## SALEFORCE PORTAL REDESIGN

CLIENT | Fortune 500 clients (MobileIron, Frontrange, Guavus, PureStorage)
OBJECTIVE | Transform standard Salesforce portals into branded portals with extended functionality for internal staff and vendors for a unique user experience
SOLUTION | Identify through business requirements on what the important homepage content should have. Apply the brand identity to the site in terms of UI look and feel and UX flow as needed.
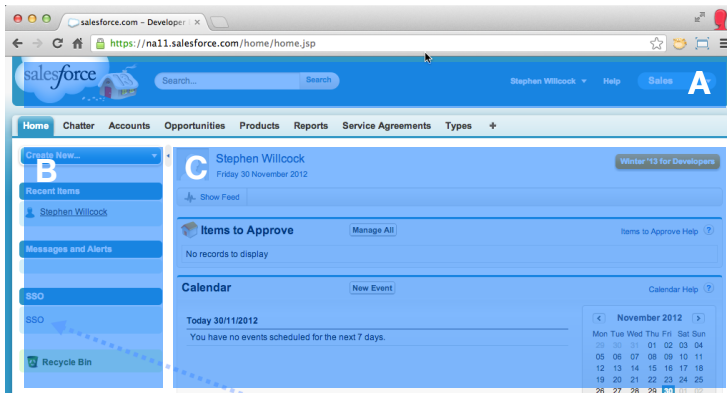

**A |** Header component - apply brand identity
B | Sidebar component - apply custom content and functionality
C | Main component - what the brand wants the user to see initially when it loads. We applied content like custom slideshows or large attractive call-to-action buttons to emphasize easy usability.

Redesigns | As you can see below, we completely redesigned the main page to reflect the client's custom needs. We created custom call-to-action buttons and a slideshow module in different instances to make it welcome for a new user who would be entering the portal.
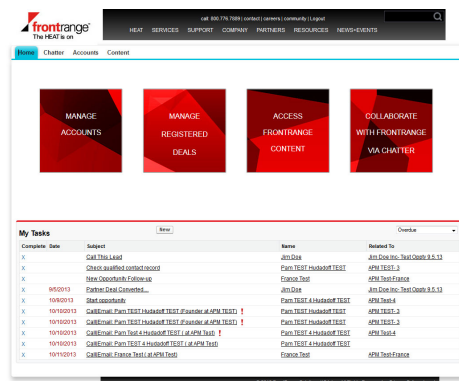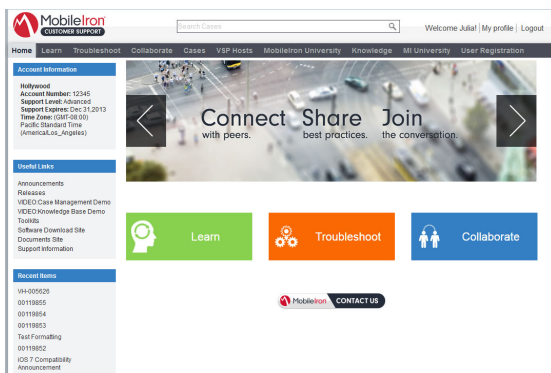
Brand Identity | As you can see below, we applied the brand identity of the clients. We overrode the basic Saleforce look and feel for the corporate brand identity of the client. We applied elements like background images, custom headers and footers, and even custom UI functionality they requested.

