## How to use this document

### Naming Things

- **Edit the Head/Foot shared layer to set the title document title at the top of the page.**
- **Rename the canvases to set the page titles**

### Using Layer Master

- **The Layer Master is non-printing canvas that simply holds the shared layers used by all of the canvas types in the document. This ensures that you don't lose any of your shared layers should you delete it from a canvas.**
- **Drag shared layers over your working canvas to use as a page master (e.g. wireframe or storyboard)**

### Presentation

- **This document was created with dimensions of 22" by 34" so that you may work at 100% and project your schematics at 100% in landscape mode.**

### Exporting and Printing

- **Select menu: File > Export**
- **From the export dialog:**
  **Select Format: PDF Vector Image**
  **Select Export Area: Entire Document**
- **Print the PDF, being sure that your Printer Handling options are set to "Scale to fit paper size."**

### More information

http://konigi.com/tools/omnigraffle-ux-template

Version info:
Version 2.4 (4/27/09)

# Bullsfirst iPad Prototype v2

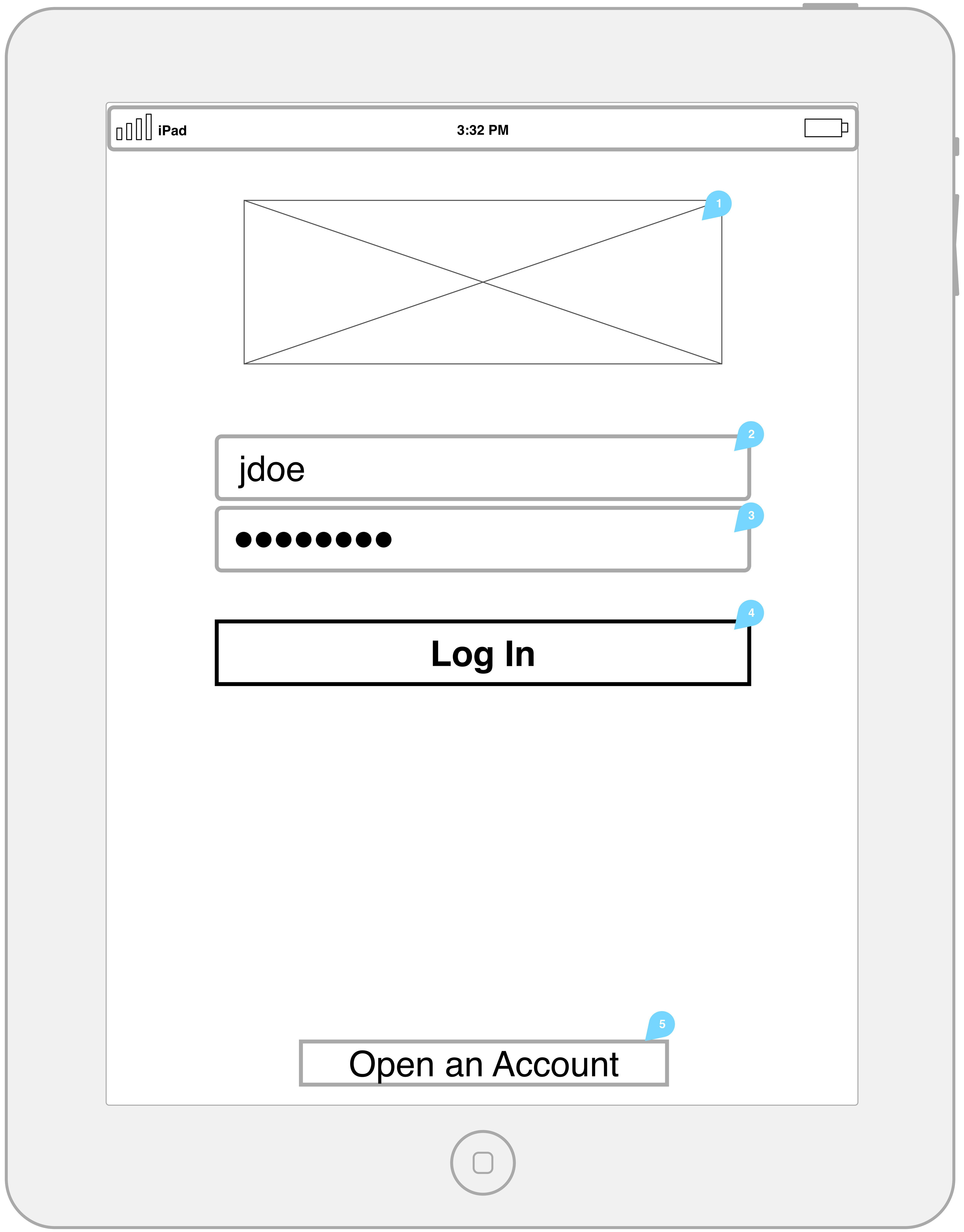
| | |
|---|---|
| MODIFICATION DATE | Wed Feb 08 2012 |
| CREATOR | Kunal Bhatia |
| FILE NAME | Bullsfirst-iPad_Wires_v2.graffle |
| DESCRIPTION | Bullsfirst iPad Wireframes.  |
| VERSION HISTORY | Version 2: Revisions with feedback from Scott and Seth. |

# Bullsfirst iPad Prototype v2

## Interaction Diagram

# Bullsfirst iPad Prototype v2

## Log In Screen



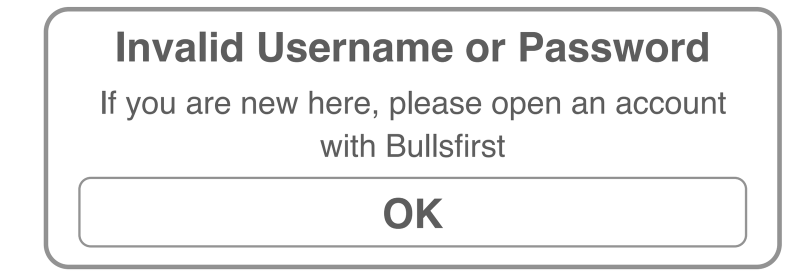

1. **Bullsfirst Logo**

2. **Username / Password Form Fields**
   Titles for these form fields will be displayed inside the field in gray text. As the user starts typing inside the field, the title will go away.

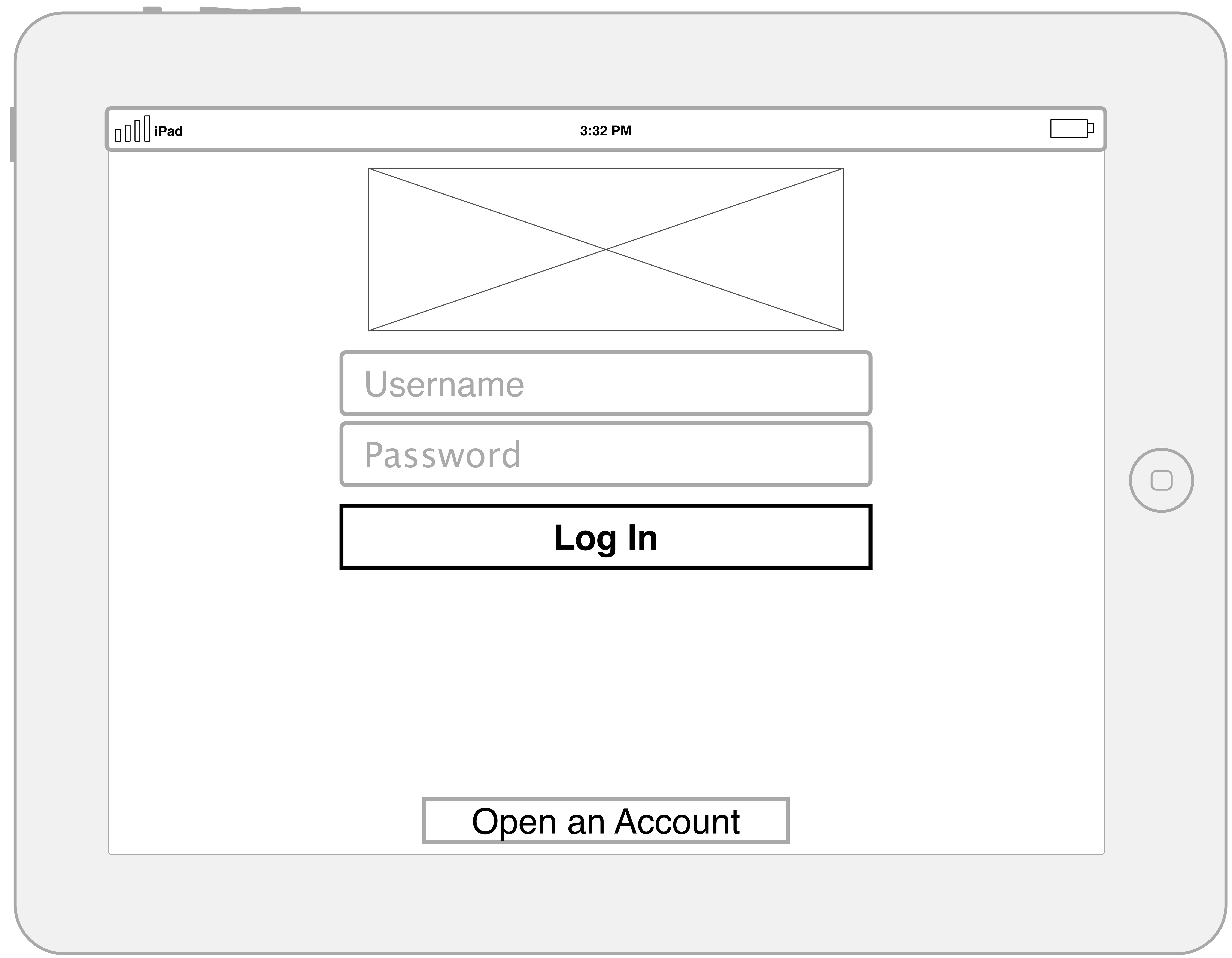
3. **Password Entry**
   Uses standard iOS password form field

4. **Login Button**
   Upon successful login, the user will go directly their account page. If login fails, a standard alert box would show up with the copy to the right.

5. **Open an Account**
   When the user clicks this button, a modal view will slide in from the bottom of the screen.

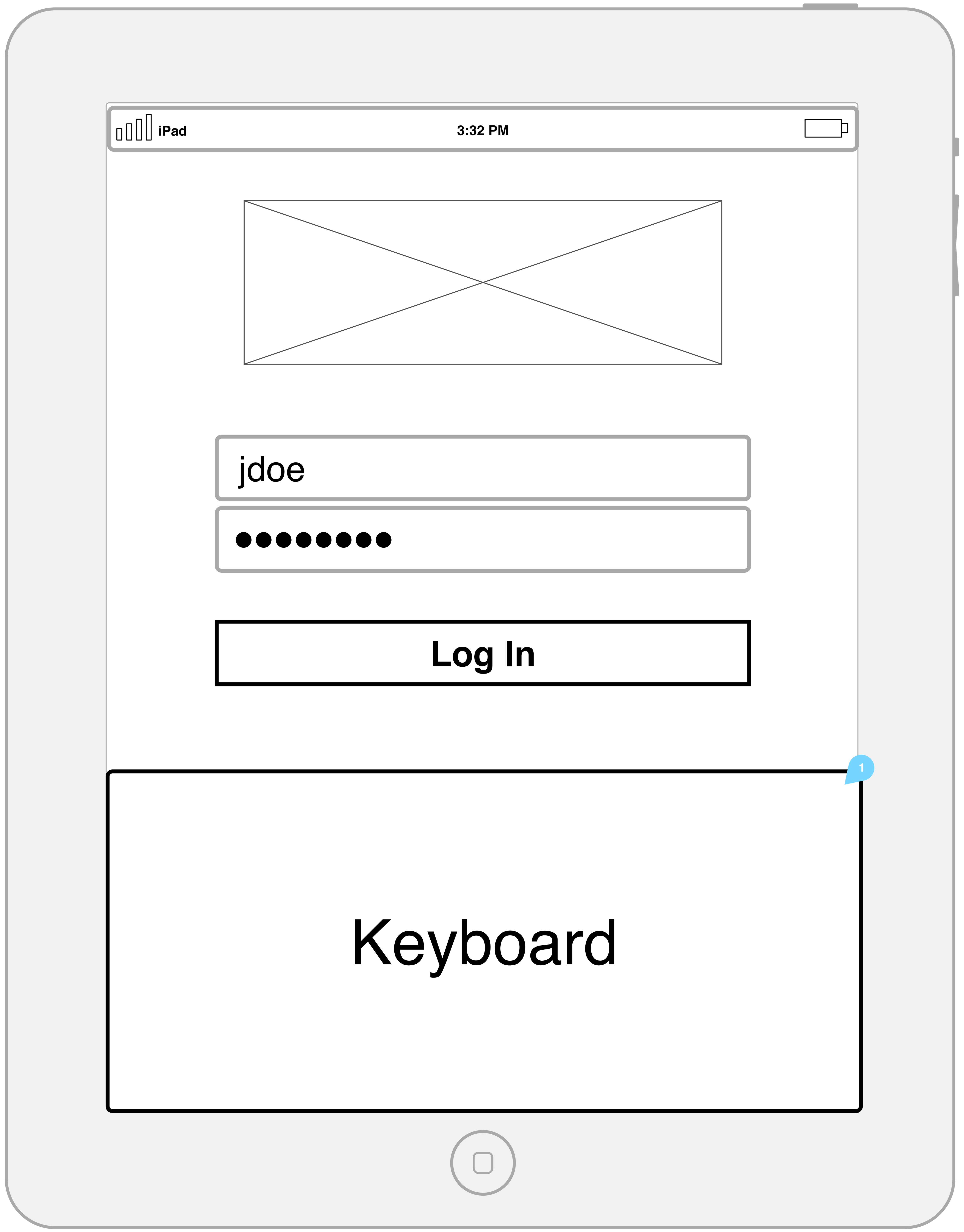



Alert Box



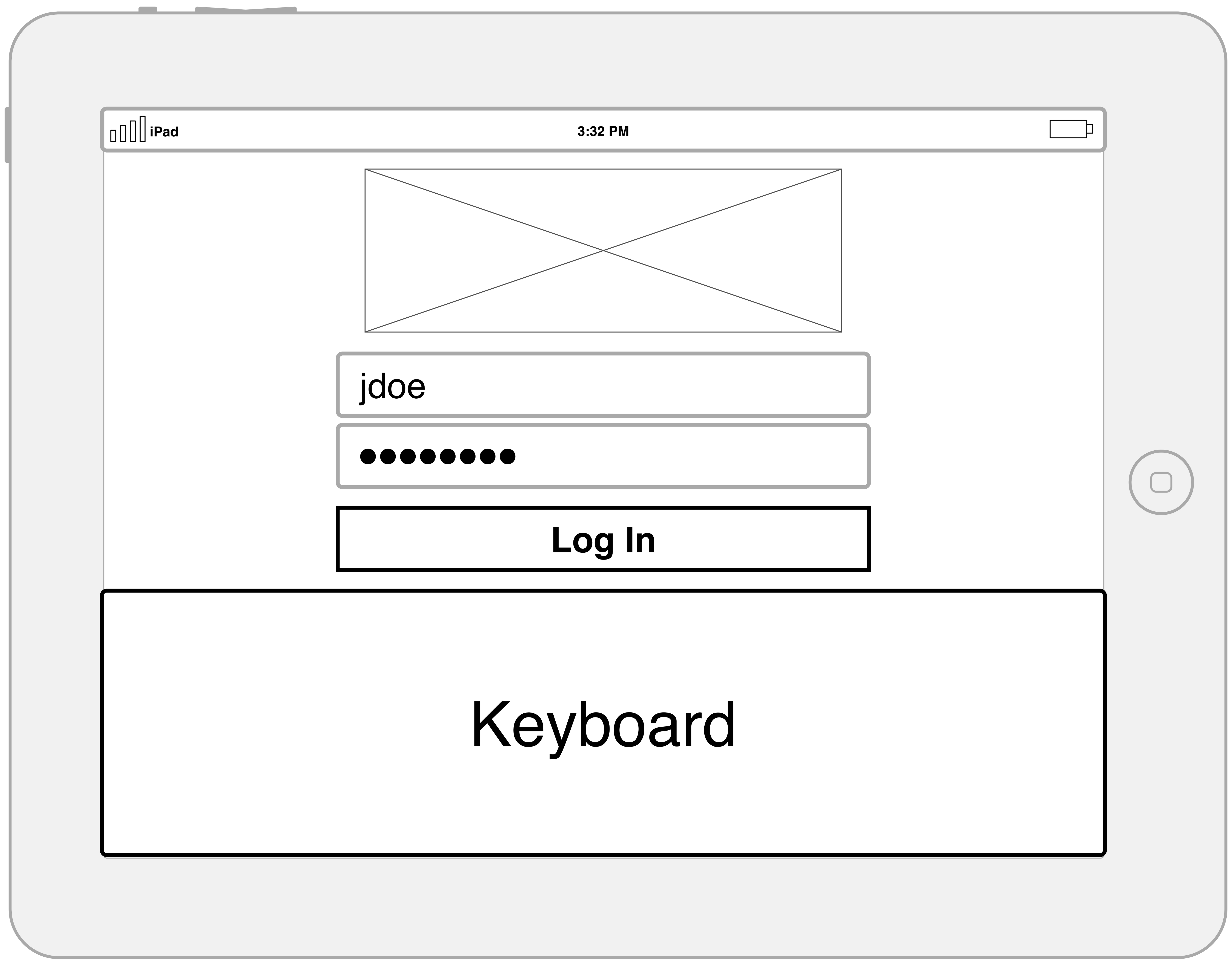
# Bullsfirst iPad Prototype v2

## Log In Screen - Keyboard Placement



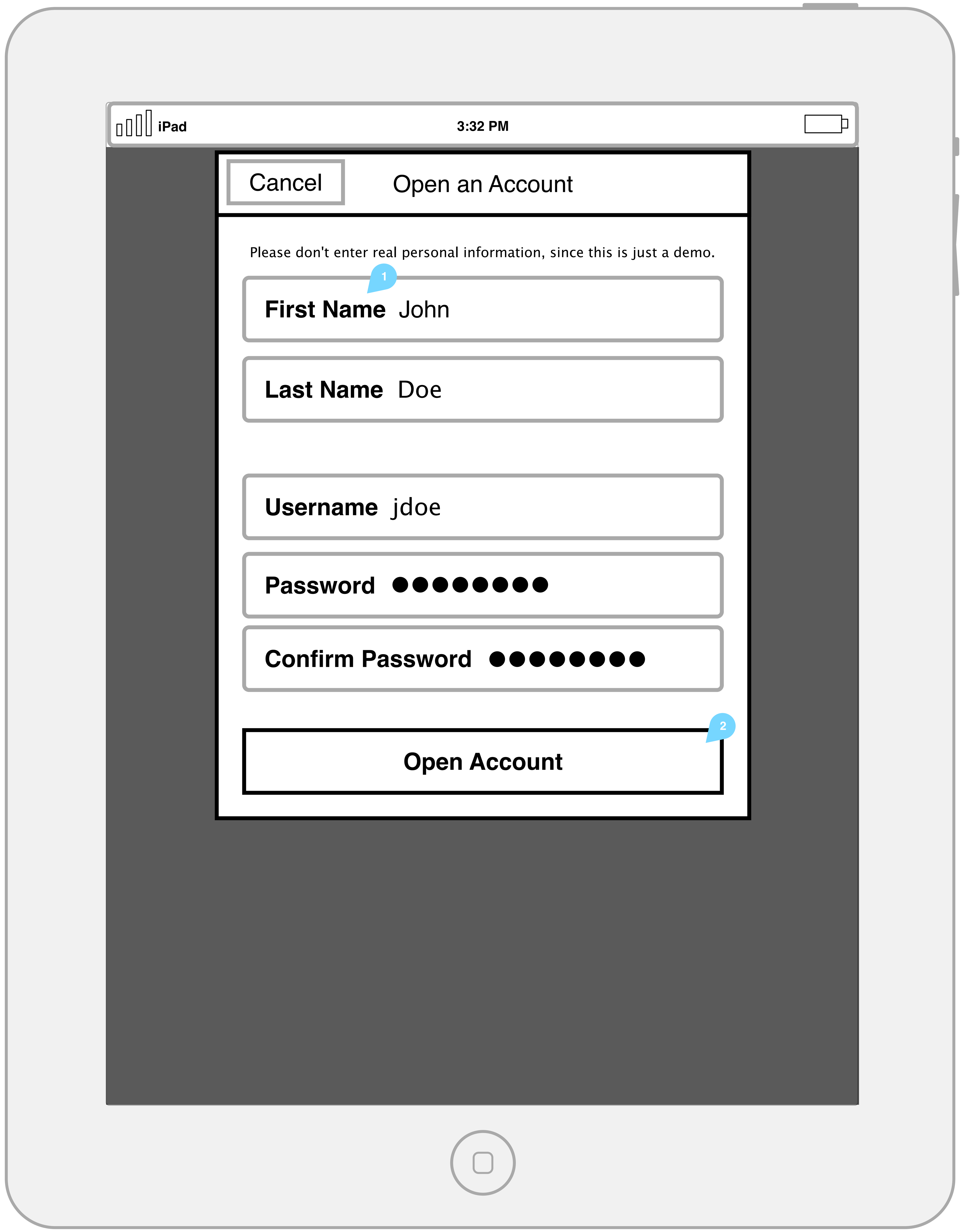

1. **Keyboard Placement**
   Make sure that both the "Username" and "Password" fields are completely visible when the keyboard is active.

