Account Summaries + Dashboard

Inspiration

[redacted]

Checklists - Account Summaries

The following is what we're gonna need for Account Summaries.

Desktop

- Titles for each account.

- Balances for each account.

- Percentage and absolute changes for each account.

- A header.

- The date range component.

Mobile

- Titles for each account.

- Balances for each account.

- Percentage and absolute changes for each account.

    – Like we do for other mobile elements, we're not showing the 'from' or 'absolute' amounts.

- A header.

- The date range component.

Brainstorming

- An idea for the net worth:

    – Instead of having it be an overlay on the accounts, we could have it just as part of the Net Worth chart, just really emphasised as a value (like Baremetrics does).

    – Then the Net Worth chart would be the first chart presented after the account summaries.

So far my favourite designs are the following:

- I really like how they both have the account summaries at the top, with a right column for other information.

- I think between the two, I'm leaning more towards the second design for the account summaries:

    - It's more in the aesthetic of what the original uFincs design had, what with the single combined 'card' for the accounts. But I do quite like the soft dividers between the sections.

    - I also like how the account summaries encompass the full width of the dashboard.

- However, I do like how the first design has a header section to fit in the title ("Dashboard") as well some date filtering elements.

- One thing about having the account summaries take up the full width of the dashboard is that we might end up *not* wanting that, simply because we don't have a sidebar navigation (or at least, I'm not planning on it). And because we don't have sidebar navigation, we need to fill more horizontal space. Since we need to fill more horizontal space, we might just have too much white space or too large a font to make the account summaries look good at such a width.

    - As such, it might actually be better to have the completely separate column like the first design.

- However, we could always do *both*, where the largest design is the account summaries in one column like the first design and then a step down would have them take the full width.

    - This would probably be the responsive optimum.
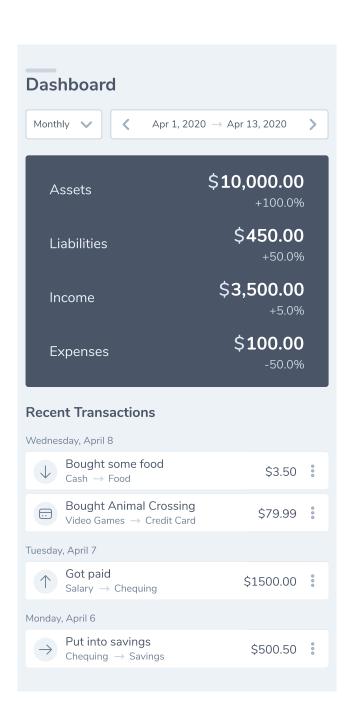
Designs

I've gone with a dark theme for the Account Summaries here, a callback to the original design, but I don't know if it's actually optimal from a UX perspective in terms of quickly parsing the account balances. I feel like the background might be a bit *too* dark, and the eye might not be properly drawn to the balances. Additionally, coloring the percentages in green/red might look really weird on the dark background. This might just be something we tweak once we add proper colors to everything.
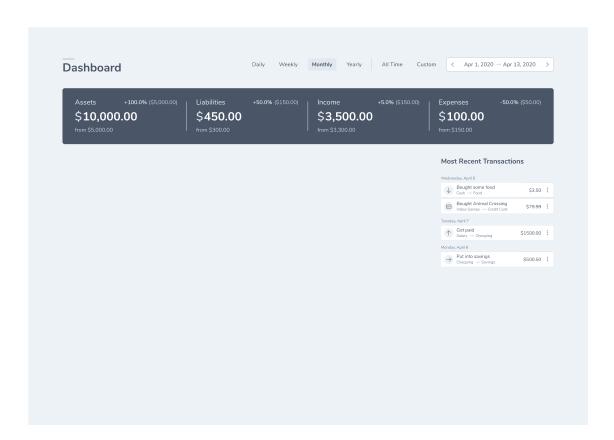
But even still, it looks *damn* cool.

Oh, idea for the coloring the percentages: it'd probably look better if they were put on badge (or pill) backgrounds that are also colored red/green (i.e. light green/red

background with dark green/red text). This would help with contrast, but would clutter the UI a bit more.

Grayscale

Dashboard

Monthly ⌄ | ‹ Apr 1, 2020 → Apr 13, 2020 ›

Assets	**$10,000.00** +100.0%
Liabilities	**$450.00** +50.0%
Income	**$3,500.00** +5.0%
Expenses	**$100.00** -50.0%

Recent Transactions

Wednesday, April 8

↓ **Bought some food**
Cash → Food $3.50   ⋮

▭ **Bought Animal Crossing**
Video Games → Credit Card $79.99 ⋮

Tuesday, April 7

↑ **Got paid**
Salary → Chequing $1500.00 ⋮

Monday, April 6

→ **Put into savings**
Chequing → Savings $500.50 ⋮

Dashboard

Assets	+100.0% ($5,000.00)	Liabilities	+50.0% ($150.00)	Income	+5.0% ($150.00)	Expenses	-50.0% ($50.00)
$10,000.00		**$450.00**		**$3,500.00**		**$100.00**	
from $5,000.00		from $300.00		from $3,300.00		from $150.00	

Most Recent Transactions

Wednesday, April 8

Bought some food		$3.50	⋮
Cash → Food			
Bought Animal Crossing		$79.99	⋮
Video Games → Credit Card			

Tuesday, April 7

Got paid		$1500.00	⋮
Salary → Chequing			

Monday, April 6

Put into savings		$500.50	⋮
Chequing → Savings			

Colored

Dashboard

Assets	**$10,000.00**
	+100.0%
Liabilities	**$450.00**
	+50.0%
Income	**$3,500.00**
	+5.0%
Expenses	**$100.00**
	-50.0%

Recent Transactions

Wednesday, April 8

↓	Bought some food Cash → Food	$3.50	⋮
💳	Bought Animal Crossing Video Games → Credit Card	$79.99	⋮

Tuesday, April 7

↑	Got paid Salary → Chequing	$1,500.00	⋮

Monday, April 6

→	Put into savings Chequing → Savings	$500.50	⋮

Post Design Ideas

Upcoming Transactions

I only just realized that it would be a good idea to show a list of upcoming transactions on the Dashboard.

I think it should be a section just like the "Most Recent Transactions", just with a different title ("Upcoming Transactions") and placed above the recent transactions. This'll help to fill out the use of that right sidebar.

As for how to fill this Upcoming Transactions section, I'm thinking the most naive logic is to just take any (recurring) transactions in the currently selected date that haven't happened yet and put them there. That is, don't go outside the selected date range.

Also, maybe for consistencies sake, maybe the "Most Recent Transactions" title should actually be "Recent Transactions" (to be consistent with the two words used in "Upcoming Transactions").

Also, I think the upcoming transactions section should be visible even if there aren't any upcoming transactions. There should just be an empty message (just not one as flamboyant as the regular empty transactions list/table; too eye-drawy on the dashboard).

Something I don't know about is whether we should have this kind of "upcoming" vs "already happened" transactions on the Transactions page. I was originally thinking we can just combine them together into the one table to keep it simple, but now I'm thinking that maybe it's a better UX to have them separate... I think I should take the simple path to start and split them out later as the need arises.