



IDS Self-Help

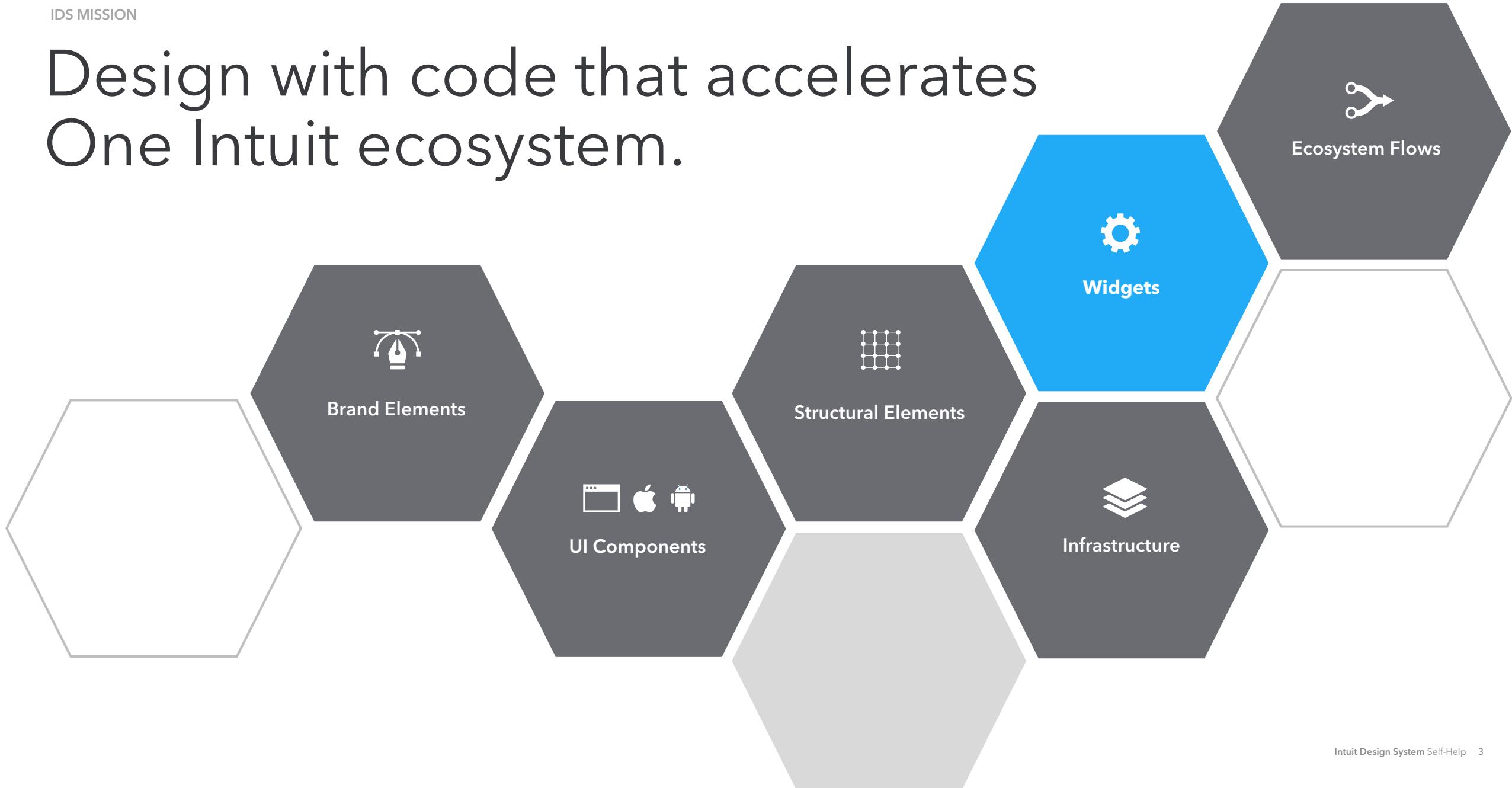
Strategic Widgets

Delivering an ideal customer experience across Intuit.

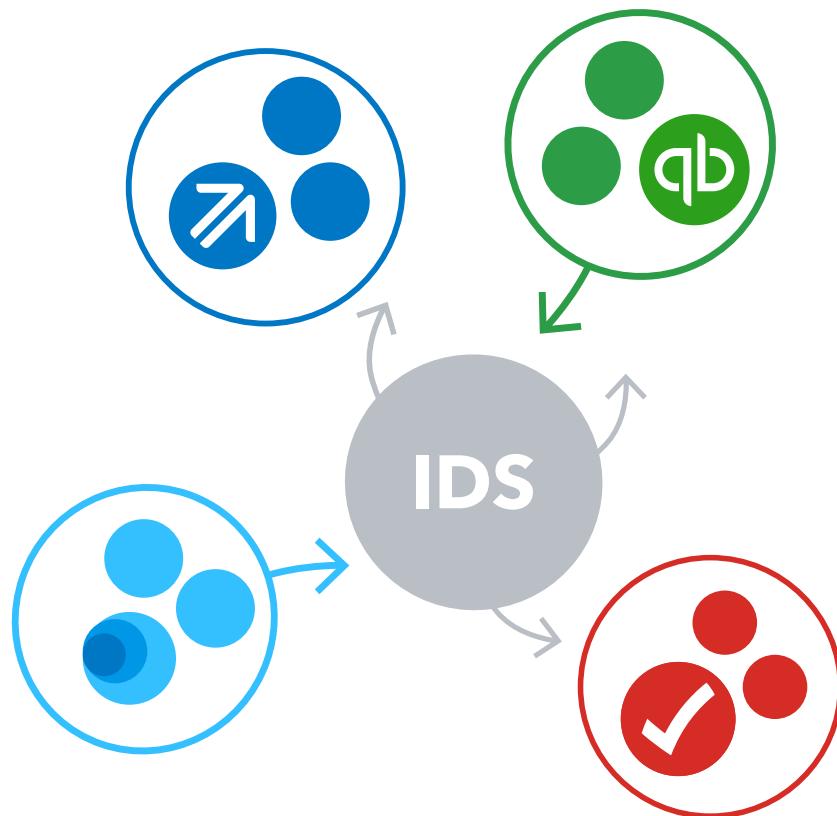
Agenda

IDS
Strategy
Summary
Entry Points
Form Factor
 Help panel
 Windowing
Point of need
Future phases

Design with code that accelerates One Intuit ecosystem.



Community model



How IDS works

"Talent wins games, but teamwork and intelligence wins championships."

- Michael Jordan

We work together to create exponential growth and impact.

We are on a journey not a destination.

We are guardians of the way we work vs. authoritarian dictatorship.

We are an imperfect system and realize everyone will have an opinion.

We iterate not aim for perfection.

Self-Help mission team



CORE BU
WORKING
TEAM



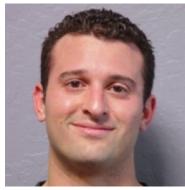
Eleanor Reinholdt
QBO



Kirsten Thulborn
QBO



Chorock Park
QBDS



Simon Santiago
QBDS



Siddhart Soni



James Helms



Chris Gielow



Approvers



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X-Team
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VP, Design
IDS Steward

CORE BU
APPROVERS



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Design Driver



Caitlin Flint



James Helms



Michele Sarko



Leslie Witt
VP, Design

Goal

To create the best shared and **singular customer experience** for discovering and using in-product help across Intuit.



IDS
Self-Help

Strategy

Utilize “best in class” learnings from TurboTax

FEDERAL REFUND \$0 (in progress) CA REFUND \$0 (in progress) Hide

Wages & Income Deductions & Credits Health Insurance Other Tax Situations Federal Review

turbotax Free Edition

Tax Home

Previous Taxes

2017 TAXES

My Info

Federal

State

Review

File

Upgrade

Tax Tools

Sign Out

Presented by intuit

Did you pay any home loans in 2017?

As a homeowner with a mortgage, you're in the right topic. This **deduction** covers:

- Interest and points on your home mortgage(s)
- Mortgage insurance (PMI or MIP)
- Refinancing or home equity loans

This deduction does **not** cover rental or business properties, or **other things**.

Forms you'll need: 1098 (no "-T" or "-E"), HUD-1, or Closing Disclosure.

What if I don't have my 1098?

◀ Back Yes No

— x

Search

Which situations aren't covered by this topic?

Here are examples of common situations that aren't handled here or aren't tax-deductible.

Example: Craig is a self-employed IT professional who works out of his home. He would claim his office as a self-employment expense (on Schedule C).

Example: Maria has a rental property. She would visit the Rental Properties topic to claim her mortgage costs (on Schedule E).

Example: Marco is a homeowner who pays mortgage interest and mortgage insurance, which are covered here. But other costs like his homeowners insurance are **not** tax-deductible. That's because not every home-related cost gives you a tax benefit. We'll help you figure out which ones do.

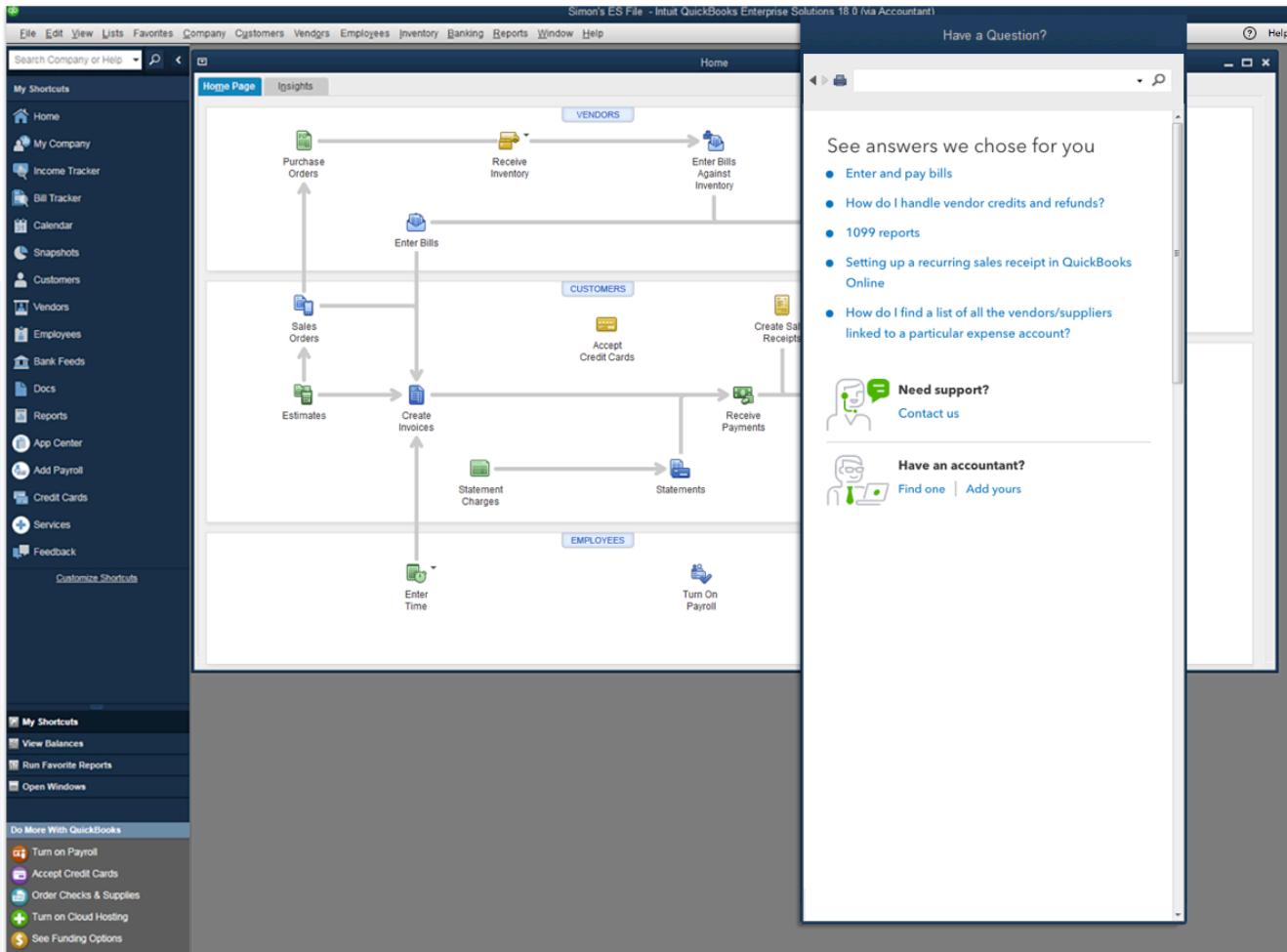
▶ What if I have multiple homes?