   In the landscape orientation only, the keyboard may obscure the form fields. In this case, the background and fields would move up. The "Open an Account" button will still be behind the keyboard. If the user hides the keyboard, the background and form fields will return to their original position.



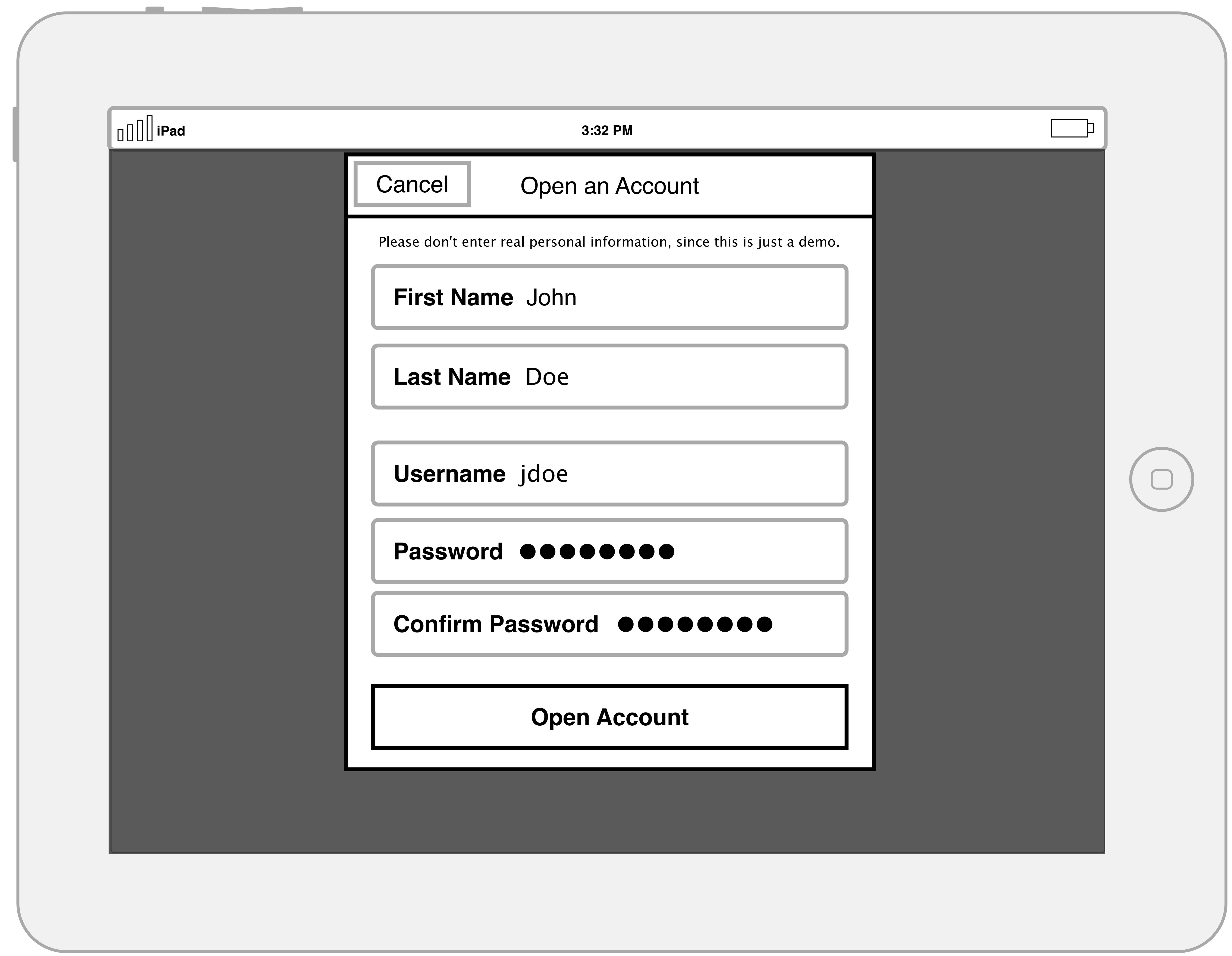
# Bullsfirst iPad Prototype v2

## Open an Account



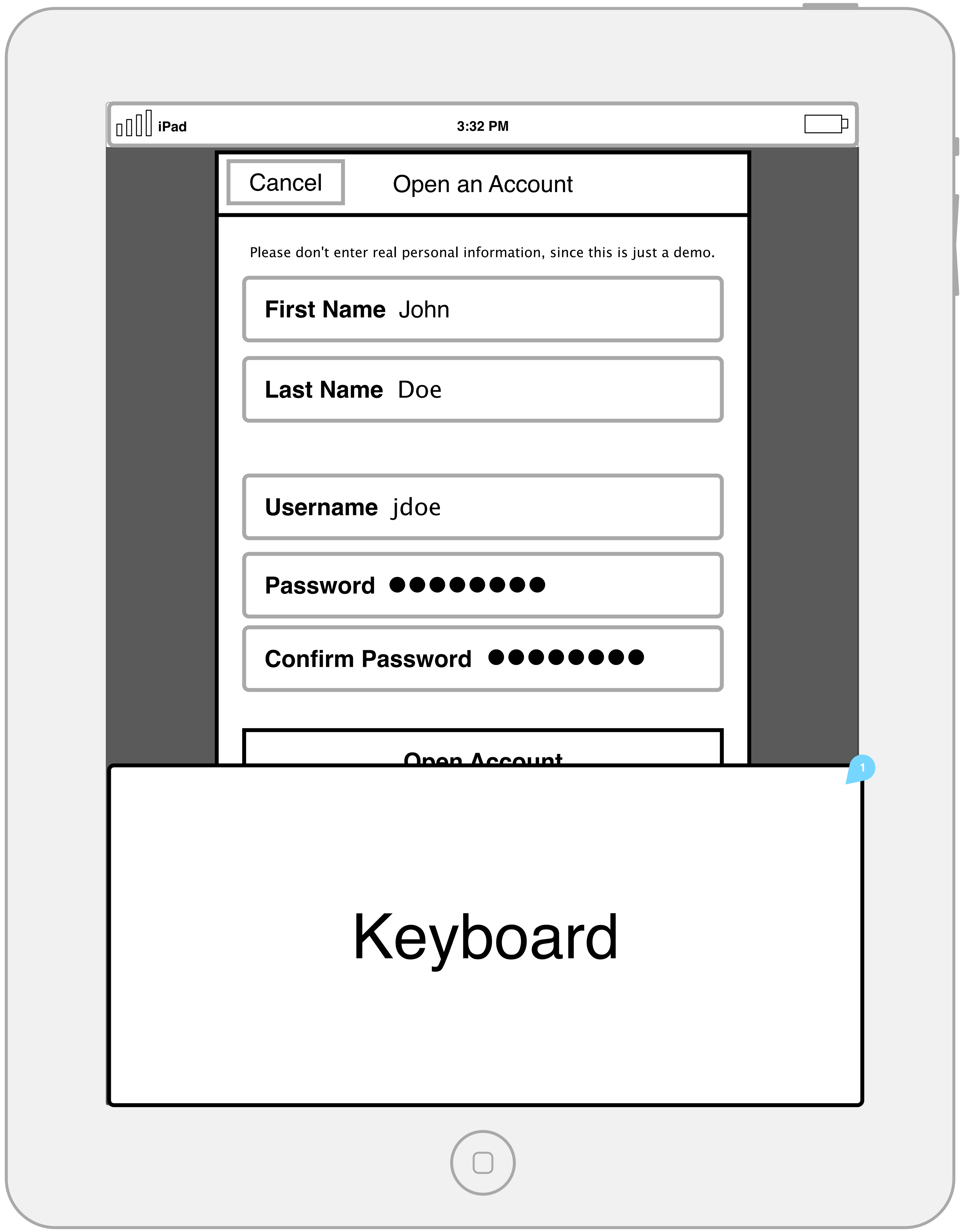

1. **Text Field Titles**
   For longer forms (unlike the simple "Log In" screen), the text field title should be displayed persistently in a bolder typeface next to the user entry.

2. **Open Account Button**
   For longer forms (unlike the simple "Log In" screen), the text field title should be displayed persistently in a bolder typeface next to the user entry.

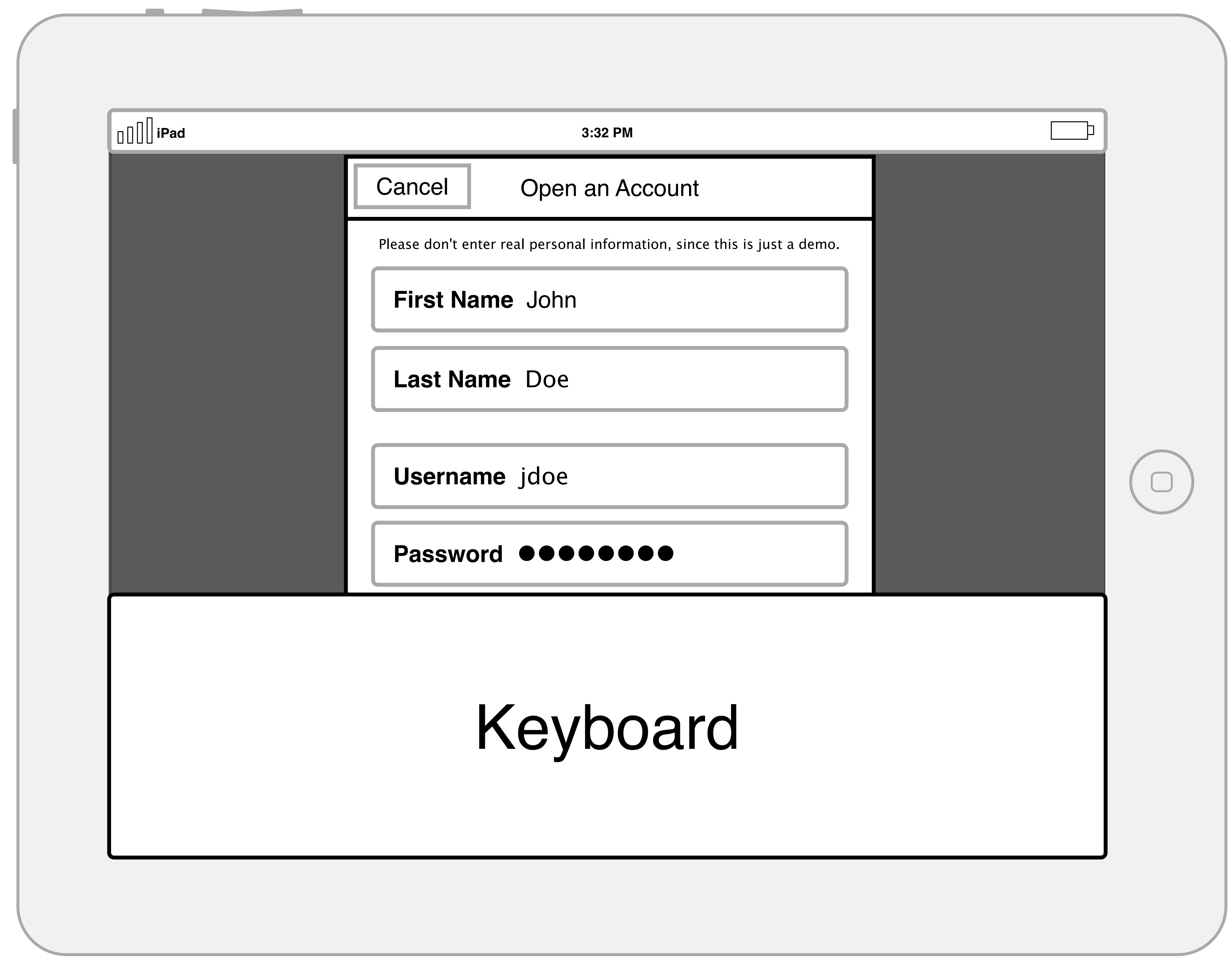


# Bullsfirst iPad Prototype v2

## Open an Account - Keyboard Placement

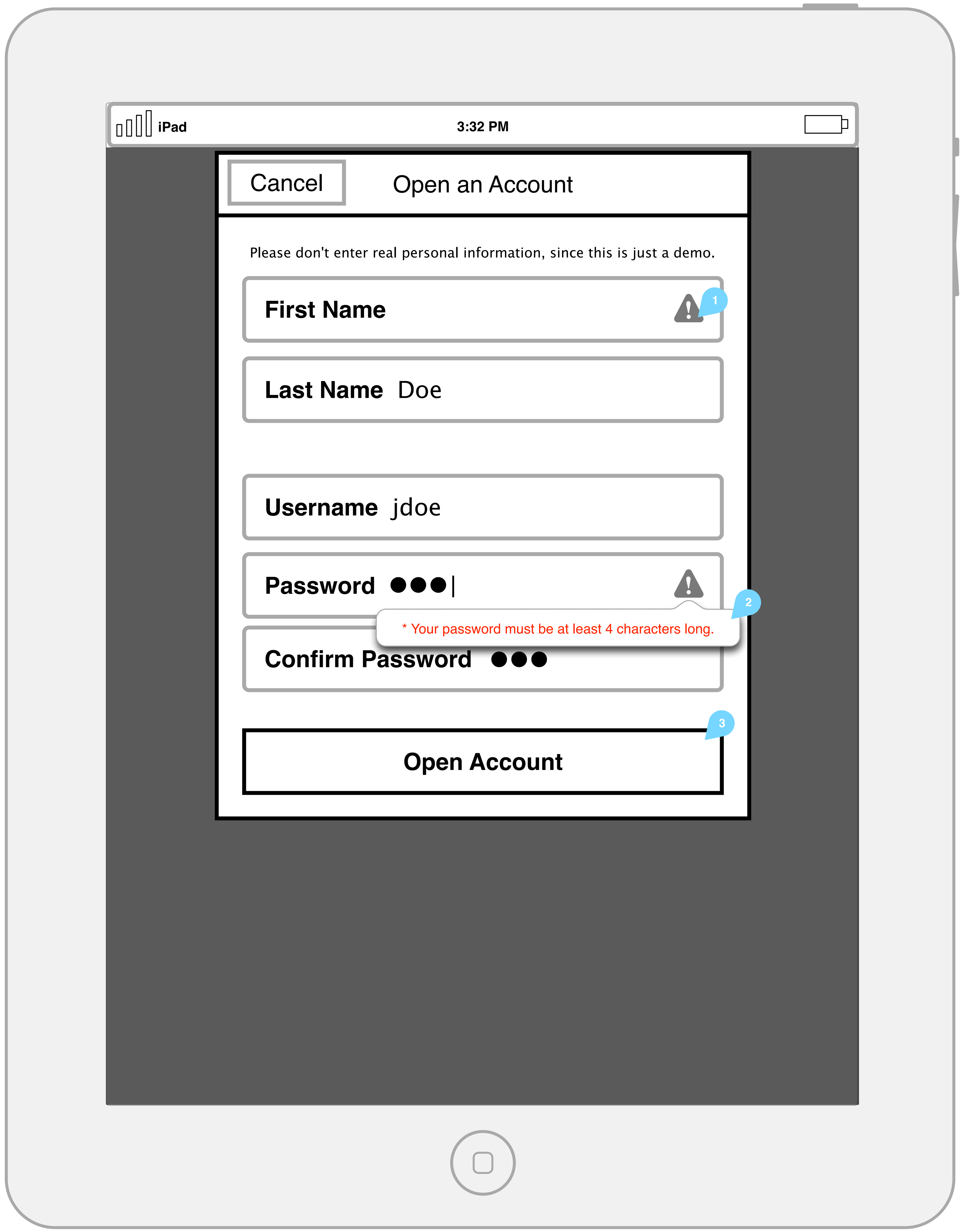



1. **Keyboard Placement**
   For longer forms (unlike the simple "Log In" screen), the keyboard will use the "Previous" and "Next" Buttons to scroll to the right place in the screen.



