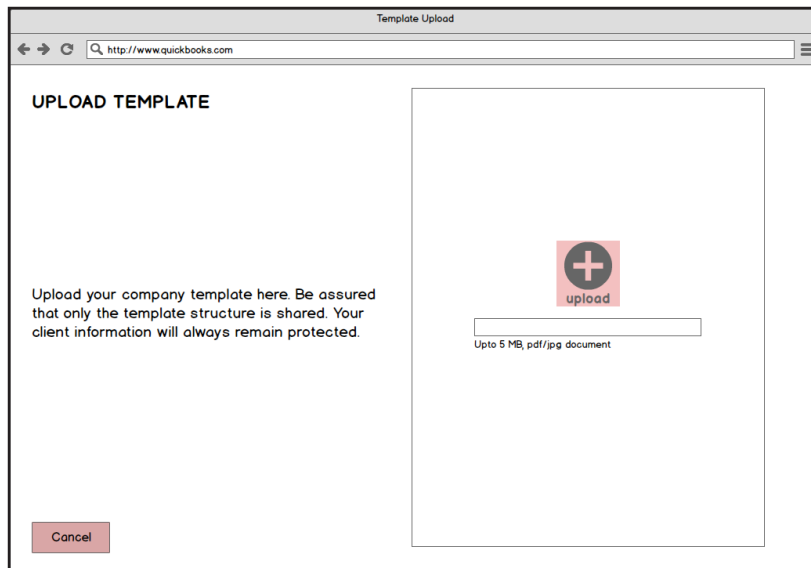
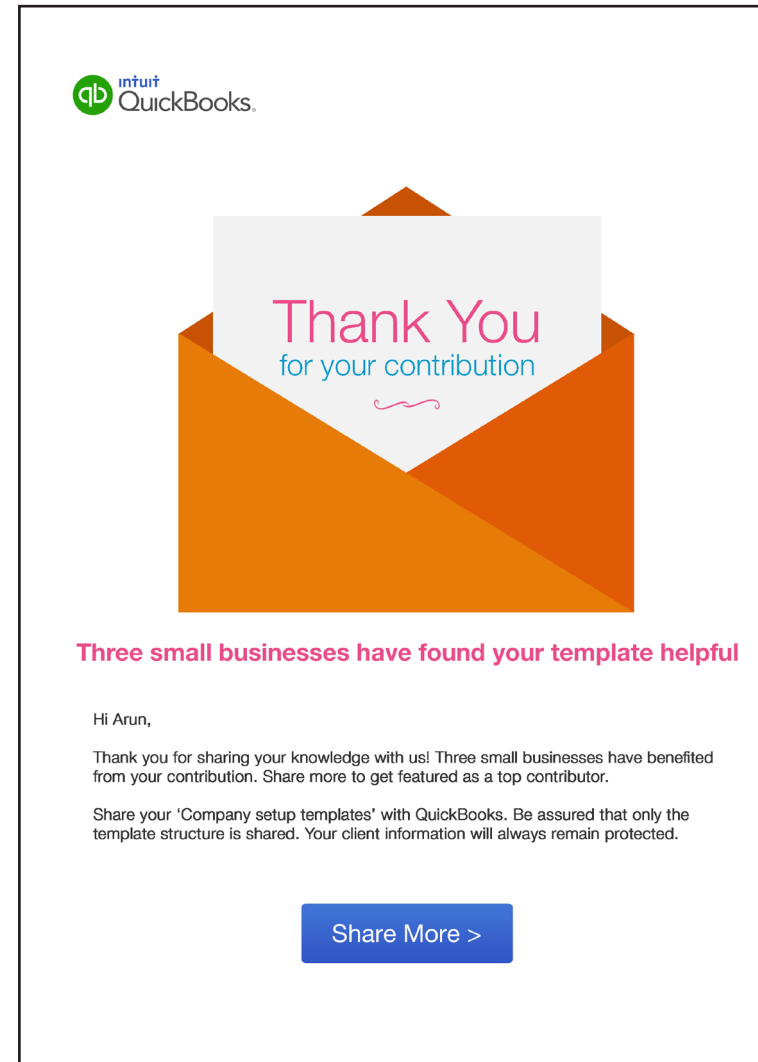Screen 2: Link takes the user to upload dialog box in QuickBooks

