

approach + selected portfolio

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version 1.0
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my approach to design

- get a multidisciplinary team quickly
- grasp the problem and initially sketch solutions
- iterate quickly to learn more (sketch to HTML)
- multiple prototypes - test a lot of ideas, don't commit
- quickly test both qualitative and active use
- let stakeholders touch my ideas
- only document what is needed

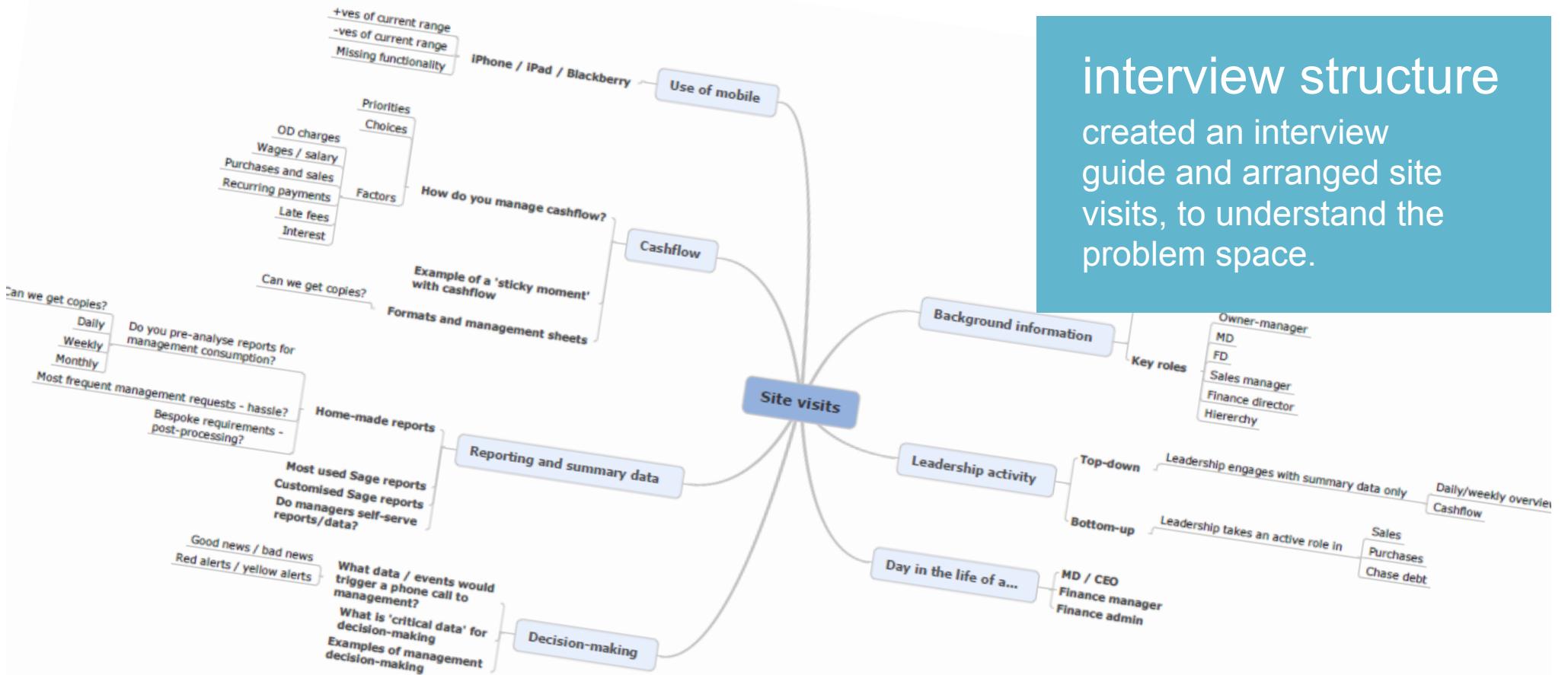
work completed by Kyle Mayne unless otherwise stated

example project:
Sage 50 Accounts Pulse

desired outcome

a Windows 8 store application that provides effortless business insight, anytime, anywhere to owner managers of small businesses, based on financial information held in Sage 50 Accounts.

interview structure
 created an interview guide and arranged site visits, to understand the problem space.