# Bullsfirst iPad Prototype v2

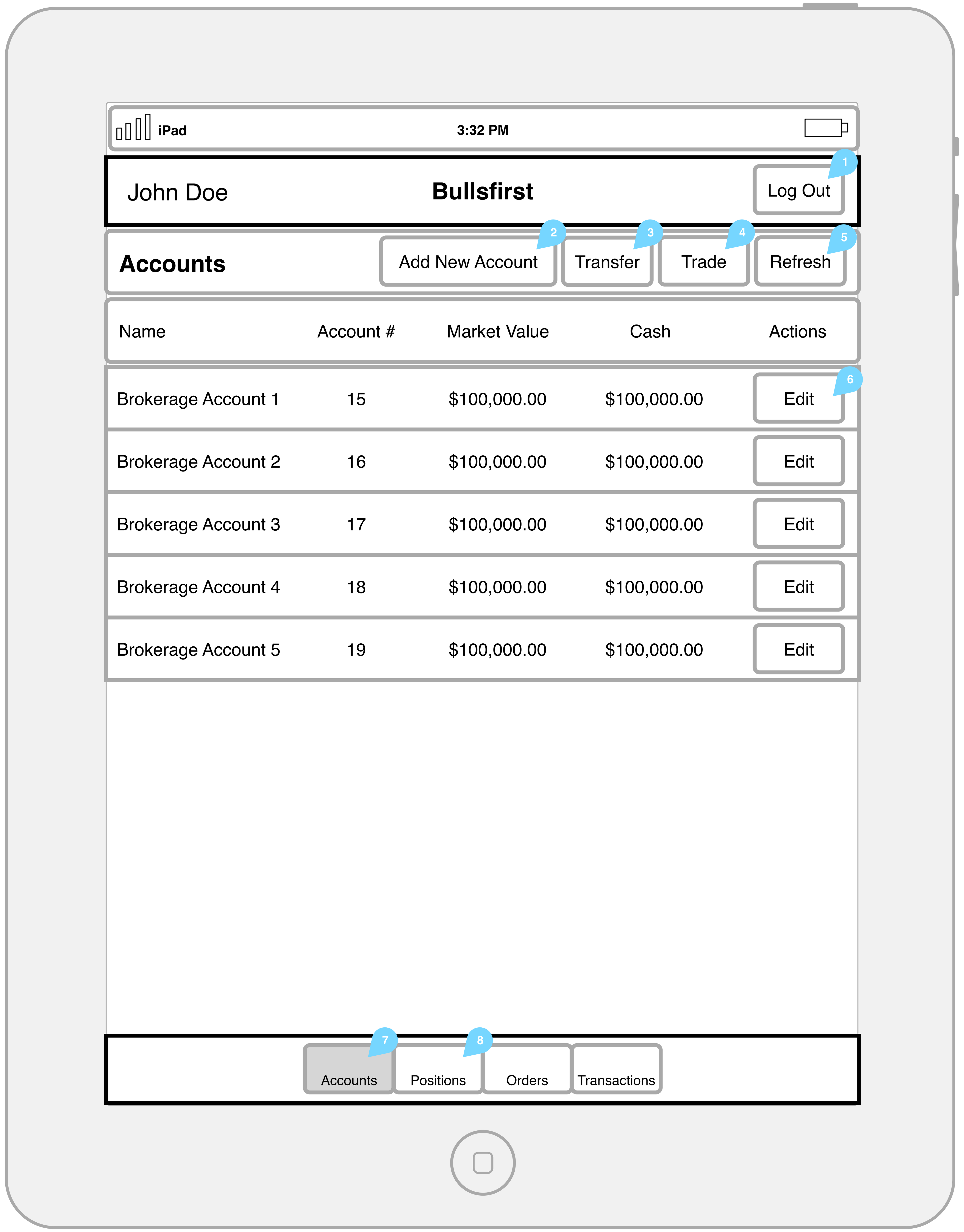
## Open an Account - Error Handling



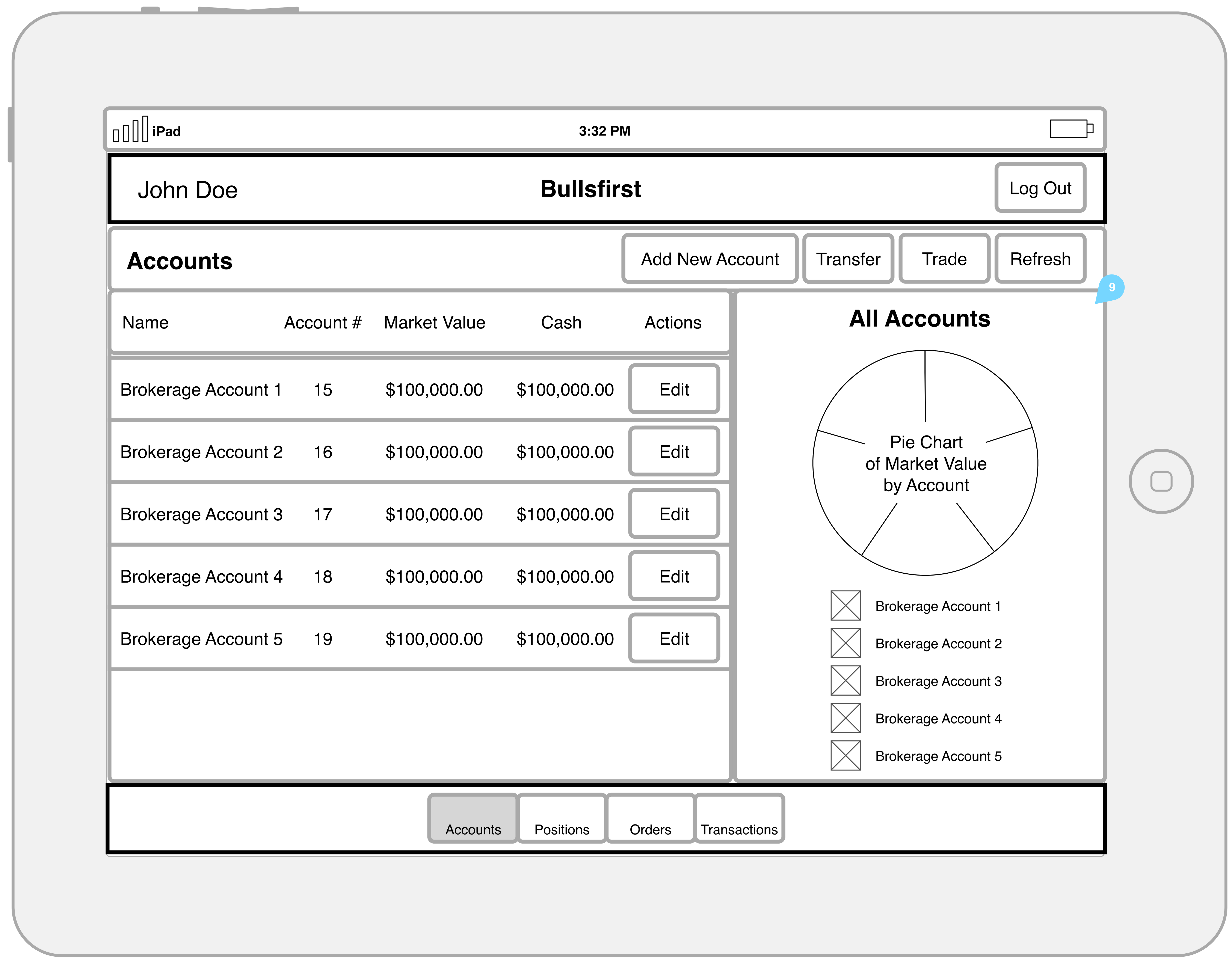

1. **Dynamic Form Validation**
   Form validation should display error icons in the right-hand side of the form field.
2. **Tool Tip**
   After coming back to an unvalidated form field, a tool tip would display the error message specific to just that field.
3. **Open Account Toggle On/Off**
   The "Open Account" button should only be enabled after all form fields are validated.

# Bullsfirst iPad Prototype v2

## Accounts Screen




1. **Log Out Button**
   Brings the user back to the "Log In Screen"
2. **Add New Account Button**
   Shows the "Add New Account" modal view.
3. **Transfer Button**
   Shows the "Transfer" modal view.
4. **Trade Button**
   Shows the "Trade" modal view.
5. **Refresh Button**
   Polls the server to refresh the "Accounts" table.
6. **Edit Button**
   Shows the "Edit Account" modal view.
7. **Active View Tab Bar Button**
   Highlights the active screen, in this case "Accounts".
8. **Inactive View Tab Bar Buttons**
   Provides navigation to the other core screens of Bullsfirst.
9. **Pie Charts (for Landscape Only)**
   Interaction defined in next wireframe.

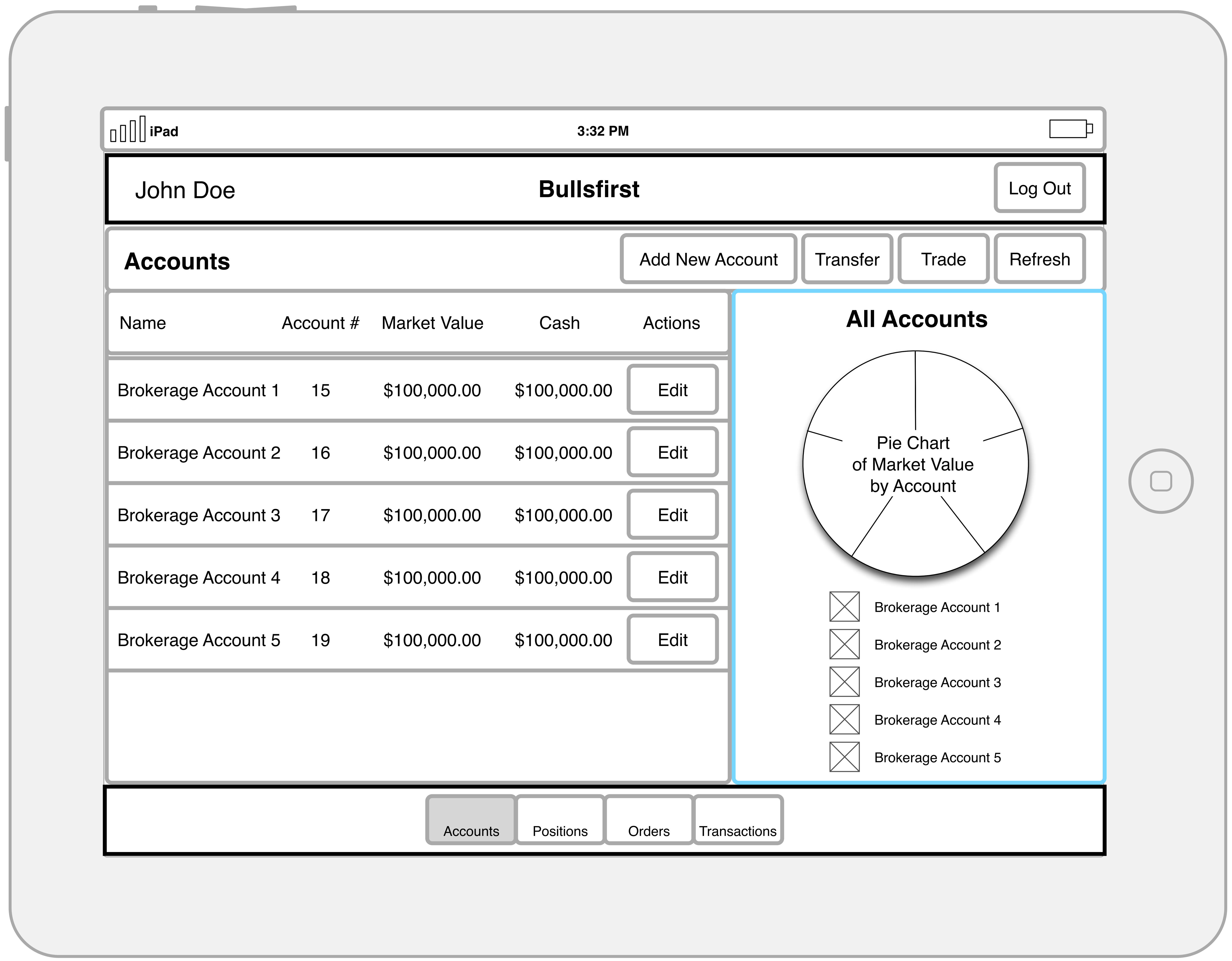




Creator Kunal Bhatia
Modified Wed Feb 08 2012

# Bullsfirst iPad Prototype v2

## Accounts Screen - Pie Chart Interaction




1. **Account Pie Slice**
   Shows the percentage of Market Value by account. Each pie slice represents one account and is colored the same as its legend icon.

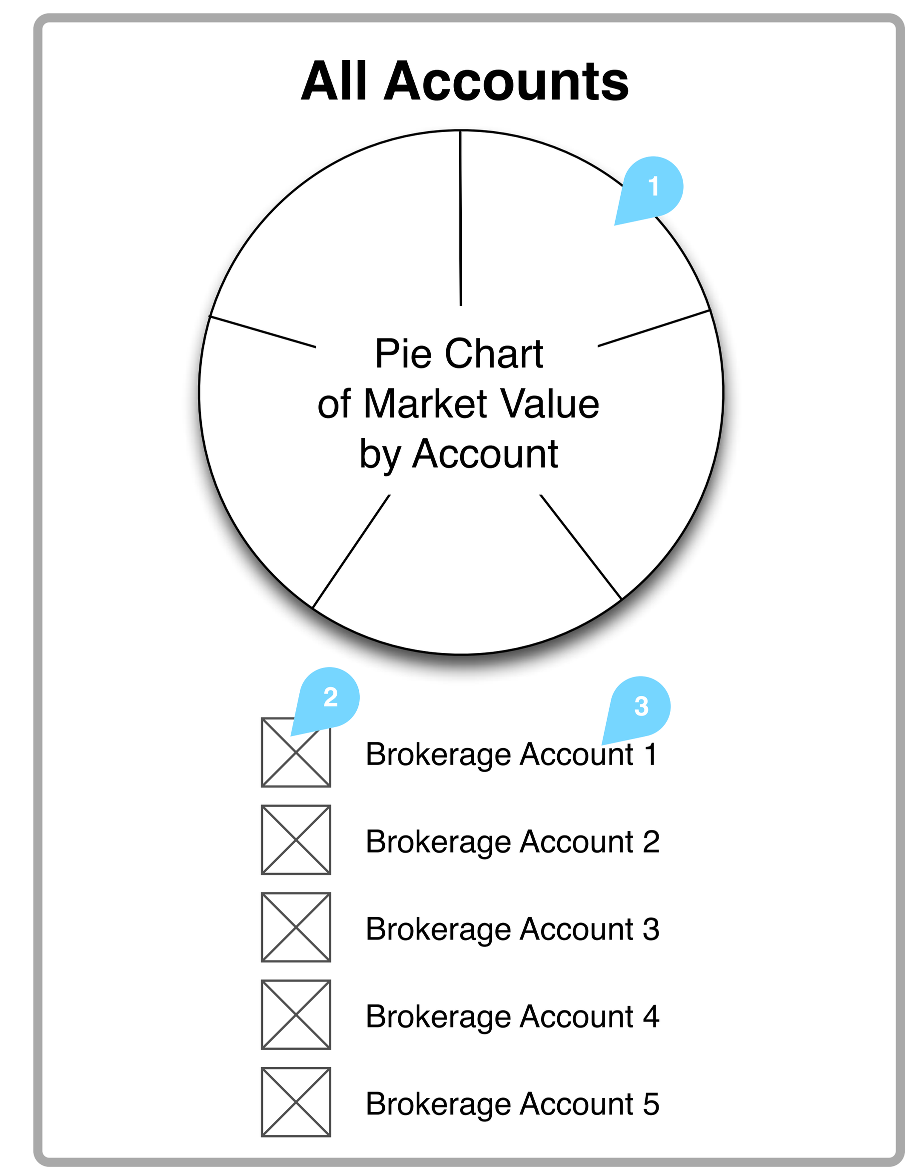
   A maximum of 10 slices will be shown. If there are more than 10 accounts, the chart will display the 9 largest accounts and everything else will be combined into the 10th pie slice called "Other Accounts".

   Pie slices will be colored using a palette of 10 colors in a sequence sorted by market value. Thus, the account with the highest market value gets color index 1. Next to the first slice will be the account with the second highest market value with color index 2, etc.

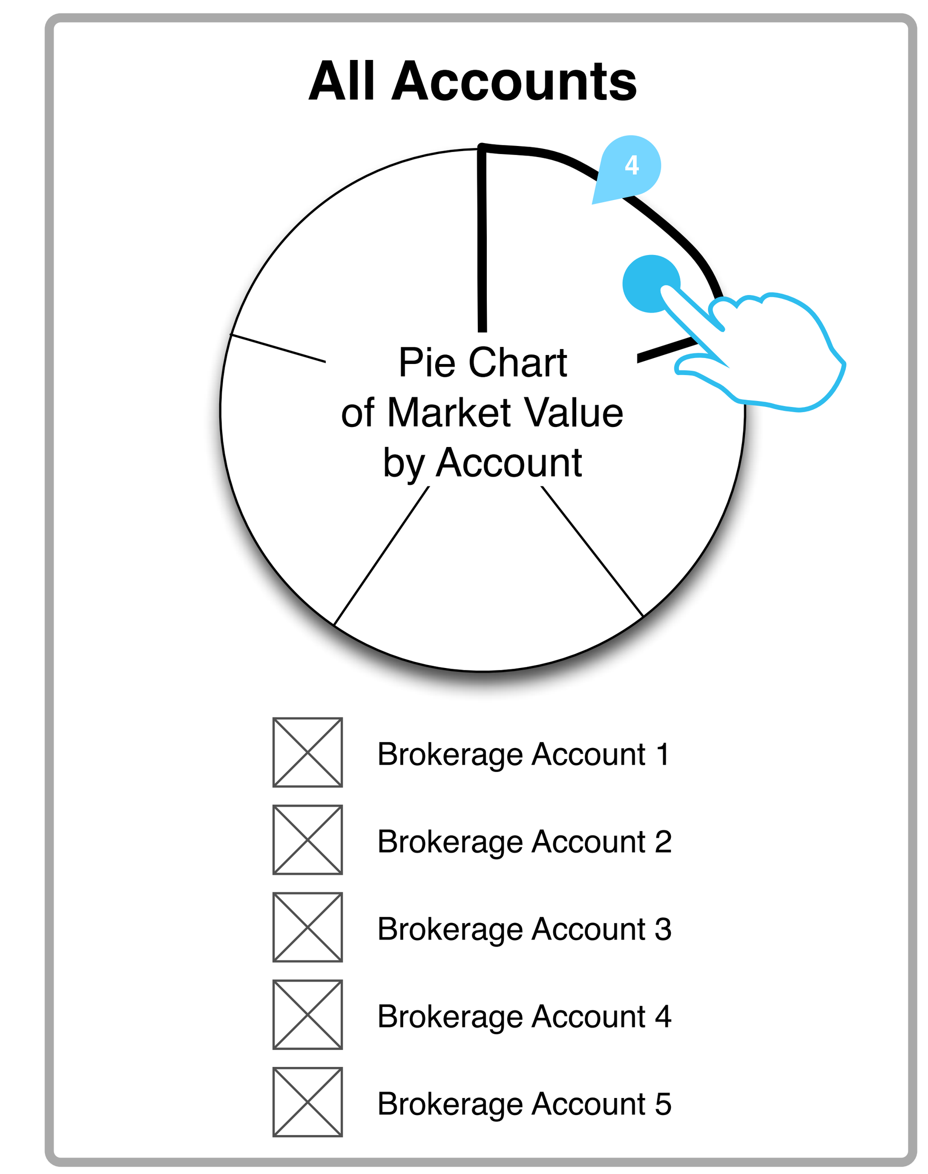
2. **Legend Icon**
   The color is the same as the corresponding account in the pie chart. Clicking on the legend icon shows the user the corresponding "Account Detail Chart".

3. **Legend Title**
   Specifies the account name. Clicking on a legend title moves the user to the corresponding "Account Detail Chart".