Screen 3: The user is thanked for his contribution.
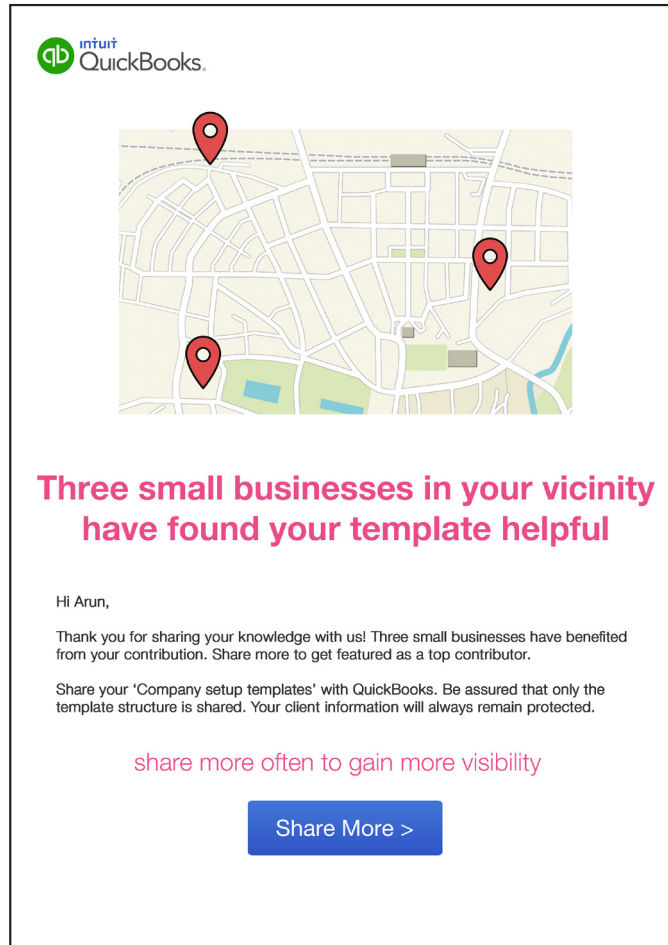
Mailer Designs

Design Brief:

After accountant had shared different templates, a mail is to be sent out to them thanking them for their contribution and letting them know how many people have found their template helpful.

The mailer not only thanks them but also lets them know how they are reaching to more and more potential customers and also if they share more, their business will further grow.
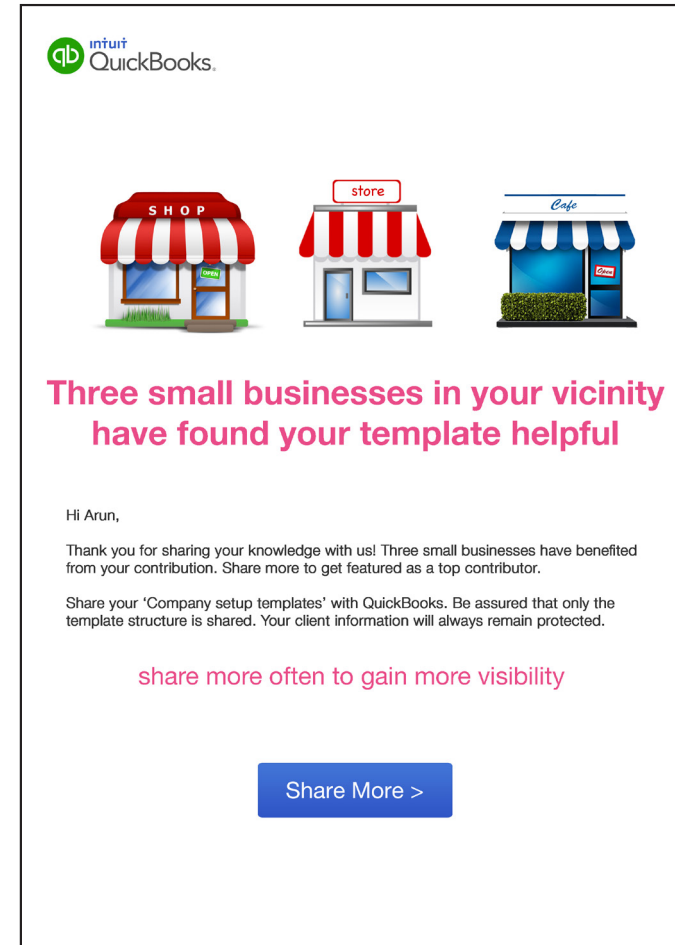

1st Alternative

Mailer Designs Contd.

Three small businesses in your vicinity have found your template helpful

Hi Arun,

Thank you for sharing your knowledge with us! Three small businesses have benefited from your contribution. Share more to get featured as a top contributor.

Share your 'Company setup templates' with QuickBooks. Be assured that only the template structure is shared. Your client information will always remain protected.

share more often to gain more visibility

Share More >

2nd Alternative

Three small businesses in your vicinity have found your template helpful

Hi Arun,

Thank you for sharing your knowledge with us! Three small businesses have benefited from your contribution. Share more to get featured as a top contributor.

Share your 'Company setup templates' with QuickBooks. Be assured that only the template structure is shared. Your client information will always remain protected.

share more often to gain more visibility

Share More >

3rd Alternative

Customer Empathy

Design Brief:

All of them team members, especially the software developers aren't very much aware about the pain points of the customers. To find a way for them to connect with the customers and develop empathy for them.

