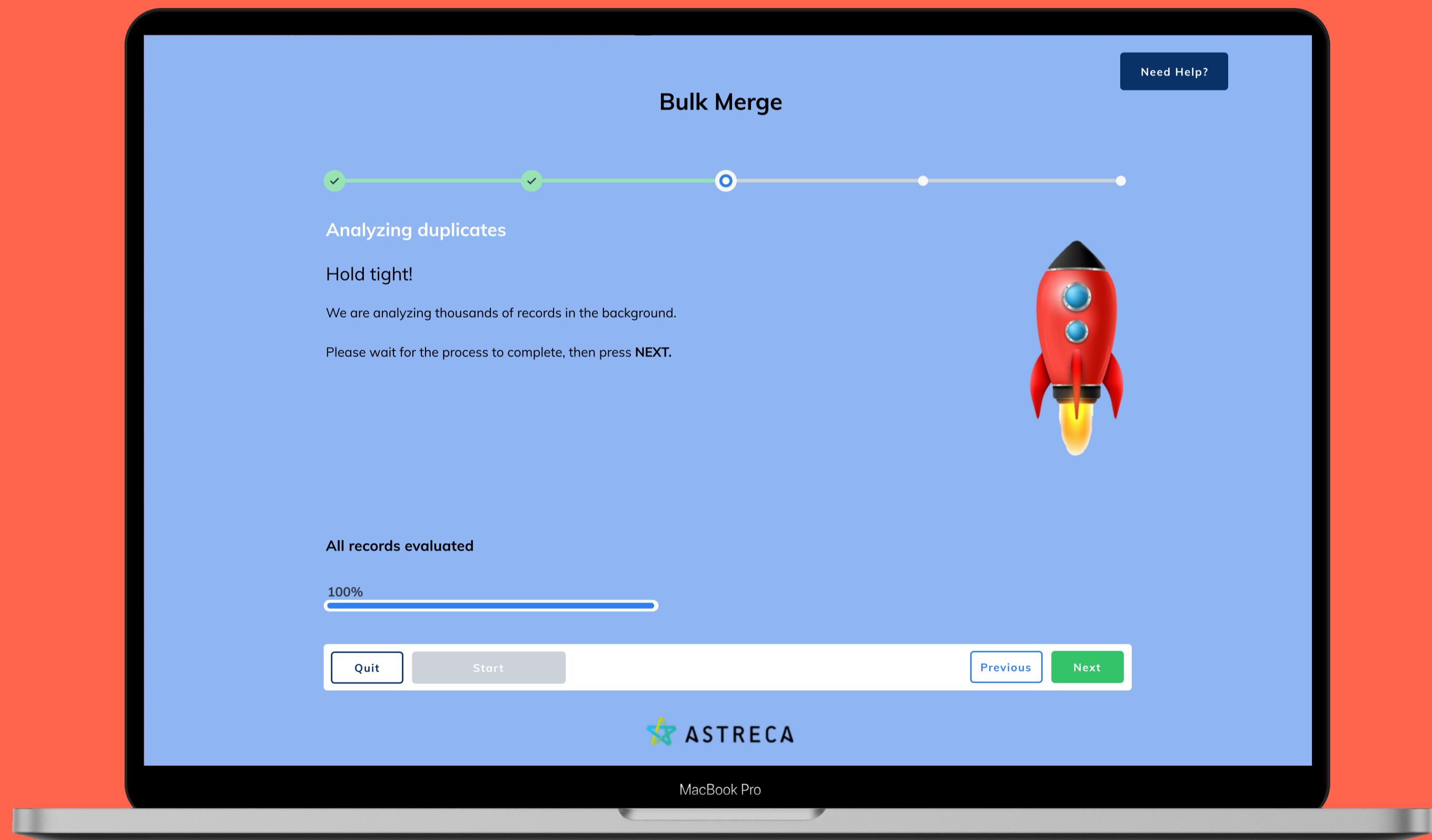


Astreca

Bulk Merge App – Salesforce Platform



Background

Astreca hired me as a Freelance UX/UI designer to improve their Minimum Viable Product for final development. The service is a web based “Bulk Merge” app that they offer within the Salesforce platform.

Project Goals

- Recommend and design new solutions for the app based on UX and UI best practices
- Design the prototype accordingly to the customers limitations of their backend system.

