Account Details

Inspiration

[redacted]

Brainstorming

So here's what we need on this page:

- The account's name, current balance, and current interest.
- The account's type.
- A graph for the account balance.
- An expected end-of-period balance.
- The account's transactions.
- A way to create a new transaction.
- A way to search transactions.
- A running balance for each transaction.
- A way to change the date period.
- A way to delete the account.
- A way to edit the account.
- An empty state.

Mobile Checklist

- The account's name, current balance, and current interest.
- The account's type.
- A graph for the account balance.
- An expected end-of-period balance.
- The account's transactions.
- A way to create a new transaction.

- A way to search transactions.
- A running balance for each transaction.
  - Settled on end-of-day running balance instead, since it works better with the date sections.
- A way to change the date period.
- A way to delete the account.
- A way to edit the account.
- A way to go back.
- An empty state.

Date Period

- What if, like Baremetrics, we had a page level date filter?
  - This way, users could more quickly compare data across accounts, as opposed to account level date filtering, where they would have to change the filter each time they switched accounts.
  - Like, we could stick the date filtering in the top-right corner, level with the "Accounts" header.
  - This would mean that the balance values in the Accounts list would have to update with the date filter.
  - Wait, this *also* means that we need the date filter on the mobile Accounts list... which complicates things since the mobile Accounts list page is separate from the mobile Accounts Details page...
- So, either we can have the date filter on the mobile Accounts list page or the Details page.
  - If we only put it on one or the other, then the expected functionality from the user's perspective becomes different from the desktop version.
  - So... what if we put it on *both* pages?
    - The only wrinkle with this idea is whether or not the date filters would then be linked.
    - Would changing the date filter on the details page then change on the Accounts list page?
    - Would users expect that? Would it confuse them?

Running Balance

Mobile:

- For mobile, I just went with an end-of-day balance since it was the easiest to fit into the existing design (considering we block up the transactions by date).
    - It's also because I stole this idea from Mobills.

Desktop:

- I don't know what the best way to do this on desktop is though.
- I'm thinking the simplest the solution is just to add another column to the Transactions table with the running balance.
- Other alternatives I thought of (but didn't think were particularly good):
    - Having a separate "block" (i.e. detached column) with the running balance.
    - Putting the running balance in-between the transaction rows (ala the mobile view). But this would look *so* stupid.

Chart

- I've already designed the chart; just a basic line chart for now.
- However, I had an idea for an improvement for it:
    - What if, when hovering over a point on the graph, it showed the transactions for that point?
    - And then, it highlighted those transactions in the table and clicking on the point jumped you to those transactions?
    - This is one of those "long ways away features", but just something I thought of.

Designs

Grayscale

Asset

Chequing

Monthly

Apr 1, 2020 → Apr 13, 2020

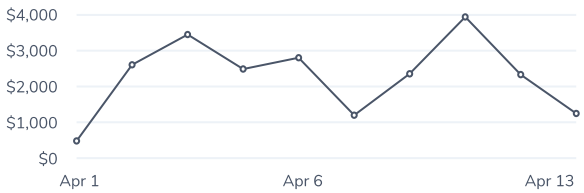
Balance

$5,000.00 from $4,300.00

+14.0% ($700.00)

Interest

1.25%



Transactions

Create

Income	Expenses	Transfers
$1500.00	$3.50	$500.50

Wednesday, April 8

Bought some food	Cash → Food	$3.50
Bought Animal Crossing	Video Games → Credit Card	$79.99
End of day balance		$10,000.00

Tuesday, April 7

Got paid	Salary → Chequing	$1500.00
End of day balance		$10,000.00

Monday, April 6

Put into savings	Chequing → Savings	$500.50
End of day balance		$10,000.00

1 - 50 of 500 transactions

1 of 10

Accounts

Daily | Weekly | **Monthly** | Yearly | All Time | Custom

< Apr 1, 2020 – Apr 13, 2020 >

Search accounts

Create Account

Assets	Liabilities	Income	Expenses
$40,000.00	$300,500.00	$1,535.00	$328.44

Assets	
Chequing	$5,000.00
Savings	$20,000.00
GIC	$15,000.00
Liabilities	
Credit Card	$500.00
Mortgage	$300,000.00
Income	
Salary	$1,500.00
Interest	$35.00
Expenses	
Food	$125.00
Video Games	$79.99
Electronics	$123.45