People won't prefer reading long texts of the Voice of Customers (VOCs), therefore make cartoon strips and paste them on walls to communicate the problems of the users to the QBO team members and to other members of Intuit as well. Also to send out mails of the same to them.

Customer's story based on interviews

Customer Empathy Contd.
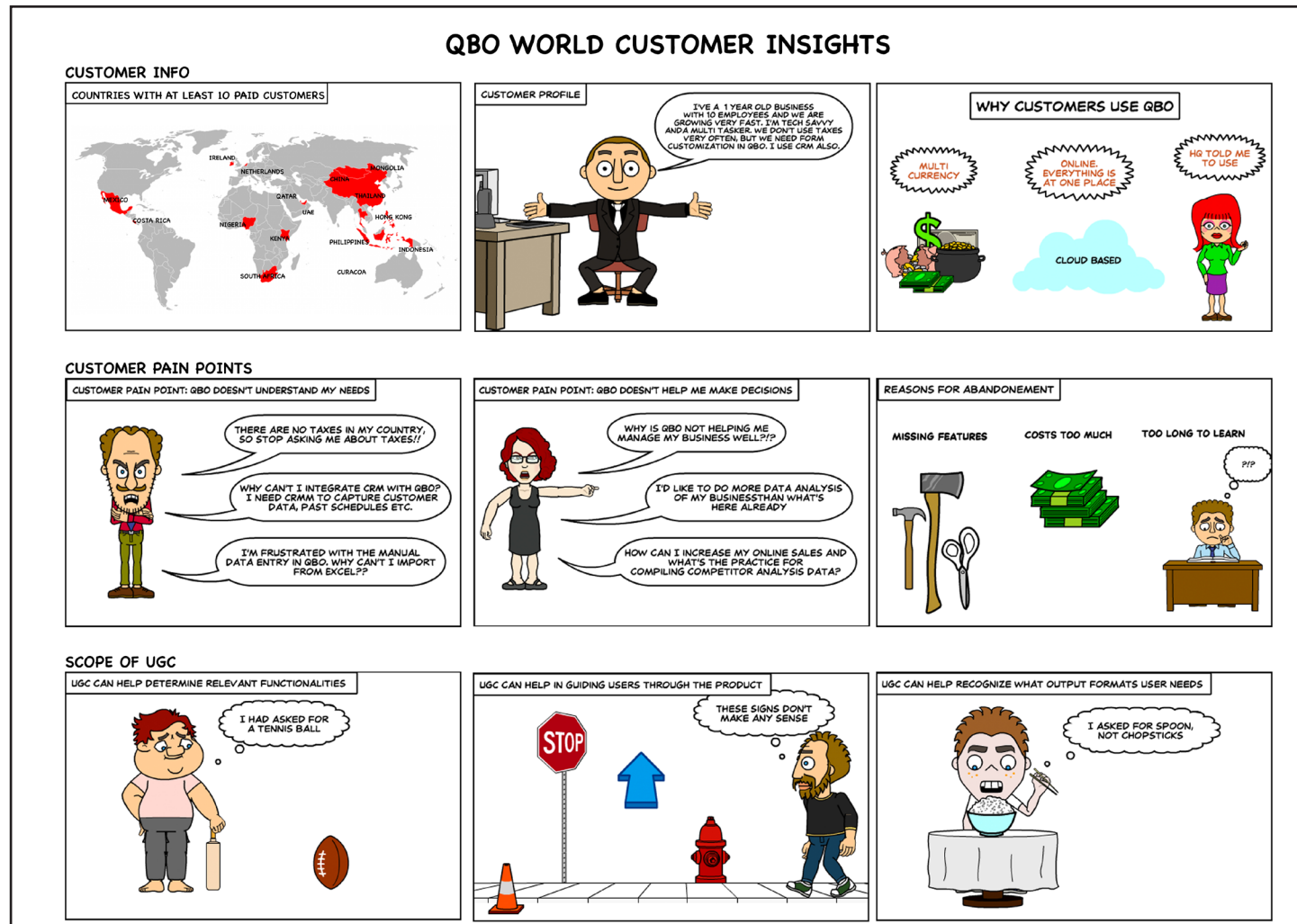
Storyboard based on global user feedback.

Wireframing: Adding COA

Design Brief:

In France, there is a list of 996 Chart of Account (COAs) stored in the database from which an SMB can add any account to their profile. There are hierarchies within the list, so when a child account is added, the parent is also added automatically. The entry point of the current 'Add COA' screen is not that great, to find a better approach.

The entry point of the current screen is not very intuitive.

People won't prefer reading long texts of the Voice of Customers (VOCs), therefore make cartoon strips and paste them on walls to communicate the problems of the users to the QBO team members and to other members of Intuit as well. Also to send out mails of the same to them.

Wireframing: Adding COA Contd.

