

Onboarding

Inspiration

[redacted]

Brainstorming

So what do we want to accomplish with the onboarding process?

- Well first of all, there should technically be 2 onboarding processes: one for setting up the user's accounts and maybe some preliminary transactions, and another for showing the user around the app and pointing important functions.
- This design will only pertain to the first: setting up accounts and transactions.
 - We'll leave walkthroughs for the future.
- So what are the goals of this particular part of the onboarding process?
 - Inform the user about the double-entry accounting nature of the app.
 - Get the user to pick/create accounts for each type.
 - I originally wanted to let users create or import transactions during the onboarding process, but now I'm second thoughts about that:
 - Mostly because it'd look a little out of place to slap our existing Transaction Form or Import Transactions designs into an onboarding wizard.
 - And I don't want to have to design *another* interface for transaction stuff...
 - As such, ideally showing users how to create/import transactions would be handled by the walkthrough.
 - Although, setting up recurring transactions might be nice.
 - But then we just run into having to create another transactions interface...
 - Let's just start with accounts.

Desktop Checklist

So here's what we'll need:

- A screen quickly explaining double-entry accounting.
 - Something as simple as "uFincs uses double-entry accounting. This means every transaction in uFincs belongs to two accounts. For example, a transaction for getting your paycheck could belong to your "Chequing" asset account and your "Salary" income account. Let's get you setup with some accounts now!"
 - Obviously, we can split this message over multiple lines to make it easier to read.
 - I'm even thinking the first sentence could be the title/header of the screen.
 - The call-to-action button's label could be "Let's Go!".
- Separate screens for choosing/adding each type of account.
 - Assets
 - Liabilities
 - Income
 - Expenses
- Each screen should have the following:
 - A title for the type of accounts being chosen.
 - A short message explaining the type of account with some examples.
 - A list of sample accounts that the user could use. Each row should have:
 - The name of the account (that is also an input).
 - An opening balance input that is initially 0.
 - A 'checkbox' for picking the account.
 - My reasoning for wanting the name/opening balance to be inputs is to kind of emulate what Every Dollar does when entering budgets (see e.g. the "Enter your paycheck amounts" screenshot). They have a table where all the values are editable.
 - Some of the accounts in the list should be preselected as defaults.

- This is in case the user just wants to blow through the onboarding wizard; need some defaults so that the user has something when they enter the app.
- A button to add a new account to the list, that is then automatically selected.
 - Obviously, the user should be able to unselect the account since we're not affording them the ability to remove accounts from the list (not that what's in the list ultimately matters to the user).
- A 'form' for adding the new account to the list.
 - Although this could be as simple as just adding a new row to the list and having all the fields editable.
- Navigation buttons to go forwards/backwards a step.
- A progress indicator to show the total number of steps and the current step.
- **NO** Maybe something showing a running summary of all the accounts the user has added as they progress through the onboarding wizard?
 - For example, there could be a sidebar element that shows the accounts.
 - Or maybe not and we should just wait till the last step to show the user a summary.
 - Yeah, let's not do that so that the process can be mobile friendly.
- A screen showing a final summary of all the accounts the user has added.

Mobile Checklist

So here's what we'll need:

- A screen quickly explaining double-entry accounting.
 - Something as simple as "uFincs uses double-entry accounting. This means every transaction in uFincs belongs to two accounts. For example, a transaction for getting your paycheck could belong to your "Chequing" asset account and your "Salary" income account. Let's get you setup with some accounts now!"
 - Obviously, we can split this message over multiple lines to make it easier to read.
 - I'm even thinking the first sentence could be the title/header of the screen.
 - The call-to-action button's label could be "Let's Go!".
- Separate screens for choosing/adding each type of account.

- Assets
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- Each screen should have the following:
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 - A 'form' for adding the new account to the list.
 - Although this could be as simple as just adding a new row to the list and having all the fields editable.
 - Navigation buttons to go forwards/backwards a step.
- A progress indicator to show the total number of steps and the current step.
- **NO** Maybe something showing a running summary of all the accounts the user has added as they progress through the onboarding wizard?
 - For example, there could be a sidebar element that shows the accounts.

