

Disingenuous Unified Monetary Bank Site Redsign Project

Design Summary

In this design, I tried to create a page that would allow users to set up alerts for their accounts without training. My goal was that they should be able to understand the page right away. I used several methods to achieve this. First, I tried to bring as much of the information about the alerts and how to create them to the front of the page. My first drafts hid the alert type from the user. In this draft, all alerts and the ability to edit them and the ability to create a new alert is on the My Alerts landing page. This means that users can now see all their alerts at once and makes the path toward editing clearer.

Second, I wanted to be sure I could design the interface to support the user in not making errors. For example, when the user has an edit panel open, the links to edit or create other kinds of accounts are disabled until the user saves or cancels the interaction. This will prevent the user from navigating away without saving and simplifies the interaction. The user can only do that proscribed set until they set their alert or decide they don't want to finish it.

Finally, I highlighted the priority of the save, cancel and remove controls to support the user against error. The save button has a standout color and is in the primary button position. This allows the user to quickly locate it and save the alert. The cancel button is a lighter color and is in the secondary button position so that the user is less likely to click it and undo all their work. I gave the remove control a different shape, mimicking the add alert control, but with a minus symbol. This should allow users to recognize the control, since the user had to have clicked the add button to create the account. The visual distinction from the

other controls in the panel— save and cancel— is important so that the user does not inadvertently click the control.

The use of these techniques should allow users to learn the interface and support them when they return to it after extended periods of time.

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- Transfers
- My Alerts
- Pay My Bills

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My Alerts

Account	Balance	Alerts	Click to Edit
Checking - (XXXX1234)	\$10,000	2 <ul style="list-style-type: none">Email me the Current Balance WeeklyText me when more than \$500 is deposited + Add Alert	
Savings - (XXXX5678)	\$10,000	1 + Add Alert	
CD - (XXXX9182)	\$10,000	<ul style="list-style-type: none">Text me the Current Balance MonthlyEmail me 45 days before my CD maturesEmail me the Year to Date Interest Monthly	3

- 0
- This is My Alerts page with several alerts set.
- 1
- Users add new alerts by clicking Add Alert. This has a prominent hover state to afford clicking and a tooltip for further learnability.
- 2
- Users can edit their alerts by clicking on the Alert link text. This also has a hover state and tooltip to encourage the user. Also this action mimics adding an alert, an action the user has already performed.
- 3
- Once all three types of Alerts have been set on an account, the Add Alert link disappears. This prevents users from setting too many alerts. This can be changed if user testing shows that people want to set more than one alert of each type.

Disingenuous Unified Monetary Bank

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My Alerts

Account	Balance	A
Checking - (XXXX1234)	\$10,000	1 + Add Alert
Savings - (XXXX5678)	\$10,000	+ Add Alert
CD- (XXXX9182)	\$10,000	+ Add Alert

- 0 This is the My Alerts page that the user would see the first time they visit it.
- 1 Add Alert links have a prominent hover state and a tool tip to guide the user in creating the alert.

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My Alerts

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	<div><div>Email me the Current Balance Weekly</div><div>Text me when more than \$500 is deposited</div><div>+ Add Alert</div></div>

1

What kind of Alert on your Checking Account?

Low Account Balance

2

Low Account Balance Alert

Send alerts when your account is below:

\$500.00

How would you like us to send you your Low Account Balance Alert?

☒ Email

☐ Text Message

3

- Remove Alert

Cancel

Save

Savings - (XXXX5678)	\$10,000	<div>+ Add Alert</div>
CD - (XXXX9182)	\$10,000	<div><div>Text me the Current Balance Monthly</div><div>Email me 14 days before my CD matures</div><div>Email me the Year to Date Interest Monthly</div></div>

- 0 This is the New Alert page for a Low Balance Alert.
- 1 The Alert option option pane should expand downward from the account line. It is loaded via ajax.
- 2 Selecting the kind of Alert loads the options appropriate for that Alert.
- 3 The Save button is deactivated until an Alert type is chosen or in the Edit pane, until a change is made. The Cancel button collapses the pane, returning the user to the My Alerts page.