Asset

Chequing

Edit | Delete

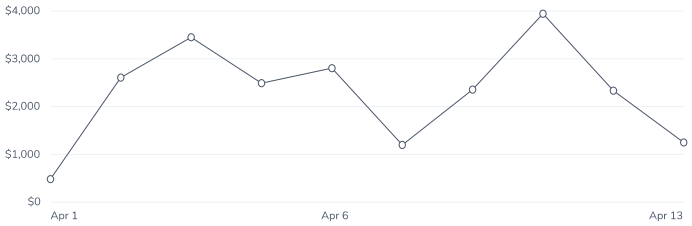
Balance

$5,500.00 from $4,300.00

+21.8% ($1,200.00)

Interest

1.25%



Transactions

Search all transaction properties

Create Transaction

Income ↑	Expenses ↓	Transfers →
$1,500.00 from $1,400.00	**$3.50** from $15.60	**$500.00** from $1,000.00
+7.14% ($100.00)	-77.6% ($12.10)	-50.0% ($500.00)

Transactions | Summary

Date	Description, From, To	Amount	Balance
Wed, Apr 15	Bought a whole metric ton of food for the quarantine. Uncategorized Income → Uncategorized Expense	$10,000.00	$100,000.00
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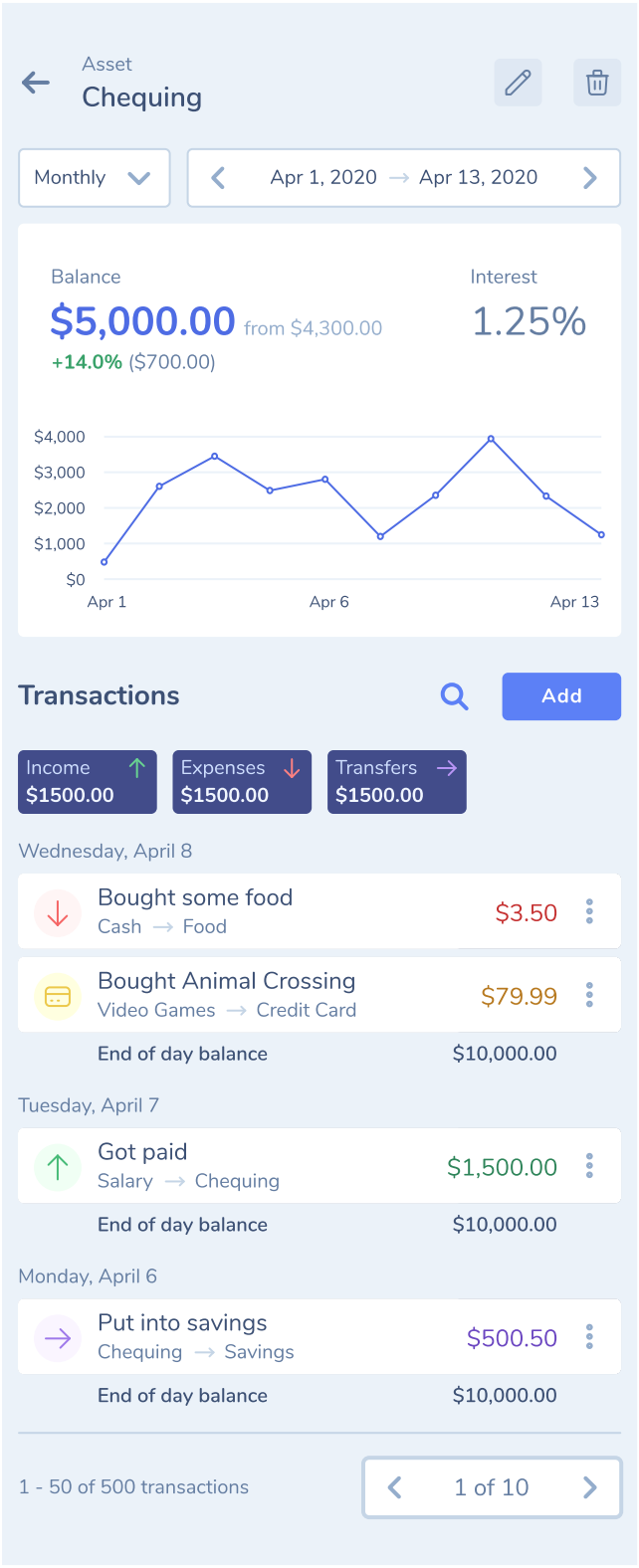
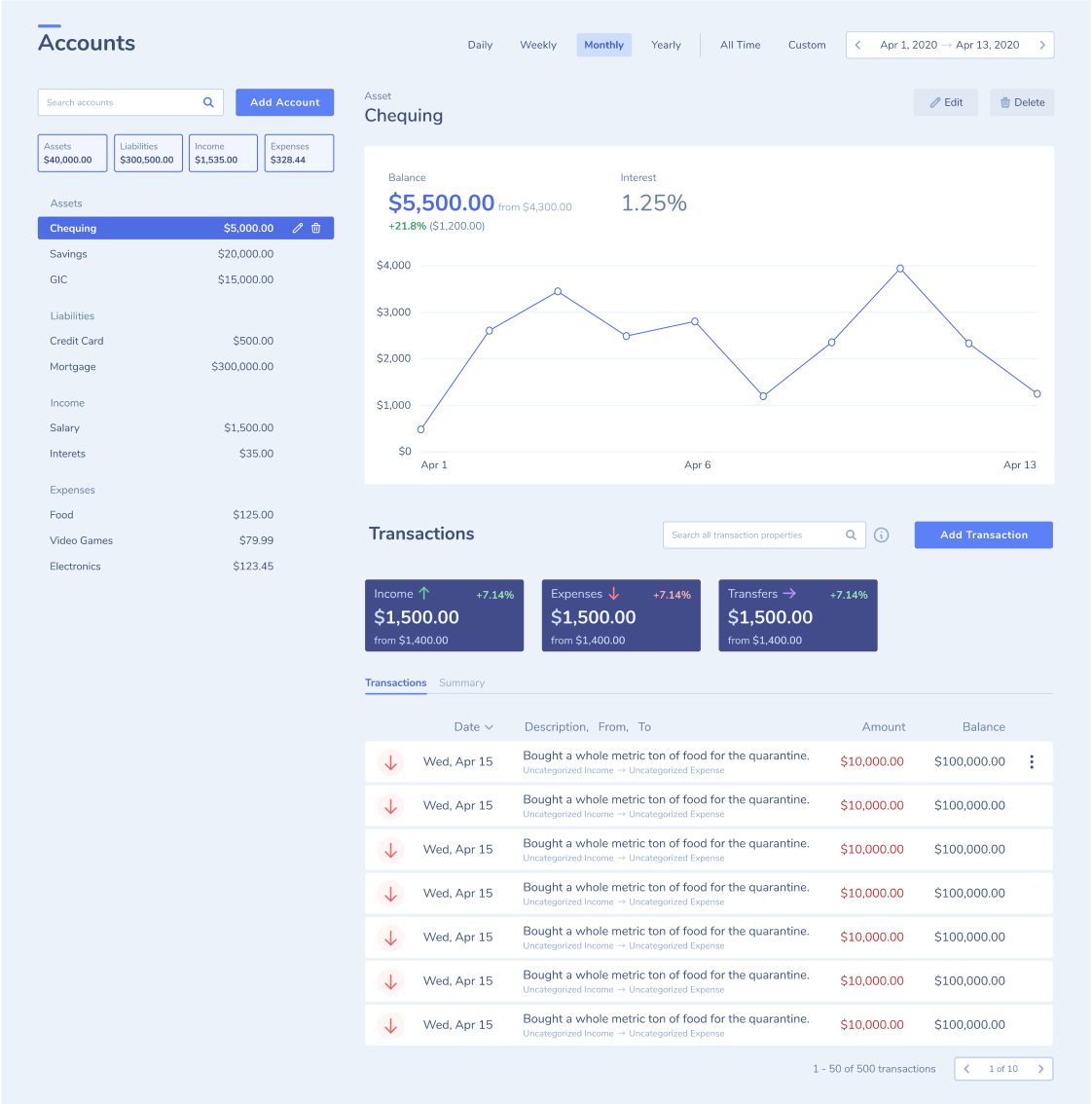
1 - 50 of 500 transactions

< 1 of 10 >

Colored


Asset
Chequing
Monthly
Apr 1, 2020 → Apr 13, 2020
Balance
$5,000.00 from $4,300.00
+14.0% ($700.00)
Interest
1.25%
$4,000
$3,000
$2,000
$1,000
$0
Apr 1
Apr 6
Apr 13
Transactions
Add
Income $1500.00
Expenses $1500.00
Transfers $1500.00
Wednesday, April 8
Bought some food
Cash → Food
$3.50
Bought Animal Crossing
Video Games → Credit Card
$79.99
End of day balance
$10,000.00
Tuesday, April 7
Got paid
Salary → Chequing
$1,500.00
End of day balance
$10,000.00
Monday, April 6
Put into savings
Chequing → Savings
$500.50
End of day balance
$10,000.00
1 - 50 of 500 transactions
1 of 10



Post Design Inspiration

I came across this:

[redacted]

I like how they shrink the width of the chart to fit in some statistics. Could probably leverage such a layout on desktop (don't know about mobile; might need to hide it behind a tab switcher like the Transactions list + Summary).