Was this helpful? Yes No

"Next Gen" Help

- Increased visibility & engagement via entry point, PON integration and side-by-side (drawer) presentation.
- Learnings tested on large customer sample size.
- Considered industry “best in class”.

Desktop leverages Self-Help platform

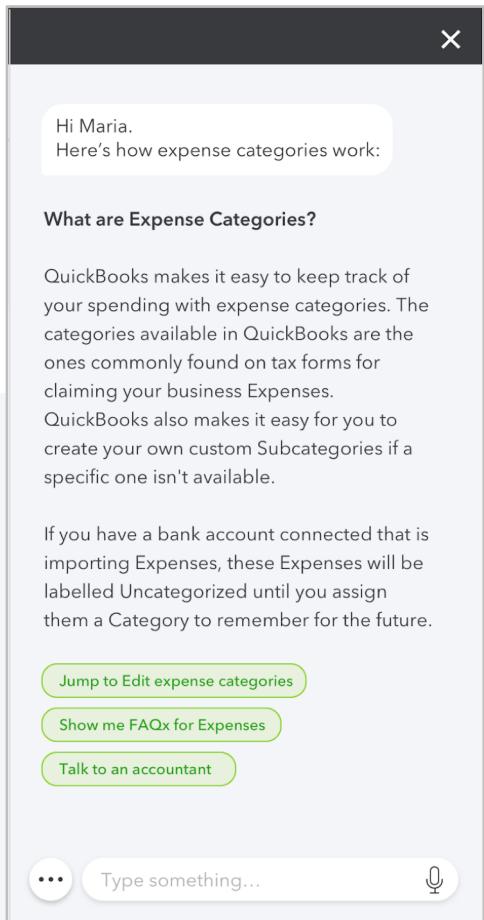


Why online?

- Easier to maintain and update shared help content to all users.
- Allows integration of Self-Help with CUI, Intuit Live, Alerts & Notifications.
- Allows real-time upgrades to Self-Help experience and services in Desktop products.

Self-Help as part of a help system

Point of need in conversation



Hi Maria.
Here's how expense categories work:

What are Expense Categories?

QuickBooks makes it easy to keep track of your spending with expense categories. The categories available in QuickBooks are the ones commonly found on tax forms for claiming your business Expenses. QuickBooks also makes it easy for you to create your own custom Subcategories if a specific one isn't available.

If you have a bank account connected that is importing Expenses, these Expenses will be labelled Uncategorized until you assign them a Category to remember for the future.

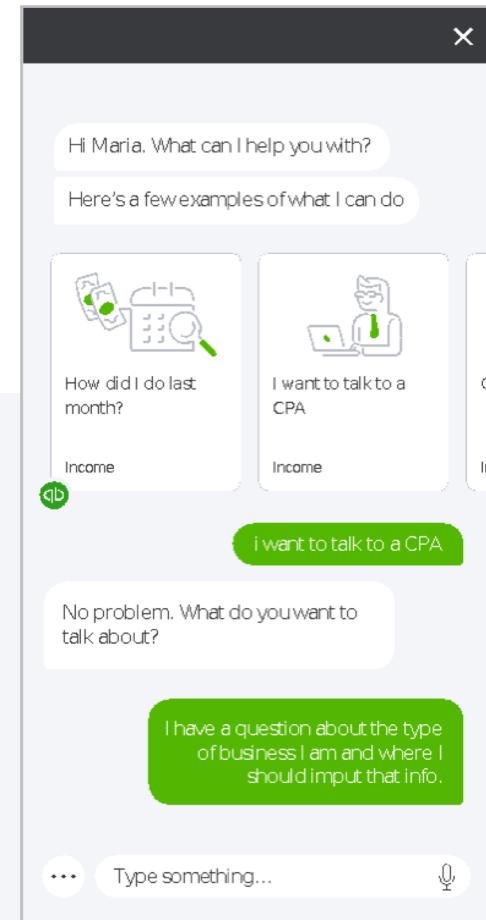
[Jump to Edit expense categories](#)

[Show me FAQx for Expenses](#)

[Talk to an accountant](#)

... Type something... 

Conversational UI



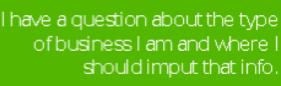
Hi Maria. What can I help you with?
Here's a few examples of what I can do

 How did I do last month?
Income

 I want to talk to a CPA
Income

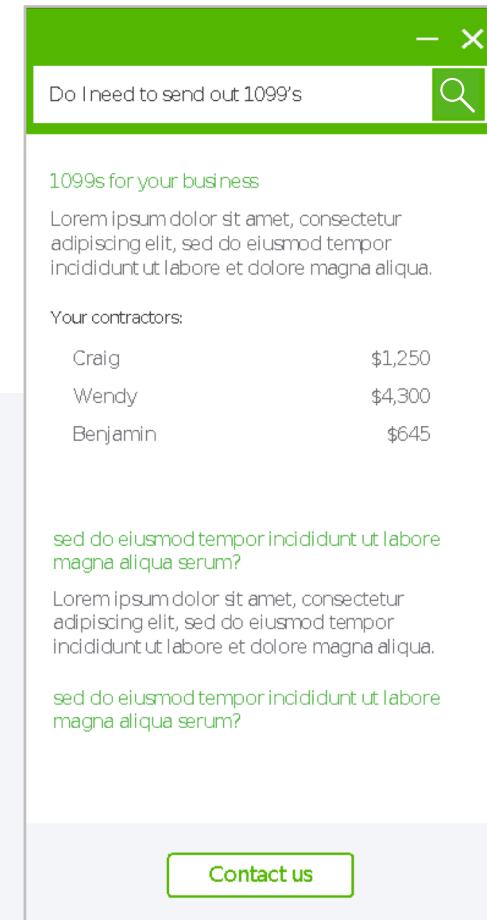
 i want to talk to a CPA

No problem. What do you want to talk about?

 I have a question about the type of business I am and where I should input that info.

... Type something... 

Self-Help search + articles



Do I need to send out 1099's 

1099s for your business
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Your contractors:

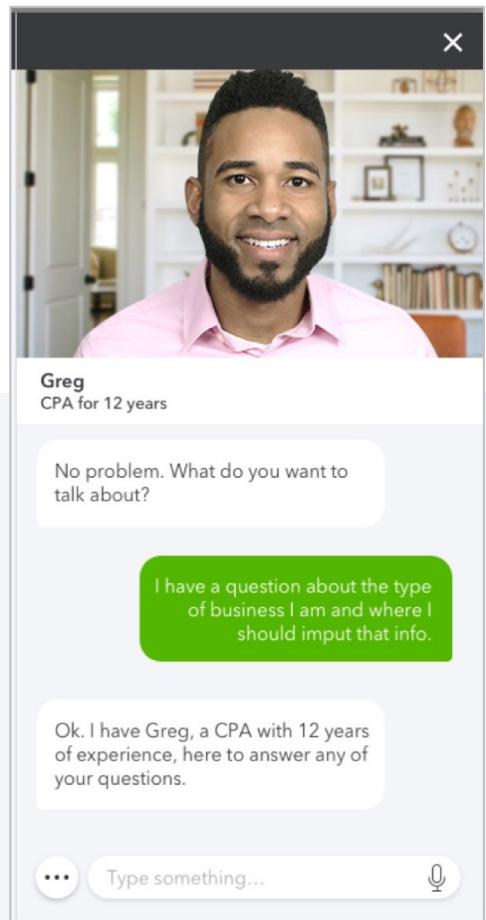
Craig	\$1,250
Wendy	\$4,300
Benjamin	\$645

 sed do eiusmod tempor incididunt ut labore magna aliqua serum?

sed do eiusmod tempor incididunt ut labore magna aliqua serum?

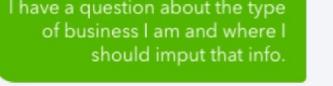
 Contact us

Intuit Live (Pro Help)



Greg
CPA for 12 years

No problem. What do you want to talk about?

 I have a question about the type of business I am and where I should input that info.

Ok. I have Greg, a CPA with 12 years of experience, here to answer any of your questions.

... Type something... 



IDS
Self-Help

Summary

Scope of recommendations



Entry points

Where customers access the Help panel.



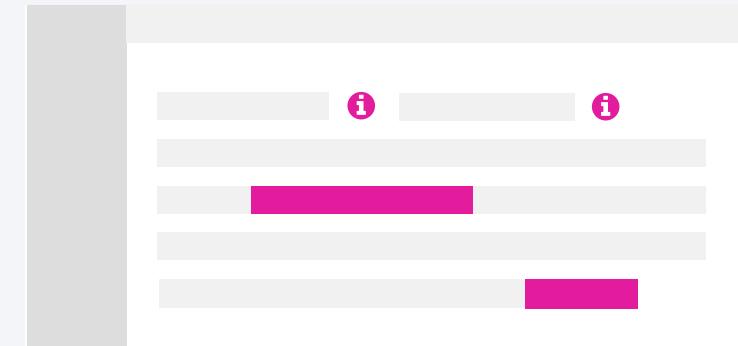
Form factor

How the Help panel interacts with the rest of the product once accessed.



Point of need

How Help is placed contextually within each product.



From > To

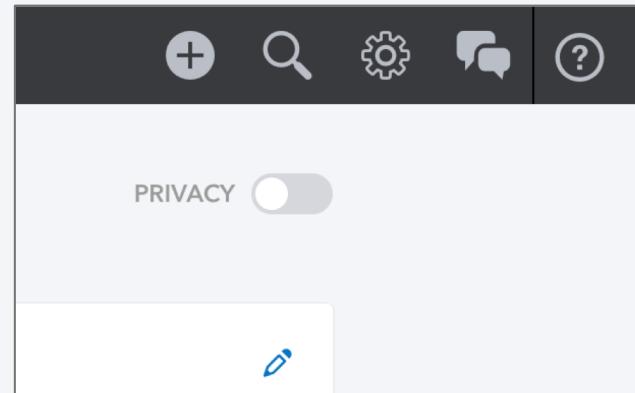


Entry points

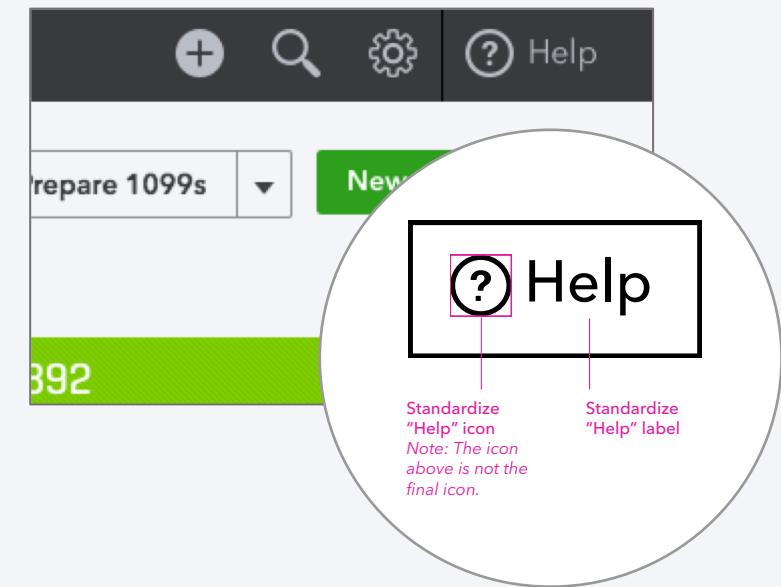
Customer benefit

Create greater discoverability and less confusion so customers get the answers they need.