ADD ACCOUNT

Search by Account No or Name (Plan Contable)

```
78
```

Reprises sur provisions exceptionnelles (7875)   already added
Reprises sur dépréciations exceptionnelles (7876)
Reprises sur provisions (à inscrire dans les produits exceptionnels) (787)
Reprises sur amortissements, dépréciations et provisions (78)

*Detail Type:

Customers

Customers track money that customers owe to the products or services, and payments customers make.

Number:

Description:

Hierarchy:

Account

Category Type

1 Liability Accounts

Account

▸ **10** Capital and reserves
▸ **11** Accumulated retained earning
▸ **12** Profit or loss for the financial year
▸ **13** Equipment grants
▸ **14** Regulated provision
▸ **15** Accruals
▸ **16** Loans and debts
▸ **17** Debts linked to shareholdings
▾ **18** Liason accounts for shareholding companies
   181 Reciprocol branch accounts
   186 Goods and services exchanged (charges)
   187 Goods and services exchanged (income)
   188 Reciprocol joint venture accounts

Description

Lorem ipsum dolor sit amet

* Name

Commissions and fees

Description

☐ Is sub-account

Enter parent account

Cancel   Save

Design 1: Search bar with predictive text. User can type either the account name or the account number and easily add it.
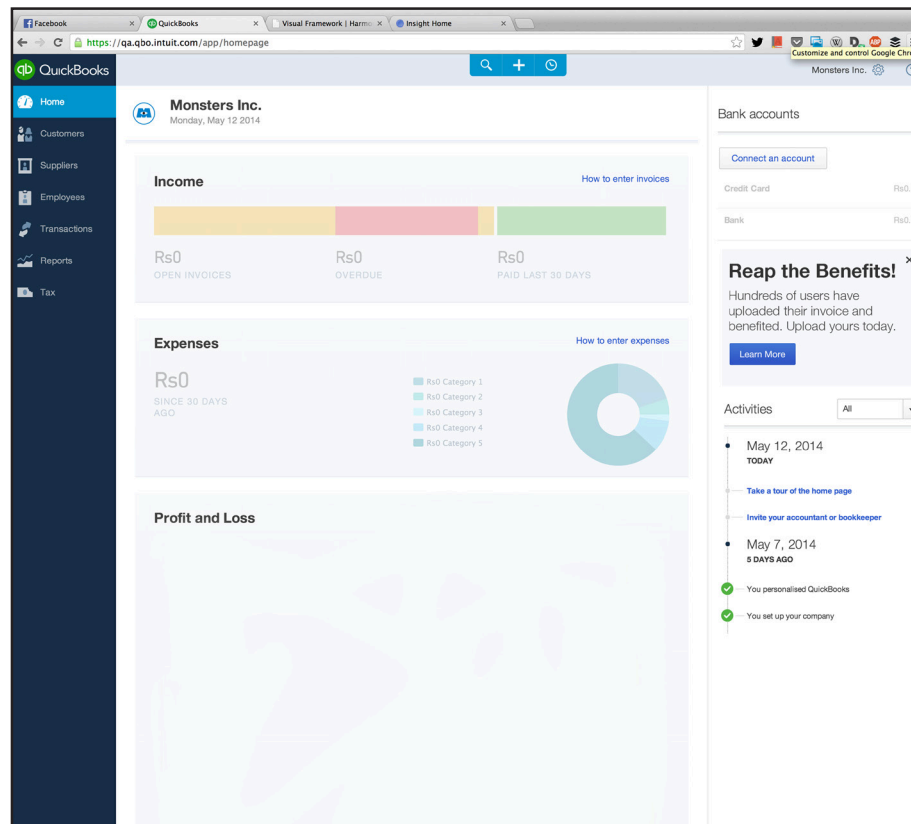
Design 2: Tree structure along with a searchbar. If the user doesn't know the Acc. name or the Acc. number, he can locate it from the tree.

Wireframing: Invoice Upload

Design Brief:

To design the workflow of asking a user to upload sample invoice from within Quick Books.

Screen 1: Some interesting text should trigger the user to click upon the 'Learn More' button. The user might ignore it completely if the share button is placed here directly.

Wireframing: Invoice Upload

Screen 2: When the user uploads the template/document, an inbuilt OCR detects the fields and displays them. The user can make changes to the text it necessary.

Screen 3: The user is thanked for his contribution.

Wireframing: Sharing Reports

Design Brief:

 QuickBooks generates statistical reports based on the company's performance like Profit & Loss (P&L), Company Snapshot, Balance Sheet etc. To design screens to facilitate the user to be able to select the report which he frequently uses so that a curated list can be built which has the frequently used reports of specific industries.