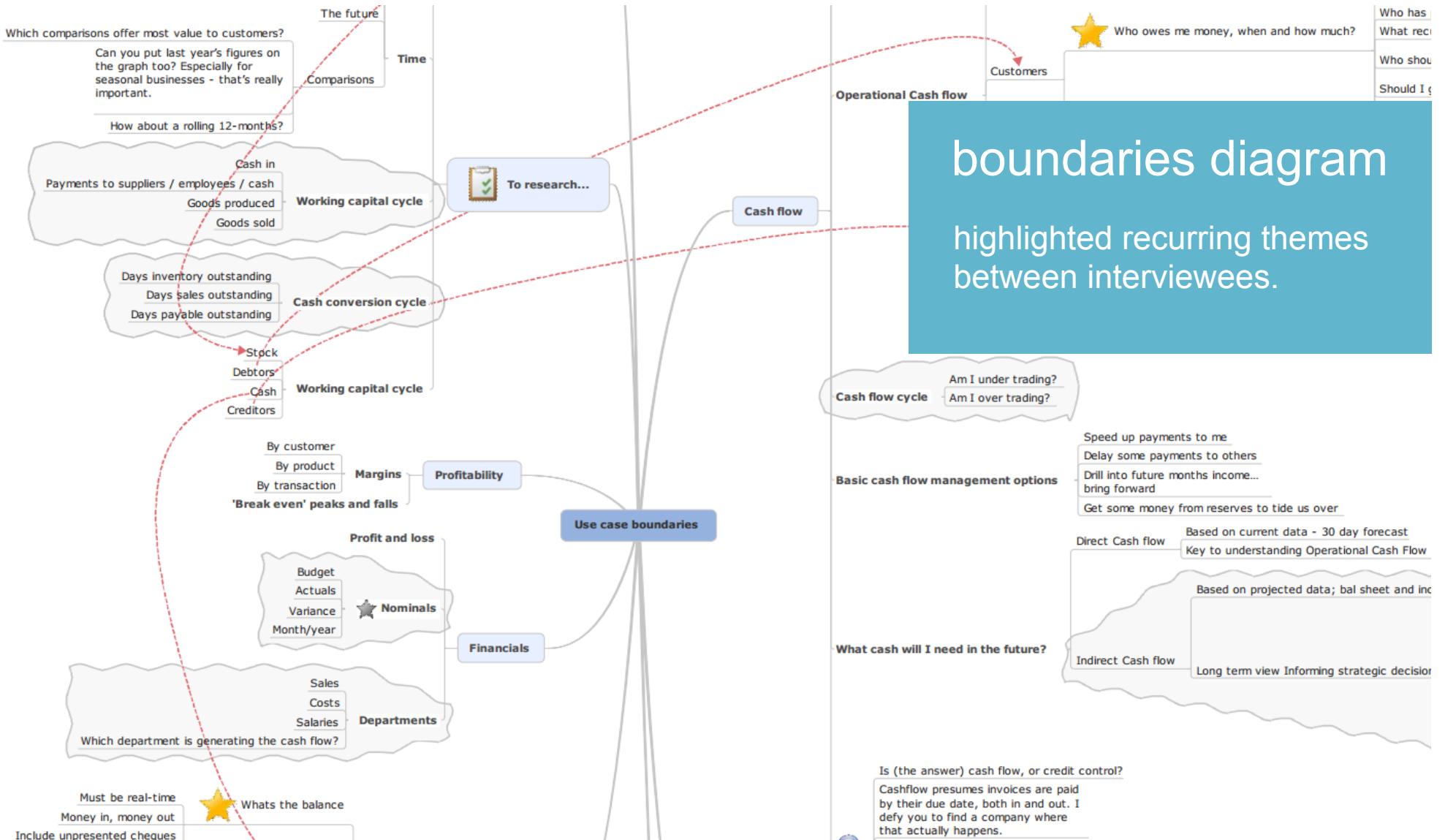


David XXXX
Financial Director

Background	Leadership activity	Day in the life...	Decision making
<ol style="list-style-type: none"> 1. Accountancy firm "XXXXXX", where overseeing the accounts for 5 clients (different sage platforms) 2. One of those businesses is Global XXXX. 3. XXXX are an international company with offices in the UK, Dubai and the US. 4. David performs all of Intec's accounts with 50 and Sage Foreign trader 5. XXXX work in Dollars, Euros, Dirham and Pound Sterling 6. 2 directors within the company, the managing director is in Dubai and the other director lives in the UK. 7. The director in London oversees the UK and the US. 8. 12 to 15 invoices a month with a turnover in excess of 2 million, which are faxed to all customers 	<ol style="list-style-type: none"> 1. David is the financial hub of the company – "The directors are not in the business of being accountants" 2. David chases the debt, but if it is more than 60 days then the MD steps in. The MD has more clout with the clients 3. MD views reports for comfort, but queries specific financials with David 	<ol style="list-style-type: none"> 1. Spends a lot of time chasing the directors to pay invoices in various currencies 2. Reconciling data counts 3. David gets specifics questions from the MD asking how much debt "Company X" owes 4. Chasing debt 5. Essential to MDs for accessing their company information 	<ol style="list-style-type: none"> 1. Sage has created him a report to show the outstanding invoices in the currency of the customer (not the base currency) 2. Monthly basis: VAT report (UK), Profit and Loss, Balance sheet, Aged debtors and Creditors 3. KPIs – Geographical split (values and percentages) / Business gained per customer (rehashes this within Excel) 4. Banking not up-to-date within 50 as they have so many bank accounts (performed monthly) 3. Problems' ensuring the cash is in the right currency. He is required to swap money in different currencies before he can pay suppliers. 4. Takes the figures from 50 and inputs them into an Excel spread sheet. The spread sheet is very basic. It has the bank balance at the top (as of today), a list of cheques that have not been presented and a list of payments that need paying and when they are due - With a bottom figure which will be a plus or a minus for the day 5. Too much information in 50, I need simplicity to give me the answer quickly 6. Priority payments: Has a list of customers who are priority and aims to pay them first not write back to 50 No drilldown functionality – Would be useful! Nominal drill down would also be useful for the accountant, but not the MD Banking isn't useful as they don't update 50 frequently enough On a mobile his MDs would be interested in: How much money is in the bank? Who owes us money, how much and how late is it? Who do we owe money to and how late are we paying them? Trends of where money has come from and where has it gone, wouldn't probably be performed

interview write up
interviewed over 25 company directors and documented the findings for each.