From



To



From > To

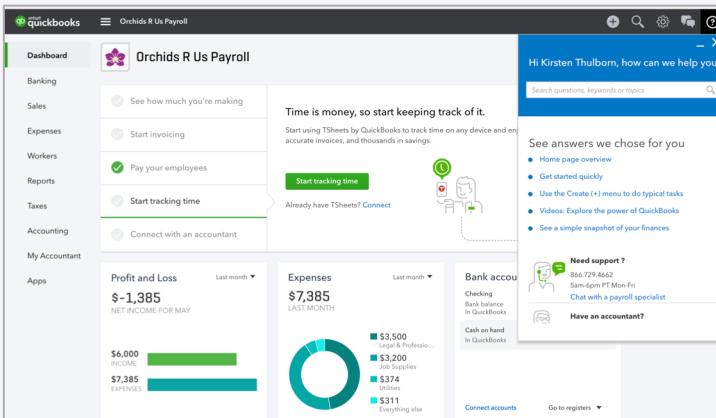


Form factors

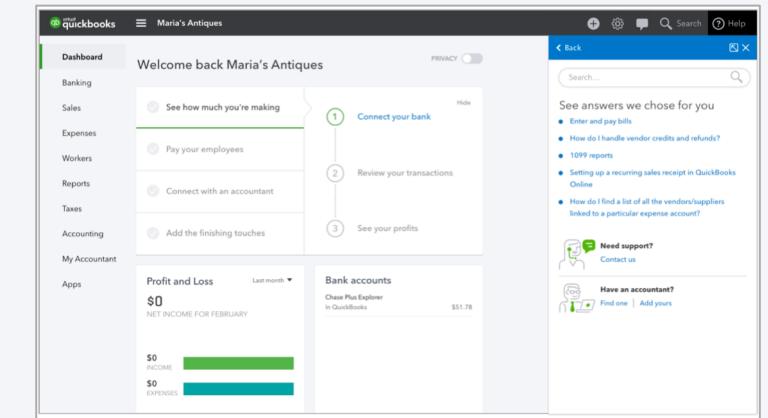
Customer benefit

Side-by-side drawer makes it easier to follow-along and apply help content.

From



To



SUMMARY OF RECOMMENDATIONS

From > To



Point of need

Customer benefit

Opens in the help-panel they know, increasing visibility and usability. Provides a path-forward for those that want to dig deeper into a subject.

From

The screenshot shows the QuickBooks Online dashboard under the 'Sales' section. It displays various financial metrics: \$0 Estimate, \$0 Unbilled Activity, \$0 Overdue, \$1,500 Open Invoice, and \$6,000 Paid Last 30 Days. Below these, a table lists sales transactions for customers like Lily, Moe DeLome, and Bill Davense. A tooltip appears over a link titled 'Learn more' in a callout box, which points to a marketing article titled 'Getting Customers: Four Marketing Tactics to Help Your Customer Base Soar'. The tooltip has a red border and a downward-pointing arrow.

To

The screenshot shows the QuickBooks Online dashboard for 'Maria's Antiques'. It features a welcome message and several action items: 'See how much you're making', 'Pay your employees', 'Connect with an accountant', 'Add the finishing touches', 'Review your transactions', and 'See your profits'. A prominent red callout arrow points from the 'Learn more' link in the 'From' screenshot to the 'Connect your bank' button in the 'To' screenshot. The 'Connect your bank' button is highlighted with a red circle and accompanied by the text 'Why do this?'. The right side of the dashboard includes sections for 'Profit and Loss' and 'Bank accounts'.



IDS
Self-Help

Entry points

Location / Arrangement / Labels

FIXED

Use the combination of standard entry points: **"Help"** and **"Search"**.

All help related access points (Help, Search, CUI) should be located in the **top right corner**.

Keep existing Desktop entry points using **F1 key**.

FLEXIBLE

For introducing experimental access points: Bookmarks, Profile, and Upsells. Location is flexible either left or right.

BACKED BY DATA

TurboTax TY 14-15

LEARNING

Have both "Help" & "Search" as Help access points and not individually just Help or Search.

IMPACT

By moving from an individual Search bar to Search & Contact access points System interaction increased by 120 index, Search increased by 103 index & Contact rate increased by 106 index.

TurboTax TY 15-17

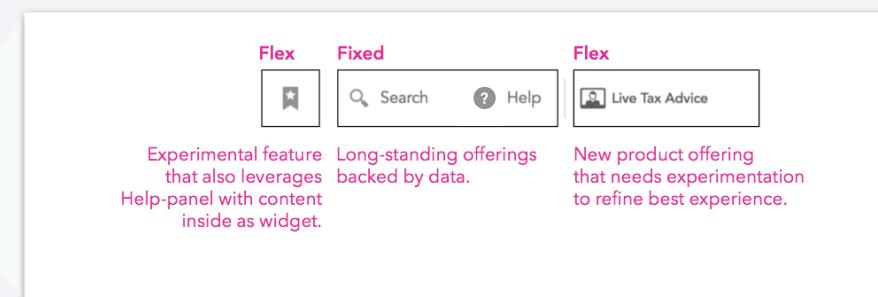
LEARNING

Use "Help" instead of "Contact" to access Help

IMPACT

By replacing "Contact" with "Help" as the Help access point System Interaction increased by 105 index, Search increased by 104 index & Contact rate and Engagement remained at 0 index.

Specifications



Help title / Help icon

FIXED

Help label

Standardize the access point for "Help" by replacing Support, etc. with Help.

Help icon

Standardize Help icon across products. Consider ISO Help icon, or TT Help icon.

FLEXIBLE

Related access points

For other entry points such as CUI, bookmarks, etc.

BACKED BY DATA

TurboTax TY 17 +
QuickBooks Online
90 day test

LEARNING

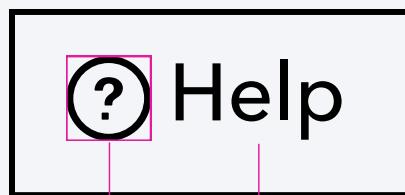
Including Help improves discoverability and increases system interaction. Using label "Help" has a higher system interaction and encompasses broader Help related touch points. Customers have a mental model that they would find "Contact" under "Help" but not necessarily the other way round.

IMPACT

TurboTax – By replacing "Contact" with "Help" as the Help access point System Interaction increased by 105 index, Search increased by 104 index & Contact rate and Engagement remained at 0 index.

QuickBooks – Discoverability increased by 35%.

Specifications



Standardize "Help" icon
Note: The icon above is not the final icon.

Standardize "Help" label

Formatting

FIXED

Stationary (online) + Desktop

Use *label + icon* for "Help".

Mobile web

Use *icons only* for all access points.

Recommended (not directional)

Use *labels + icon* for "Search".

FLEXIBLE

Stationary (online) + Desktop

For other entry points such as CUI and "Search" use *icon only* or *Label + icon*.

BACKED BY DATA

TurboTax TY 17 +
QuickBooks Online
90 day test

LEARNING

Including Help improves discoverability and increases system interaction.

IMPACT

QuickBooks Online – Discoverability increased by 35%.

Specifications

STATIONARY (ONLINE) + DESKTOP



FLEX
Icon only

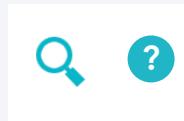


FLEX
Icon + label



FIXED
Icon + label for "Help"

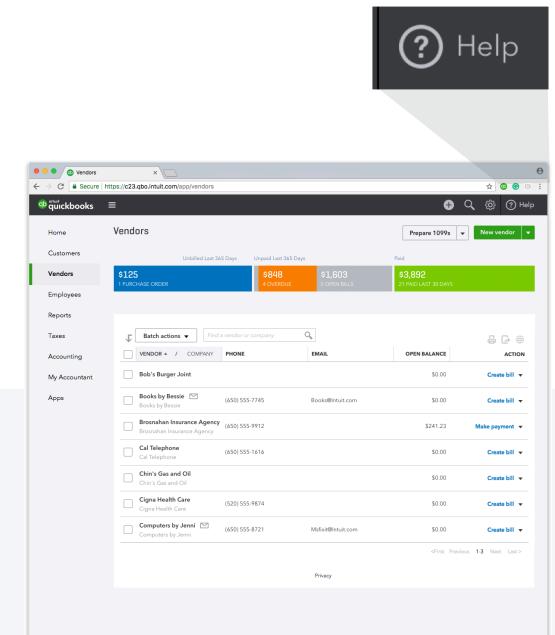
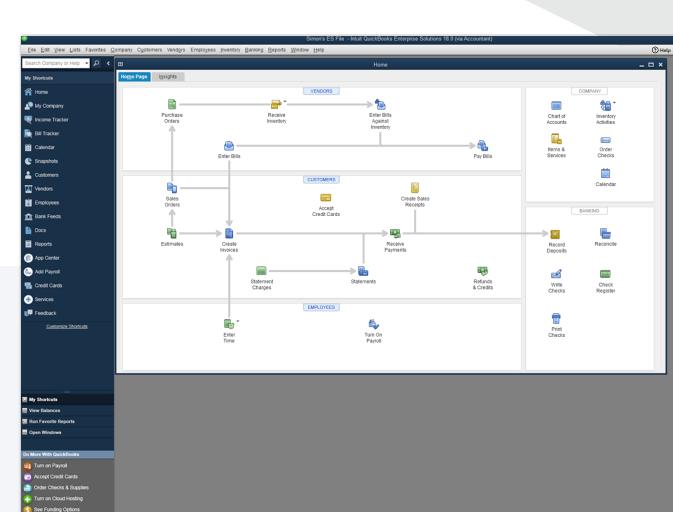
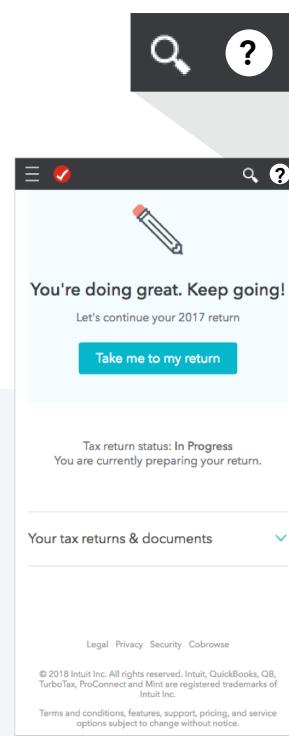
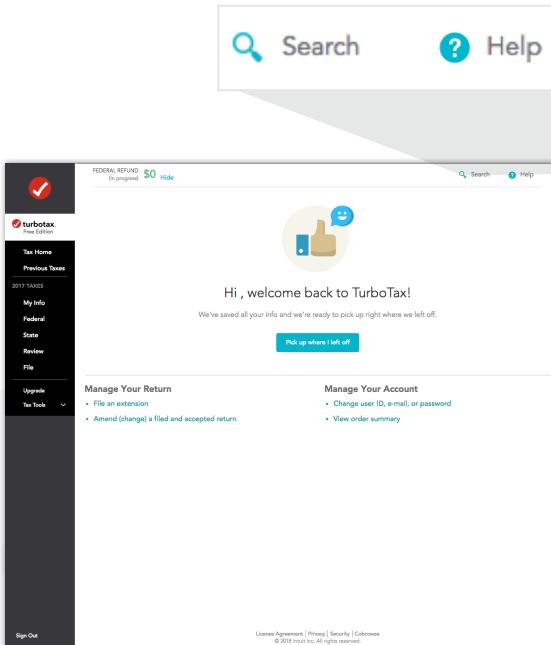
MOBILE WEB



FIXED
Use icons only

ENTRY POINTS

Mock-up





IDS
Self-Help

Form factors

Help drawer

Web stationary – Consumer

Recommended for:

- TurboTax Online – Side-by-side drawer

Issues:

- Need data to inform this direction.
- Need consolidated product header.