COMMONLY ASKED QUESTIONS

1. I want to find out the money I've earned and the money I've spent; like an income statement. ☐

2. I want to see year over year comparisons through expense and income using pie charts and bar graph. ☐

3. I want to see how long I've been open (outstanding) for the last 30, 60, 90+ days. ☐

OTHER REPORTS

1. I want to see my income minus expenses (net income) for each customer. ☐

2. I want to be able to group transactions by customer name, so you can see all activity related to each customer. ☐

Have an additional question?

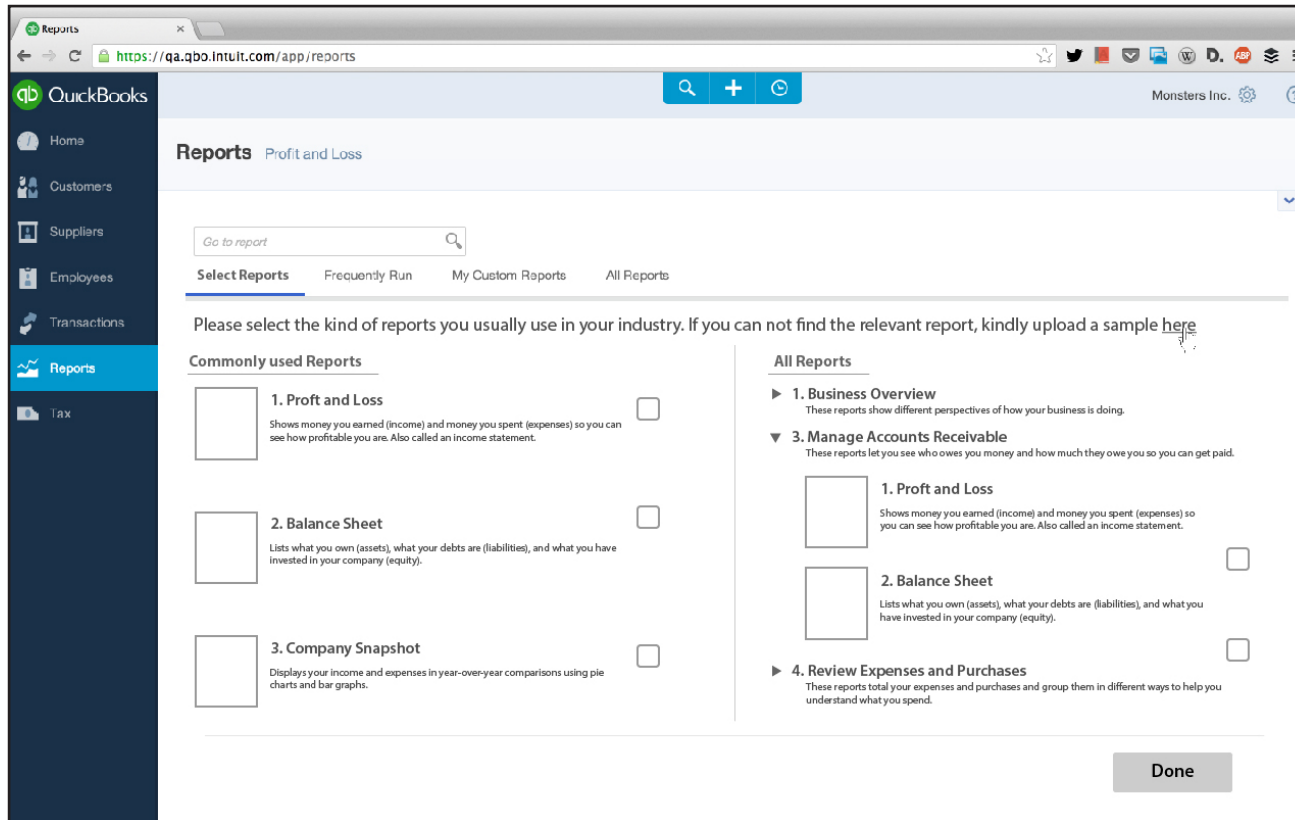*Type your query here and we'll get back to you soon*

SUBMIT

CANCEL   NEXT

 Approach 1: Ask the user what kind of data he needs to see in his reports for his industry so that an industry specific report list maybe curated. User also has the pro- vision to ask a question or give some suggestion.