documented to share findings with project team



User Stories [Read-Only] - Microsoft Word

File Home Insert Page Layout References Mailings Review View HP ePrint and Share

Cut Copy Format Painter

Font: Calibri (Body) 16 A Aa AaBb AaBbCcDc AaBbCcDc AaBbCcDd US1: AaBb AaBbCcDd AaBbCcDd AaBbCcDd AaBbCcDd

Paragraph: Emphasis Heading 1 Heading 2 Heading 3 Heading 4 Normal User Story ... No Spacing Subtle Em... Intense Em... Quote Change Styles Find Replace Select Editing

Styles: 1 AaBb 1.1 AaBb AaBbCcDc AaBbCcDc AaBbCcDd US1: AaBb AaBbCcDd AaBbCcDd AaBbCcDd AaBbCcDd

Clipboard

Font: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18

Windows 8 – User Stories

N1: Do I have enough money for my business to continue running?

F1: Visibility of my money

US1: Bank accounts totalled (High priority)
As a Manager, I need to be able to see how much money I have in all of my bank accounts added together, to get a sense of how much total available cash my business has.

US2: Totals for selected bank accounts (High priority)
As a Manager, I need to be able to see how much money I have in total, from a set of bank accounts that I select myself, so that I know that the cash total excludes specific accounts that I am not interested in.

US3: Each bank account (High priority)
As a Manager, I need to be able to see how much money I have in each of my bank accounts so that I can decide whether or not to spend money from a certain account.

US4: Foreign bank accounts (Low priority)

user stories
created user stories based
on prominent themes.

Page: 1 of 10 | Words: 2,547 | 110%



exploration

sketched a broad range of concepts to explore different solutions.



**CASH FLOW
7 DAY CASH FLOW**

Today 15,232.86 Tomorrow 22,926.90 14 June 2012 3,214.89 15 June 2012 5,698.17 16 June 2012 7,125.17 17 June 2012 2,147.32 18 June 2012 3,963.21

BEGIN WITH

INCOMES

OUTGOINGS

END WITH

INCOME

OUTEXPENSES

Last updated @ Thursday, June 14, 2012 2:32:20 PM

Cash Flow

Overview Reporting

ADD INCOME **ADD EXPENSE**

APR 12 - SEP 12	APRIL	MAY	JUNE	JULY	AUGUST	
CASH IN HAND	Beginning of the month	33,490.00	37,593.00	35,568.00	42,021.36	46,321.00
▼ INCOME	APRIL	MAY	XX,XXX.XX	JULY	AUGUST	
▼ CONSULTING	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
▼ ORANGE BUS	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
USER INTERFACE DE...	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
▼ PRODUCTS	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
► BOOKS	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
▼ ELECTRONICS	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
► SERVICES	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	
▼ EXPENSE	APRIL	MAY	JUNE	JULY	AUGUST	
► CONSULTING	XXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	

**CASH FLOW
7 DAY CASH FLOW**

Today 15,232.86 Tomorrow 22,926.90 14 June 2012 3,214.89 15 June 2012 5,698.17 16 June 2012 7,125.17 17 June 2012 2,147.32

BEGIN WITH

INCOMES

OUTGOINGS

BEGIN WITH

END WITH

Category Breakdown

**PROFIT & LOSS
EXPENDITURE 2012**

June

May

April

Expenditure

Purchases

Sales Promotion

Travel Expenses

Gross Wages

Rent & Rates

Motor Expenses

Maintenance

Cash Flow

Monthly Totals

July's Income

Pie Chart

July's Expenses

Pie Chart

Category Breakdown

Unc

Prod

Broi

Ren

iterated to higher fidelity

validated HMTL prototypes with

end users and business

stakeholders on each iteration.

