

Transactions Form

Inspiration

[redacted]

Brainstorming

Will start with the standard Transaction form.

Standard

- Needs the following fields:
 - description
 - amount
 - date
 - type
 - source account
 - destination
 - account
- I still want to keep it as a sidebar form on desktop.
- I like the idea of using small cards with icons and text for the type picker.
 - Can use an outline to indicate selection, instead of a color fill.
- I think I'll start with a bog-standard layout:
 - Header at the top, with a close button
 - Labels and inputs
 - Submit button
- Then we can see how to 'flourish' it.

Due to reading the following articles:

- [Why You Shouldn't Use Solid or Underlined Text Fields](#)

- [The Best Way to Display Text Fields](#)
- [Stronger Visual Cues for Text Fields](#)

I have decided to invert the current paradigm of "gray inputs on white background" to be "white inputs on grey background". Additionally, inputs now have outlines. This is to improve the UX in accordance with the above articles.

Recurring

- I think laying out the schedule such that it flows as closely to a sentence would be a good idea for UX.
- Here's the schedule cases we need to support:
 - Every X day(s).
 - Every X week(s) on weekday Y.
 - Every X month(s) on [first|last|Xth] day.
 - Every X year(s) on month Y, day Z.
- We also need a 'start date' that is autofilled with the first value of the schedule.
- We also need an 'end date'. It can be one of the following:
 - Never.
 - On date X.
 - After X occurrences.
- Here's a possible script:

This transaction happens every [X] [days|weeks|months|years] on [N/A|weekday|day|month, day].

It should start on [start date] and finish [Never|On date X|After X occurrences].

- Now how do we want to go about representing each input?
 - The 'X's (when they are numbers) can be just text inputs, with a restriction on type and checking for positivity.
 - When picking between days|weeks|months|years, I've seen forms use a dropdown. However, since we want to avoid using dropdowns, how can we get away using one of the other techniques?

- Honestly, I don't think we can. Because we want to preserve the structure of a sentence, we'd need to only ever be showing one option (the currently selected one), otherwise it would be one hell of a clunky sentence.
 - However, if we split the sentence across multiple sections, then we *might* be able to get away with using something like segmented buttons for.
 - Something to experiment with.
- Something to think about is how does the user *get* to the recurring transaction form?
 - My first thought was that, since we're reducing the number of items in the global 'Create' (or whatever it becomes) dropdown to just 'Transaction' and 'Account', we could probably spare adding 'Recurring Transaction' to the list.
 - This approach works best if we go with the approach of representing the recurring/non-recurring transactions in the New Form with tabs at the top. This way, it's just a switch between tabs.
 - My second thought is that the 'recurring' part is just an optional section in the main form.
 - As much as this is conventional, I don't think it is the most optimal solution for our use case.
 - This is because I want to be able to change the labels of the Description and Amount to Default Description and Default Amount. Additionally, I also want to remove Date altogether.
 - As such, I think it'd be best for 'single transaction' and 'recurring transaction' to be separate forms.
 - My third thought was that, if they are going to be separate forms, maybe we shouldn't do the 'tab-at-the-top' thing, and just have them be completely separate forms.
 - Pro: We can change the form title; less clutter on the form.
 - Con: It doesn't introduce the user to the tab pattern that could be used below for editing the template.
- We also have to think about editing. That is, how can one edit the template for a recurring transaction?
 - I'm thinking that, to get to editing the template, one would just have to edit one of the transactions in the series. There could be two tabs at the top of the Edit Transaction Form: one for the current transaction and one for the template.

- When users edit the current transaction, then changes are only applied to that transaction.
- But when users edit the template, then it changes this and future transactions, but not transactions that have already happened.

So, I decided to change up the approach for recurring transactions:

- Instead of having the user have a separate "Create Recurring Transaction" button or something, the recurring schedule is now part of the regular Transaction form.
- This is accomplished by changing the "Date" input out for a new section with two tabs: One-off and Recurring.
 - The One-off tab has the regular Date input.
 - And the Recurring tab has the schedule input.
- This way creating a Recurring Transaction is only very marginally different than creating a regular transaction.
- I came to this conclusion because I was originally putting "Default" labels on the first set of inputs (e.g. "Default Description"), but then realised users might want to also change the Accounts (or even the type!) on a scheduled transaction.
 - As such, instead of putting "Default" on everything, I did the "refactoring" decision to just change out the one thing that is different between the two layouts: the Date input.

This does still open up the question of how to handle editing the template/schedule for a recurring transaction.

- I think going with putting tabs at the top of Editing form to change between "This Transaction" and "Recurring Template" will be the most effective way.
 - Because we've introduced the user to the concept of tabs during creation, they shouldn't be confused about this.
- However, I think we might need a better label than "Recurring Template", but I've got nothing better for now.
 - I've come up with "This & Future" as an alternative. That way, the update button can read "Update This & Future Transactions".
- Side note: Might be worthwhile to change the submission button labels to match the tab:
 - "Update this Transaction" and
 - "Update Recurring Template"

- This way users have another affirmation of what's going on.

Another thing I thought of was how to handle deletion of recurring transactions?

- I guess, when deleting any of the transactions in the series, the user could be prompted for whether they want to delete "This Transaction" or "This and Future Transactions".
- I don't know if they should get an option for deleting past transactions in the series as well. I don't think they should.

Designs

Grayscale

New Transaction



Description

e.g. Bought some food

Amount

\$3.50

Optional details ▼

One-Off Recurring

Date

Friday, April 10

What type of transaction is this?



Income



Expense



Debt



Transfer

Expense Account

Select an account



Liability Account

Select an account



Create Transaction

Create & Make Another

New Transaction



Description

e.g. Bought some food

Amount

\$3.50

Optional details

One-Off Recurring

Date

Friday, April 10

What type of transaction is this?

↑

Income

↓

Expense

💳

Debt

→

Transfer

Expense Account

Select an account

Liability Account

Select an account

Create Transaction

Create & Make Another

New Transaction

✕

Description

e.g. Bought some food

Amount

\$3.50

Optional details ▾

One-Off

Recurring

Date

Friday, April 10

What type of transaction is this?

Income

Expense

Debt

Transfer

Expense Account

Select an account

Liability Account

Select an account

Create Transaction

Create & Make Another

Colored

New Transaction

×

Description

e.g. Bought some food

Amount

\$3.50

Optional details ▼

One-Off

Recurring

Date

Friday, April 10

What type of transaction is this?

↑

Income

↓

Expense

💳

Debt

→

Transfer

Expense Account

Select an account ▼

Liability Account

Select an account ▼

Add Transaction

Add & Make Another

Post Design Ideas

Here's some things I've thought of since creating the above version of the design.

Create in Dropdown

I came across this dropdown:

[redacted]

I quite like this idea for adding a new account in the account inputs.

Swap Order of Create Actions?

According to [Optimal Placement for Mobile Call to Action Buttons](#), when there are multiple vertical actions, it's more optimal to place the primary action beneath the secondary action(s).

As such, maybe we should swap the "Create Transaction" button to be below the "Create & Make Another" button? Perhaps this doesn't apply as well since the secondary action is a link button as opposed to a filled button?