# Wireframing: Sharing Reports

Approach 2: Ask the user to select the reports he generally uses. If he feels that some other report needs to be added, he can upload his own sample also.
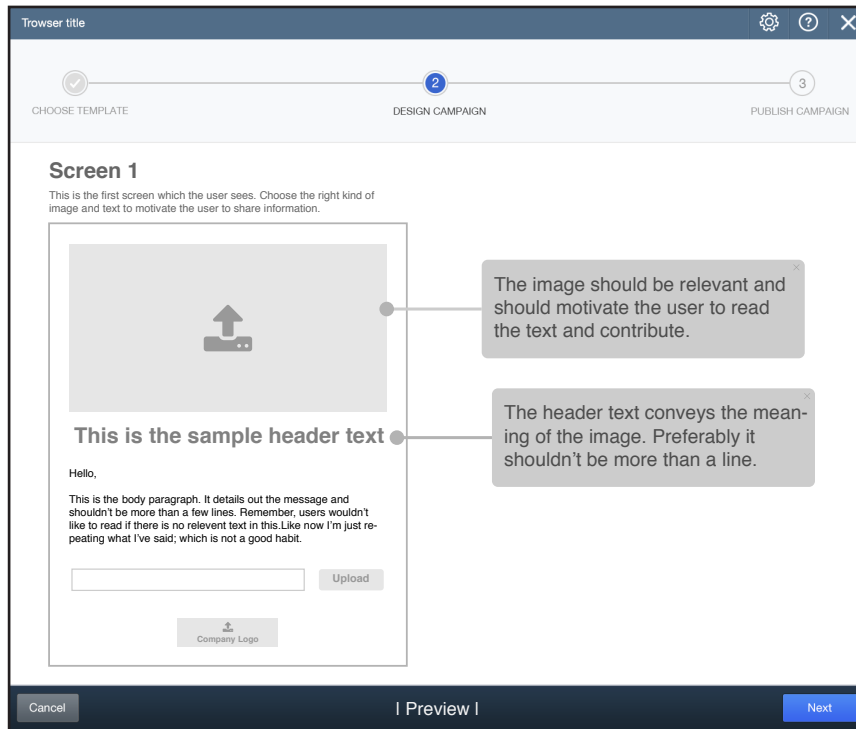
Wireframing: Form Builder

Design Brief:

To build the screens for an internal tool which will help one to make well designed form based mailers (without the help of designers for sending them to clients.
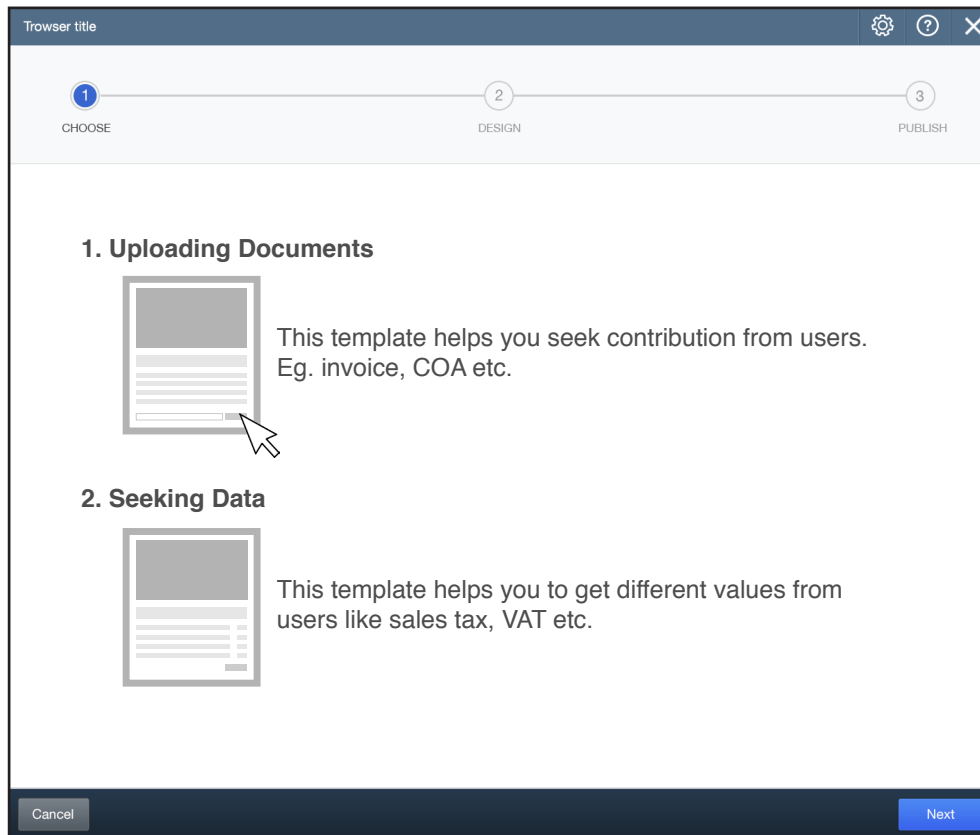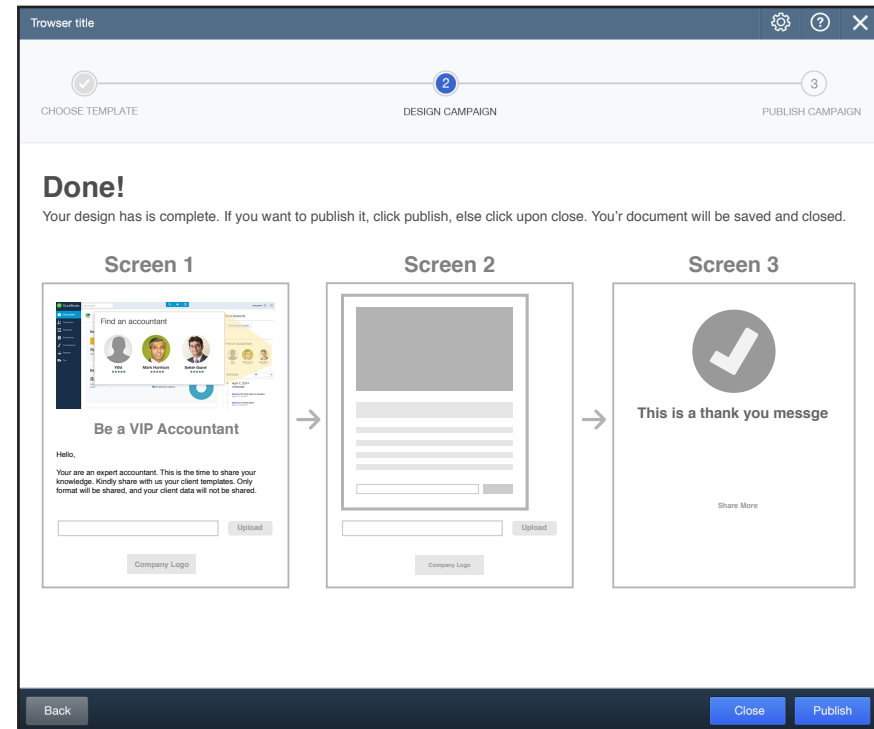