The challenge

The biggest challenge was to keep the limitations of the backend in mind. This played an important role in designing the call to action buttons. Certain actions could only be executed by the user clicking a button, and could not happen automatically.

Role

UX/UI Designer working with a product manager.

Timeline

Timeline: 3 Dec - 10 Dec (1 week)

Discovery

Before diving into designing the wireframes, I wanted to get an idea of what exists in the market for similar products and re-cap UX best practices taking into careful consideration the following areas of the app:

Stepped processes

"There are three primary reasons to use a stepped process: to logically group inputs, set clear expectations for the user, and to track progress within a complex process."

Call to action buttons

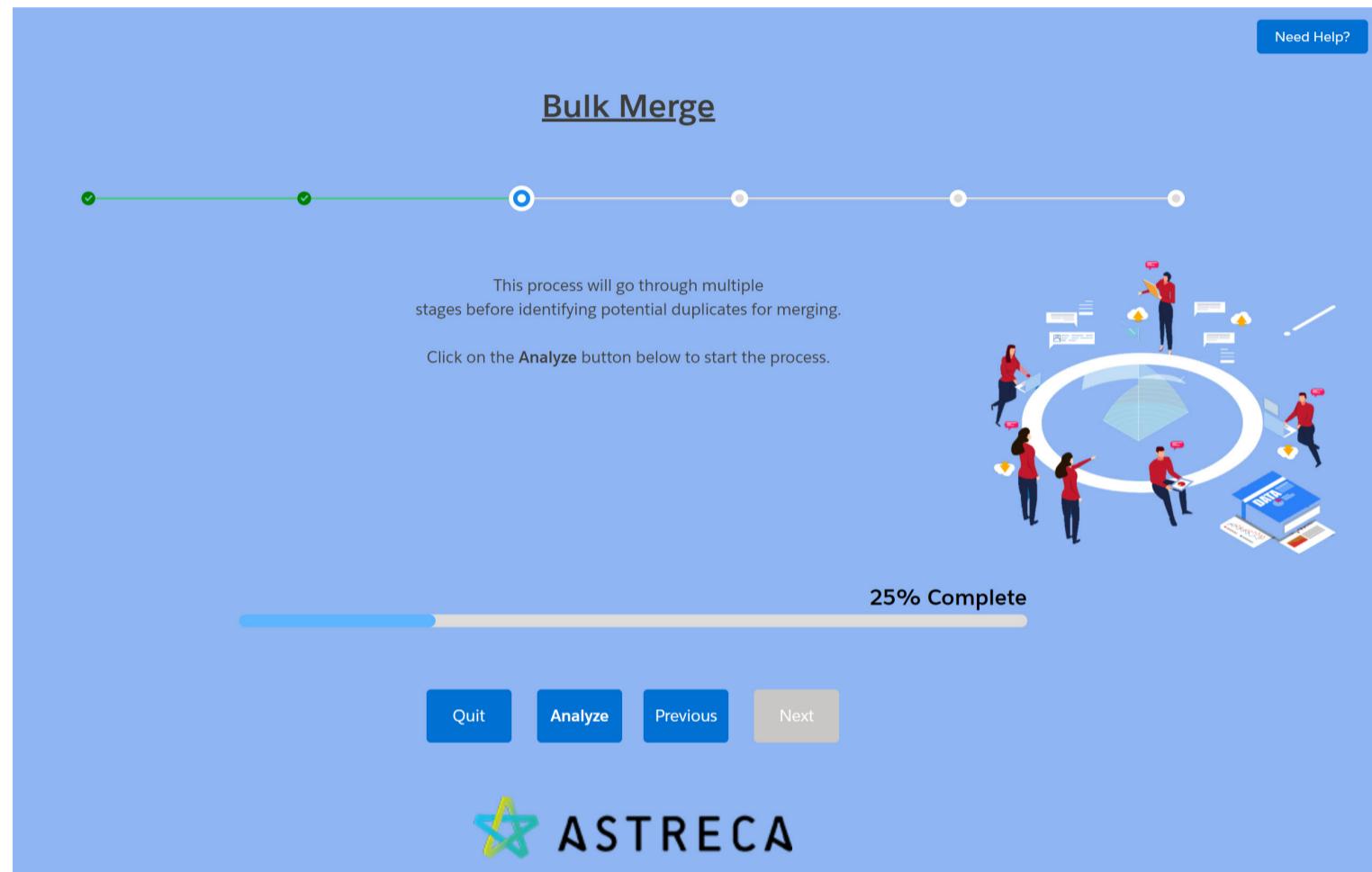
"CTA buttons should be easy to notice, even more, designers intentionally create them that way so that people cant resist clicking it"

Visibility of systems

"Communicating the current state allows users to feel in control of the system, take appropriate actions to reach their goal, and ultimately trust the brand."