Gross Wages

Rent & Rates

Motor Expenses

Open Balance XXXX

Overdue XXXX

Customer

Quotations

Invoices

Sales Orders

List

A1 Design Services

Contact Person

Billing Address

Shipping Address

Payment Method

Search

Home

Banking

Cash Flow

Profit & Loss

Customers

Suppliers

Customers

Quotations

Invoices

Sales Orders

List

A1 Design Services (A1001)

Contact Person

Billing Address

Shipping Address

Payment Method

Search

Home

Banking

Cash Flow

Profit & Loss

Customers

Suppliers

HOME

Money Available

Customer watchlist

Supplier watchlist

County Golf Sales

Compton Packaging

Hausser GMBH

Apple

Orange

Everything Everywhere

Microsoft

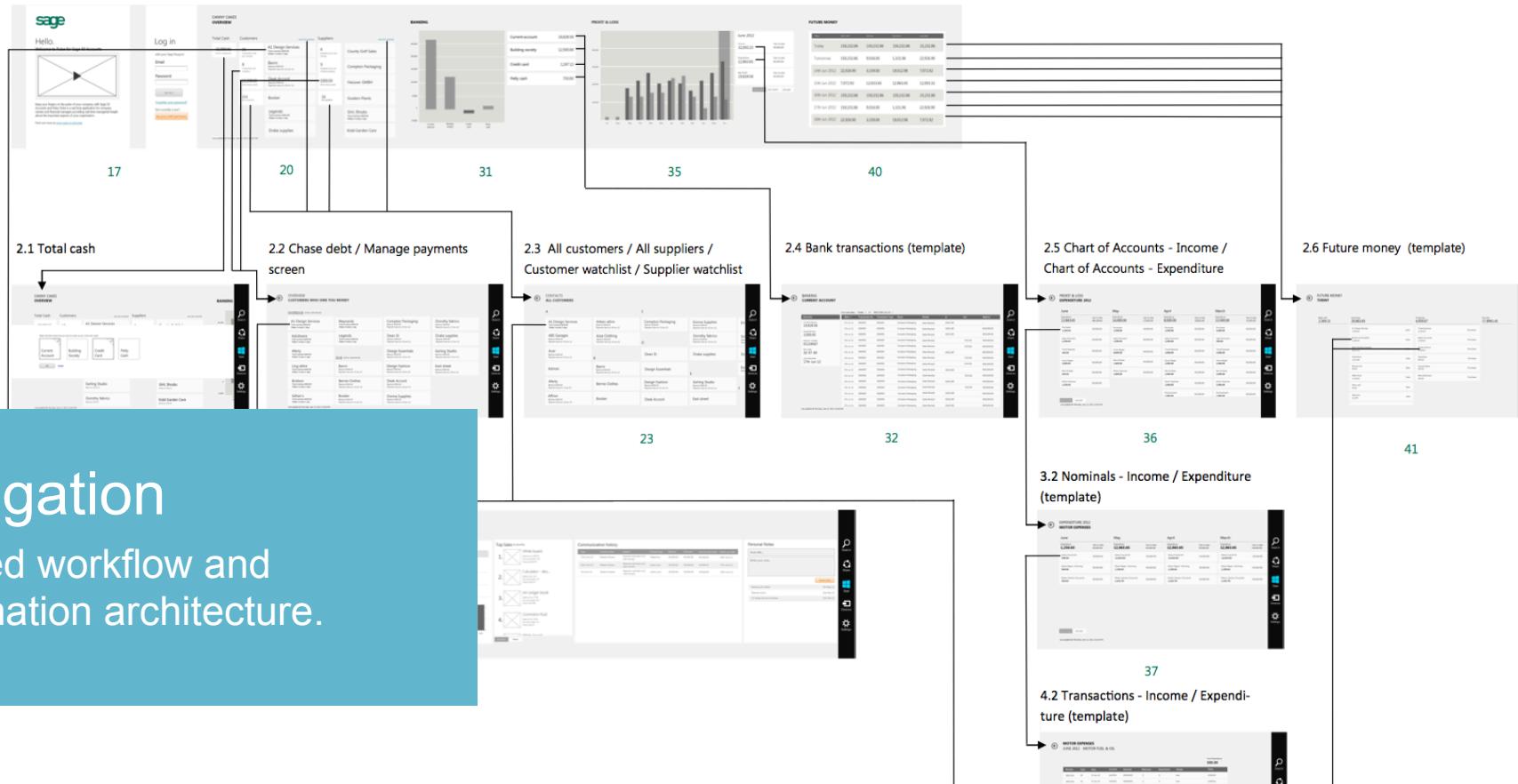
Everything Everywhere

Orange

Visual overview

The page numbering beneath each wireframe refers to the corresponding detail page within the ID-Specification.

1.0 The Hub



CANNY CAKES

OVERVIEW

Total Cash

32,088.96

From 3 accounts

Customers

21

Customers owe
you money

8

Customers are
overdue

12,258.00

Total value owed

304

All customers

[view full watchlist](#)

Suppliers

4

Suppliers you owe
money

0

Suppliers you are
overdue paying

1000.00

Total value owed

16

All suppliers

[view full watchlist](#)