Screen 1: There are specific form templates for the user to design

Wireframing: Form Builder Contd.

Screen 2: All the fonts and colours are predecided. The user has to just change text and upload any image. There is text to guide the user.

Screen 3: After the design process is complete the user is shown all the screens he has built. He can email this to clients or share a link with them, or save it for later use.

Unstructured Time: QBO Assets

Different kinds of charts and graphs mockups which can be used during visual design of wireframes. This will save a lot of time for the designer as he won't have to manually design everything. Also, there will be consistency in everybody's work.
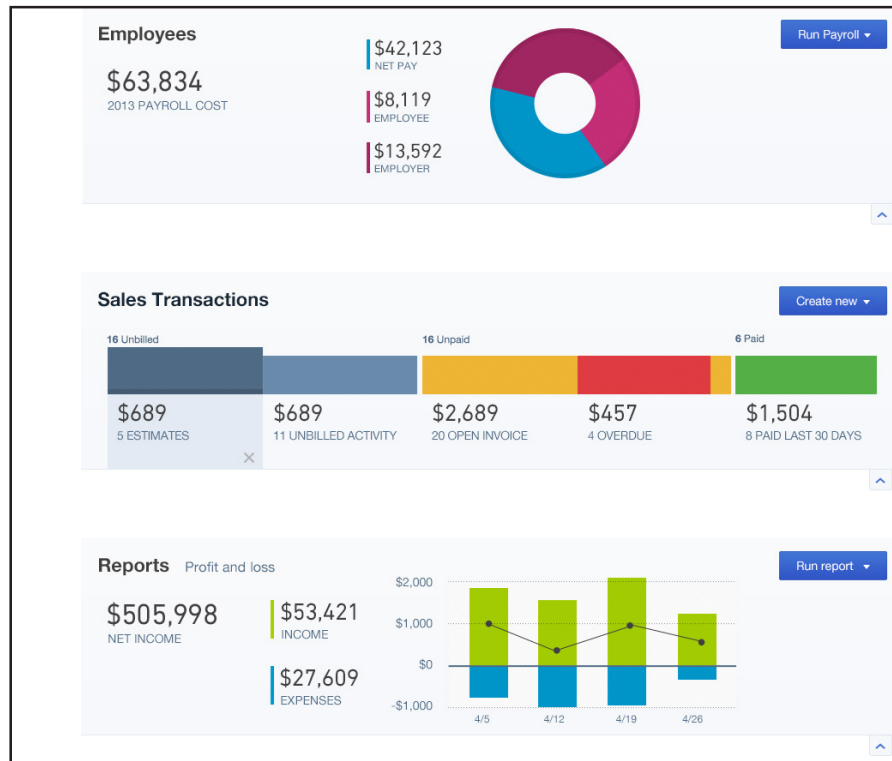
Unstructured Time: Icon Design