UX Recommendations

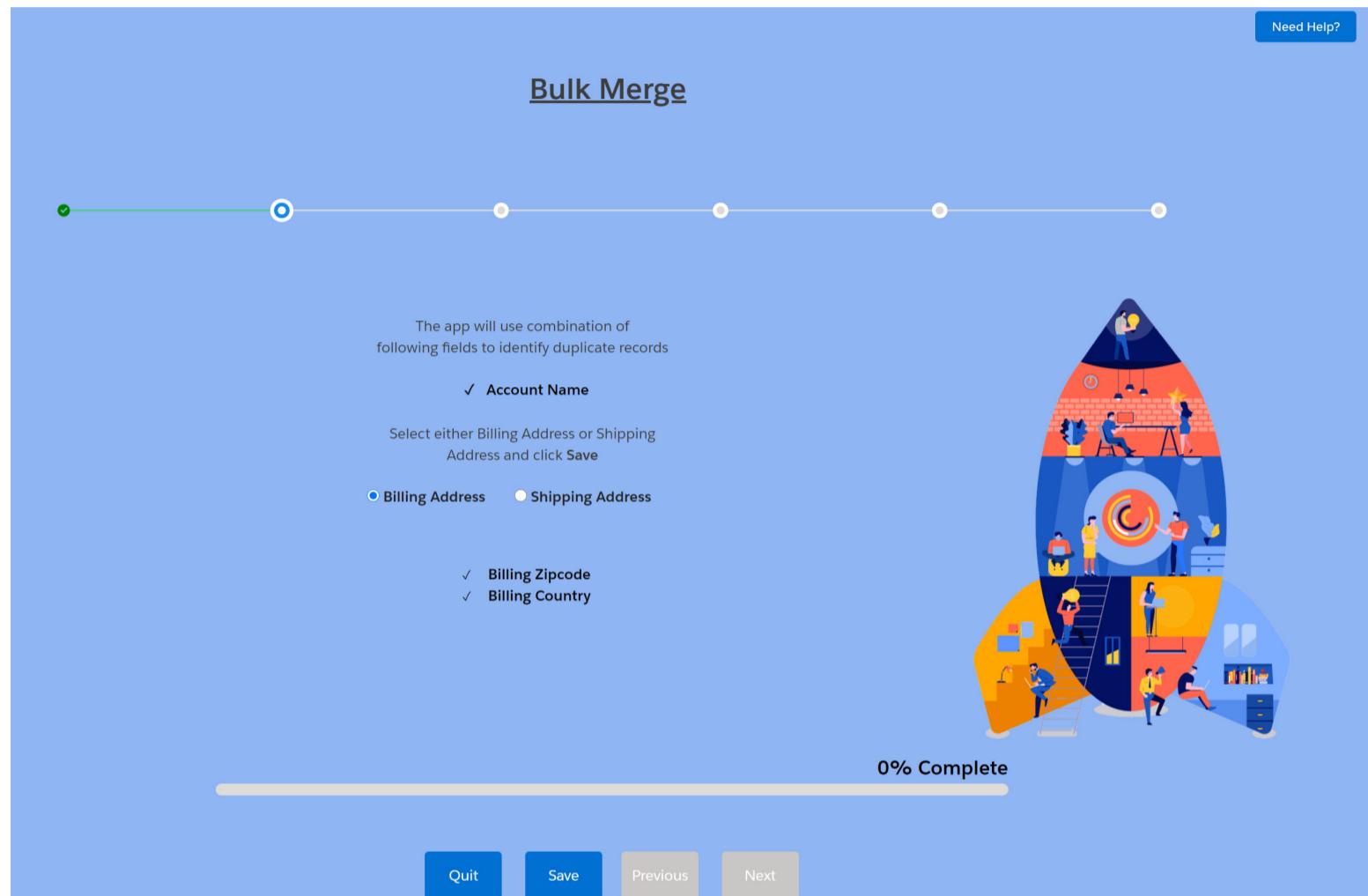
Original



- Visibility of systems: Always let the user know what is currently happening in the process. Since some of the processes in creating the bulk merge takes time, it is crucial to give the user feedback, so that they don't think the application froze!
- User journey – some of the steps can be merged together to shorten the user journey
- Tooltips will help the user understand what to do next, or if they are stuck.
- Button Navigation is unclear and inconsistent. Design a new button navigation system that works with the backend, but also eliminates any mistakes that users could make.