Help drawer

Web stationary – Pro

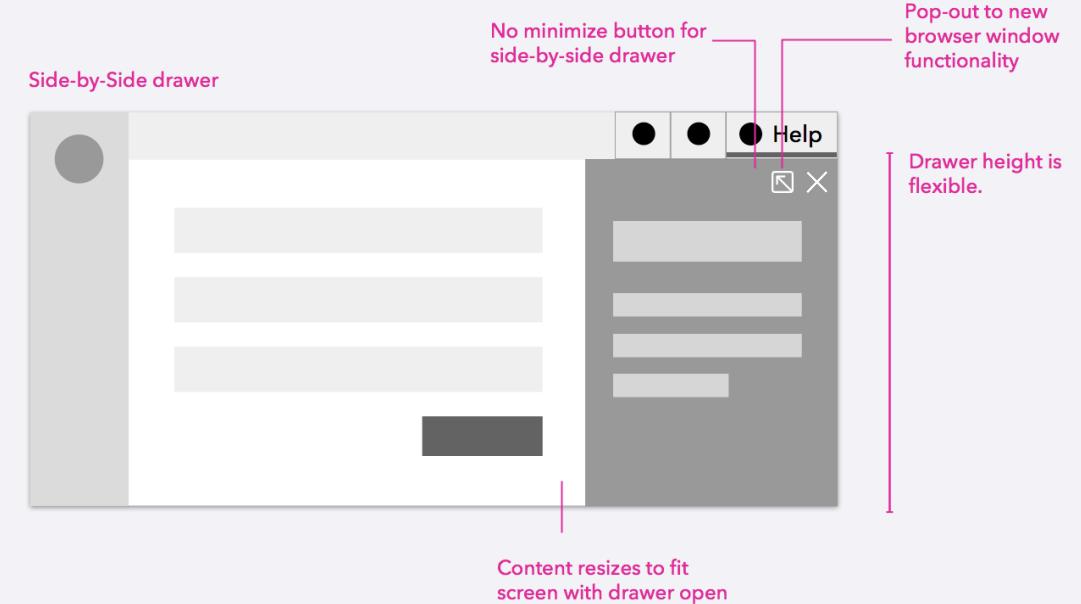
Recommended for:

- QuickBooks Online
- QuickBooks Online Accountant

Specifications

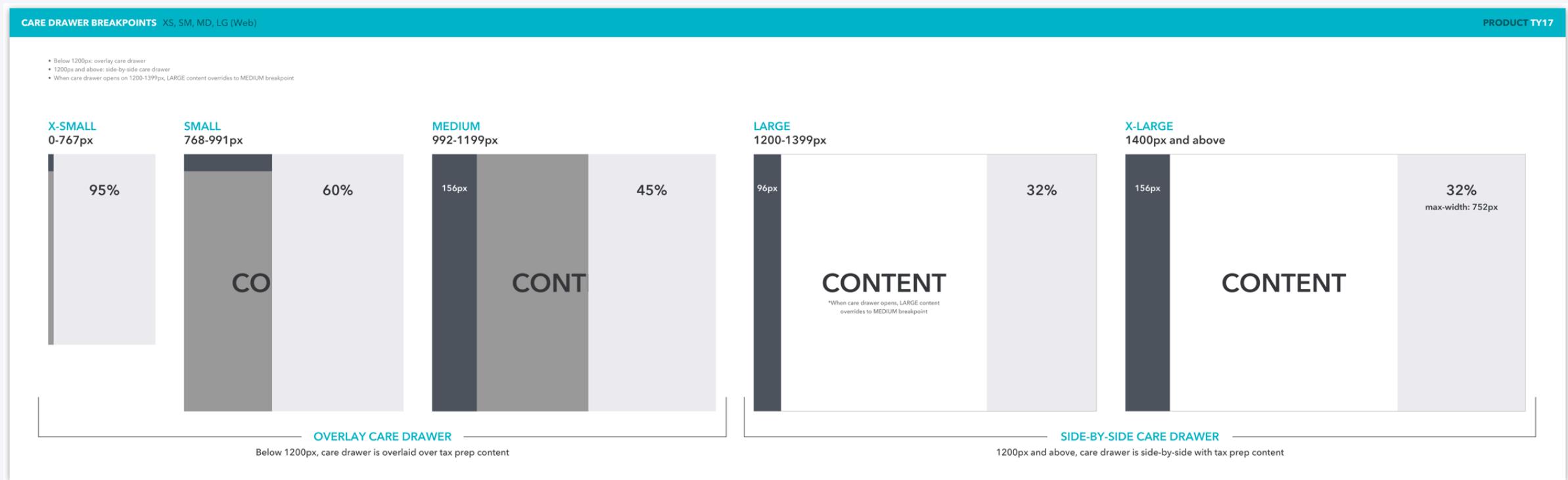


Side-by-Side drawer



Help drawer

Care drawer breakpoints



Help window

Desktop – Pro + Consumer

Pros need an unpinned panel that can move around multiple screens due to today's technology. Need responsive UI framework.

Self-Help opens as an **pop-up window/panel** by default. It can be resized and moved around in a native window or outside of the native window.

Recommended for:

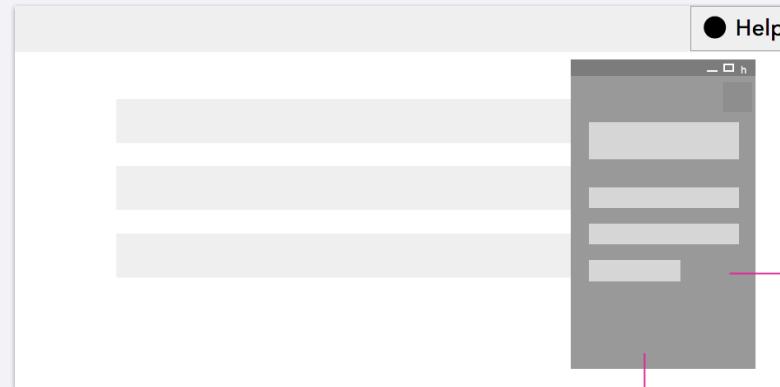
- QuickBooks Desktop
- TurboTax Desktop
- ProConnect Tax Online, Lacerte Tax, and ProSeries Tax

Specifications

Initial state



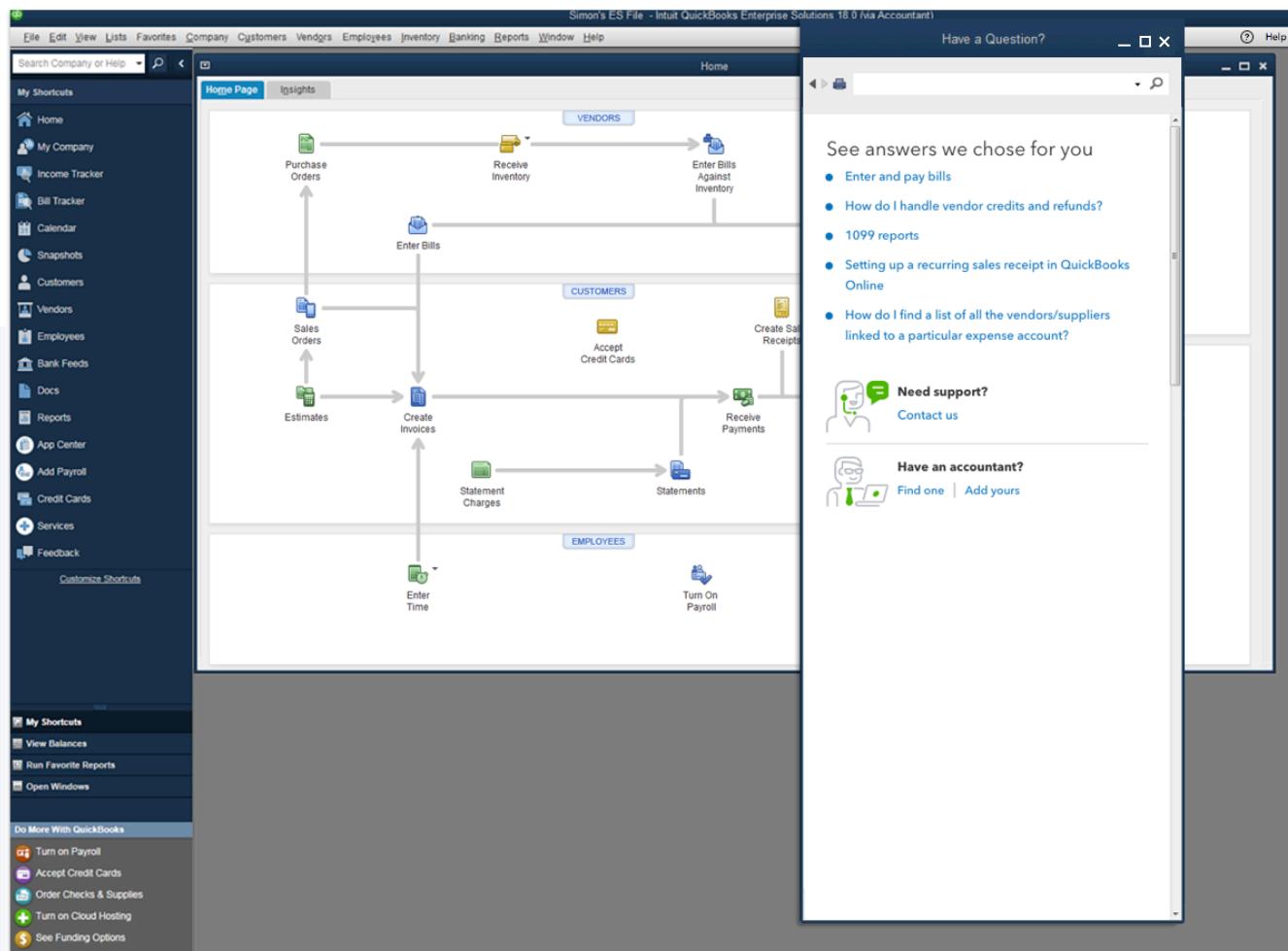
Overlay



Panel can be dragged around within the desktop application or outside the desktop application. The panel is a native window.

Panel opens in same location and same size as last use

Mock-up



Windowing

Stationary

DEFAULT

Self-Help appears in a drawer as a default. It pushes the background content to left. The background screen **resets to full-width** once the Self-Help window pops-out.

Specifications

Initial state



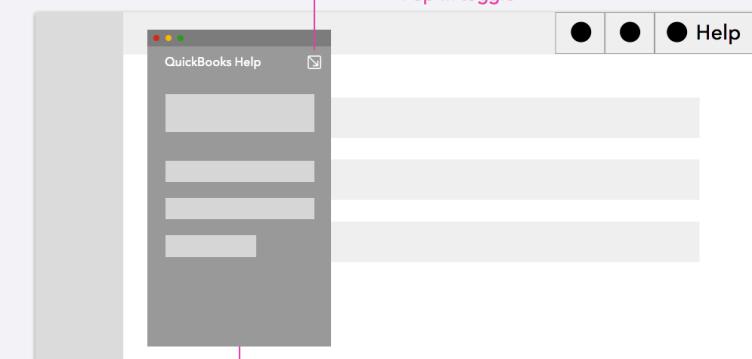
Side-by-side drawer expanded



Flexible: Pop-out windowing



Pop-over (Child browser window)



The self-help panel pops-out as a browser window.

FORM FACTORS: DEFAULT

Mock-up



Vendors

Unbilled Last 365 Days Unpaid Last 365 Days Paid

\$125	\$848	\$1,603	\$3,892																																		
1 PURCHASE ORDER	4 OVERDUE	3 OPEN BILLS	21 PAID LAST 30 DAYS																																		
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Privacy

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See answers we chose for you

- Enter and pay bills
- How do I handle vendor credits and refunds?
- 1099 reports
- Setting up a recurring sales receipt in QuickBooks Online
- How do I find a list of all the vendors/suppliers linked to a particular expense account?