Icons for various accounting keywords used within QuickBooks and emails.
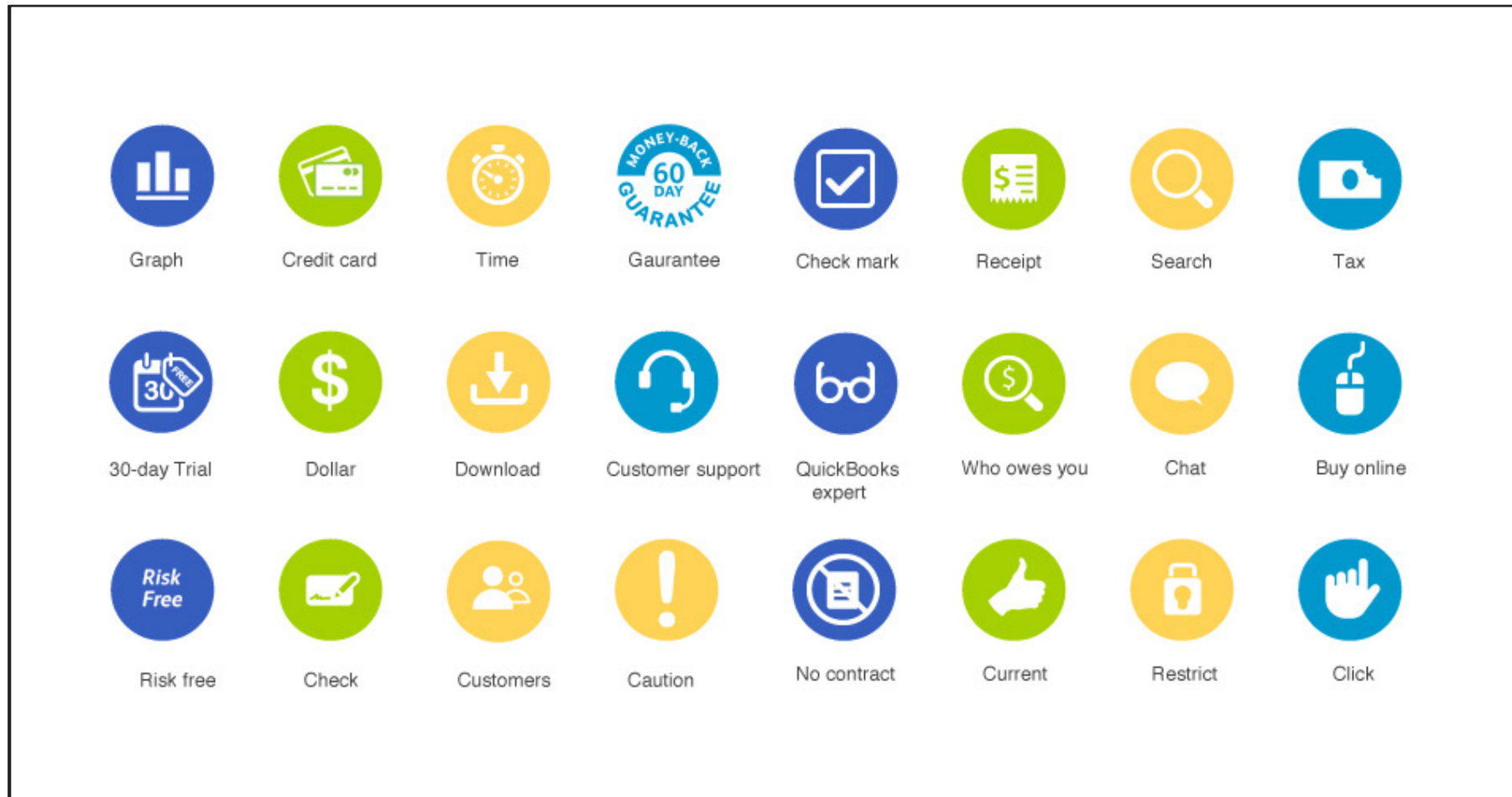
Takeaway

- Understanding the user and his needs is very crucial.

- Having a minimum viable product which gets the work done is very important before releasing the ideal version.

- One should always have alternat ideas. If forces the mind to think more and come up with better versions.

- Importance of running experiments.

- Iteration is very crucial to good design.

- There is always room for improvement.

- Sketching experience on paper is always helpful before going digital.

References

Books

- Sketching User Experiences - Bill Buxton

- Envisioning Information - Edward Tufte

- Designing Interfaces - Jennifer Tidwell

Internet

- Intuit Harmony Guidelines harmony.intuit.com

- Intuit Customer Empathy blog.intuit.com/customer-empathy

intuit®

June 16, 2014

TO WHOMSOEVER IT MAY CONCERN

This is to certify that **Abhishek Chakraborty** of **IIT, Bombay** has undergone his Internship from **May 05, 2014** to **June 16, 2014** at **Intuit India Product Development Center Pvt Ltd -Bangalore**. During this period he worked on the project entitled **"QBO UGC"** under the able guidance of Project Manager **Ravi Krishna Pudi**, Intuit Bangalore.

During the period of his work, his conduct and character were good and tasks assigned to him were completed satisfactorily.

Thanking you

Sincerely,

For **Intuit India Product Development Center Pvt Ltd**

Sundareswaran V
Leader-Global HR Operations