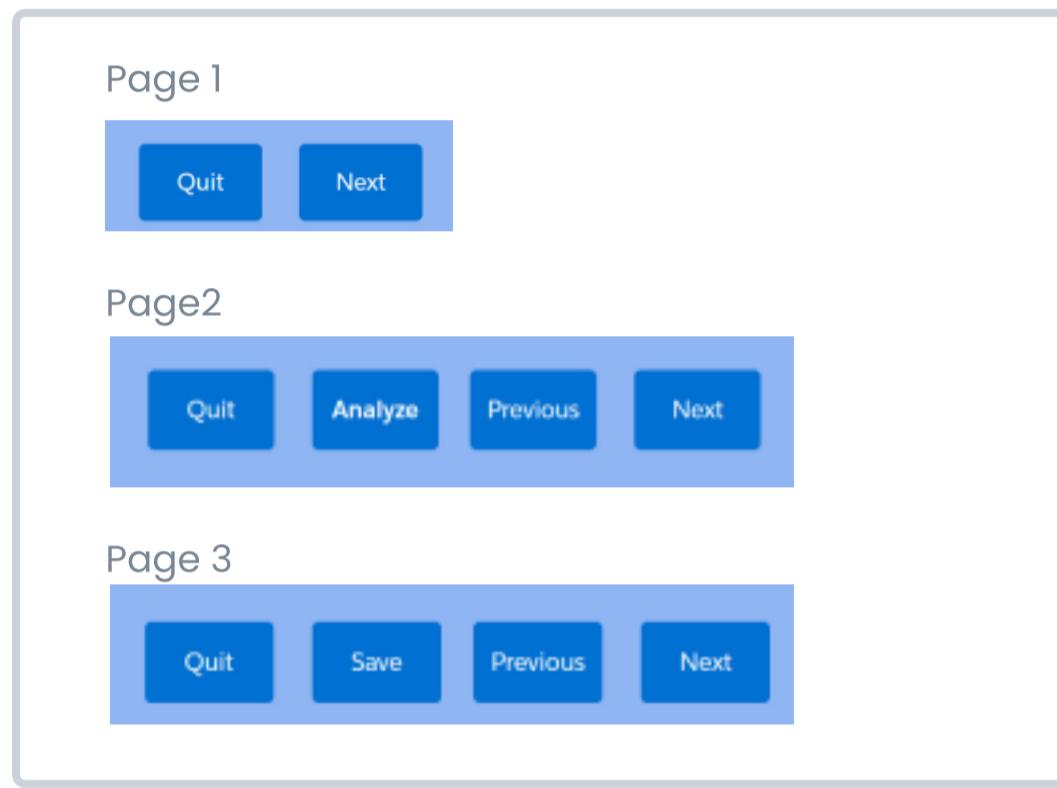
UI Recommendations

Original



- Left align text. Humans are used to reading from left to right, it will be much easier to read!
- Create consistent button design that stays in the same position on each page.
- Design clear button states with consistency
- Stepper colour needs a higher contrast
- Increase typeface size so it is easy to read
- Don't underline Bulk Merge as it is not meant to be a hyperlink.