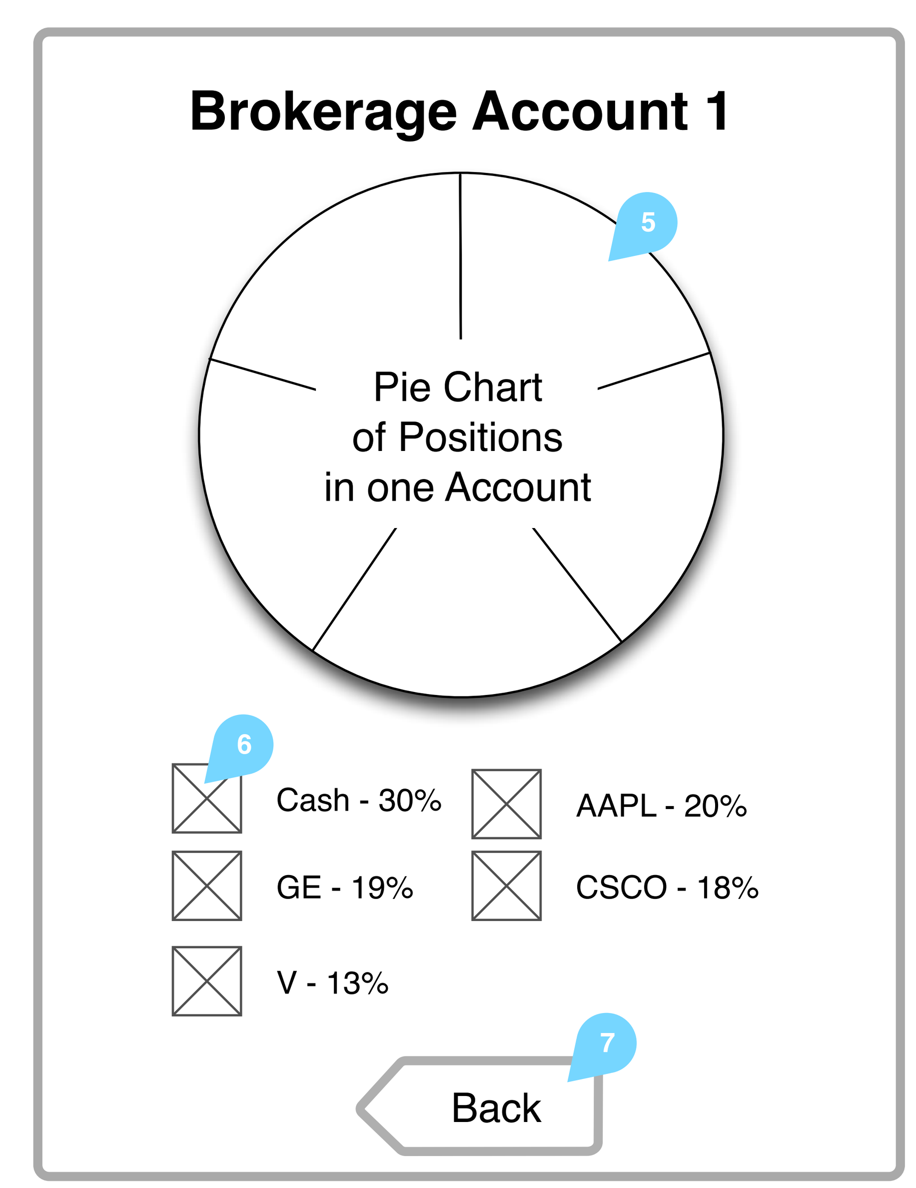
4. **Tapped Slice**
   When a user taps on a pie slice, the slice should highlight and lift off the screen. When the user lets go, the view switches to the corresponding "Account Detail Chart".




Not Tapped State




Tapped and Held State




Account Detail Chart

5. **Position Pie Slice**
   Shows the percentage of major positions held inside one account.

   A maximum of 10 slices will be shown. If there are more than 10 positions, the chart will display the 9 largest accounts and everything else will be combined into the 10th pie slice called "Other".

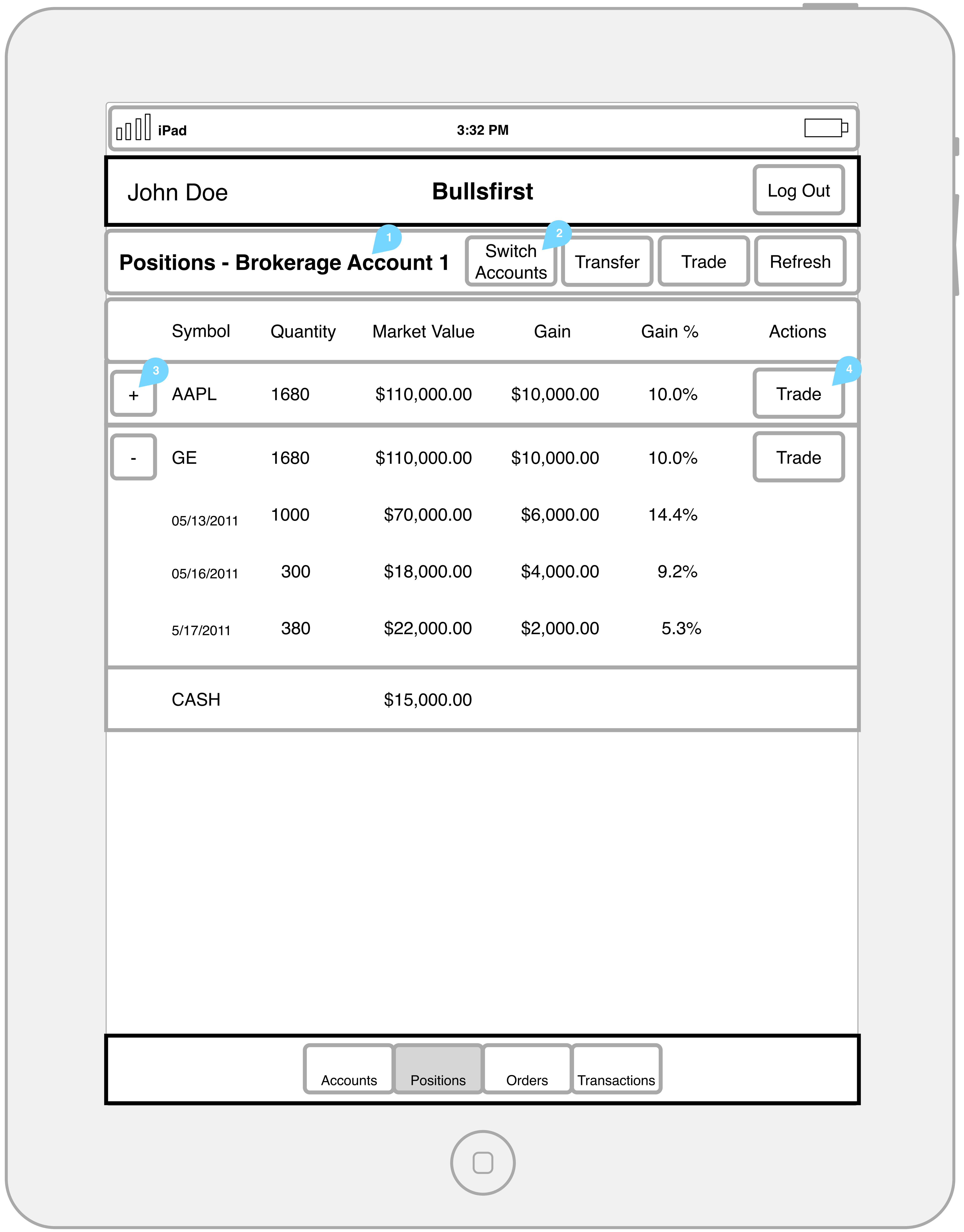
   Pie slices will be colored using a palette of 10 colors in a sequence sorted by market value. Thus, the position with the highest market value gets color index 1. Next to the first slice will be the position with the second highest market value with color index 2, etc.

6. **Legend Icon**
   The color is the same as the corresponding position in the pie chart.

7. **Back Button**
   Tapping on this button will change the view back to the "All Accounts" pie graph.

# Bullsfirst iPad Prototype v2

## Positions Screen

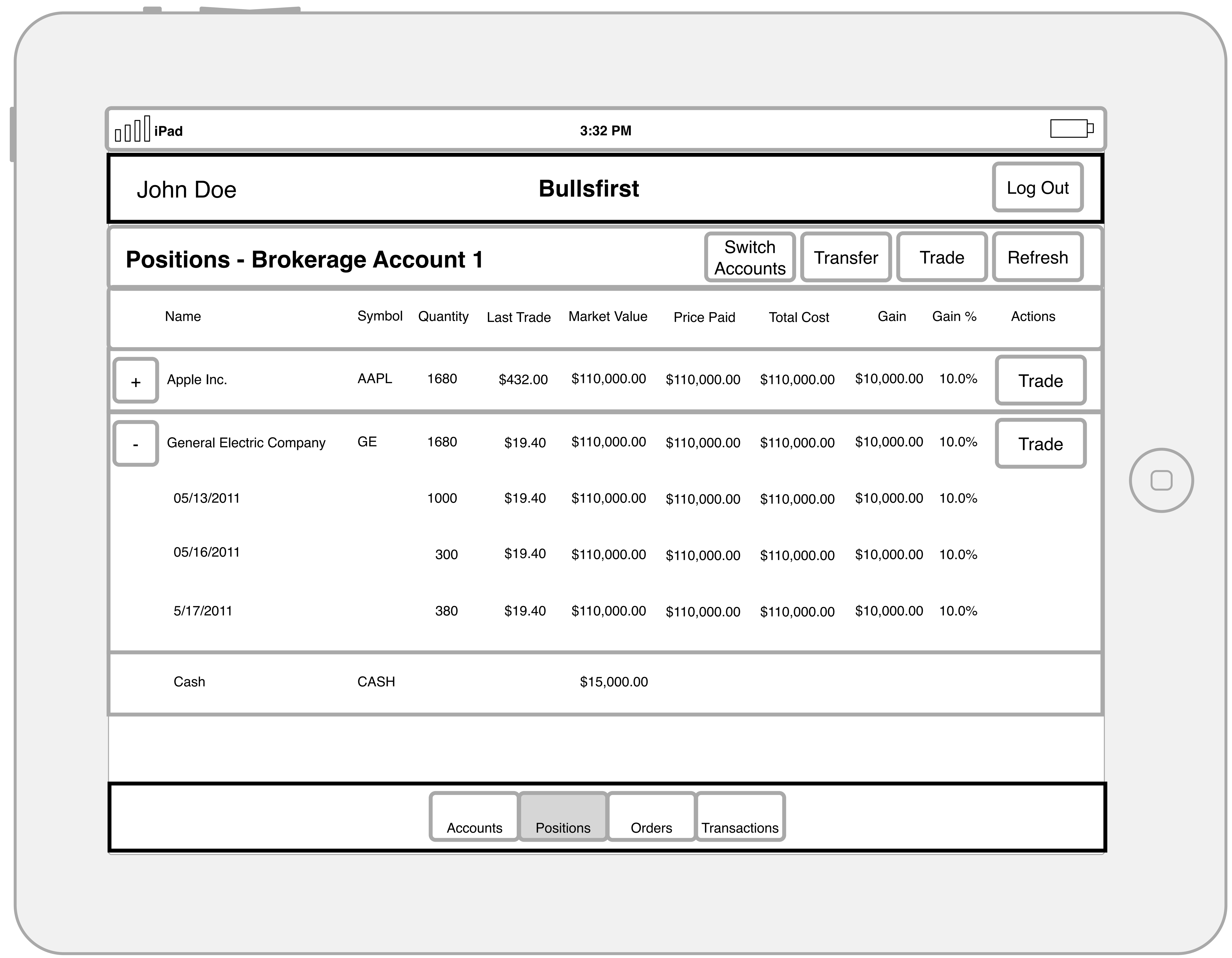



1. **Positions Title**
   Unlike other screen titles, the positions title will specify which account you are looking at as follows: "Positions - [Account Name]".

2. **Switch Accounts Button**
   Clicking on this button reveals the "Switch Accounts" popover.

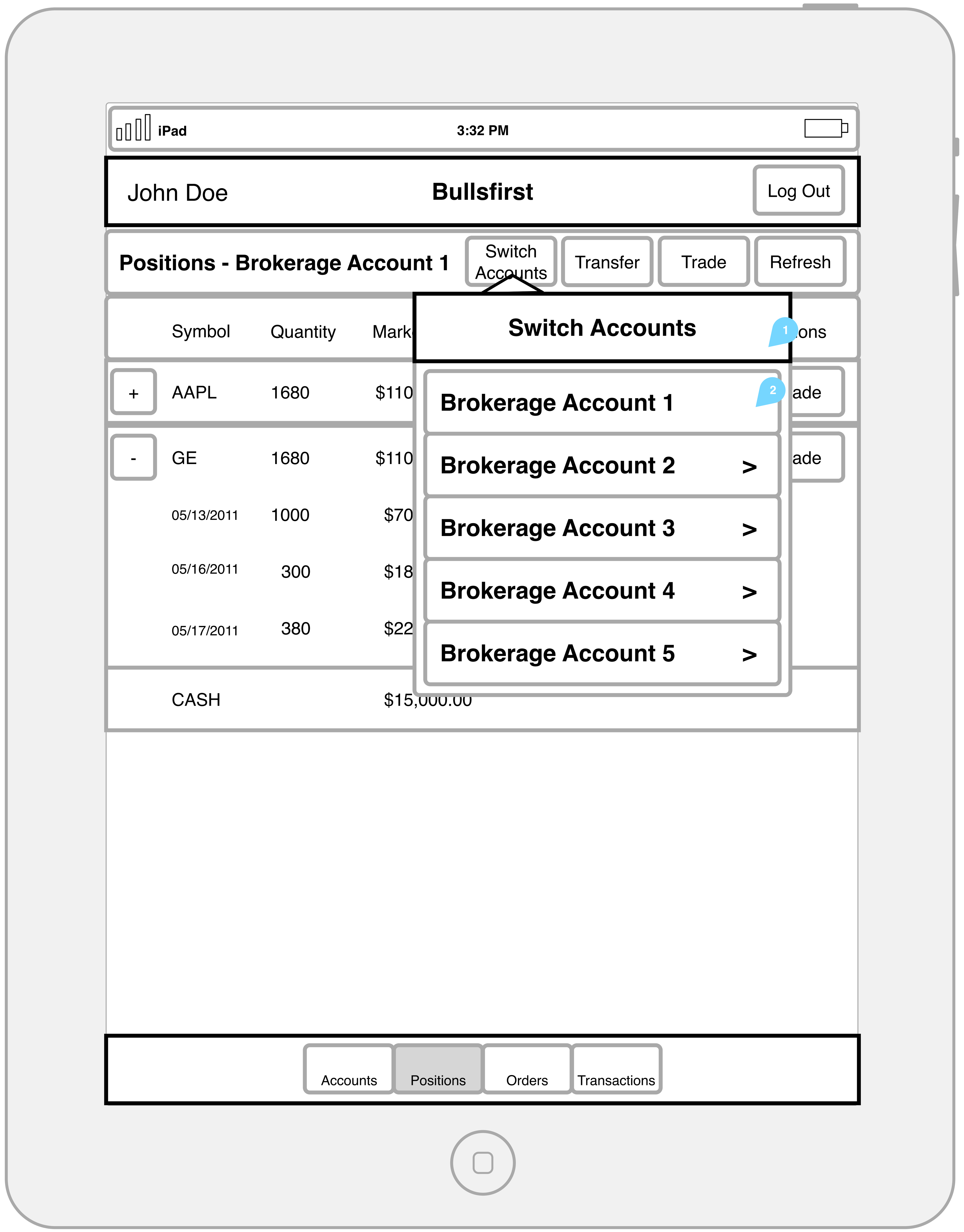
3. **Expand/Collapse Lots Button**
   Clicking the "+" sign will expand the position to show lots associated to that position. Clicking the "-" sign will hide those lots.

4. **Trade Button**
   When the trade button next to a position is hit, the trade modal view will show up with the position autofilled inside the form fields.



# Bullsfirst iPad Prototype v2

## Positions Screen - Switch Accounts Popover

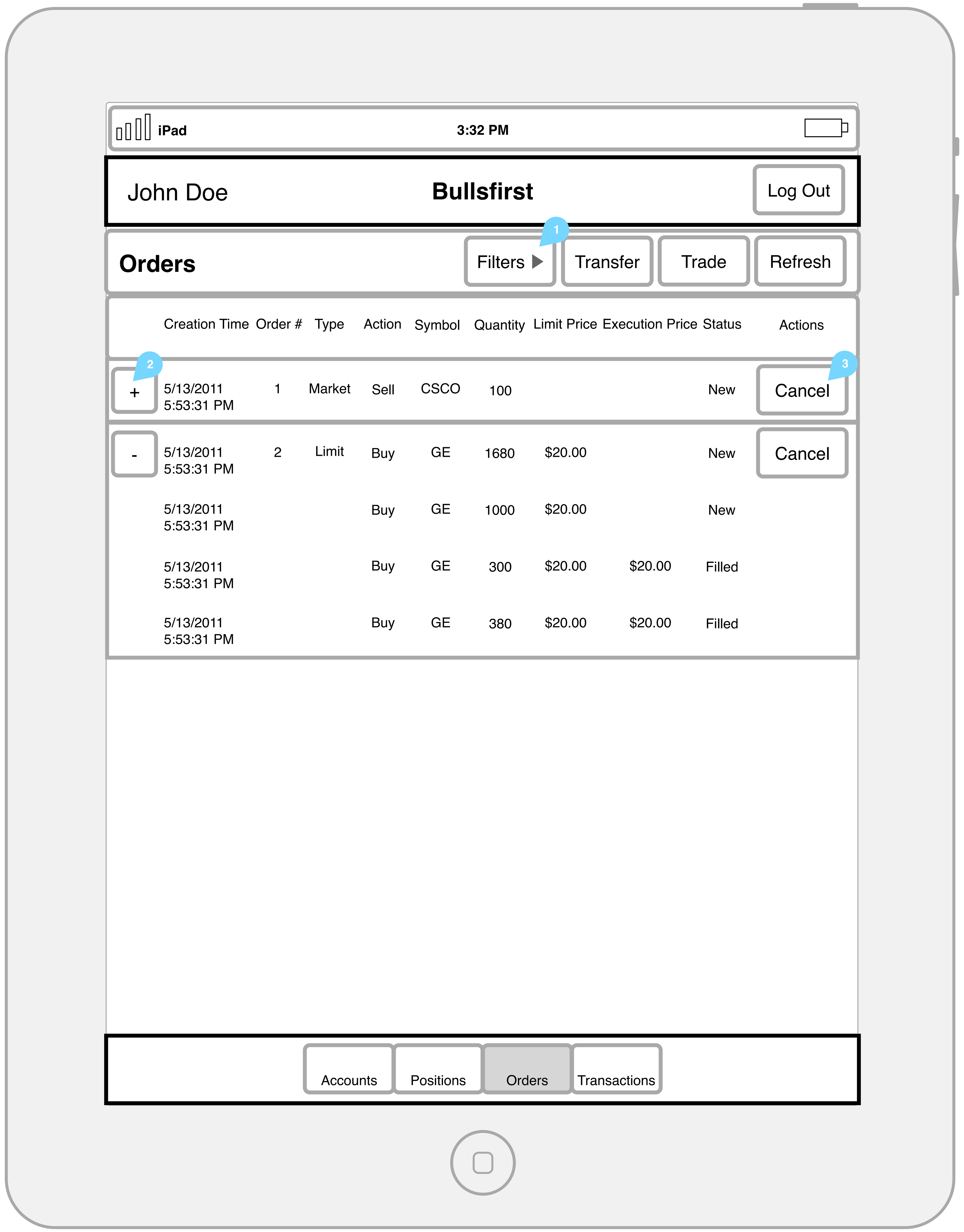



1. **Switch Accounts Popover**
   Popover displays all accounts. The popover is closed when the user taps outside the popover button or taps the "Switch Accounts" button. In the event that an actual account is tapped, the positions screen for that account is shown.