- Or maybe not and we should just wait till the last step to show the user a summary.
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- A screen showing a final summary of all the accounts the user has added.

Overall Layout

I see two ways of going with the overall layout:

- Where there's a nice colored sidebar with some information and then a primary section.
- Like Every Dollar (and the current Transactions Import design), where there's a centered, minimalist layout with grey/hard color backgrounds.

Personally, *because* that's how the Transactions Import is currently designed, I'm heavily leaning towards the second option.

Of course, I do want to leverage some of that "bright colored background with watermarked shapes" aesthetic, so I'm sure mixing it up between the two will be good.

Account Lists

- I want my checkboxes on the left.
- I like the selection state used in the first inspiration image (colored border, slightly colored background), ala how we do the selection state for the Transaction Type cards.
- The name and opening balance need to be inputs.
- It'll need to be treated like the Transactions Table, where there are column headers for the name and opening balance (which is also similar to the design used in Every Dollar).
- However, I want the rows to be *thicker*, because I like that aesthetic better and we can get away with using more space here.
- I *don't* want a constrained scrolling container; it should just be on the page like Every Dollar.
- I want a more pronounced button for adding an account than what Every Dollar has; they use just a link style button, but I want at least an outline button (if not a full primary filled button).

Navigation

- Can be like the Next/Back buttons of the Transactions Import process.

Stepper

- Can be like the Transactions Import process.

Summary

- Should be one giant list of all of the accounts, with type headers separating each section (ala the Accounts Page).

Designs

Grayscale

Customize your Asset Accounts

Assets are your **resources**.

These are things like the **Chequing Account** at your bank or the **Cash** you're short on.

	Name	Opening Balance
<input checked="" type="checkbox"/>	<input type="text" value="Chequing Account"/>	<input type="text" value="\$0.00"/>
<input type="checkbox"/>	<input type="text" value="Cash"/>	<input type="text" value="\$0.00"/>
<input checked="" type="checkbox"/>	<input type="text" value="Savings Account"/>	<input type="text" value="\$0.00"/>
<input checked="" type="checkbox"/>	<input type="text" value="Retirement Account"/>	<input type="text" value="\$0.00"/>

+ Add Asset Account



Customize your Asset Accounts

Assets are your **resources**.

These are things like the **Chequing account** at your bank or the **cash** you have on hand.

Name		Opening Balance
<input checked="" type="checkbox"/>	Chequing	\$0.00
<input type="checkbox"/>	Cash	\$0.00
<input checked="" type="checkbox"/>	Savings Account	\$0.00
<input checked="" type="checkbox"/>	Retirement Account	\$0.00

+ Add Asset Account

Back

Next

Colored

Customize your Asset Accounts

Assets are your **resources**.

These are things like the **Chequing Account** at your bank or the **Cash** you're short on.

Name

Opening Balance

<input checked="" type="checkbox"/>	<input type="text" value="Chequing"/>	<input type="text" value="\$0.00"/>
<input type="checkbox"/>	<input type="text" value="Chequing"/>	<input type="text" value="\$0.00"/>
<input checked="" type="checkbox"/>	<input type="text" value="Chequing"/>	<input type="text" value="\$0.00"/>
<input checked="" type="checkbox"/>	<input type="text" value="Chequing"/>	<input type="text" value="\$0.00"/>

+ Add Asset Account

1

Customize Assets

2

Customize Liabilities

3

Customize Income

4

Customize Expenses

5

Finish Setup

Customize your Asset Accounts

Assets are your **resources**.

These are things like the **Chequing account** at your bank or the **cash** you have on hand.

Name	Opening Balance
<input checked="" type="checkbox"/> Chequing	\$0.00
<input type="checkbox"/> Chequing	\$0.00
<input checked="" type="checkbox"/> Chequing	\$0.00
<input checked="" type="checkbox"/> Chequing	\$0.00

+ Add Asset Account

Back

Next

Post Design Ideas

Some inspiration from Asana: [Asana Business' upgraded onboarding experience](#)