Need support? [Contact us](#)

Have an accountant? [Find one](#) | [Add yours](#)

Privacy

Windowing

Stationary

TROWSER

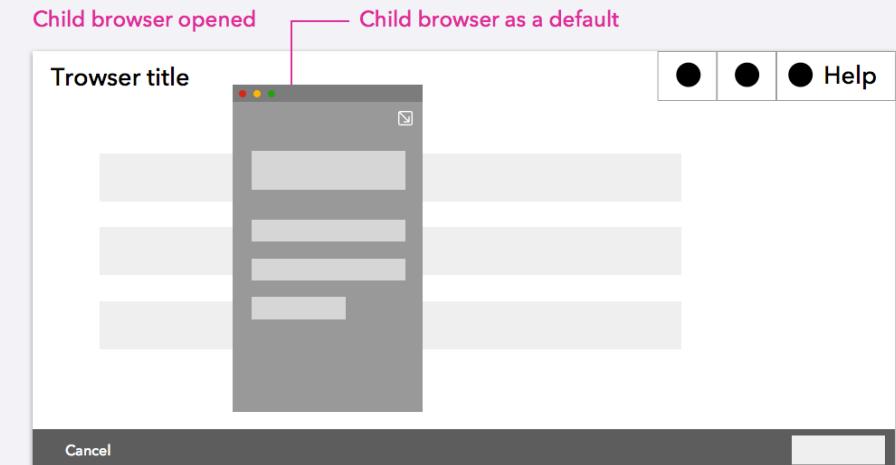
Self-Help opens in a **pop-up window/panel** as a default, but it can be popped-out to resize or move around in a browser window. On reopening, it appears in the last user placement.

Specifications

Initial state



Child browser opened



Mockup



Invoice #1018

Diego Rodriguez	Diego@Rodriguez.com	<input type="checkbox"/> Send later	Cc/Bcc																																																															
BALANCE DUE \$80.00																																																																		
Receive payment																																																																		
Billing address	Terms	Invoice date	Due date																																																															
Diego Rodriguez 321 Channing Palo Alto, CA 94303	Net 30	04/25/2018	05/25/2018																																																															
Crew # <input type="text"/>																																																																		
<table border="1"> <thead> <tr> <th>#</th> <th>PRODUCT/SERVICE</th> <th>DESCRIPTION</th> <th>QTY</th> <th>RATE</th> <th>AMOUNT</th> <th>TAX</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Landscaping;Gardening</td> <td>Weekly Gardening Service</td> <td>4</td> <td>20</td> <td>80.00</td> <td><input type="button"/></td> </tr> <tr> <td>2</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="button"/></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Subtotal</td> <td style="text-align: right;">\$80.00</td> <td></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Taxable subtotal \$0.00</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Select a sales tax rate</td> <td style="text-align: right;"><input type="button"/></td> <td></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Discount percent</td> <td style="text-align: right;"><input type="button"/></td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Total</td> <td style="text-align: right;">\$80.00</td> <td></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Balance due</td> <td style="text-align: right;">\$80.00</td> <td></td> </tr> </tbody> </table>				#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX	1	Landscaping;Gardening	Weekly Gardening Service	4	20	80.00	<input type="button"/>	2						<input type="button"/>					Subtotal	\$80.00						Taxable subtotal \$0.00	0.00						Select a sales tax rate	<input type="button"/>						Discount percent	<input type="button"/>	\$0.00					Total	\$80.00						Balance due	\$80.00	
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Invoice #1012

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Hi Craig Carlson, how can we help you?																																			
Search questions, keywords or topics <input type="text"/>																																			
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Windowing

Stationary

TROWSER WITH DRAWER

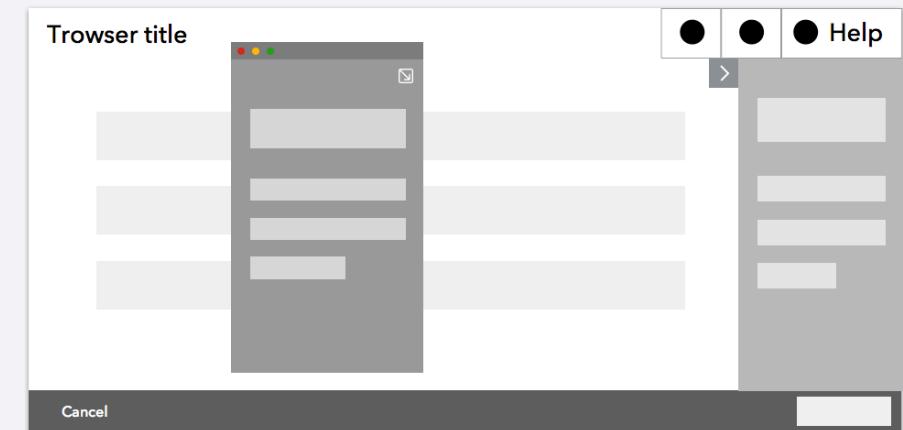
Self-Help appears in a **pop-up window/panel**.

Specifications

Trowser with drawer



Trowser with drawer and child browser



Mock-up



Invoice #1012

Amy's Bird Sanctuary	Birds@Intuit.com																								
<input type="checkbox"/> Send later Cc/Bcc																									
BALANCE DUE \$274.50																									
Receive payment																									
Billing address Amy Lauterbach Amy's Bird Sanctuary 4581 Finch St. Bayshore, CA 94326																									
Terms	Invoice date Due date																								
Net 30	04/20/2018 05/20/2018																								
Crew #																									
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Message displayed on invoice Thank you for your business and have a great day!																	
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Cancel Revert Print or Preview Make recurring Customize More Save Save and send																	

Windowing

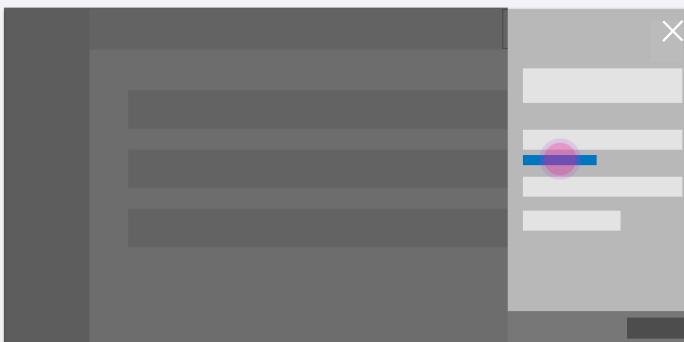
Stationary

DRAWER

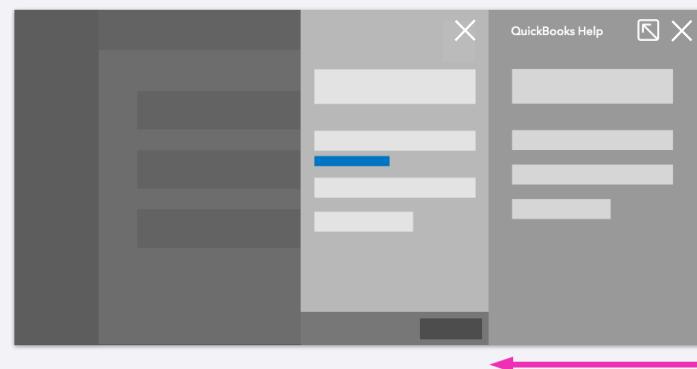
When the user clicks a point of need inside of a drawer, the drawer expands from right and **pushes the entire screen**, including the drawer, to the left.

Specifications

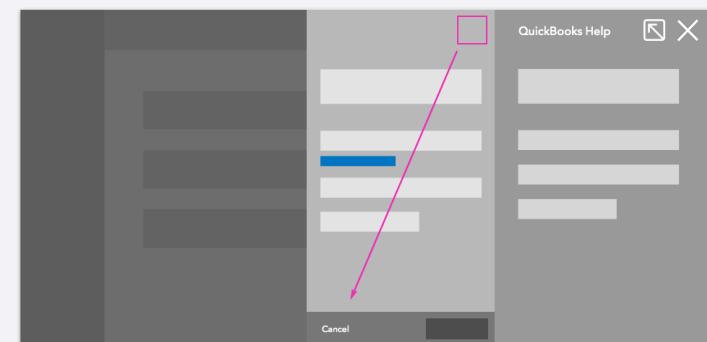
PON inside of a drawer



Drawer with help



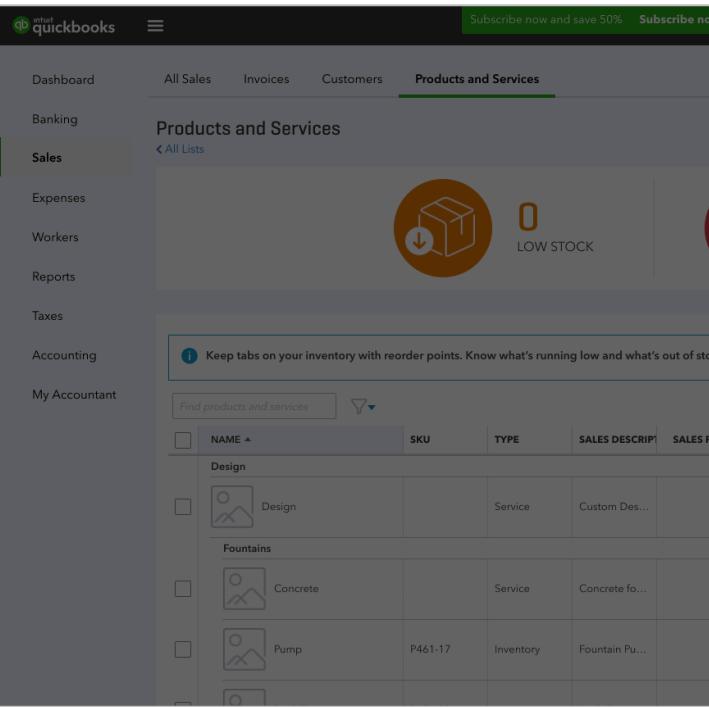
Future recommendation) Replace close icon with dismissive tertiary button.



FORM FACTORS: DRAWER

Mock-up



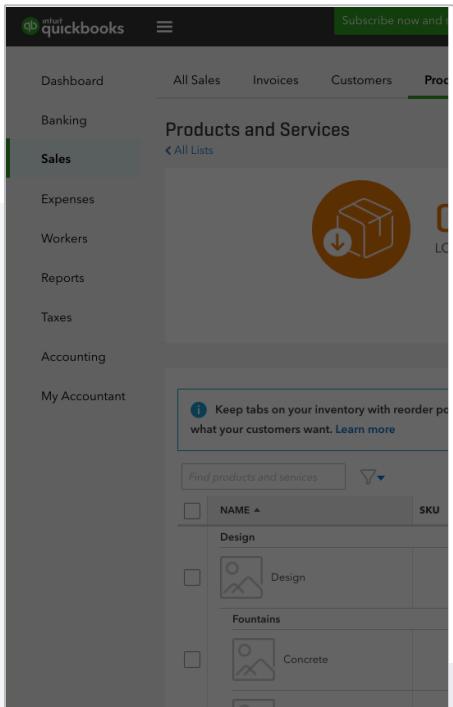


Product/Service information

Inventory [Change type](#)

Name*	<input type="text"/>
SKU	<input type="text"/>
Category	<input type="text"/>
Initial quantity on hand*	<input type="text"/>
As of date*	<input type="text"/>
Reorder point	<input type="text"/>
Inventory asset account	<input type="text"/>
Sales information	<input type="text"/>
Sales price/rate	<input type="text"/> Income account <input type="text"/>

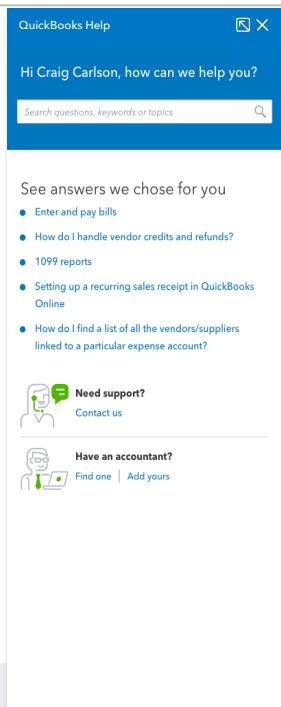
Save and close



Service [Change type](#)

Name*	<input type="text"/>
SKU	<input type="text"/>
Category	<input type="text"/>
Sales information	
<input checked="" type="checkbox"/> I sell this product/service to my customers.	
Custom Design	
Sales price/rate	<input type="text"/> 75
Income account	<input type="text"/> Design income
Purchasing information	
<input type="checkbox"/> I purchase this product/service from a vendor.	

Save and close



Service [Change type](#)

Name*	<input type="text"/>
SKU	<input type="text"/>
Category	<input type="text"/>
Sales information	
<input checked="" type="checkbox"/> I sell this product/service to my customers.	
Custom Design	
Sales price/rate	<input type="text"/> 75
Income account	<input type="text"/> Design income
Purchasing information	
<input type="checkbox"/> I purchase this product/service from a vendor.	