2. **Current Account Popover Selection**
   The account that is currently shown in the positions screen will be treated visually different than the others and will be disabled.

# Bullsfirst iPad Prototype v2

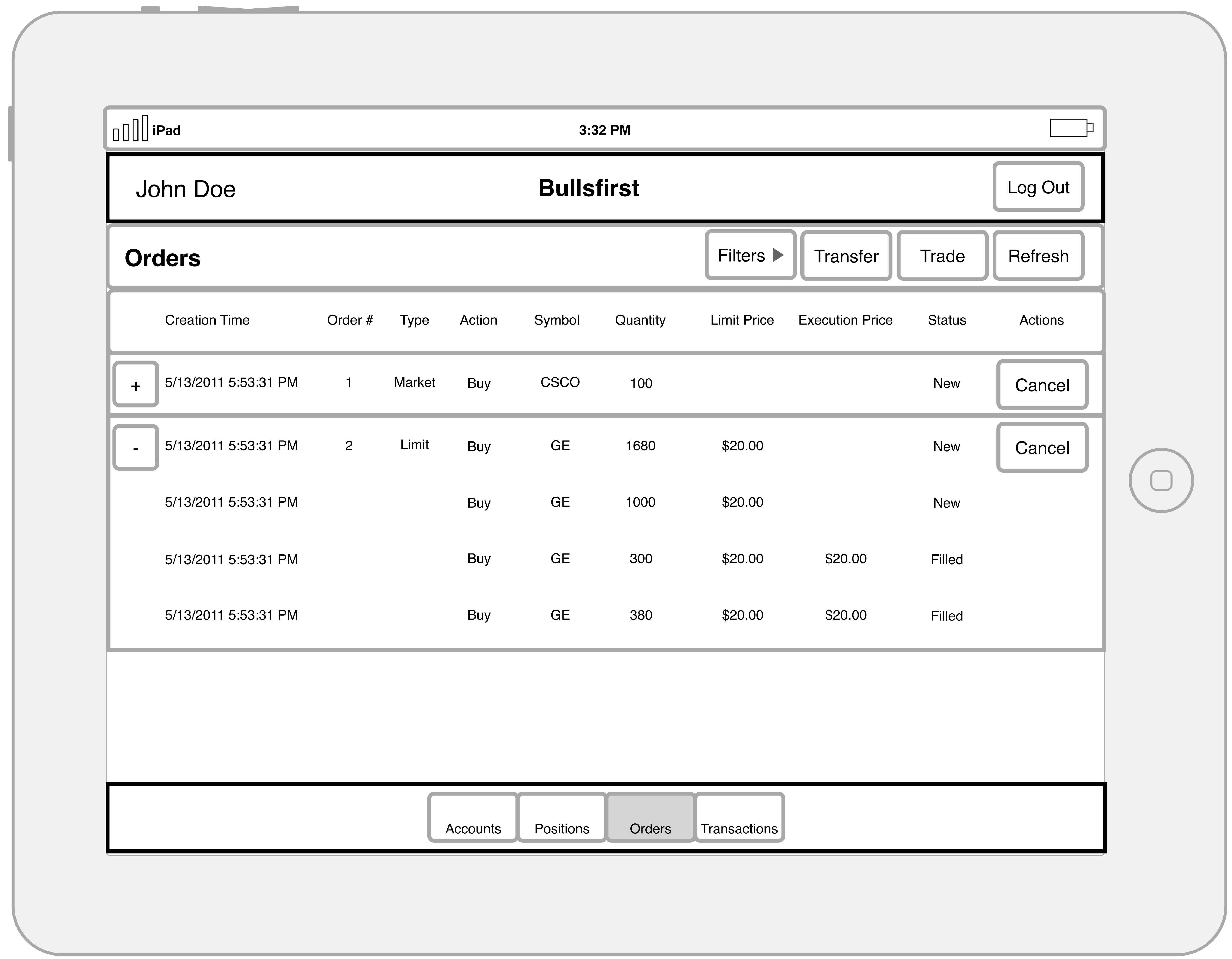
## Orders Screen




1. **Filters Button (Expand)**
   Tapping on the filters button will expand the area between the "Orders" title bar and the rest of the table, exposing various filters that can be applied to the table data.

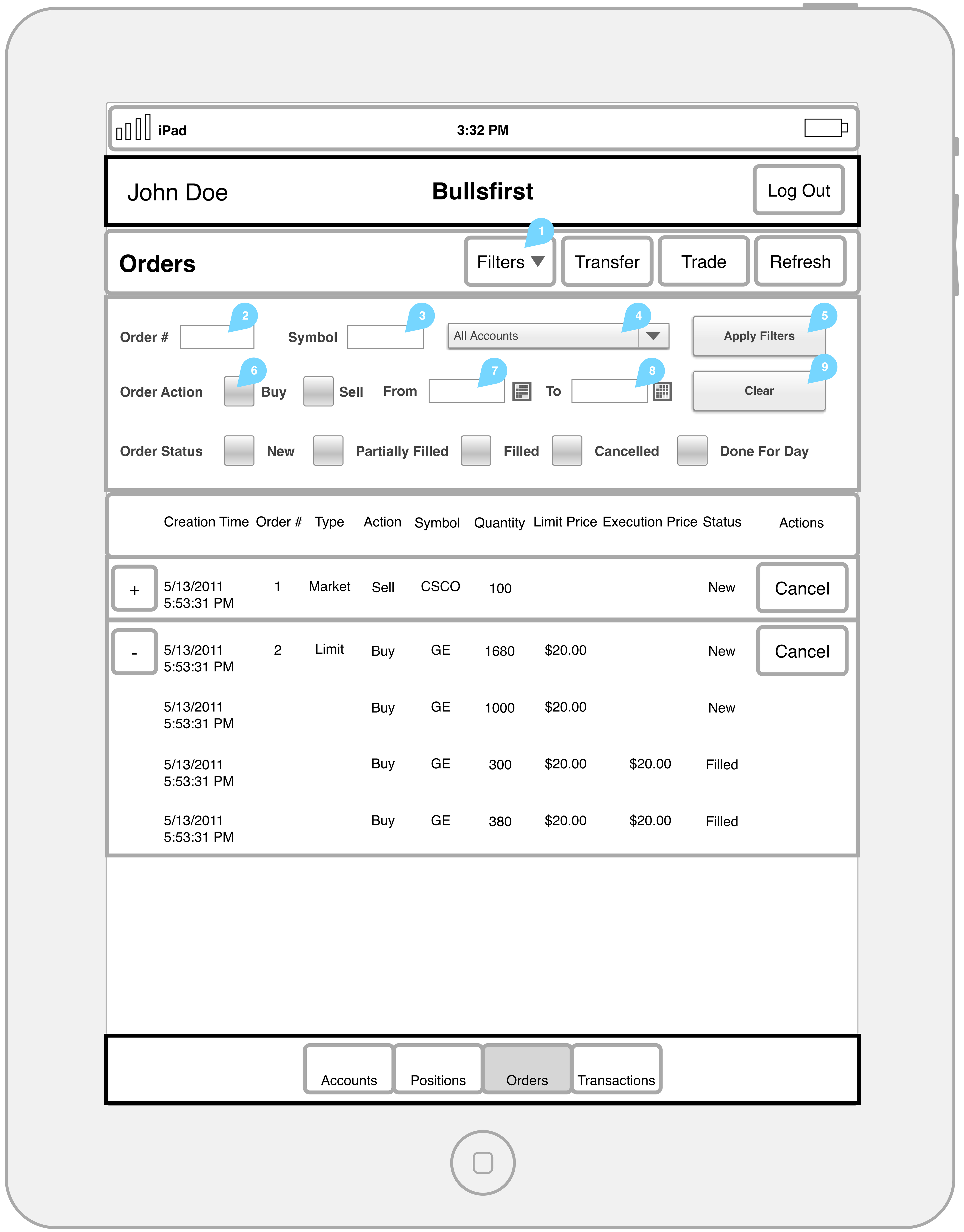
2. **Expand/Collapse Executions Button**
   Clicking the "+" sign will expand the position to show executions associated to that order. Clicking the "-" sign will hide those executions.

3. **Cancel Button**
   When the cancel button next to an order is hit, a request to to cancel the order is sent to the server. Only open trades can be cancelled.

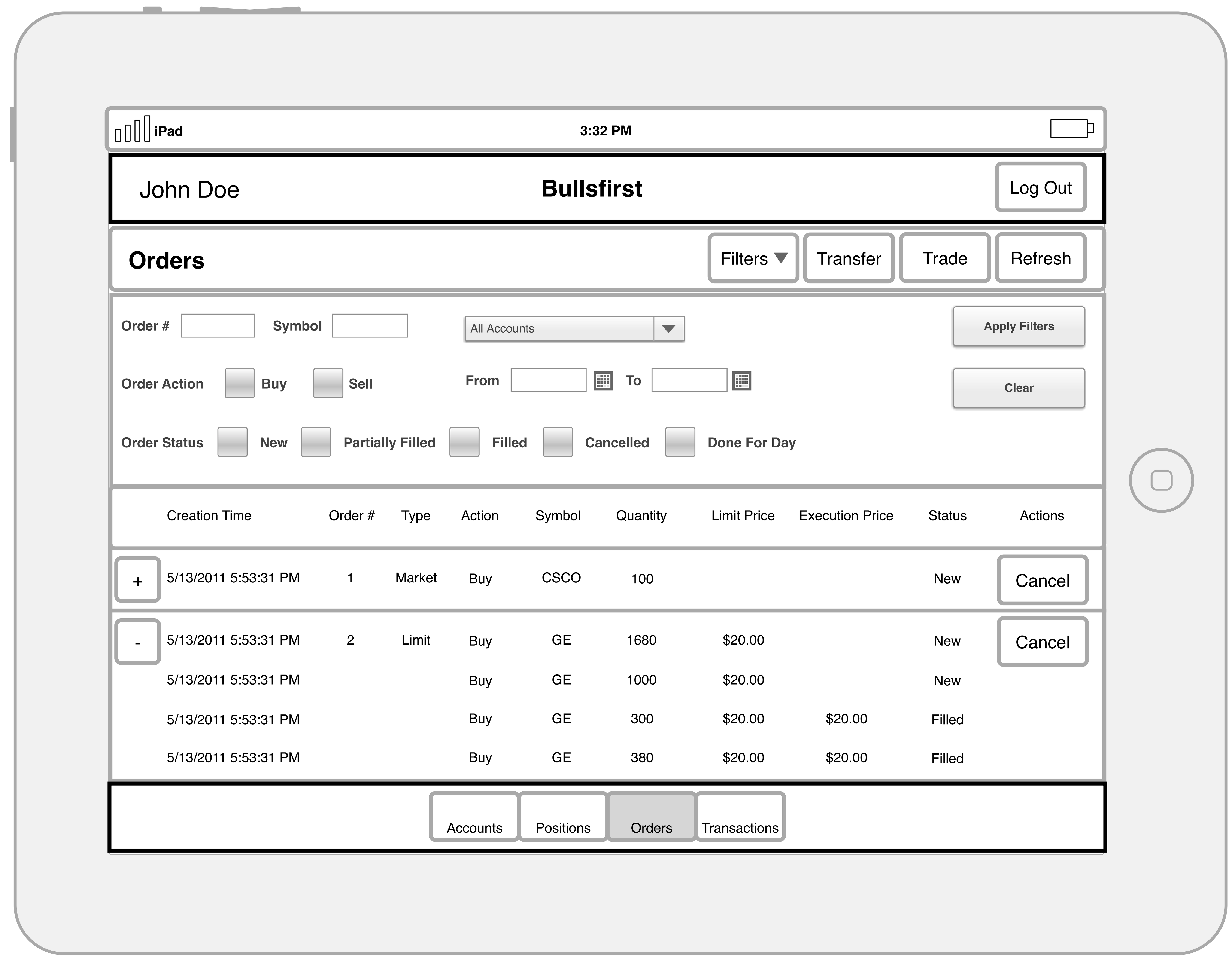


# Bullsfirst iPad Prototype v2

## Orders Screen - Filters

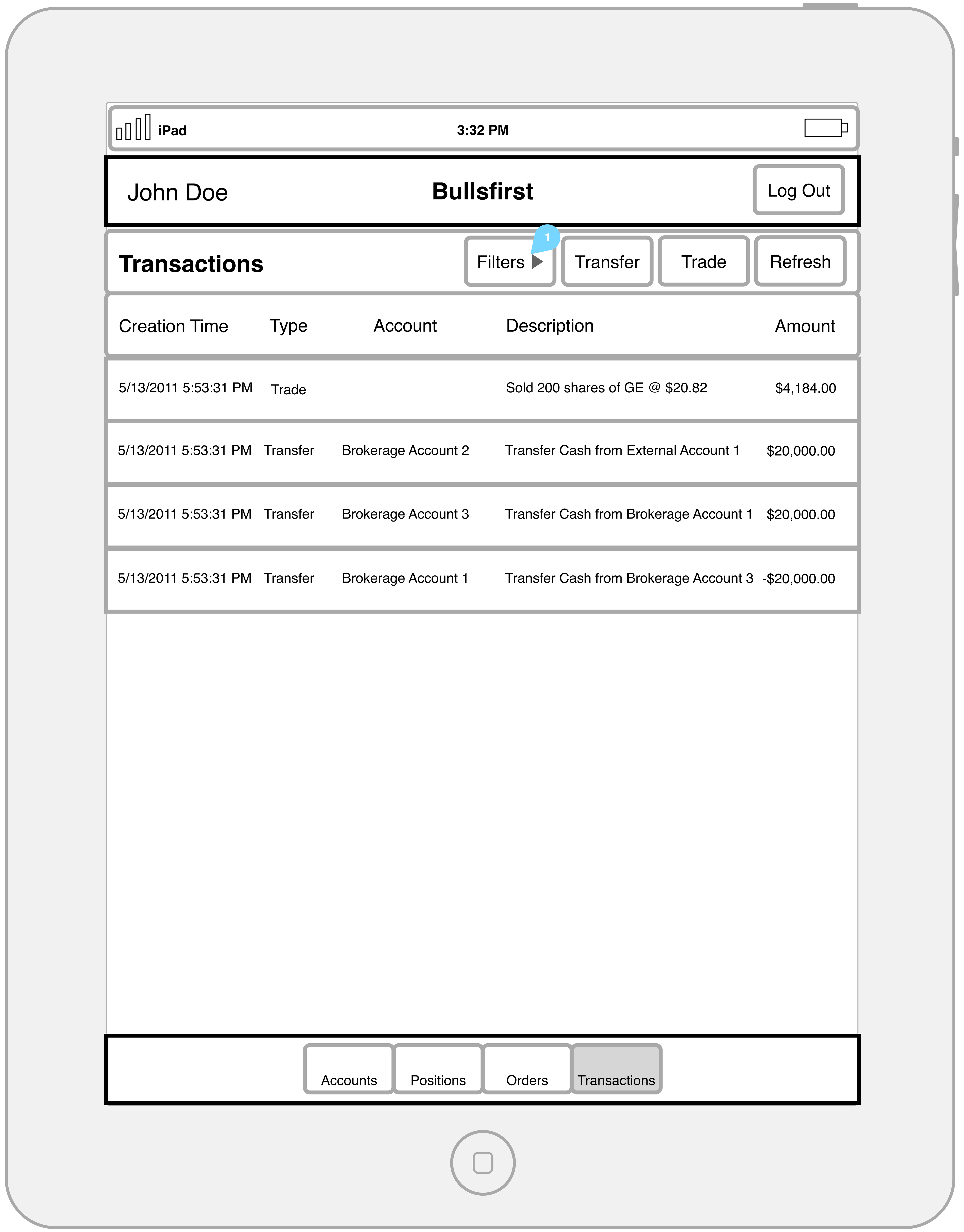



1. **Filters Button (Collapse)**
   Tapping on the filters button will collapse the filters.
2. **Order # Text Field**
   Tapping on the field brings up a numeric keypad.
3. **Symbol Text Field**
   Tapping on the field brings up an alpha only keypad. Autofill options come up for the symbols in a popover.
4. **Accounts Filter Popover**
   Tapping on the field brings up a popover. The options include all accounts and "All Accounts".
5. **Apply Filters**
   Tapping on the "Apply Filters" button refreshes the table below. The filters box remains visible.
6. **Check Boxes**
   Standard check boxes with checked and unchecked states.
7. **"From" Calendar Date**
   Tapping on the field brings up a calendar modal view. The modal view must allow the user to clear just this field.
8. **"To" Calendar Date**
   Tapping on the field brings up a calendar modal view. The modal view must allow the user to clear just this field.
9. **Clear Button**
   Pressing this button clears all filters and resets the account selection to "All Accounts".