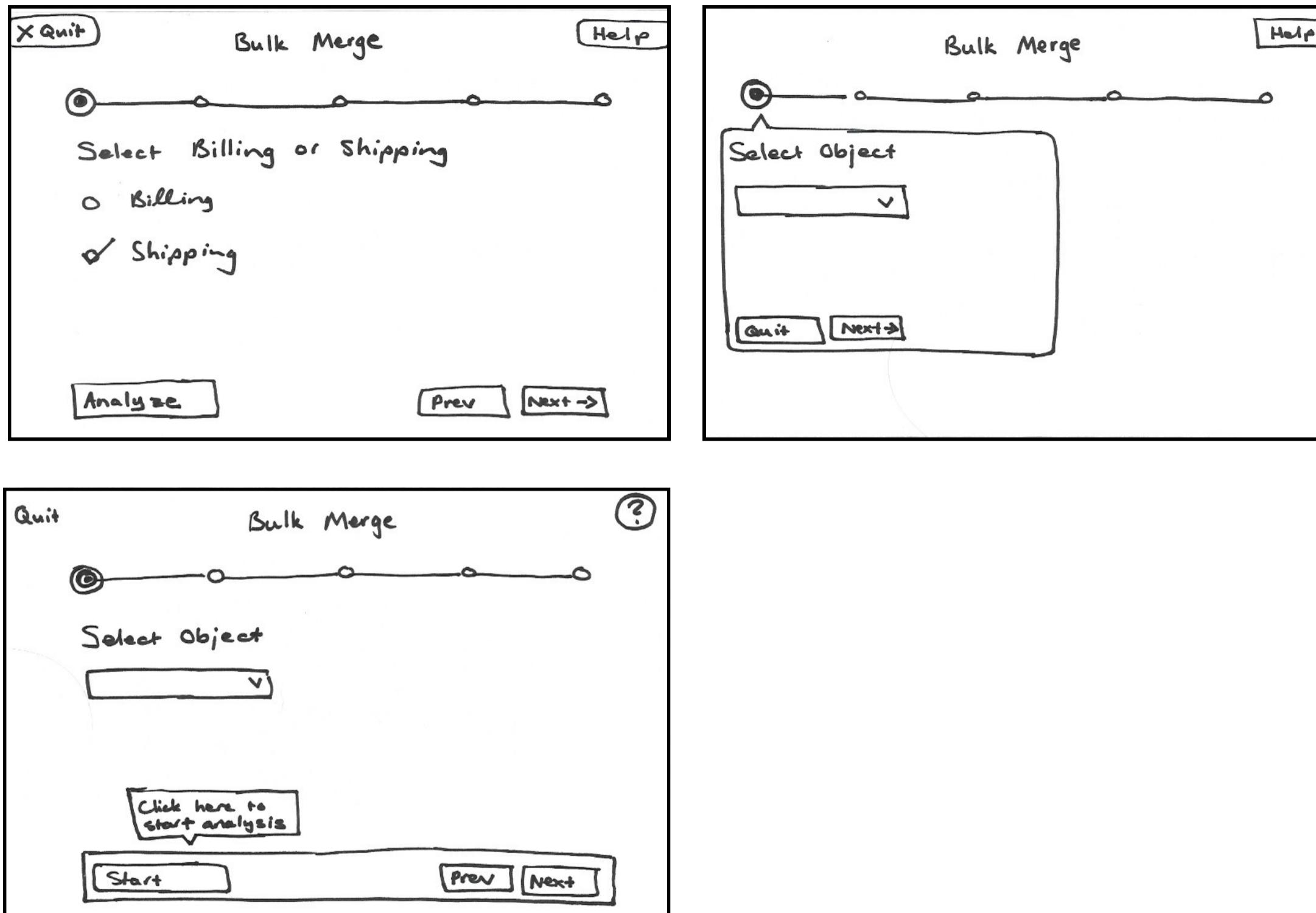
Button Navigation



- ✖ Inconsistent wording
- ✖ Inconsistent placement
- ✖ No clear distinction between active & disabled buttons.
- ✖ Unclear wording of buttons