Save and close



IDS
Self-Help

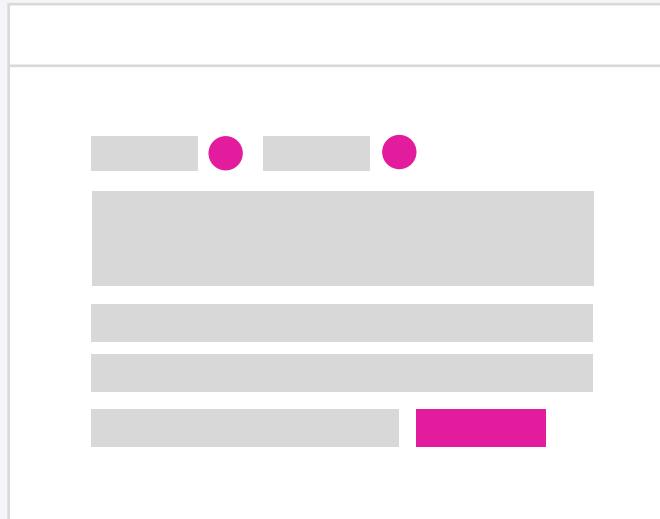
Point of need

Location

FIXED

Hyperlinks integrated with content. An **optional glyph symbol** may be used in cases where the designer wishes to economize for space or attention. Glyphs are frequently chosen to provide additional information next to table-headings, labels, and other UI elements.

Specifications



Hyperlink

FIXED

Follow In-Line Help **content guidelines** for point of need (PON) help.

Notable specs include phrasing PON links into the **voice of the customer** as statements or questions.

Only **punctuate when in the form of a question** or exclamation. Don't punctuate statements that would normally end with a period.

For tight spaces, like landing tables and forms, **use "Learn more"** (not "Explain this"). In mobile and other tight spaces, PON links may also render as buttons.

FLEXIBLE

Choice of hyperlink or button.

Hyperlink style per **relevant style guide** (font, color, underline, hover, and click state etc.)

Use **contextual labels** other than "Learn more" such as "Explain this" "How does this work?" "How do I...?" "Learn more about..." "Frequently asked questions."

Specifications

Something that **needs further explanation** with the point of need link inside the content. Avoid ending with a learn more link if possible. Often PON's will appear at the end of the content as well. **Why we're asking.**

Button

FIXED

Use a **lower case block letter “i”** per ISO 7000 - Graphical symbols for use on equipment, reference number PI PF 001 Information, which specified use to indicate where information is to be obtained.

Put the **symbol inside a circle** to aid in visibility and targeting.

Glyph floats with text and is placed at the end of the label.

Specifications

Short label 

Long label
that wraps
with PON 

PAYEE 	CATEGORY 
Lowe's	Purchases

Button floats with text, positioned at end (right side).

Element label 

Hint text

Button remains attached to label, not UI element.

Behavior

FIXED

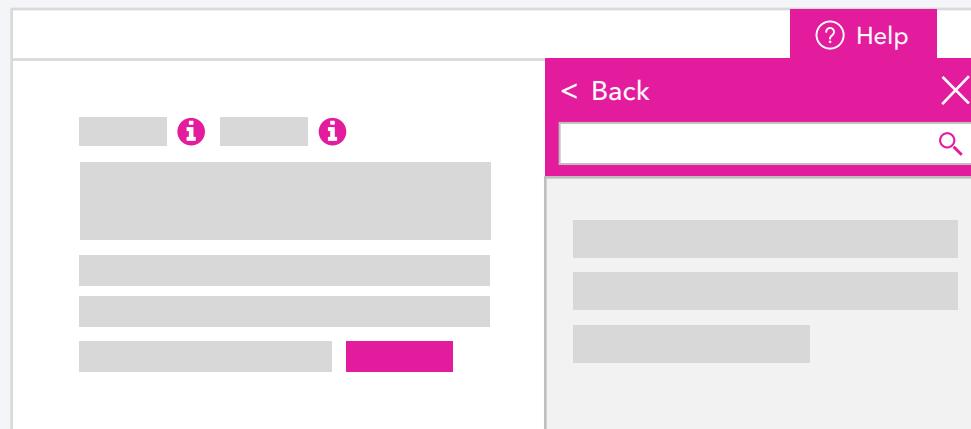
On activation, open the help panel to it's **previous opened state**. If already open, refresh it's content with relevant PON article.

Include Search. This allows the user to further engage in help if needed.

Include Back. This allows users to return to the previously viewed article. This is particularly important since the PON may surprise the user by pre-empting the current article.

The PON shall **remain visible** even if the user navigates to another page in the product.

Specifications



FLEXIBLE

Panel should **avoid dead-ending the user** who may need additional help.

Recommend including a **home button**, **search-bar**, and **contact-us** features.

Treat PON's like any other Self-Help article.

Ensure we don't dead-end the user by providing "Back" and "Home" links as well as "Search". This is also important if the user already had the panel open to an article, and a PON replaced it; the user needs a way to get back to the prior article.

Add the PON glyph to the top of the PON article.

Recommend including Post-your-question and Contact-us links for PONs.

Mock-up



Help tab is highlighted.

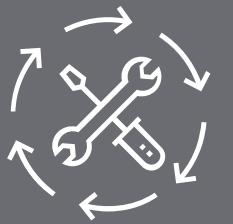
Help label especially useful if panel is floating, or to distinguish from other drawer content like Assistant.

Home recommended so as to not dead-end the customer.

Back recommended because the PON may have replaced an article the customer was viewing.

State is retained, even if leaving the page the PON was triggered from.

The screenshot shows the QuickBooks Online dashboard for 'Maria's Antiques'. The left sidebar has tabs for Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, My Accountant, and Apps. The Dashboard tab is selected. A floating help panel titled 'Welcome back Maria's Antiques' contains three numbered steps: 1. Connect your bank, 2. Review your transactions, and 3. See your profits. Step 1 is circled in green. A pink arrow points from the 'Help' tab in the top right to the 'Why connect to your bank' section of the help panel. Another pink arrow points from the 'Why do this?' link in step 1 to the explanatory text about connecting bank accounts. The main dashboard area shows a Profit and Loss summary for February with \$0 net income, and a Bank accounts section showing a Chase Plus Explorer account with a balance of \$51.78. The bottom right corner of the screen shows links for Help home, Search, Contact us, and Post your question.



IDS
Self-Help

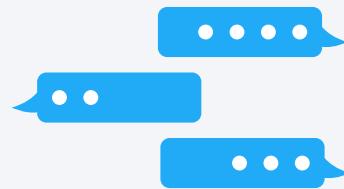
Future phases

Future phases of work



Contact Us

Service design process



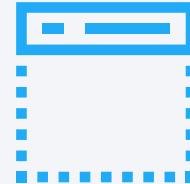
CUI

Deeper explorations



Content strategy

Form factor standards



Headers

Consolidated across products

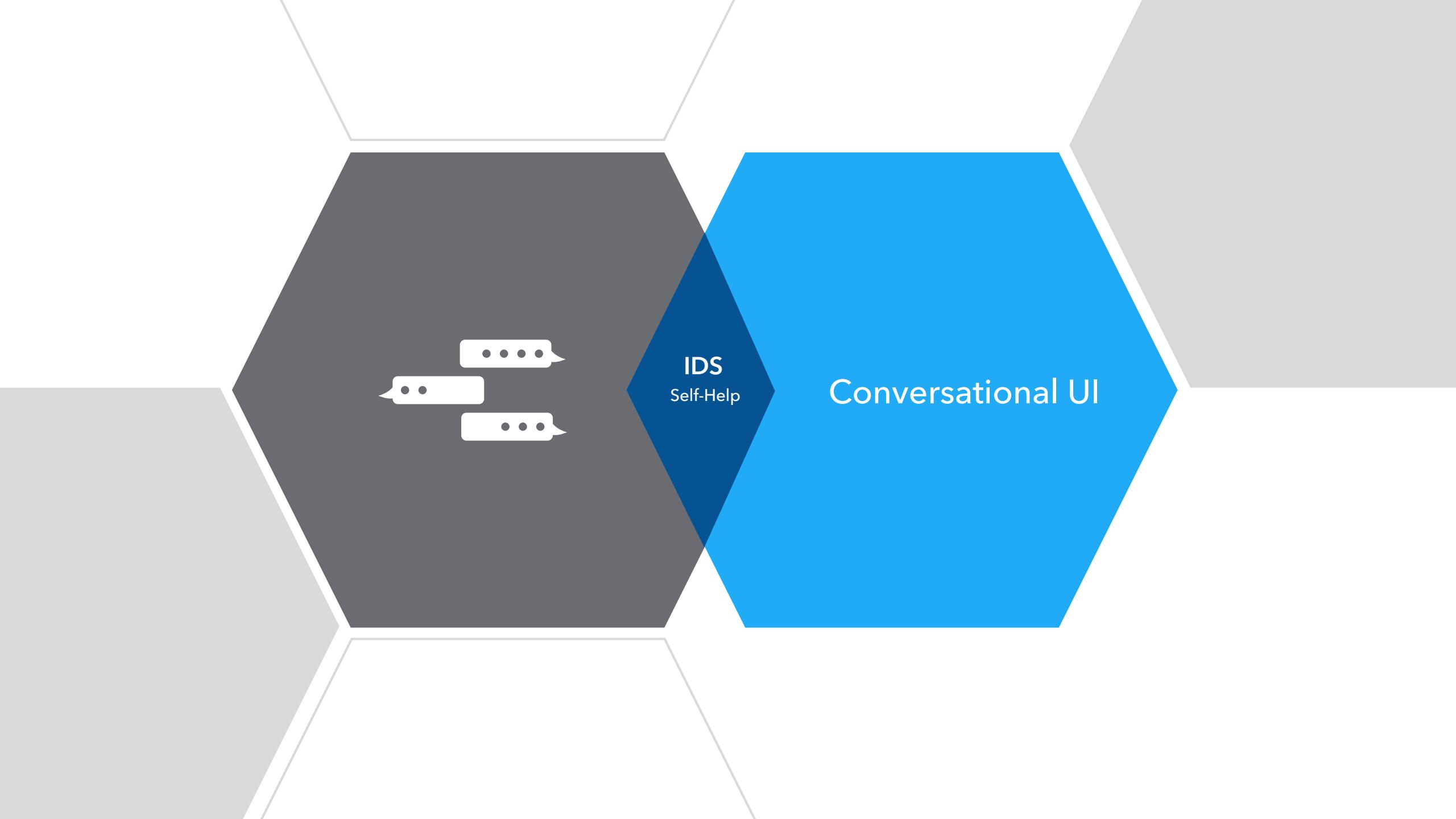


Mobile Native

Explorations

Appendix

Conversational UI
Point of need



Conversational UI

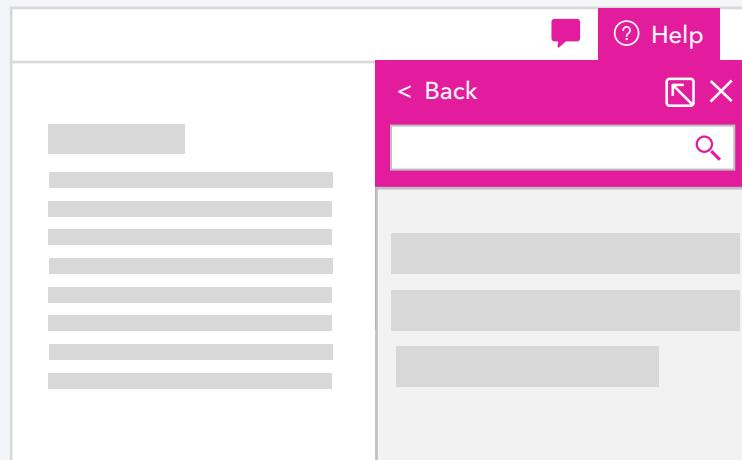
IDS
Self-Help

Location

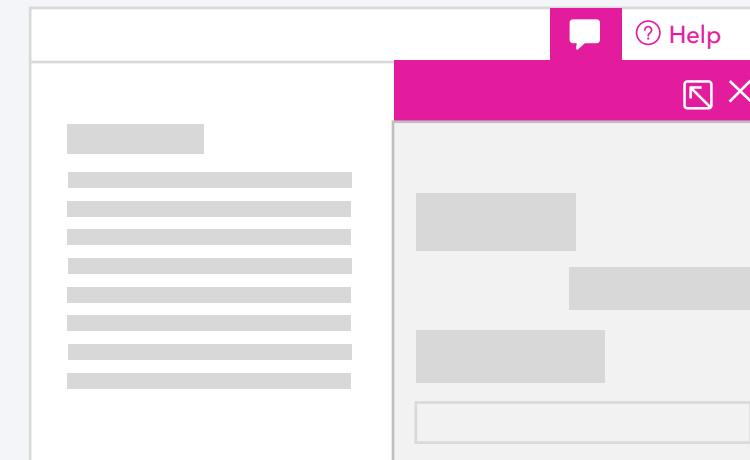
TEST RECOMMENDATION

The CUI entry point should be located in the header, near the Help entry point. Like Help, it acts as a tab. It shares the same drawer as Help, and the user can **toggle between the two**, but not have both visible at the same time.