BANKING

25,000

20,000

15,000

10,000

5,000

0

-5,000

Cu
ao



Search



Share



Start



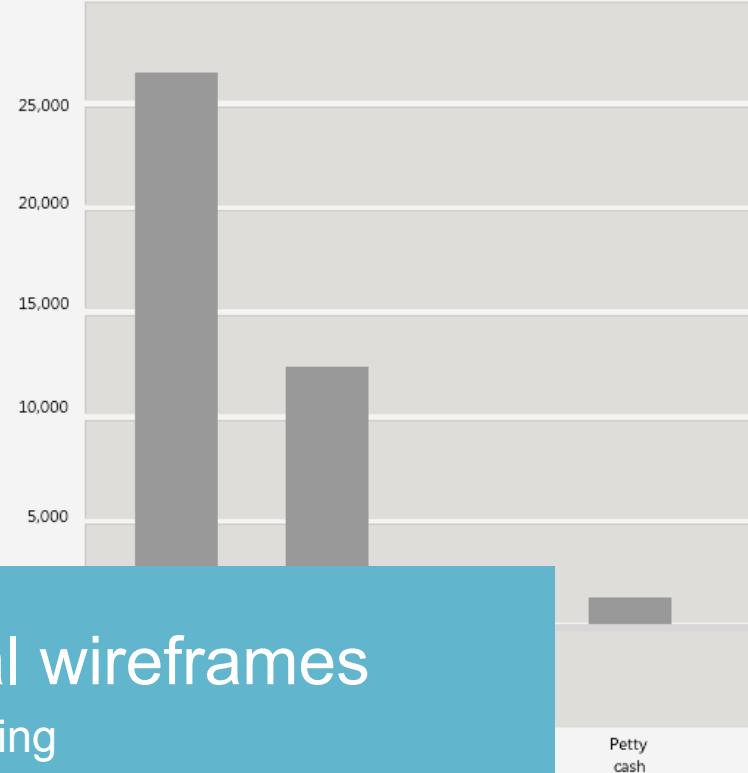
Devices



Settings

final wireframes
overview

CANNY CAKES LTD
BANKING

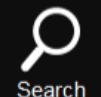
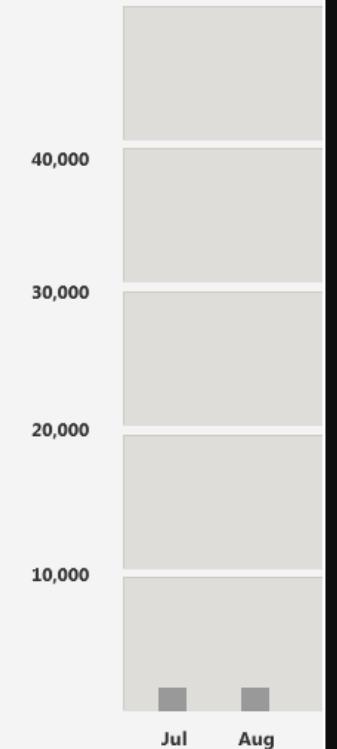


final wireframes
banking

Last updated @ Thursday, June 12, 2012 2:13:20 PM

PROFIT & LOSS

Current account	26,828.58
Building society	12,500.00
Credit card	1,247.12
Petty cash	750.00