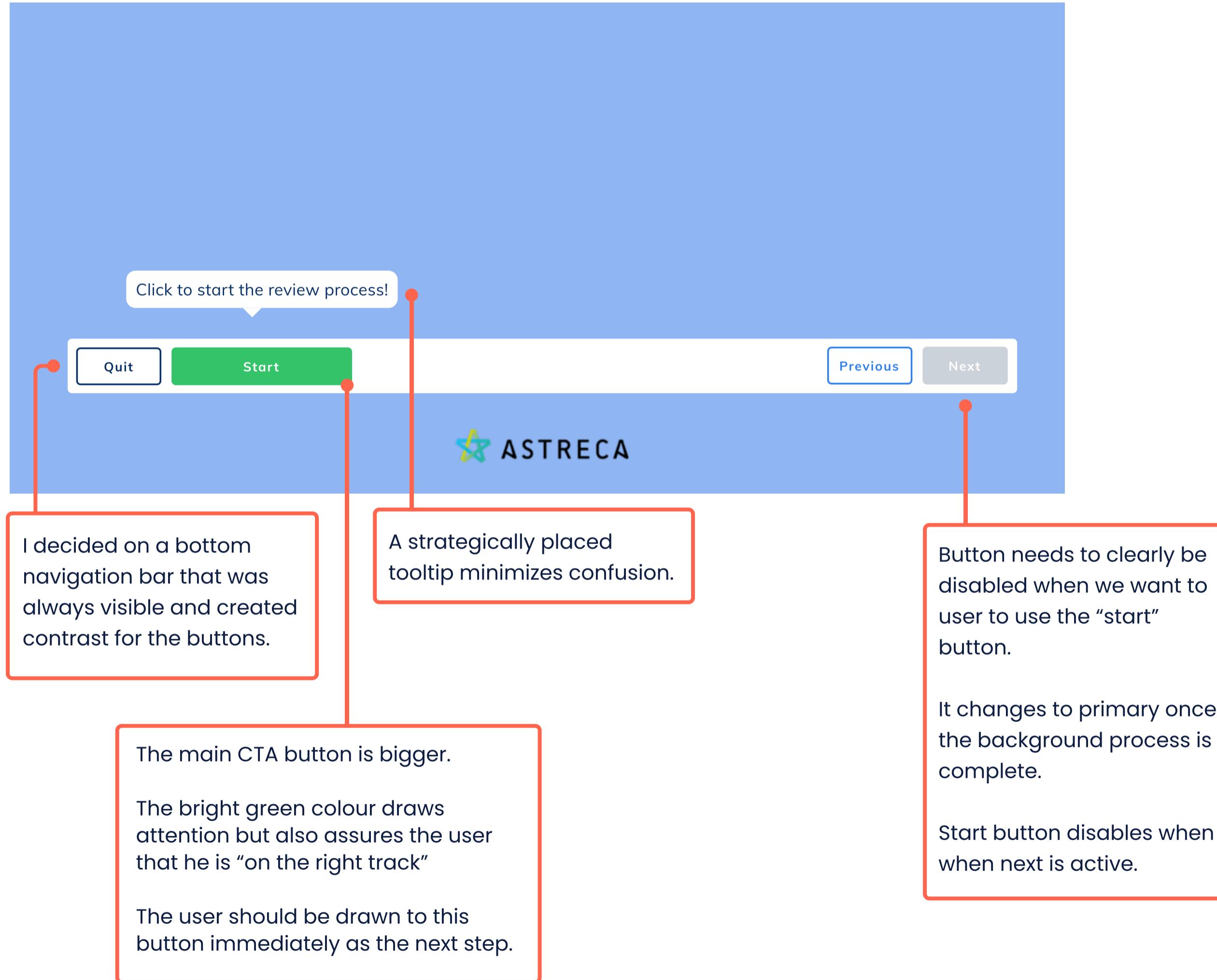
- The button navigation was very confusing. All the buttons looked the same and there was no distinction between active, inactive or primary buttons.
- I needed to keep in mind the technical limitations. For the backend program to start running, the user always needs to click on the “start analysis” button. It could **not** be triggered automatically by pressing “next.”
- The Design needed to be super simple for easy development with minimal effort.