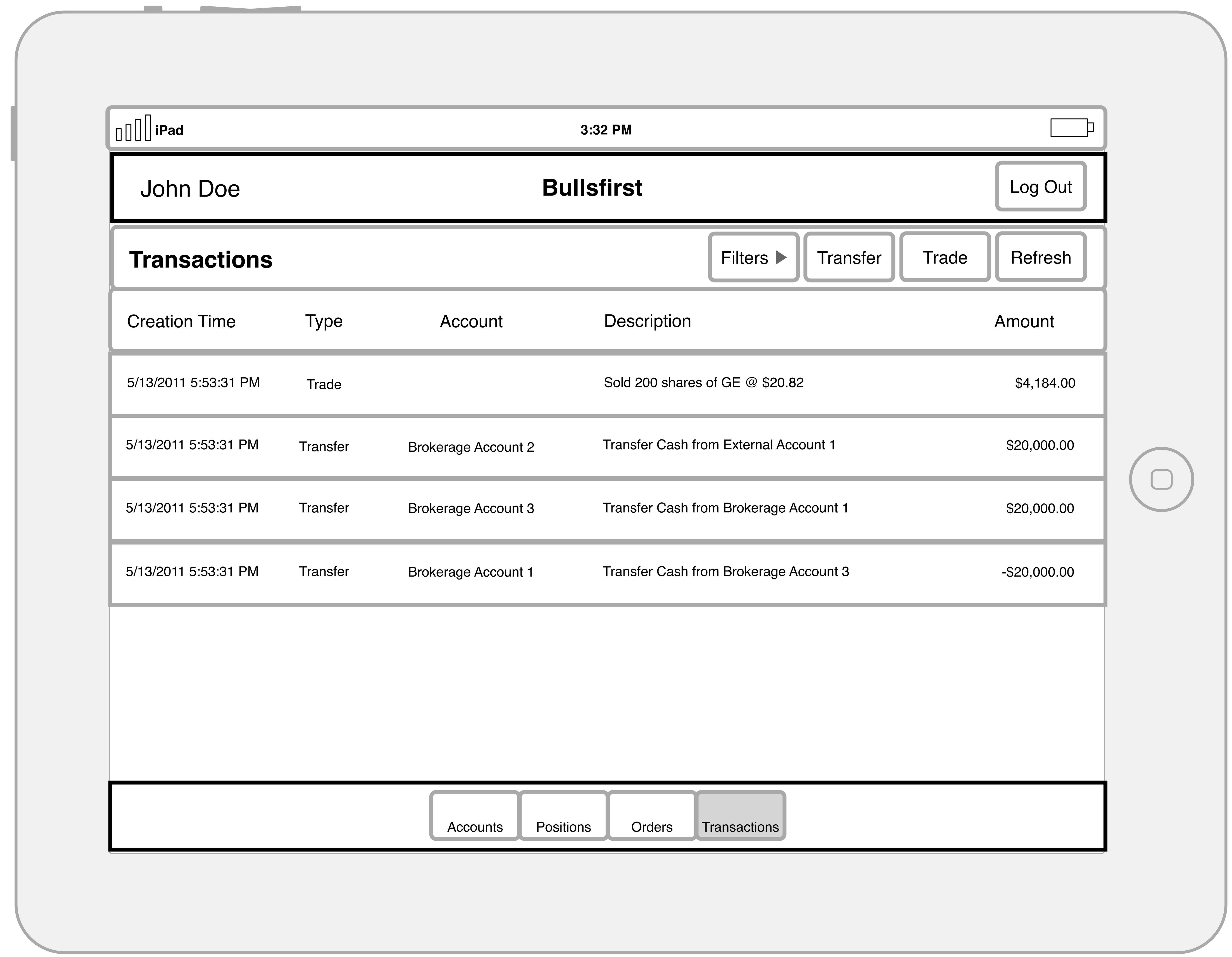


# Bullsfirst iPad Prototype v2

## Transactions Screen

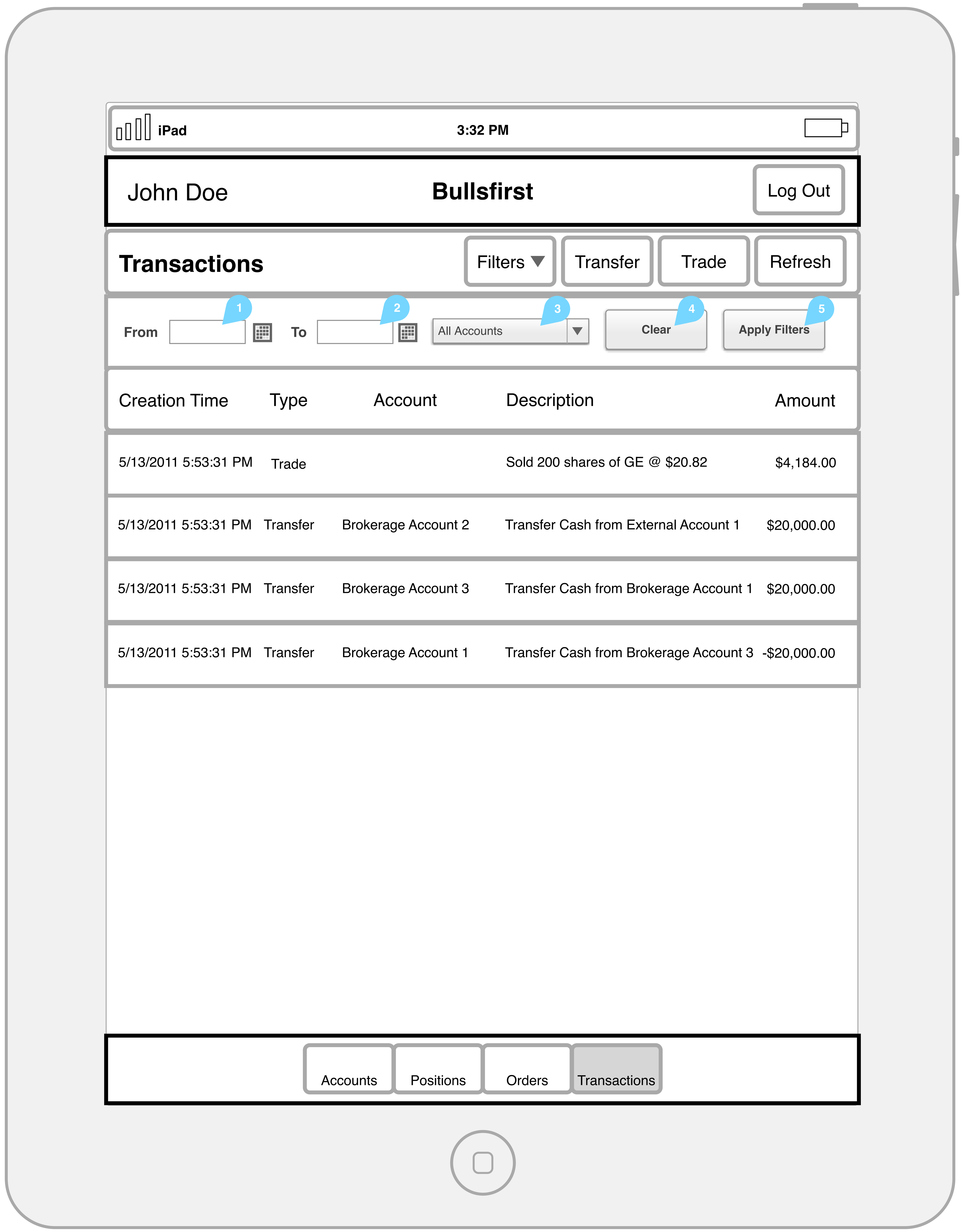



1. **Filters Button (Expand)**
   Tapping on the filters button will expand the area between the "Transactions" title bar and the rest of the table, exposing various filters that can be applied to the table data.

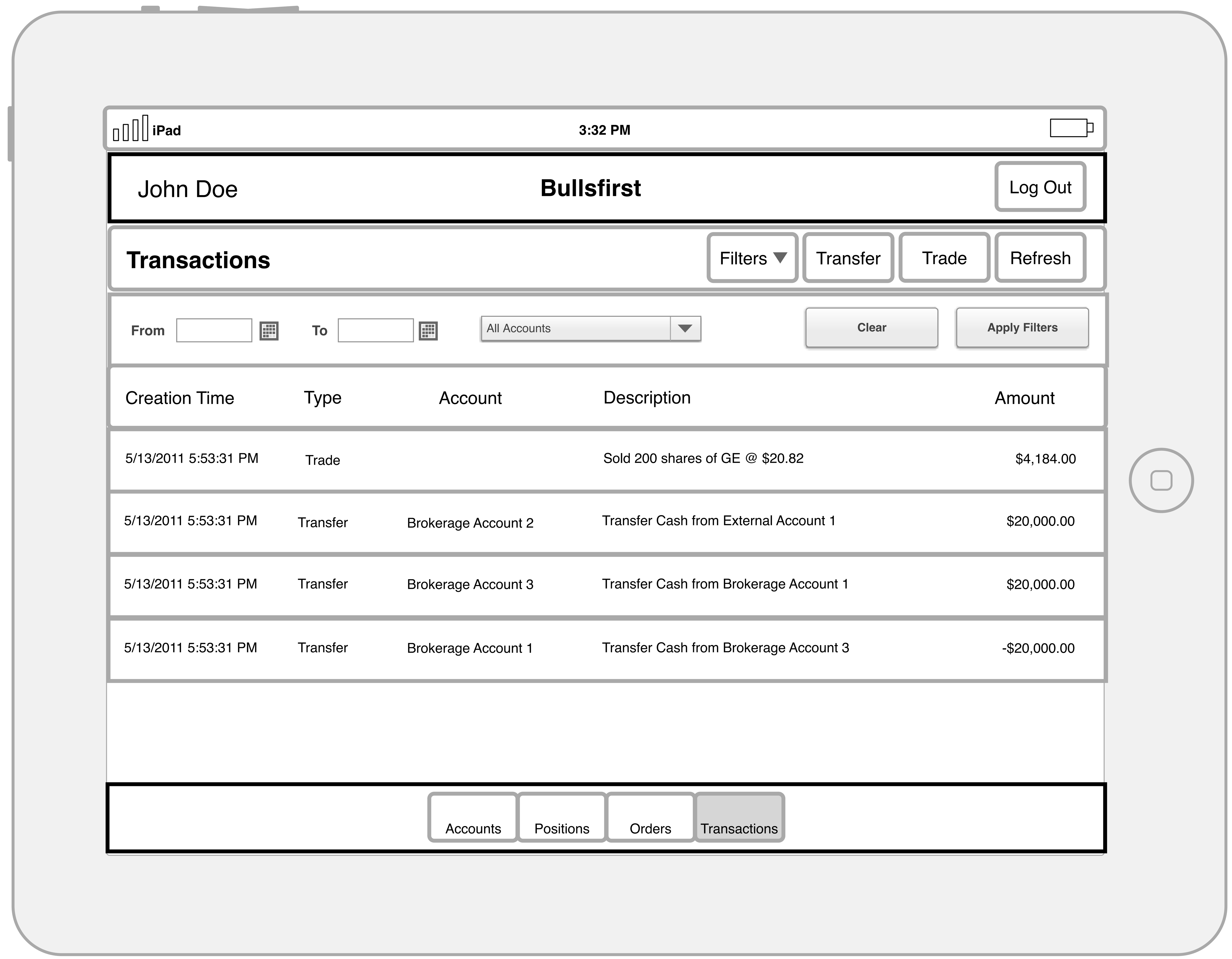


# Bullsfirst iPad Prototype v2

## Transactions Screen - Filters

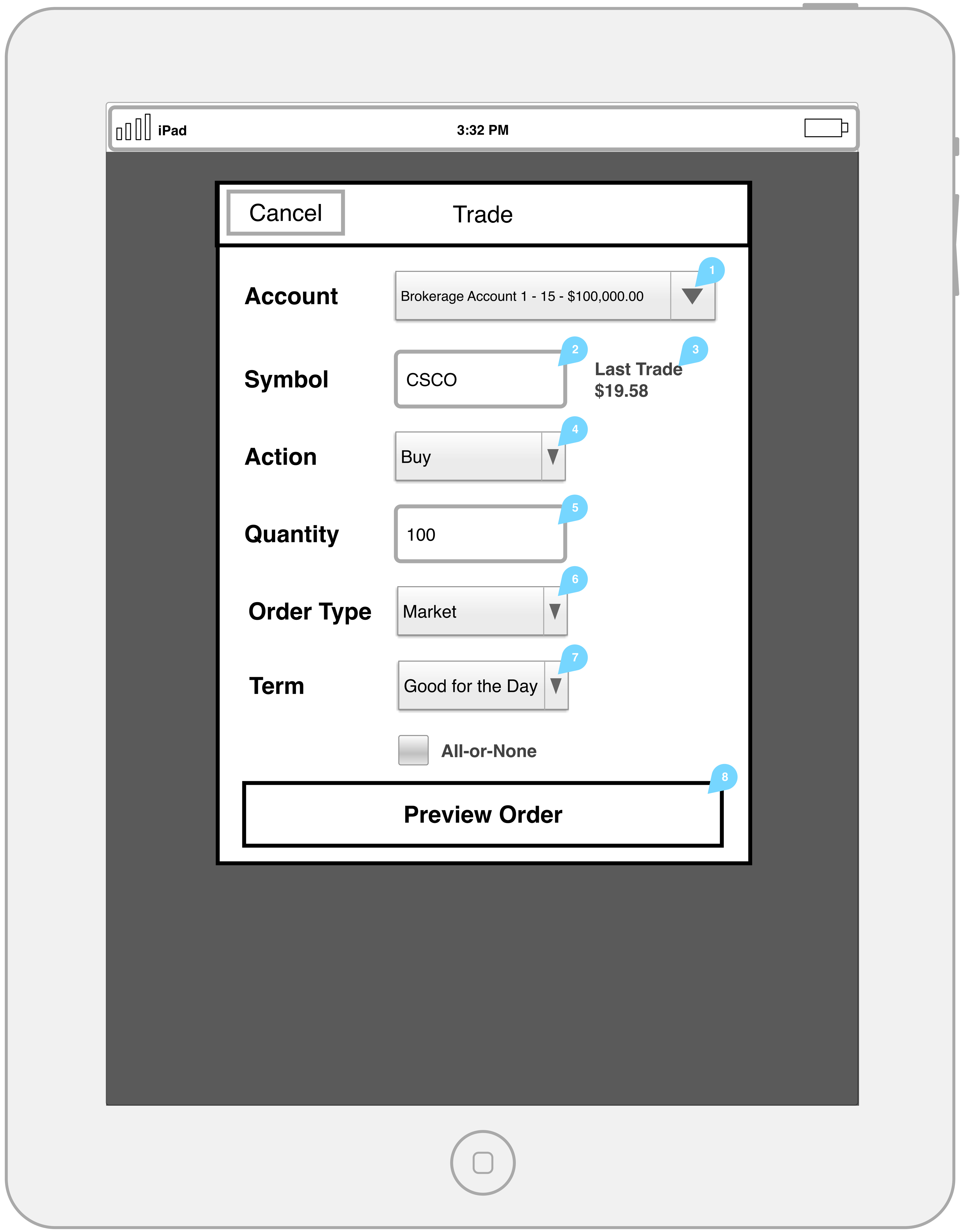



1. **"From" Calendar Date**
   Tapping on the field brings up a calendar modal view. The modal view must allow the user to clear just this field.
2. **"To" Calendar Date**
   Tapping on the field brings up a calendar modal view. The modal view must allow the user to clear just this field.
3. **Accounts Filter Popover**
   Tapping on the field brings up a popover. The options include all accounts and "All Accounts".
4. **Clear Button**
   Pressing this button clears all filters and resets the account selection to "All Accounts".
5. **Apply Filters**
   Tapping on the "Apply Filters" button refreshes the table below. The filters box remains visible.

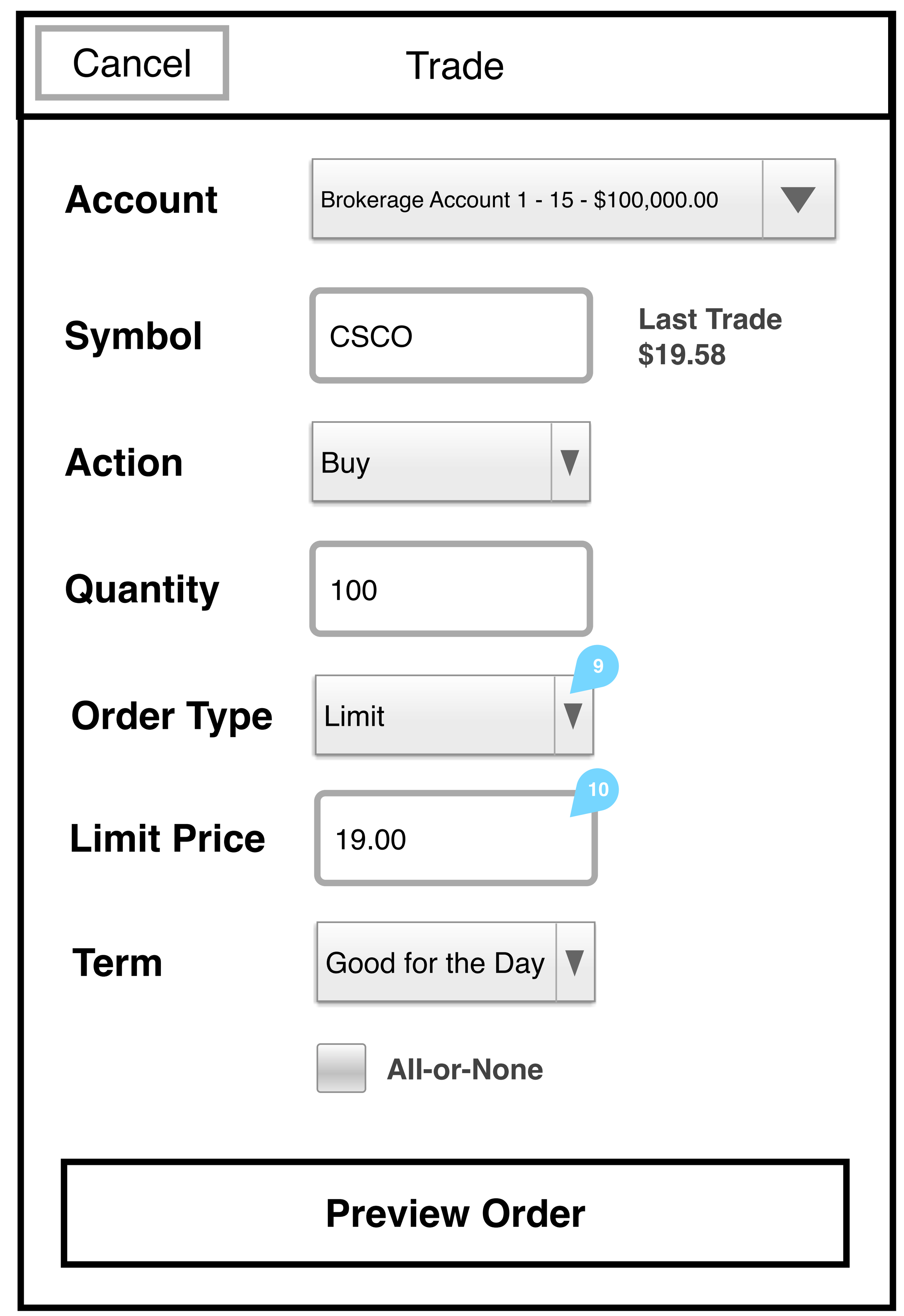


# Bullsfirst iPad Prototype v2

## Trade

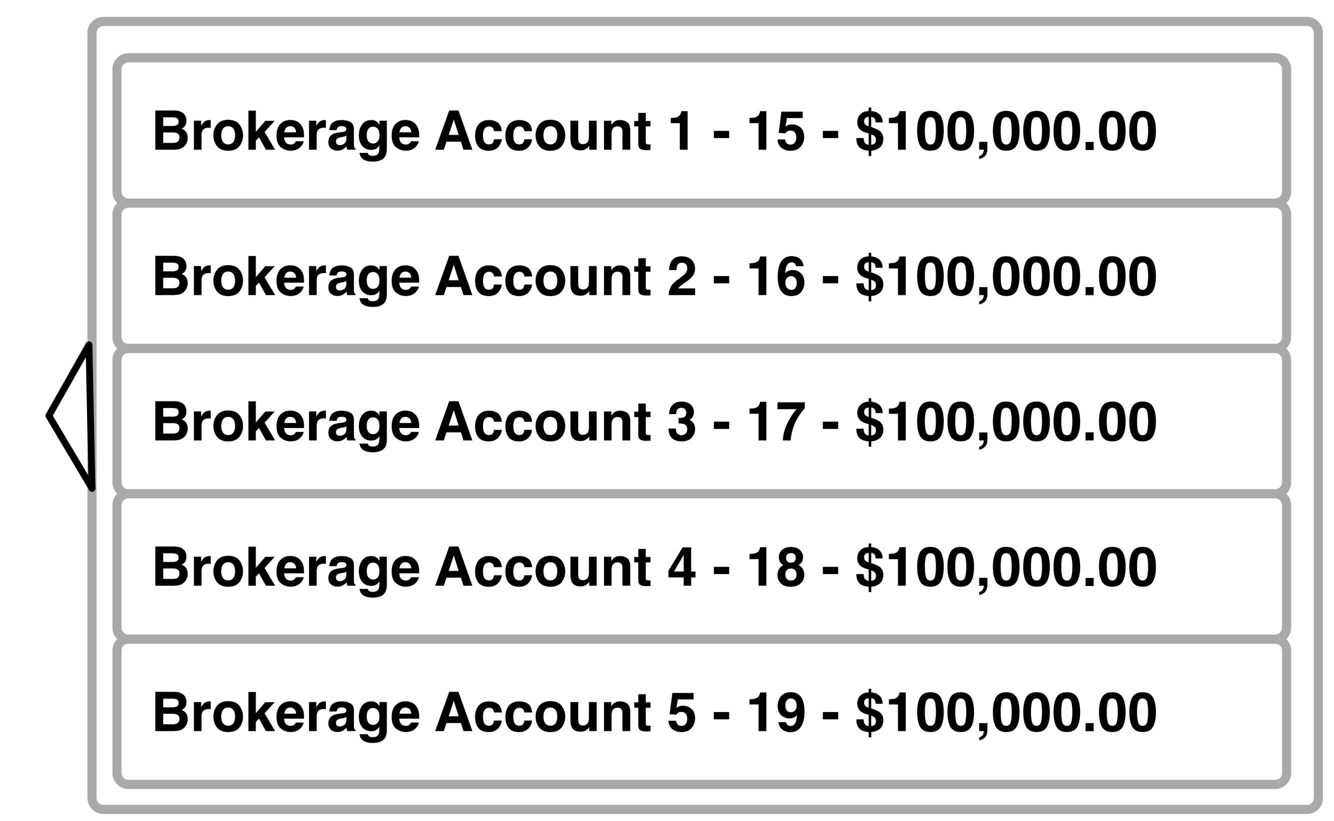



1. **Account Selection**
   Tapping on the field brings up a Account Selection popover. The account is defaulted to the currently "Selected Account" in the application.
2. **Symbol Text Field**
   Tapping on the field brings up an alpha keyboard and has autocomplete functionality.
3. **Last Trade Price**
   After the symbol has been entered by the user, the price of the last trade shows up dynamically next to the field.
4. **Action Selection**
   Tapping on the field brings up a Action Selection popover.
5. **Quantity Text Field**
   Tapping on the field brings up an numeric keyboard.
6. **Order Type Selection**
   Tapping on the field brings up a Order Type Selection popover.
7. **Term Selection**
   Tapping on the field brings up a Term Selection popover.
8. **Preview Order Button**
   This button is only enabled after all text fields are locally validated.
9. **Limit Price Order**
   In the case that the user selects a limit order, an additional field will appear below this field, moving the rest of the form down.
10. **Limit Price Field**
    Tapping on the field brings up an numeric keyboard.