Specifications



Example of "Help" acting as a tab to open the help panel.



Example of "CUI" acting as a tab to open the CUI panel.

Mock-up



Assisted integration shared panel concept with full-width navigation bar.

Full-width navigation bar allows drawer to have a connection to the "tabs" that trigger it.

Ability to toggle between the two, as well as pop-out the panel.

The screenshot displays the QuickBooks desktop application interface. At the top is a dark header bar with the Intuit QuickBooks logo, the company name 'Maria's Antiques', and standard menu icons for search and help. Below this is a full-width navigation bar containing a vertical list of tabs: Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, and My Accountant. The 'Dashboard' tab is currently selected, highlighted by a green bar at the top of the list. To the right of the navigation bar is the main content area. The main content area features a 'Welcome back Maria's Antiques' message and a 'See how much you're making' section with five checklist items: 'See how much you're making', 'Pay your employees', 'Connect with an accountant', and 'Add the finishing touches'. To the right of this section is a callout box titled 'Connect your bank' with three numbered steps: 1. Connect your bank, 2. Review your transactions, and 3. See your profits. Below this is a 'Profit and Loss' summary for 'Last month' showing a net income of '\$0' for February. To the right is a 'Bank accounts' section showing an account for 'Chase Plus Explorer' with a balance of '\$51.78'. On the far right of the main content area is a sidebar titled 'See answers we chose for you' containing a list of links related to bill entry, vendor credits, 1099 reports, recurring sales receipts, and vendor lists. At the bottom right of the sidebar are two support icons: one for 'Need support?' and another for 'Have an account?'. The overall design uses a clean, modern look with a mix of light and dark colors and a clear distinction between the navigation bar and the main content area.

Mock-up



intuit quickbooks

Maria's Antiques

PRIVACY

Welcome back Maria's Antiques

See how much you're making

Pay your employees

Connect with an accountant

Add the finishing touches

1 Connect your bank

2 Review your transactions

QuickBooks Assistant

How did I do last month?

I need help

Check out the **Help** menu in the header, or jump straight to one of these choices:

Type something...

QuickBooks Help

Hi Maria, how can we help you?

Search questions, keywords or topics

See answers we chose for you

- Enter and pay bills
- How do I handle vendor credits and refunds?
- 1099 reports
- Setting up a recurring sales receipt in QuickBooks Online
- How do I find a list of all the vendors/vendors linked to a particular expense account?

Need support? Contact us

Have an accountant? Find one | Add yours

Mock-up



intuit quickbooks Maria's Antiques + ⚡ ? Help X

Hi Craig Carlson, how can we help you?

Search questions, keywords or topics

Welcome back Maria's Antiques

PRIVACY

Connect your bank

- 1 See how much you're making
- 2 Pay your employees
- 3 Connect with an accountant
- 4 Add the finishing touches

Hide

Review your transactions

See your profits

1 See how much you're making

2 Pay your employees

3 Connect with an accountant

4 Add the finishing touches

Profit and Loss Last month ▾

\$0 NET INCOME FOR FEBRUARY

\$0 INCOME

\$0 EXPENSES

Bank accounts

Chase Plus Explorer In QuickBooks \$51.78

I need help

Check out the **Help** menu in the header, or jump straight to one of these choices:

QuickBooks help Contact us

Training classes Tutorials Webinars

...

Type something...

Microphone icon

Mock-up



Assisted integration shared panel concept with full-width navigation bar.

Full-width navigation bar allows drawer to have a connection to the "tabs" that trigger it.

Ability to toggle between the two, as well as pop-out the panel.

The mock-up illustrates a user interface design for Intuit QuickBooks. At the top is a header bar with the Intuit QuickBooks logo, the company name 'Maria's Antiques', and standard navigation icons for search and help. A green 'Assistant' bar is positioned on the right side. The main content area features a 'Welcome back Maria's Antiques' message and a 'See how much you're making' checklist. To the right of this is a 'Connect your bank' section with three numbered steps: 1. Connect your bank, 2. Review your transactions, and 3. See your profits. Below these sections are 'Profit and Loss' and 'Bank accounts' summaries. A sidebar on the left contains a full-width navigation bar with tabs for Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, My Accountant, and Apps. The 'Accounting' tab is currently selected. A 'Search' bar is located at the bottom right of the main content area.



IDS
Self-Help

Point of need

Hyperlink

FIXED

Follow In-Line Help **content guidelines** for point of need (PON) help.

Notable specs include phrasing PON links into the **voice of the customer** as statements or questions.

Only **punctuate when in the form of a question** or exclamation. Don't punctuate statements that would normally end with a period.

For tight spaces, like landing tables and forms, **use "Learn more"** (not "Explain this"). In mobile and other tight spaces, PON links may also render as buttons.

FLEXIBLE

Choice of hyperlink or button.

Hyperlink style per **relevant style guide** (font, color, underline, hover, and click state etc.)

Use **contextual labels** other than "Learn more" such as "Explain this" "How does this work?" "How do I...?" "Learn more about..." "Frequently asked questions."

Specifications

Something that **needs further explanation** with the point of need link inside the content. Avoid ending with a learn more link if possible. Often PON's will appear at the end of the content as well. **Why we're asking.**

Button

FIXED

Use a **lower case block letter “i”** per ISO 7000 - Graphical symbols for use on equipment, reference number PI PF 001 Information, which specified use to indicate where information is to be obtained.

Put the **symbol inside a circle** to aid in visibility and targeting.

Glyph floats with text and is placed at the end of the label.

Specifications

Short label 

Long label
that wraps
with PON 

PAYEE 	CATEGORY 
Lowe's	Purchases

Button floats with text, positioned at end (right side).

Element label 

Hint text

Button remains attached to label, not UI element.

Behavior

FIXED

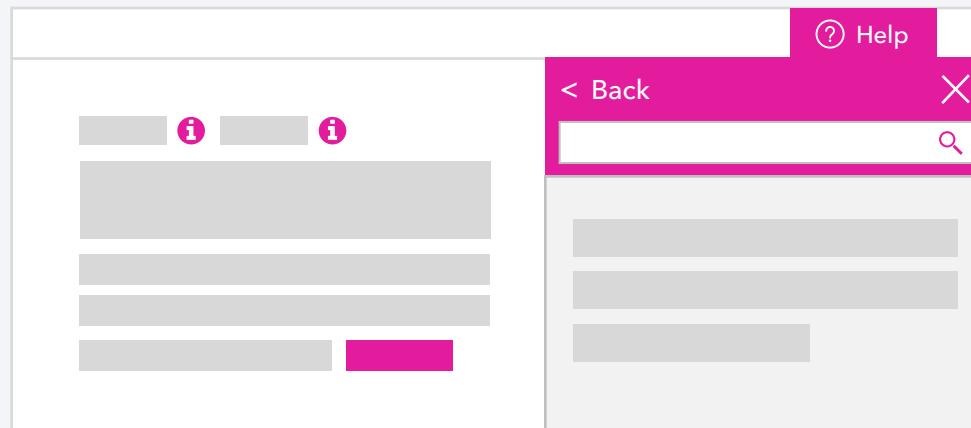
On activation, open the help panel to it's **previous opened state**. If already open, refresh it's content with relevant PON article.

Include Search. This allows the user to further engage in help if needed.

Include Back. This allows users to return to the previously viewed article. This is particularly important since the PON may surprise the user by pre-empting the current article.

The PON shall **remain visible** even if the user navigates to another page in the product.

Specifications



FLEXIBLE

Panel should **avoid dead-ending the user** who may need additional help.

Recommend including a **home button**, **search-bar**, and **contact-us** features.

Treat PON's like any other Self-Help article.

Ensure we don't dead-end the user by providing "Back" and "Home" links as well as "Search". This is also important if the user already had the panel open to an article, and a PON replaced it; the user needs a way to get back to the prior article.

Add the PON glyph to the top of the PON article.

Recommend including Post-your-question and Contact-us links for PONs.

Mock-up



Help tab is highlighted.

Help label especially useful if panel is floating, or to distinguish from other drawer content like Assistant.

Home recommended so as to not dead-end the customer.

Back recommended because the PON may have replaced an article the customer was viewing.

State is retained, even if leaving the page the PON was triggered from.

The screenshot shows the QuickBooks Online dashboard for 'Maria's Antiques'. The left sidebar has tabs for Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, My Accountant, and Apps. The Dashboard tab is selected. A floating help panel titled 'Welcome back Maria's Antiques' contains three numbered steps: 1. Connect your bank, 2. Review your transactions, and 3. See your profits. Step 1 is circled in green. A pink arrow points from the 'Help' tab in the top right to the 'Why connect to your bank' section of the help panel. Another pink arrow points from the 'Why do this?' link in step 1 to the explanatory text about connecting bank accounts. The main dashboard area shows a Profit and Loss summary for February with \$0 net income, and a Bank accounts section showing Chase Plus Explorer with a balance of \$51.78. The bottom right corner of the dashboard has links for Help home, Search, Contact us, and Post your question.

Future considerations

FLEXIBLE

Optimize PON article template & help panel presentation

Display a **quick view** on hover or long-press.

Walk-through all PONS on a page.

Add **social-proof** to PON to indicate if it's trending, recently updated, etc.

Click anywhere to read or add relevant **crowdsourced content**.

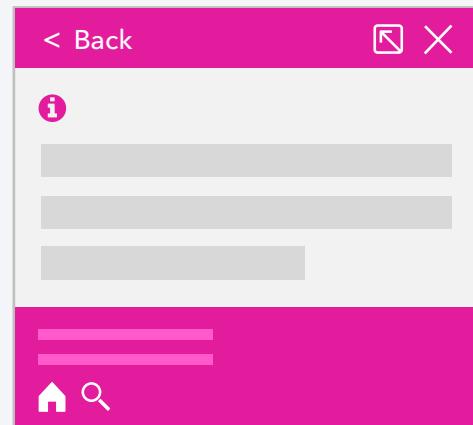
Specifications

ALTERNATIVE 1

Treat PON's differently

Use special style for PON articles.
Use icon to depict article type.

Use a secondary-nav solution that
puts search, contact-us, post-a-
question, and home in the footer.