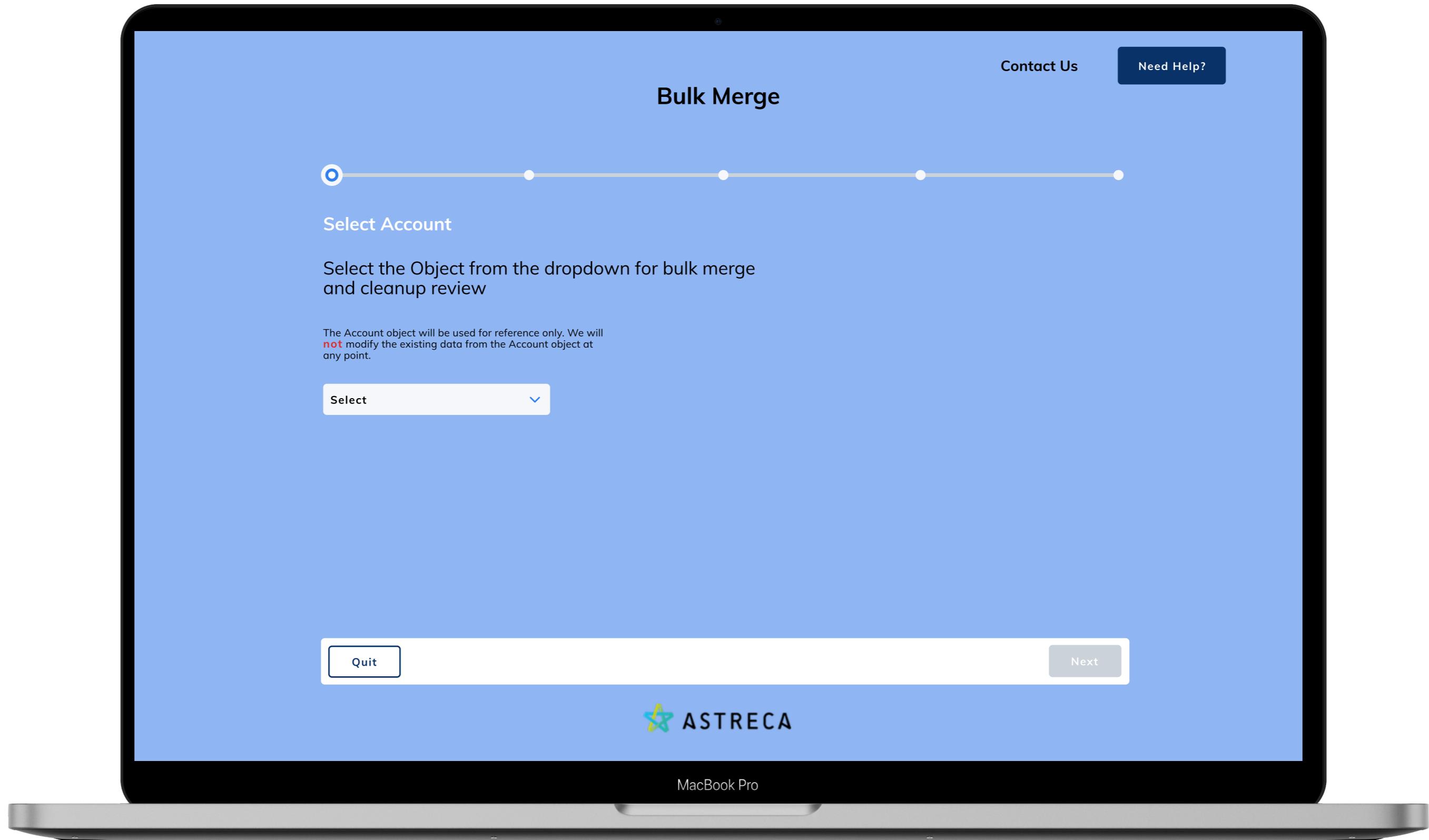
Paper wireframes



→ Paper iterations are a quick and easy way to test out various ideas

Final solution for buttons

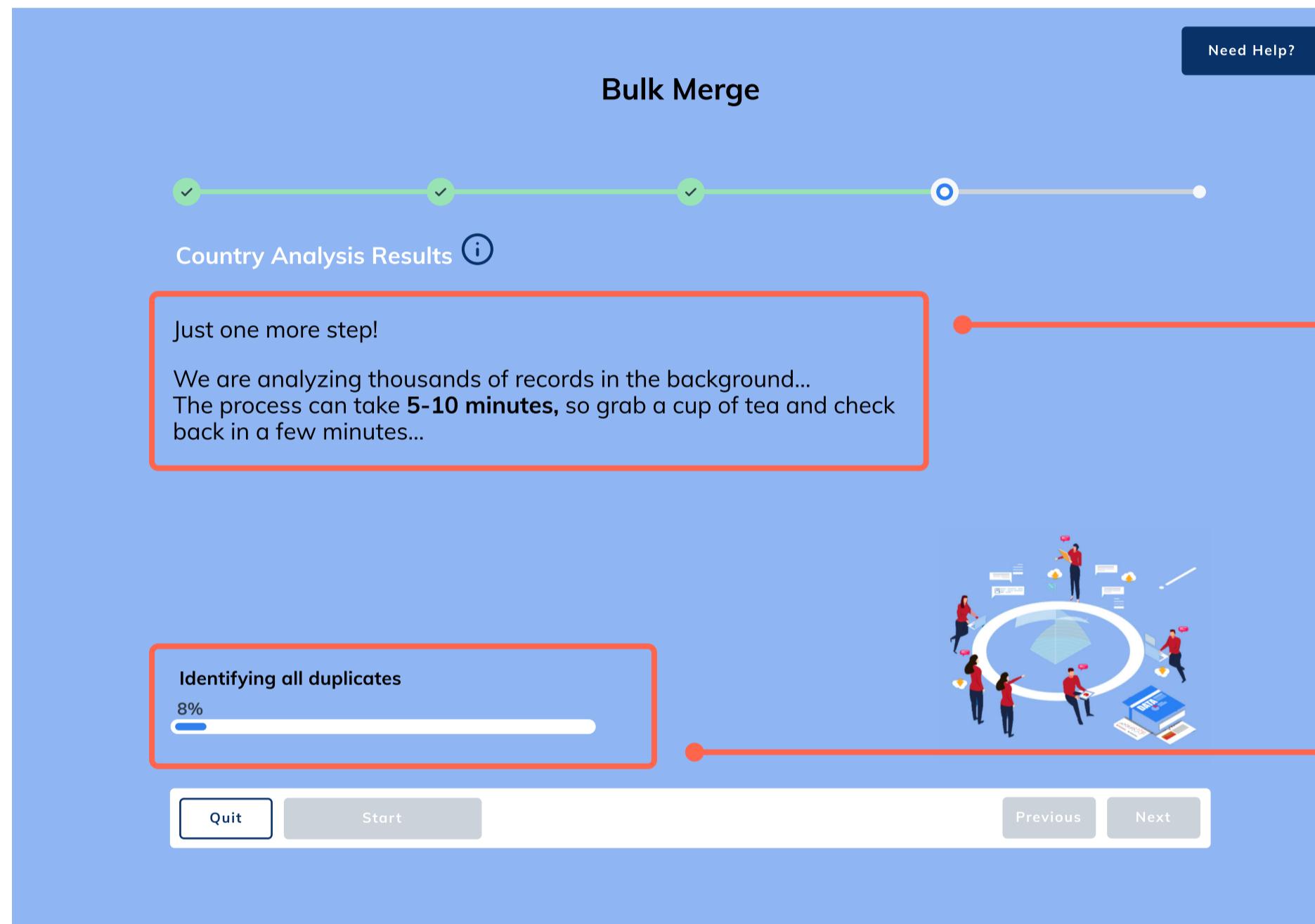




[VIEW PROTOTYPE](#)

Let's take a closer look

Visibility of systems



I adjusted the copy to let the user know that this could take up to 10 minutes. This manages their expectations and also gives a friendly tip about what they can do while they wait.

I added relevant copy that adjusts as the progress bar fills up.

Adding words like "Identifying all duplicates" or "preparing for bulk merge" gives the user constant feedback of what is happening in the back end. It assures the user that their system is working for them!

It also shows the user the value upfront, before the process is completed, which leads to satisfaction even while they have to wait.

- In the previous iteration, there was no feedback to help the user understand that something is running in the background or how long a process will take.

Design Library

Buttons States

Primary Active



Secondary Active



Tertiary Active for
Quit only



Disabled/Inactive



Only on Contact Us
Submit form



Primary Active to
Start processes



Primary Active for
contact us CTA



Typography

H1

Bold, 32pt, 100%, 0px

H2

Regular, 25pt, 112%, 0 px

H2

Regular, 25pt, 112%, 0 px

H3

Bold, 20pt, 120%, 0.15px

Body / Bold

Bold, 16pt, 125%, 0px

Body / SemiBold

SemiBold, 16pt, 150%, 0px

Body / Regular

Regular, 16pt, 150%, 0px

Button

Bold, 15pt, 100%, 1.25px

Key Learnings

The biggest learning was to accomodate the client from a technical perspective as well.

Since some of the best practices in UX design could not be implemented due to technical limitations, I was challenged to think out of the box to design something user friendly with minimal development effort.

Client Feedback

Ui/UX expert

★★★★★ 5.00 Dec 8, 2020 - Dec 9, 2020 

"Karin is very responsive and knowledgeable about her work. We had to deal with a lot of technical limitations and she understood it very well and made suggestions and improvements that were easy from an implementation perspective. She is a pleasure to work with and works hard to meet the project timeline. Finally, she is very easy to work with, and will hire her again for any future projects."