Search

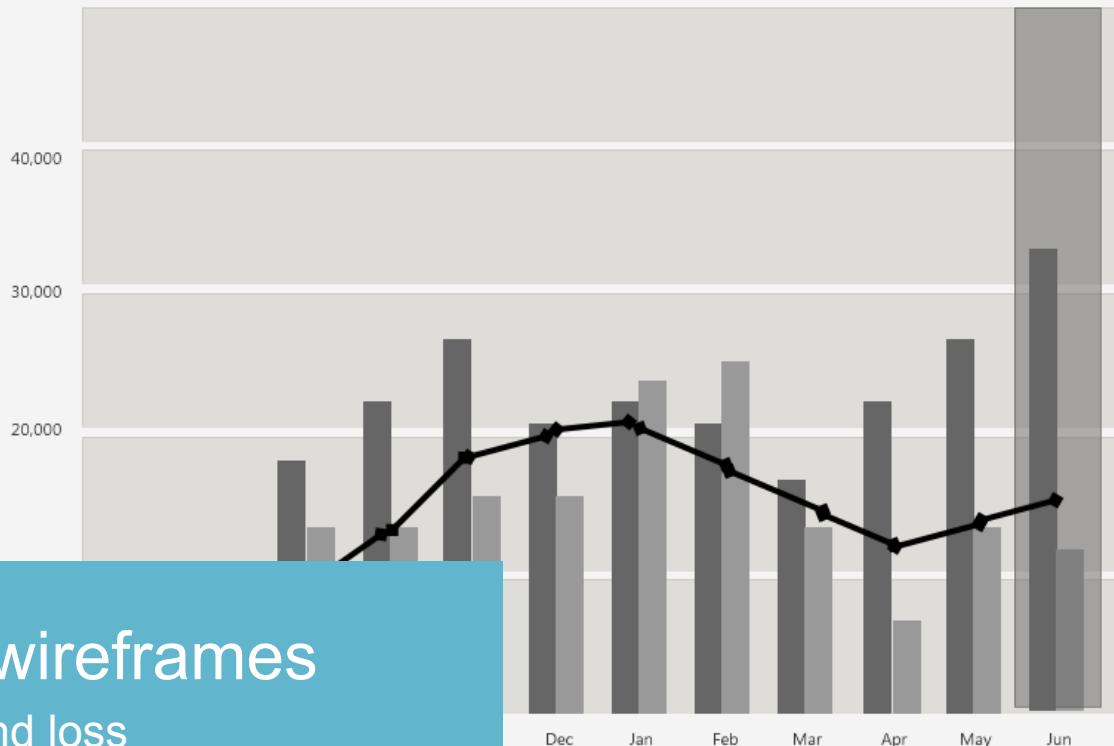
Share

Start

Devices

Settings

CANNY CAKES LTD PROFIT & LOSS



June 2012

Income
32,692.23

Year to date
XX,XXX.XX

Expenditure
12,863.65

Year to date
XX,XXX.XX

Net Profit
19,828.58

Year to date
XX,XXX.XX

Year to date Last month Last year

final wireframes
profit and loss

Last updated @ Thursday, June 12, 2012 2:13:20 PM



Search



Share



Start

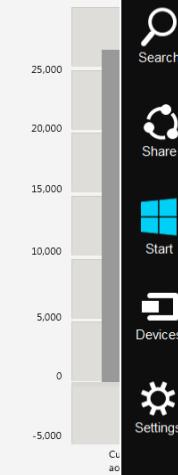


Devices



Settings

20

BANKING

3.2.1 Overview

The first screen presented to the user after logging in to Pulse for Sage 50 Accounts

Meets the following user stories

N1:F1
US1 **Bank accounts totalled**

As a Manager, I need to be able to see how much money I have in all of my bank accounts added together, to get a sense of how much total available cash my business has.

N2:F2
US2 **Number of selected bank accounts**

As a Manager, so that I know how many accounts are included in the total for the selected bank accounts, I need to be able to see how many accounts I have selected to make up that total.

N2:F2
US1 **Total due from all customers**

As a Manager, so that I can understand how effective my credit control is, I need to be able to see the total amount of money that is owed by all my customers.

N2:F2
US2 **How many customers owe me money**

As a Manager, so that I can get a sense of how my total due is derived, I need to be able to see how many of my customers owe me money.

N2:F3
US1 **Total due to all suppliers**

As a Manager, so that I can understand how effective my credit terms are, I need to be able to see the total amount of money that is owed to all suppliers.

N2:F3
US2 **How many suppliers do I owe money**

CANNY CAKES OVERVIEW

Total Cash	Customers	Suppliers
① 32,088.96 From 3 accounts	② 21 Customers owe you money	④ view full watchlist A1 Design Services Total overdue XXXXX Oldest invoice: 3 days
8 Customers are overdue	12,258.00 Total value owed	⑤ 0 Suppliers you are overdue paying
③ 304 All customers	Deak Accord Balance XXXXXX Payment due on: 16 Jun 12	1000.00 Total value owed
	Booker	⑥ 16 All suppliers
	Legends Total overdue XXXXX Oldest invoice: 1 day	GHL Shrubs Total overdue XXXXX Oldest invoice: 1 day
	Drake supplies	Kidd Garden Care

Created @ Thursday, June 12, 2012 2:13:20 PM

ixd doc

interaction design specification for remote development.

- The sum of all bank accounts chosen in the tile navigates to '3.2.2 Total due from all customers'. This information shown consists of three aspects:
- The total number of customers who owe you money (everyone= due + not yet due)
 - The total number of customers who are overdue
 - The total amount owed

- ③ **Customer watchlist**
As the user begins to add customers to their customer watchlist they collate here. The first customer the user adds to the watchlist would appear in the list first.

- ④ **View full watchlist list (customers)**
This link navigates the user to list of customers they have added to their watchlist. This list uses the same design template as '3.2.4 All customers'.

- ⑤ **Suppliers who owe money**
Selecting this navigates the user to the same design template '3.2.3 Customers who owe you money', but is titled 'Suppliers who you owe money'. The information shown consists of three aspects:

- ⑥ **All suppliers**
The total number of suppliers value, which navigates to 'All suppliers', but uses the same design template as '3.2.4 All customers'.

- ⑦ **Supplier watchlist**
As the user begins to add suppliers to their supplier watchlist they collate here. The first supplier the user adds to the watchlist would appear in the list first.

- ⑧ **View full watchlist list (suppliers)**
This link navigates the user to list of suppliers they have added to their watchlist. This list uses the same design template as '3.2.4 All customers'.



STATIONERY & COMPUTER MART UK OVERVIEW

Total Cash	Customers
-5,584.06 from 6 accounts	24 customers owe you money
	View full watchlist (6)
	11 customers are overdue
	90,640.61 total value owed
	30 total customers

A1 Design Services
Balance 0.00
View full watchlist (6)
ABS Garages Ltd
Balance 2,533.31
View full watchlist (6)
Bobs Building Supplies
Balance 4,309.77
View full watchlist (6)
Bronson Inc
Balance 0.00
View full watchlist (6)
Business Exhibitions
Balance 2,066.62
Total overdue invoices 2,166.62
Oldest invoice 33 days
View full watchlist (6)