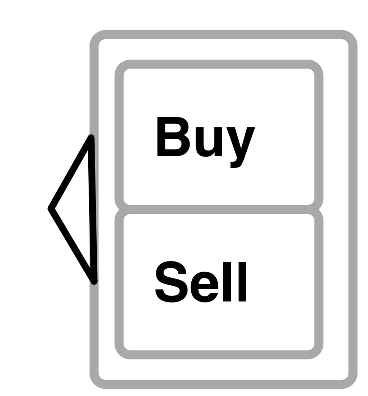



Limit Order Modal View

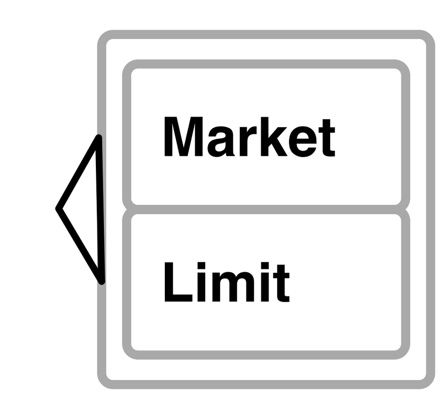
## Popovers



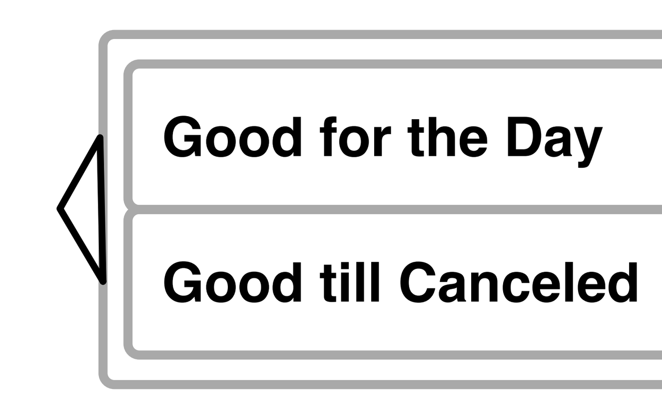

Account Selection




Action Selection



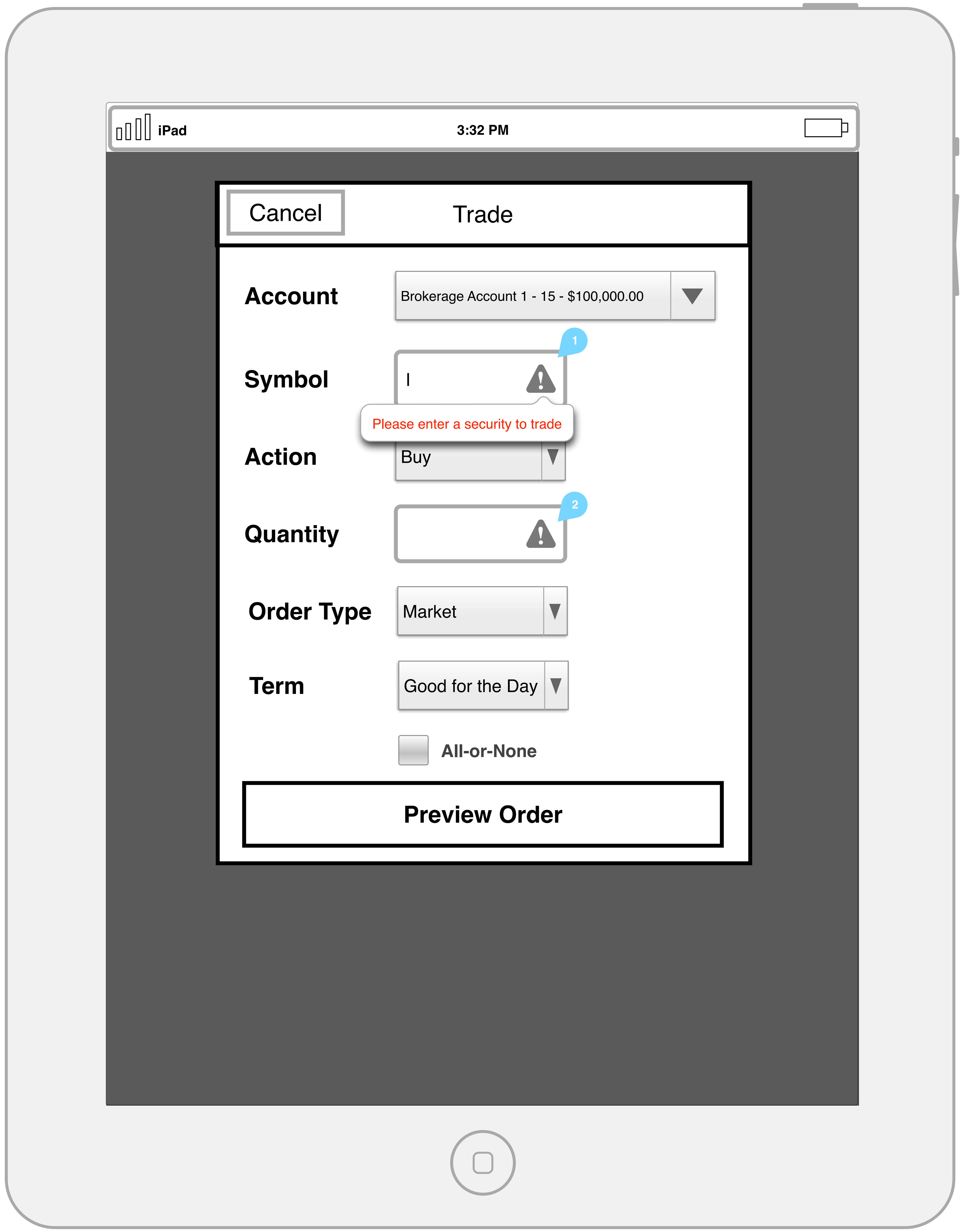

Order Type Selection




Term Selection

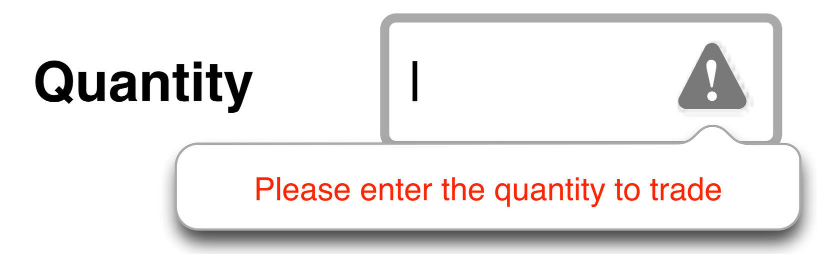
# Bullsfirst iPad Prototype v2

## Trade - Error Handling

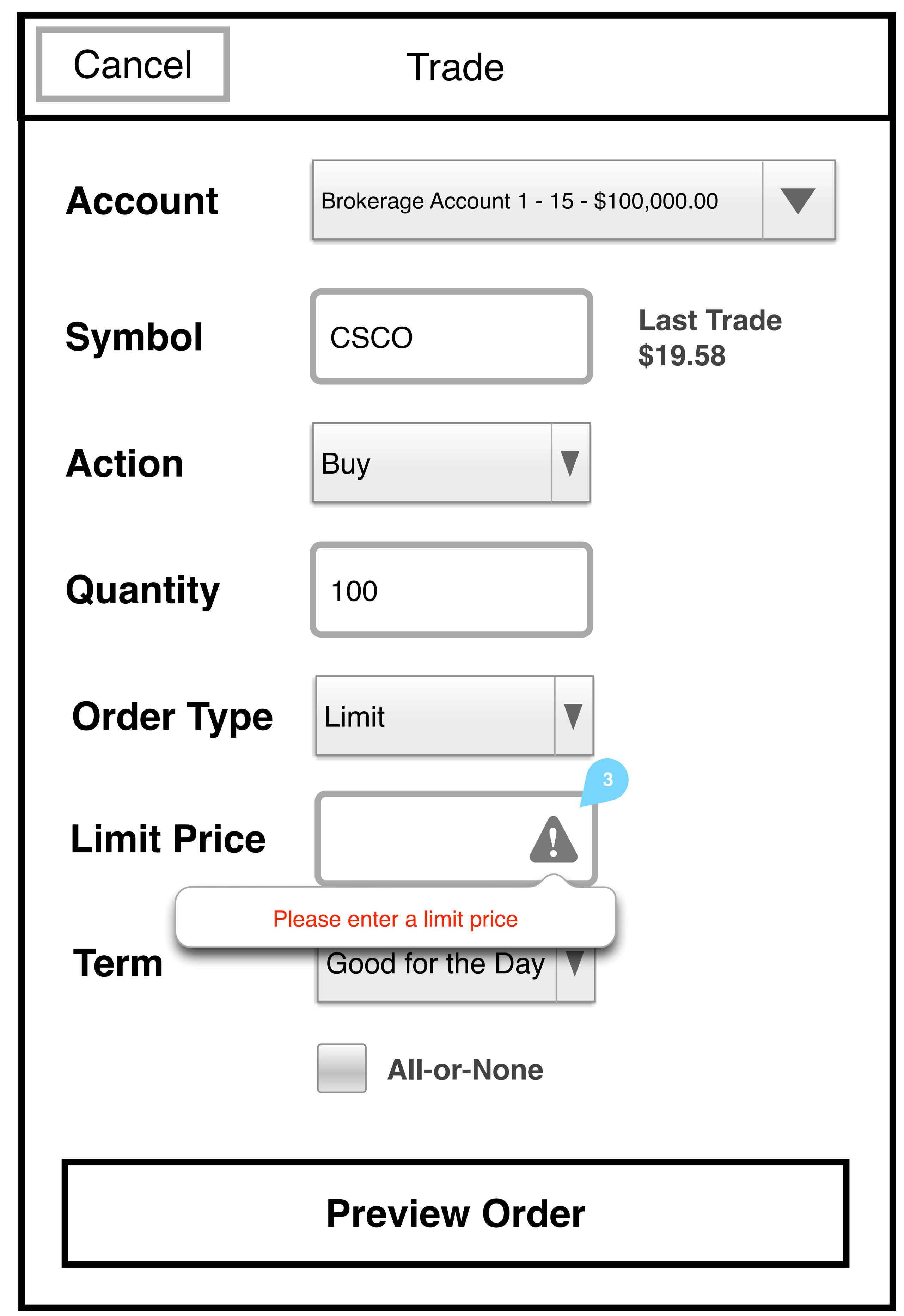



1. **Stock Symbol Error**
   If the stock symbol field does not validate after the user passes this field, an error is displayed when the user re-enters the field.

2. **Quantity Error**
   If the quantity field does not validate after the user passes this field, an error is displayed when the user re-enters the field (as shown below):



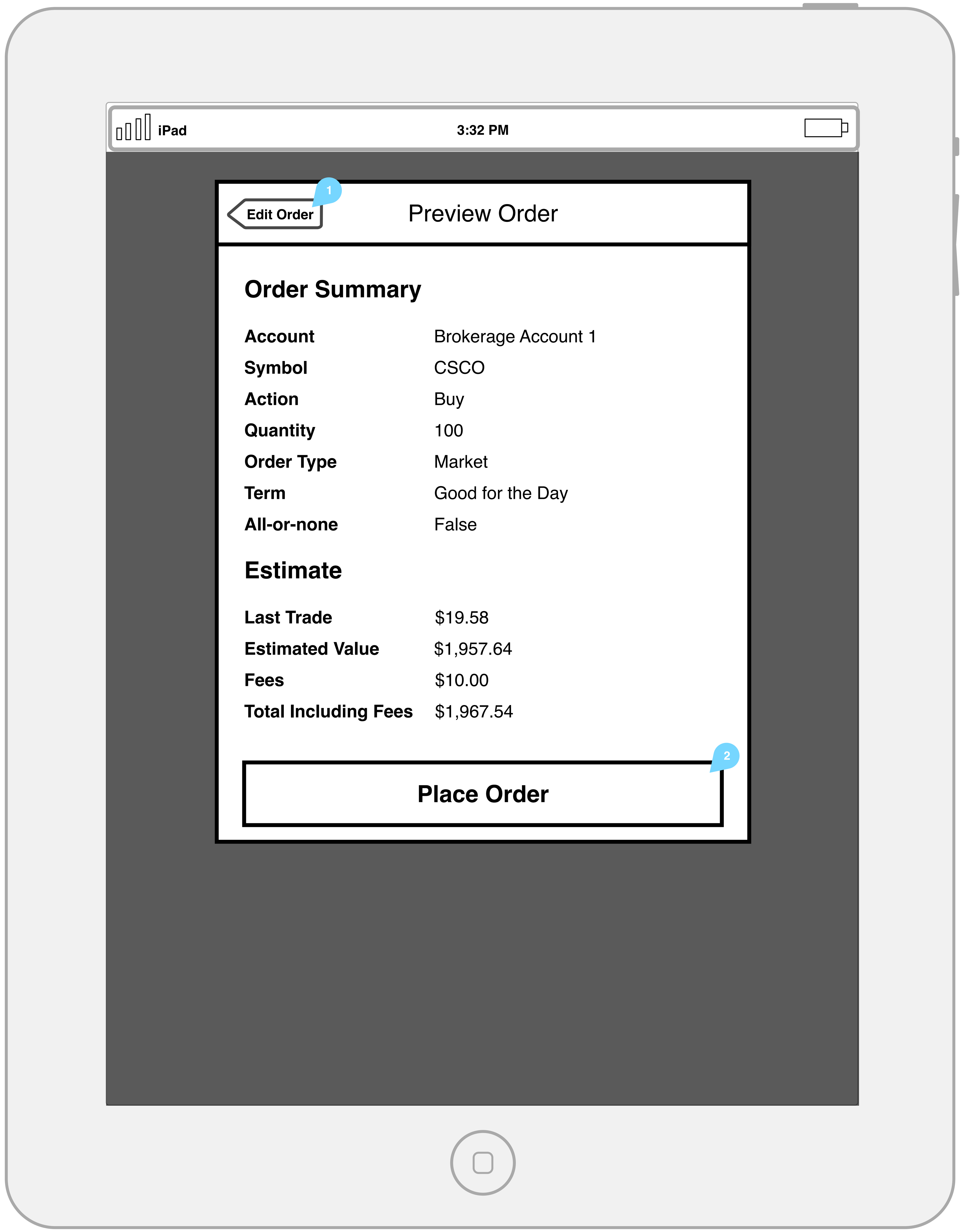

3. **Limit Price Error**
   If the limit price field does not validate after the user passes this field, an error is displayed when the user re-enters the field.