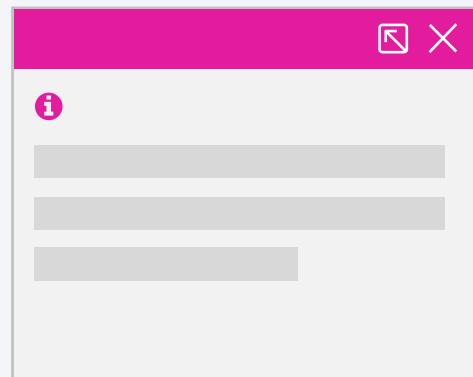


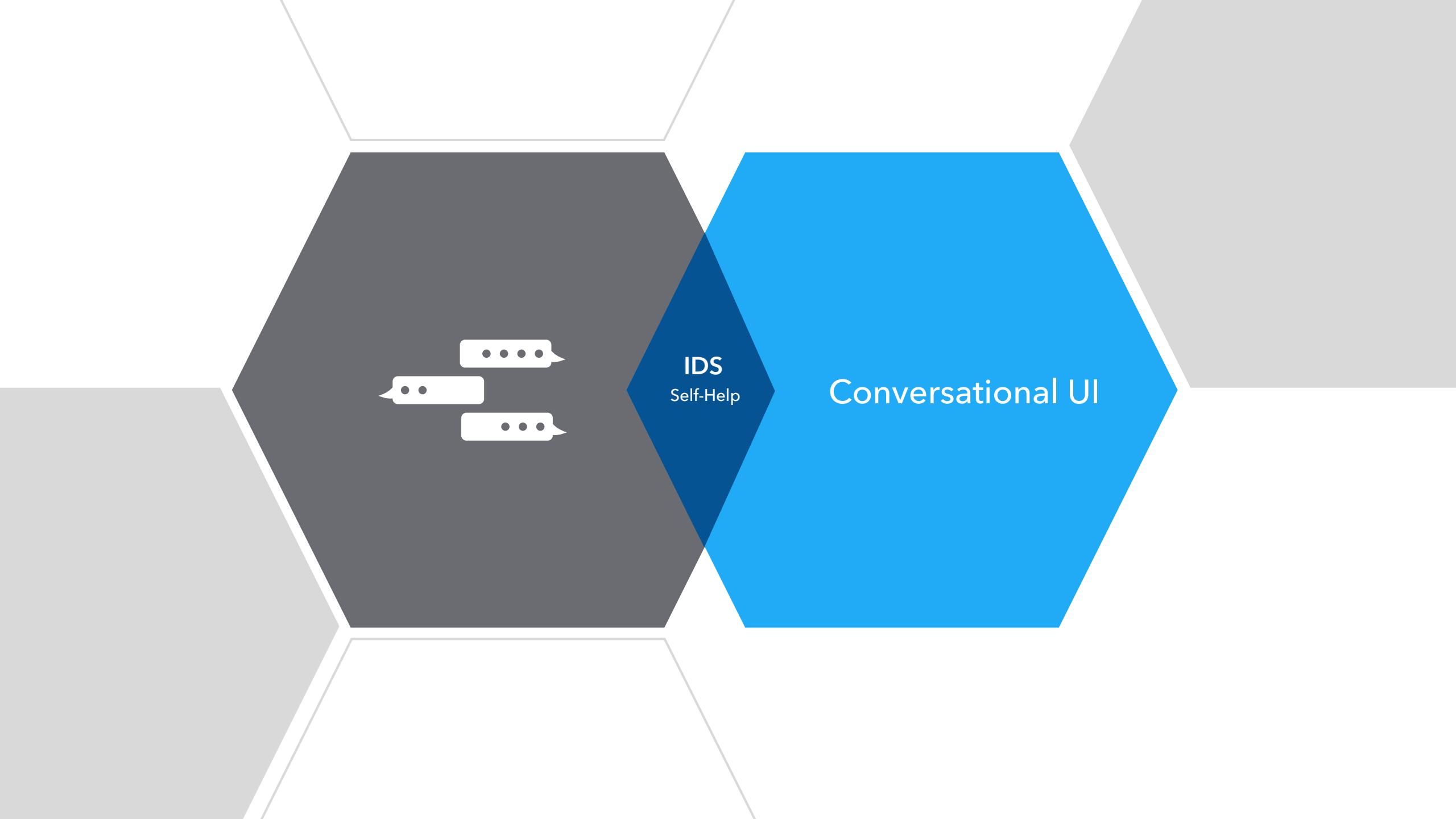
ALTERNATIVE 2

Treat PON's as modals

Pop-over the self-help panel. No need
for back or other self-help tools.

...But what would happen when
clicking a self-help link inside of a PON
like this?





Conversational UI

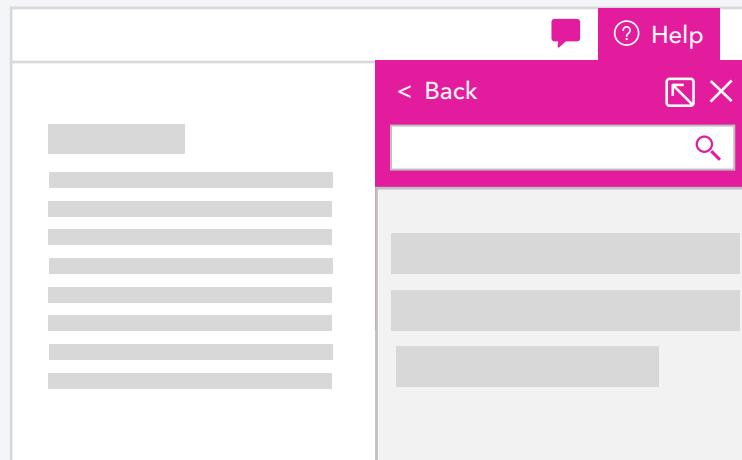
IDS
Self-Help

Location

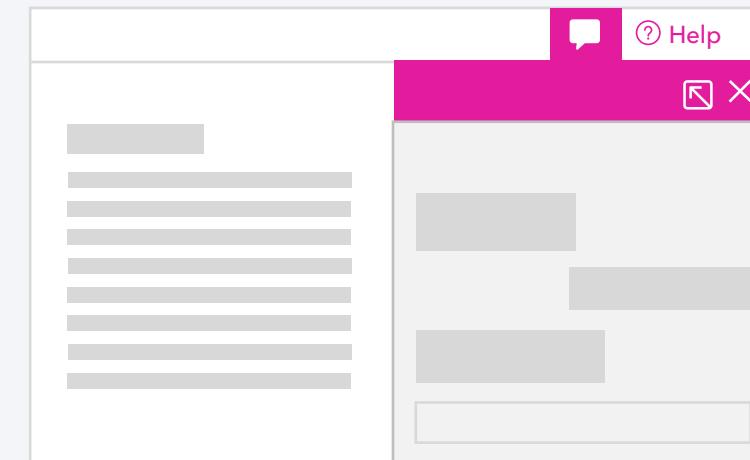
TEST RECOMMENDATION

The CUI entry point should be located in the header, near the Help entry point. Like Help, it acts as a tab. It shares the same drawer as Help, and the user can **toggle between the two**, but not have both visible at the same time.

Specifications



Example of "Help" acting as a tab to open the help panel.



Example of "CUI" acting as a tab to open the CUI panel.

Mock-up



Assisted integration shared panel concept with full-width navigation bar.

Full-width navigation bar allows drawer to have a connection to the "tabs" that trigger it.

Ability to toggle between the two, as well as pop-out the panel.

The screenshot displays the QuickBooks desktop application interface. At the top is a dark header bar with the Intuit QuickBooks logo, the company name 'Maria's Antiques', and standard menu icons for search and help. Below this is a full-width navigation bar containing a vertical list of tabs: Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, and My Accountant. The 'Dashboard' tab is currently selected and highlighted in green. To the right of the navigation bar is the main content area. The main content area features a 'Welcome back Maria's Antiques' message and a 'See how much you're making' section with five checklist items: 'See how much you're making', 'Pay your employees', 'Connect with an accountant', and 'Add the finishing touches'. To the right of this section is a callout box titled 'Connect your bank' with three numbered steps: 1. Connect your bank, 2. Review your transactions, and 3. See your profits. Below this is a 'Profit and Loss' summary for 'Last month' showing a net income of '\$0' for February. To the right is a 'Bank accounts' section showing an account for 'Chase Plus Explorer' with a balance of '\$51.78'. On the far right of the main content area is a sidebar titled 'See answers we chose for you' containing a list of links related to bill entry, vendor credits, 1099 reports, recurring sales receipts, and vendor lists. At the bottom right of the sidebar are two support icons: one for 'Need support?' and another for 'Have an account?'. The overall design uses a clean, modern look with a mix of light and dark colors and a clear distinction between the navigation bar and the main content area.

Mock-up



Assisted integration shared panel concept with full-width navigation bar.

Full-width navigation bar allows drawer to have a connection to the "tabs" that trigger it.

Ability to toggle between the two, as well as pop-out the panel.

The mock-up illustrates the 'Assisted integration shared panel concept with full-width navigation bar'. The interface features a dark header bar with the 'intuit quickbooks' logo, the company name 'Maria's Antiques', and standard navigation icons (Search, Help). A green navigation bar on the right contains tabs like 'Assistant' and 'Help'.

The main content area includes a 'Welcome back Maria's Antiques' message, a 'Privacy' toggle, and a 'Connect your bank' section with three numbered steps: 1. Connect your bank, 2. Review your transactions, 3. See your profits. Below this are sections for 'Profit and Loss' (showing \$0 net income for February) and 'Bank accounts' (listing Chase Plus Explorer with a balance of \$51.78).

A large, semi-transparent white box on the left represents the 'Assisted integration shared panel'. It contains a sidebar with navigation links: Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting, My Accountant, and Apps. It also displays a list of tasks: See how much you're making, Pay your employees, Connect with an accountant, and Add the finishing touches. The 'See how much you're making' task is highlighted with a green checkmark and a horizontal line.

To the right of the sidebar is a 'Help' panel titled 'Hi Maria. What can I help you with?'. It lists examples: 'Here's a few examples of what I can do', 'How did I do last month?', 'Income', 'I need help', and 'Help'. A green button labeled 'I need help' is located at the bottom of this panel. At the very bottom, there's a footer with links: 'QuickBooks help', 'Contact us', 'Training classes', 'Tutorials', 'Webinars', and a text input field 'Ask me something...' with a microphone icon.

Mock-up



intuit quickbooks Maria's Antiques + ⌂ ⚙️ ? Help QuickBooks Help - ⌂ X

Welcome back Maria's Antiques PRIVACY ⚙️

Dashboard Banking Sales Expenses Workers Reports Taxes Accounting My Accountant Apps

See how much you're making
Pay your employees
Connect with an accountant
Add the finishing touches

1 Connect your bank
2 Review your transactions

QuickBooks Assistant How did I do last month? I need help Income Help

Check out the **Help** menu in the header, or jump straight to one of these choices:
 QuickBooks help Contact us
 Training classes Tutorials Webinars
 ... Type something... ⌘

Search questions, keywords or topics

Hi Maria, how can we help you?

See answers we chose for you

- Enter and pay bills
- How do I handle vendor credits and refunds?
- 1099 reports
- Setting up a recurring sales receipt in QuickBooks Online
- How do I find a list of all the vendors/vendors linked to a particular expense account?

Need support?
Contact us

Have an accountant?
Find one | Add yours

Mock-up



intuit quickbooks Maria's Antiques + ⚡ ? Help — ✎ X

Welcome back Maria's Antiques

PRIVACY

See how much you're making

Pay your employees

Connect with an accountant

Add the finishing touches

1 Connect your bank

2 Review your transactions

3 See your profits

Hide

Bank accounts

Chase Plus Explorer
In QuickBooks \$51.78

Profit and Loss Last month ▾

\$0 NET INCOME FOR FEBRUARY

\$0 INCOME

\$0 EXPENSES

See answers we chose for you

- Enter and pay bills
- How do I handle vendor credits and refunds?
- 1099 reports
- Setting up a recurring sales receipt in QuickBooks Online
- How do I find a list of all the vendors/vendors linked to a particular expense account?

I need help

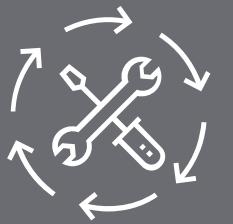
Check out the **Help** menu in the header, or jump straight to one of these choices:

QuickBooks help Contact us

Training classes Tutorials Webinars

...

Type something...



IDS
Self-Help

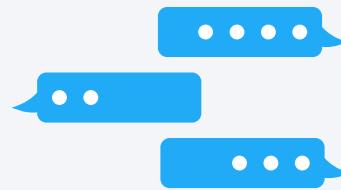
Future phases

Future phases of work



Contact Us

Service design process



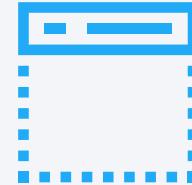
CUI

Deeper explorations



Content strategy

Form factor standards



Headers

Consolidated across products



Mobile Native

Explorations