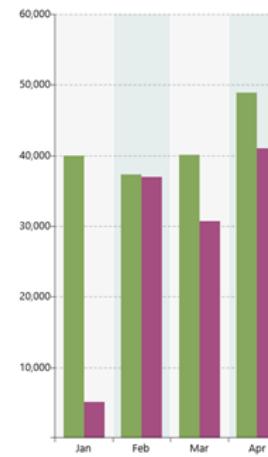
Suppliers
View full watchlist (6)
12 suppliers you owe money to
7 suppliers you are overdue paying
44,502.68 total value you owe
15 total suppliers

Concept Stationery Supplies
Balance 1,644.39
View full watchlist (8)
McNally Computer Supplies
Balance 24,734.12
Total overdue invoices 8,991.51
Oldest invoice 34 days
View full watchlist (8)
Mears Insurance
Balance 0.00
View full watchlist (8)
Newtown Builders Ltd
Balance 0.00
Total overdue invoices 0.01
Oldest invoice 63 days
View full watchlist (8)
Quality Motors
Balance 30.22
View full watchlist (8)

BANKING

Bank Current Account	Company Credit Card
-20,091.04	9,358.97
Bank Deposit Account	
3,510.00	
Building Society Account	
507.53	
Petty Cash	
1,130.48	
Cash Register	
0.00	

PROFIT & LOSS



visual design
not completed by myself.

positive feedback

great feedback from customers.

 David

Easy to use and beautiful app
★★★★★ 19 November 2012

Very impressed with this. I use Sage 50 regularly and it's great that non Sage 50 users can get a summary of the business performance too. It's quick to respond, easy to navigate and a very good to look at. Recommended.

0 out of 0 people found this review helpful
Was this review helpful? Yes No
[Report this review](#)

 Greg

Excellent piece of kit
★★★★★ 17 November 2012

This is an excellent piece of kit if you need to keep an eye on your key finances without the hassle of navigating the full Sage 50 Accounts program.

1 out of 1 people found this review helpful
Was this review helpful? Yes No
[Report this review](#)

 Adam

Excellent for senior members staff
★★★★★ 16 November 2012

This app is brilliant for senior staff who might want to keep an eye on finances without having to bother company admin staff. I looked into it as part of the possibilities of Windows 8 in my office, the way it gives a simplistic look at company finances is perfect of senior management!

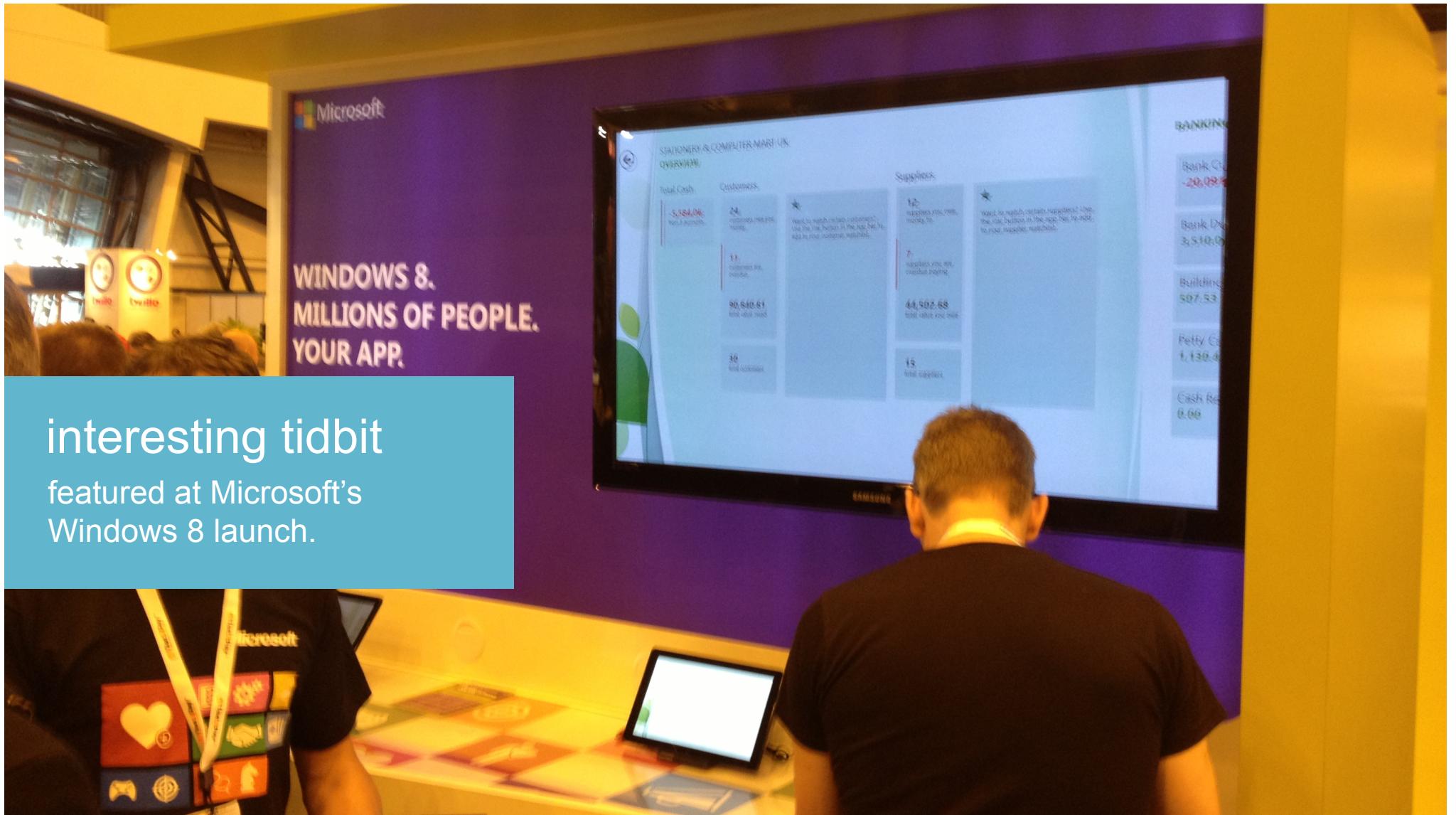
6 out of 6 people found this review helpful
Was this review helpful? Yes No
[Report this review](#)