**Limit Order Modal View**

# Bullsfirst iPad Prototype v2

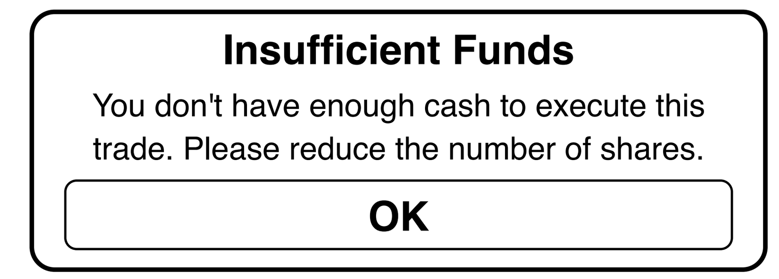
## Preview Order



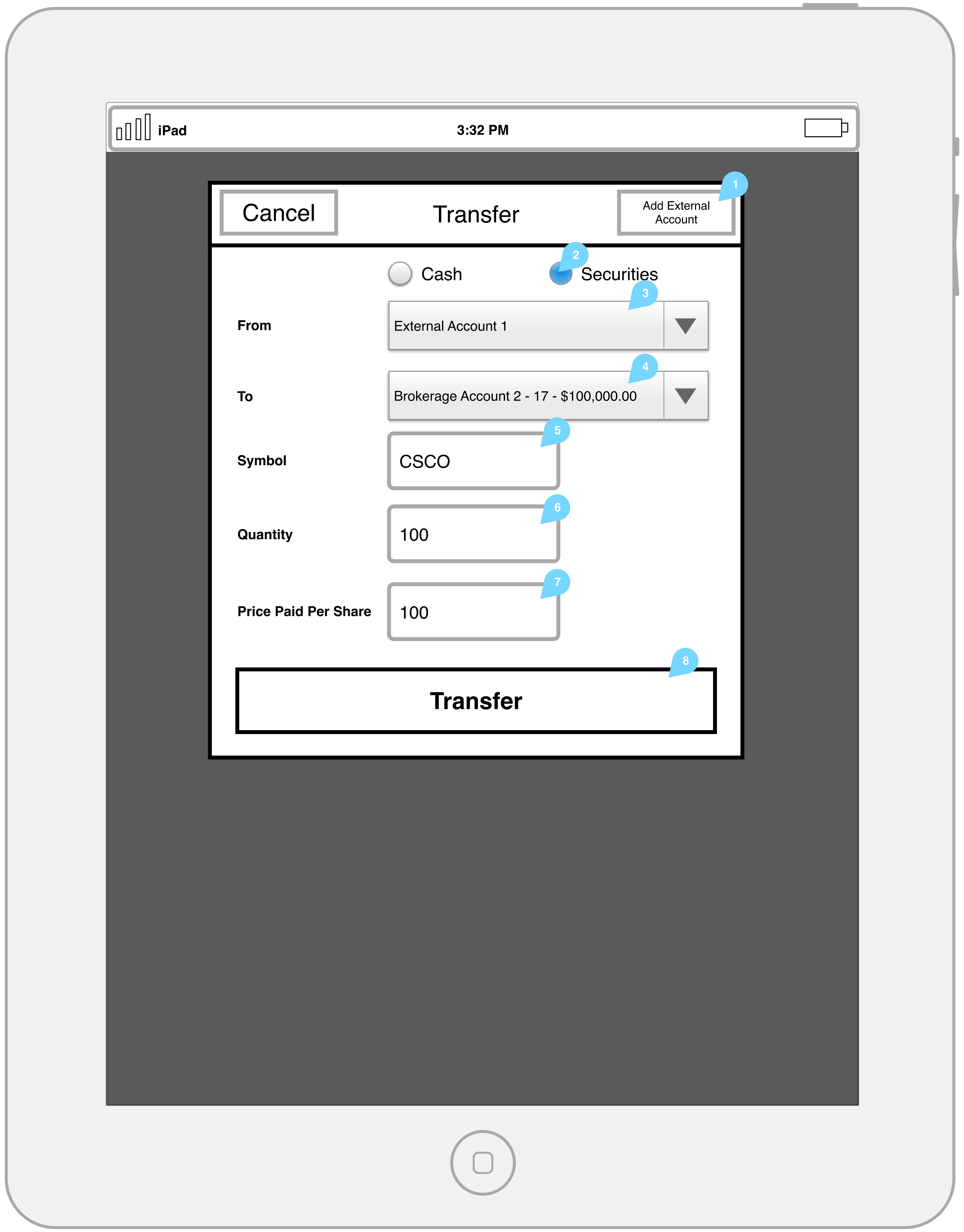

1. **Edit Order Button**
   Tapping on this button brings the user back to the trade screen with all the form fields filled from before.

2. **Place Order Button**
   Tapping on this brings the user to the "Orders" screen after the trade has been validated and submitted.

   In the event that the account selected has insufficient funds to execute the trade, the following alert box will pop up:



## Transfer




1. **Add External Account Button**
   Tapping on this button brings you to the "Add External Account" modal view within the same frame. The animation should be a simple swipe from right to left.

2. **Securities Transfer Radio Button**
   Tapping on this radio button refreshes the text fields below to include "Symbol", "Quantity", and "Price".

3. **Account Selection (From)**
   Clicking on this form field brings up a popover of account selection as described in previous wires. However, this popover will also include any external accounts. External accounts will not include an account ID or cash value.

4. **Account Selection (To)**
   Clicking on this form field brings up a popover of account selection as described in previous wires. However, this popover will also include any external accounts. External accounts will not include an account ID or cash value.

5. **Symbol Form Field**
   Tapping on the field brings up an alpha keyboard and has autocomplete functionality.

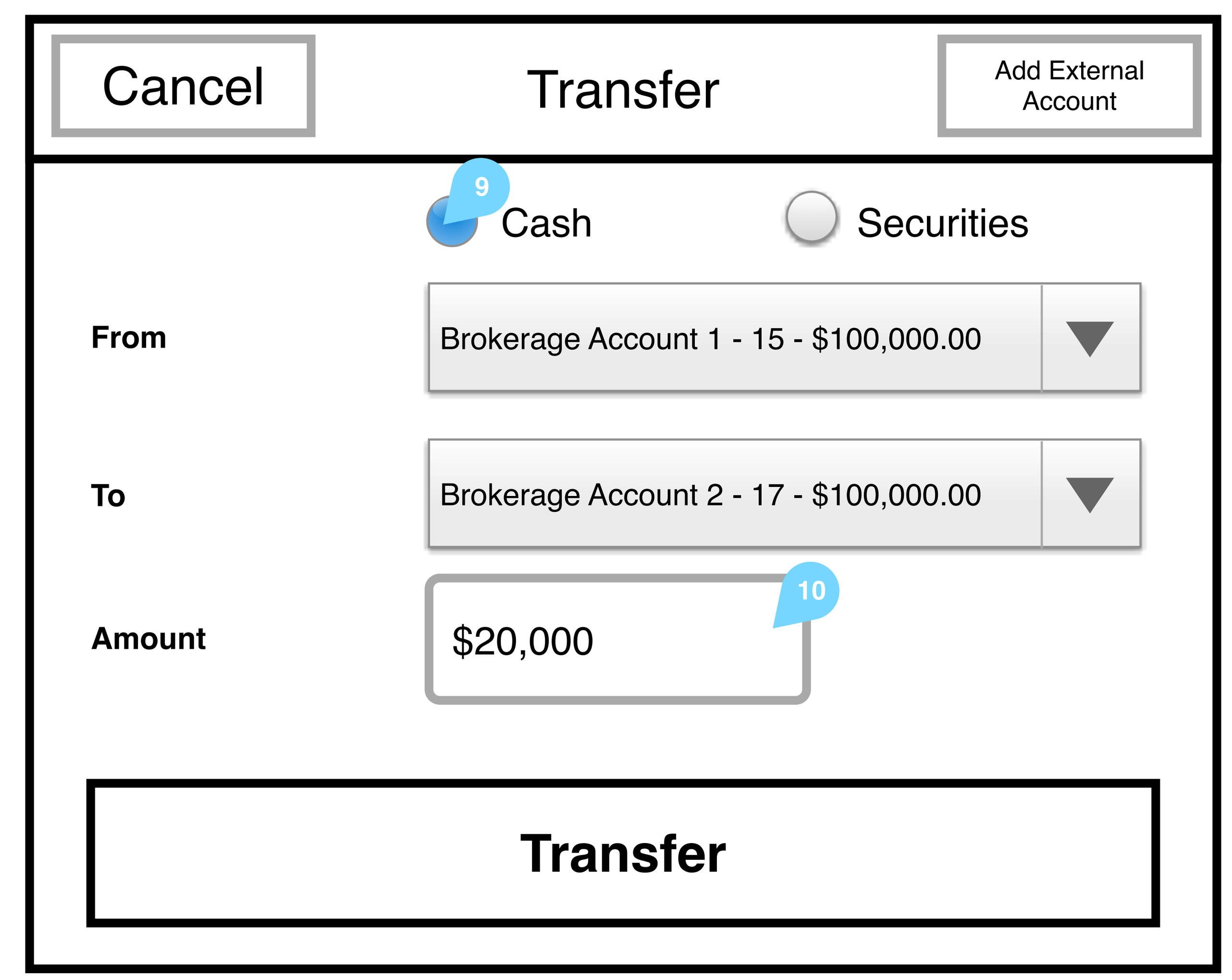
6. **Quantity**
   Tapping on the field brings up an numeric keyboard.

7. **Price Paid Per Share**
   Tapping on the field brings up an numeric keyboard.

8. **Transfer Button**
   Tapping on the button brings the user back to the transaction view with an updated table.

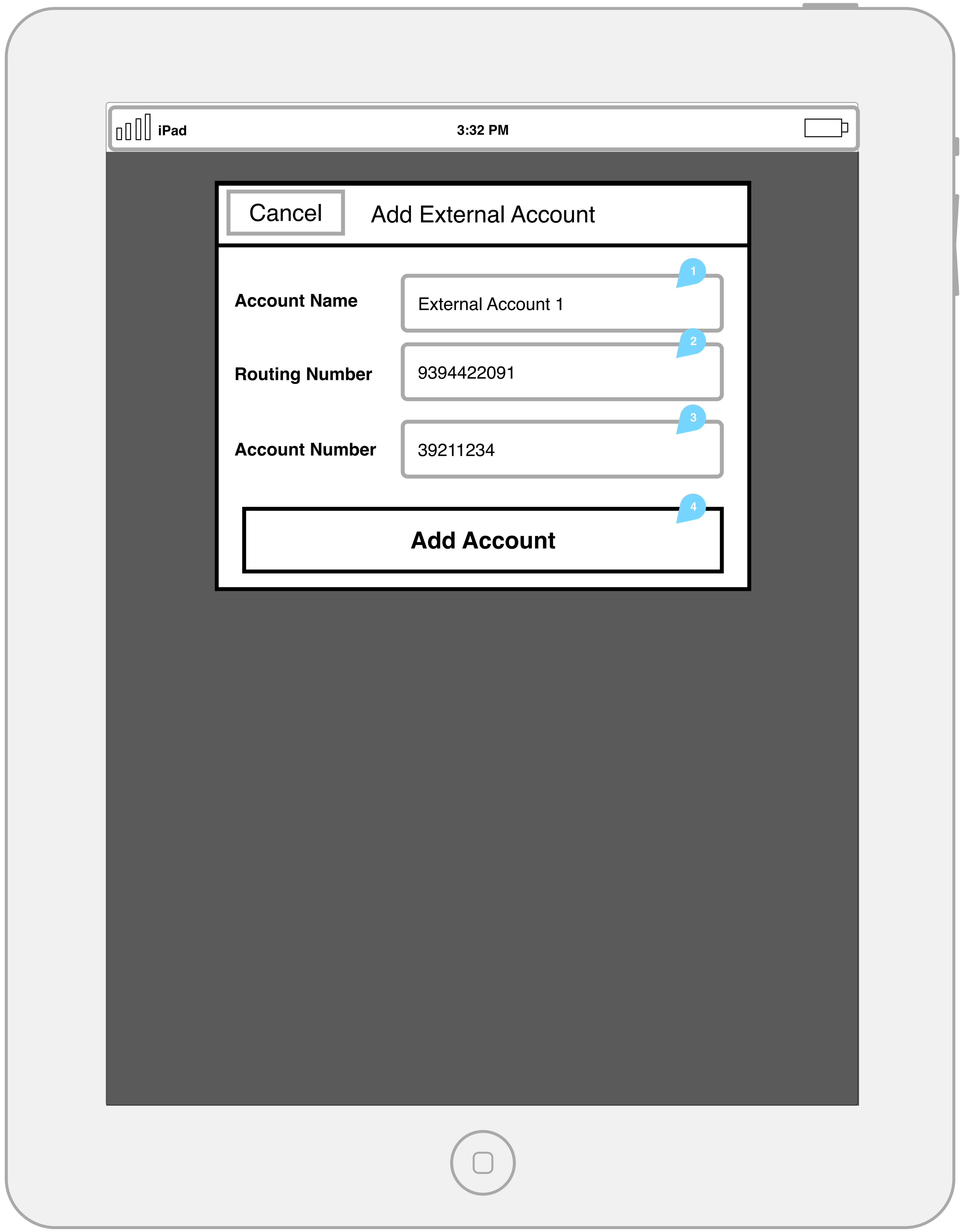
9. **Cash Transfer Radio Button**
   When the transfer screen is initially brought up, a "Cash" transfer will be the default selection. Tapping on this radio button refreshes the text fields below to include "Amount".

10. **Amount**
    Tapping on the field brings up an numeric keyboard.




Cash Transfer

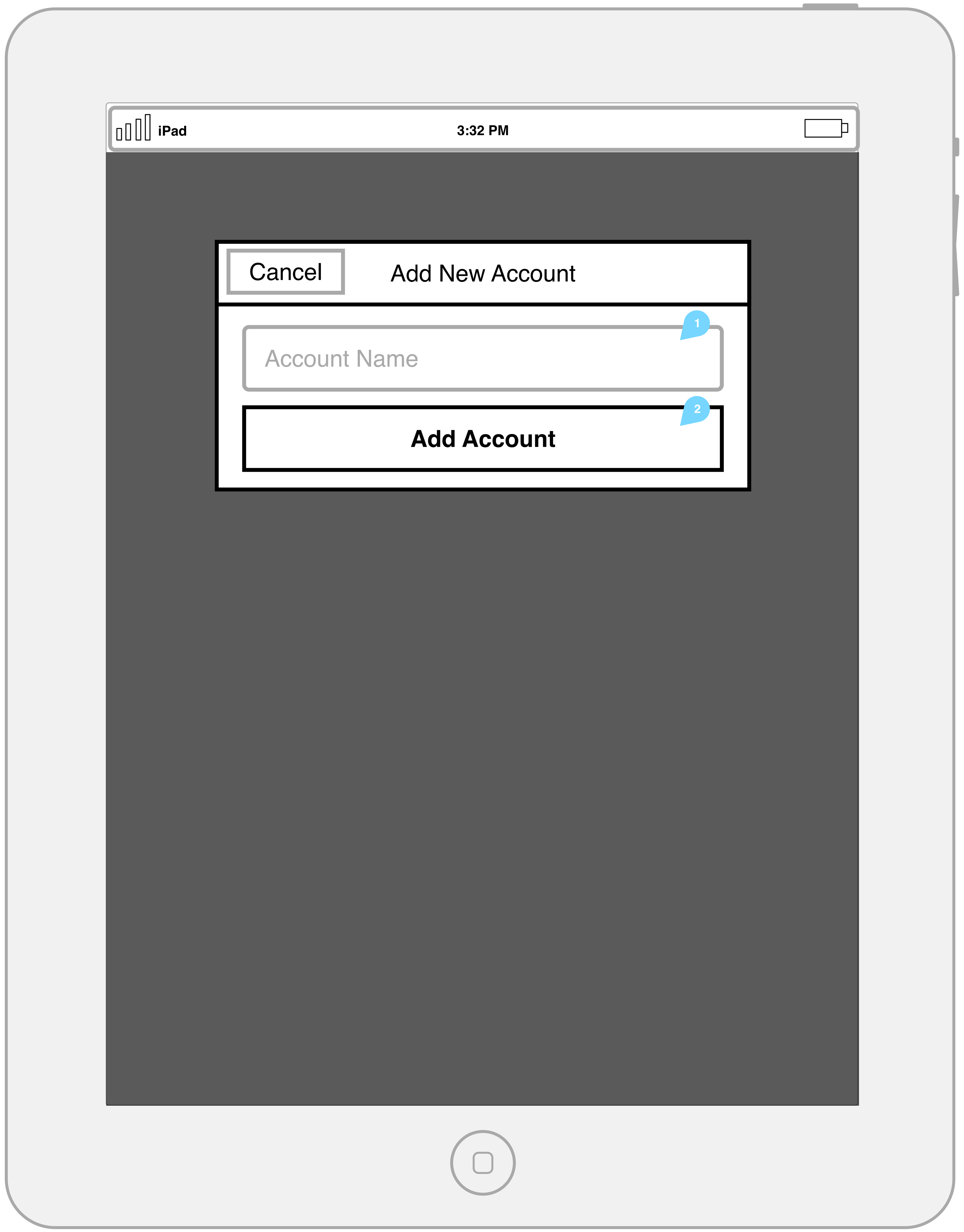
# Bullsfirst iPad Prototype v2
## Add External Account




1. **Account Name**
   Tapping on the field brings up an alpha-numeric keypad.
2. **Routing Number**
   Tapping on the field brings up an alpha-numeric keypad.
3. **Account Number**
   Tapping on the field brings up an alpha-numeric keypad.
4. **Add Account Button**
   Tapping on this button brings the user back to the "Transfer" screen. The animation should be a simple swipe from left to right. The new external account will now be available in the "From" account selection popover.

# Bullsfirst iPad Prototype v2

## Add New Account / Edit Account

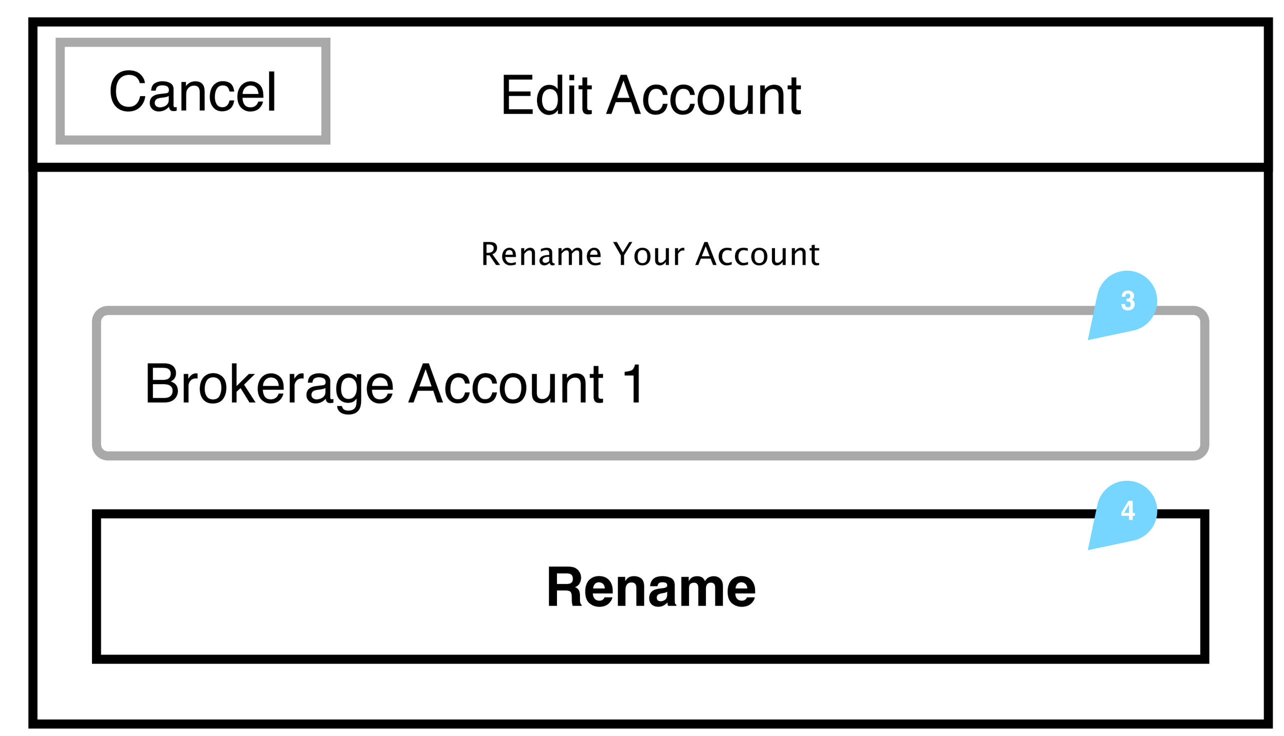



1. **Account Name Text Field**
   Tapping on the field brings up an alpha-numeric keypad.

2. **Add Account Button**
   Tapping on this button brings the user back to the "Accounts" screen with an updated table.

3. **Rename Account Text Field**
   This field should be pre-populated with the name of the account the user wants to edit. Tapping on the field brings up an alpha-numeric keypad.

4. **Rename Account Button**
   Tapping on this button brings the user back to the "Accounts" screen with an updated table.




**Edit Account**