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My Alerts

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	<div><div>Your Low Balance Alert has been Set</div><div>1</div><div><div>Email me the Current Balance Weekly</div><div>Text me when more than \$500 is deposited</div><div>Email me when my Balance is below \$500</div></div></div>
Savings - (XXXX5678)	\$10,000	<div><div>+ Add Alert</div></div>
CD - (XXXX9182)	\$10,000	<div><div>Text me the Current Balance Monthly</div><div>Email me 14 days before my CD matures</div><div>Email me the Year to Date Interest Monthly</div></div>

- 0

This is the Success Message for Adding an Alert.
- 1

Alerts Appear here when they have been created.

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My Alerts

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	<div>• Email me the Current Balance Weekly</div>

1

• [Text me when more than \\$500 is deposited](#)

Edit Your Current Balance Alert

Would you like us to send your Current Balance to you Monthly or Weekly?

☐ Monthly

☒ Weekly

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

How would you like us to send you your Current Balance?

☒ Email

☐ Text Message

[- Remove Alert](#)

Cancel

Save This Alert

2

Savings - (XXXX5678)	\$10,000	<div>+ Add Alert</div>
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CD - (XXXX9182)	\$10,000	<div>• Text me the Current Balance Monthly</div> <div>• Email me 14 days before my CD matures</div> <div>• Email me the Year to Date Interest Monthly</div>
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0

This is the Edit page for a Current Balance Alert.

1

All other alert links are greyed out when an Alert is being edited or created. This prevents the ambiguity of navigating to another Alert when the user has not clicked save or cancel.

2

The Alerts available for Savings Accounts are the same as for Checking Accounts.

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My Alerts

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	<div><div>Your Current Balance Alert has been Saved</div><div><div><div>Email me the Current Balance Weekly</div><div>Text me when more than \$500 is deposited</div><div>+ Add Alert</div></div></div></div>
Savings - (XXXX5678)	\$10,000	<div><div>+ Add Alert</div></div>
CD - (XXXX9182)	\$10,000	<div><div><div>Text me the Current Balance Monthly</div><div>Email me 14 days before my CD matures</div><div>Email me the Year to Date Interest Monthly</div></div></div>

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My Alerts

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	<ul style="list-style-type: none">Email me the Current Balance WeeklyText me when more than \$500 is deposited

Edit Your Large Deposit Alert

Send alerts on deposits above:

How would you like us to send you your Large Deposit Alert?

☐ Email ☒ Text Message

[- Remove Alert](#)

Cancel

Save

Savings - (XXXX5678)	\$10,000	+ Add Alert
CD - (XXXX9182)	\$10,000	<ul style="list-style-type: none">Text me the Current Balance MonthlyEmail me 14 days before my CD maturesEmail me the Year to Date Interest Monthly

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CD - (XXXX9182)	\$10,000	<ul style="list-style-type: none">Text me the Current Balance MonthlyEmail me 14 days before my CD maturesEmail me the Year to Date Interest Monthly

Edit Your Current Balance Alert

Would you like us to send your Current Balance to you Monthly or Weekly?

- ☐ Monthly
- ☒ Weekly
- ☒ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday

How would you like us to send you your Current Balance?

- ☒ Email
- ☐ Text Message

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Savings - (XXXX5678)	\$10,000	<div><div>+ Add Alert</div></div>
CD - (XXXX9182)	\$10,000	<div><div>Text me the Current Balance Monthly</div><div>Email me 14 days before my CD matures</div><div>Email me the Year to Date Interest Monthly</div></div>

Edit Your Maturity Date Alert

How many days before your CD matures would you like an Alert?

14

How would you like us to send you your Maturity Date Alert?

☐ Email ☒ Text Message

[- Remove Alert](#)

Cancel

Save This Alert

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Edit Your Year to Date Interest Alert

Work on this alert or Weekly?

Are you sure you want to remove your Year To Date Interest Alert?

No, I want to keep it Yes, Remove it

How often would you like to receive this alert?

☒ Email ☐ Text Message

[- Remove Alert](#)

Cancel

Save This Alert

0 This is the success message for Removing an Alert.

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Savings - (XXXX5678)	\$10,000	<div><div>+ Add Alert</div></div>
CD - (XXXX9182)	\$10,000	<div><div>Text me the Current Balance Monthly</div><div>Email me 45 days before my CD matures</div><div>+ Add Alert</div></div>

0 Your Year to Date Interest Alert was Removed