 Neville

Sage 50 Pulse
★★★★★ 16 November 2012

Got the full version on my Window 7 pc, this is a much better interface and works well with my account.

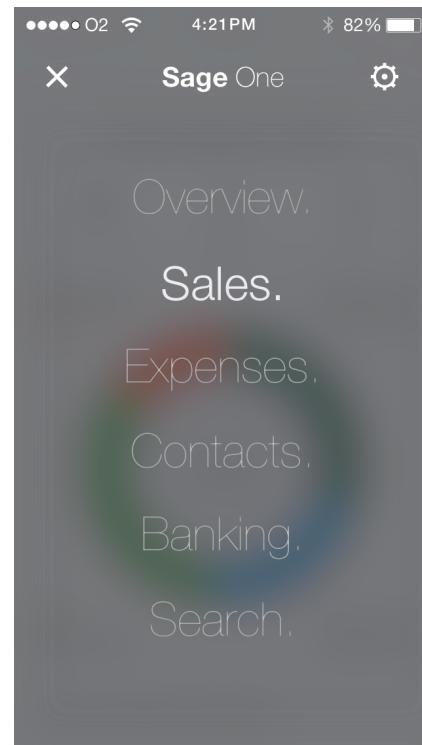
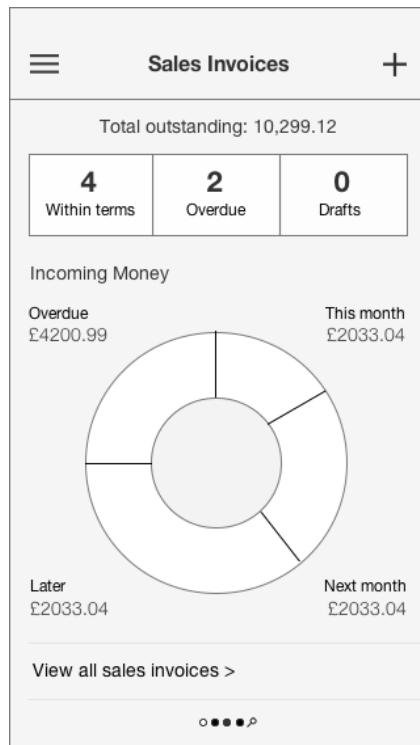
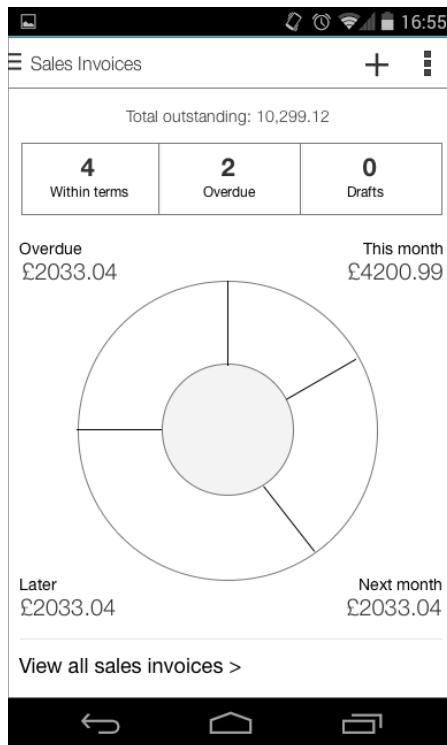
4 out of 4 people found this ...
Was this ...
[Report this review](#)



work completed by Kyle Mayne unless otherwise stated

more recent work...
mobile concepts

same approach to design applied to
this piece of work...



all work completed by Kyle Mayne unless otherwise stated.

current work...
Design Standards

Sage One Standards

[Design](#) [Develop](#) [Market](#) [Release](#) [Support](#)

- [01 - Getting Started](#)
- [Getting Started](#)
- [02 - Vision Principles](#)
- [03 - Style](#)
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design leader

designing and documenting UI components / patterns for the Sage One global platform.

thank you!

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