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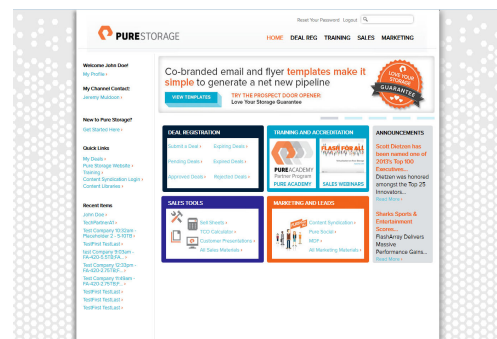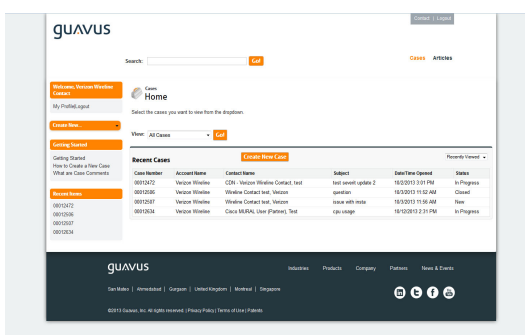
## UX REDESIGN STUDY
SUBJECT | Quickbooks
OBJECTIVE | To explore how Quickbooks could optimize their mobile app in regards to their competition, and how they could simplify the UI or streamline to reach a larger audience while retaining the current without sacrificing complexity.
SOLUTION | We went through the UX flow of the current app to see what we could redesign and alter the flow to be more user friendly. We also reserached the competiting apps to see what exciting features we could draw from them.

Research | We quickly identified competitiors with better UX flows like Freshbooks. They offered less functionality, but the way they implemented was more user friendly and for the small business user it was an easier point of entry and easier to use. We then downloaded the apps and tried them out to see what we liked or what we wanted to remove from Quickbooks

Interviews | We then found small business owners or people who would fit the test case and walked them through the UX flow of Quickbooks and Freshbooks in the sense of the actual product. We asked which one they liked or which one they favored on their use. Many said Quickbooks had many features, but Freshbooks was easy to use and for small scale it made more sense to adopt. From there. we moved onto brainstorming and building out a lo-fi UX flow in Sketch.

Brainstorming | we first looked at the existing app and tried to generate a lo-fi mockup about how we could improve it while not entirely changing the UX flow. We split up the items and re-designed the flow to be more user-friendly and easy to modify.
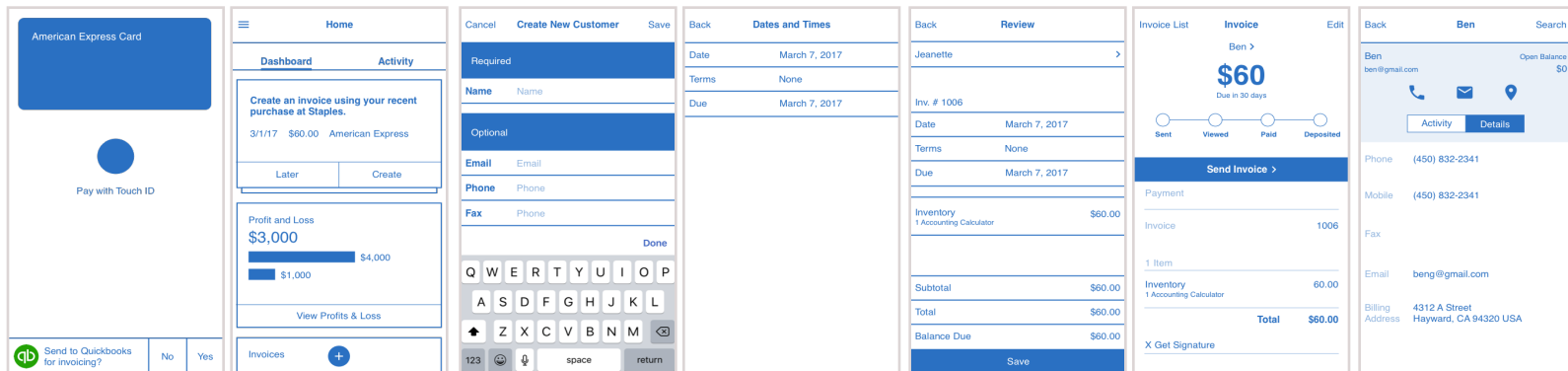
simplifying the payment option

dashboard more user friendly

splitting up the customer creation

sample view of custom field

review screen for new entry

added indicator to show progress

final review before send out

Final Version | We looked at it and we decided to just complete rework the UI process for a isolated process. We felt there were too many steps and to simplify it down to the basic easy functionality like Freshbooks or other competitors.
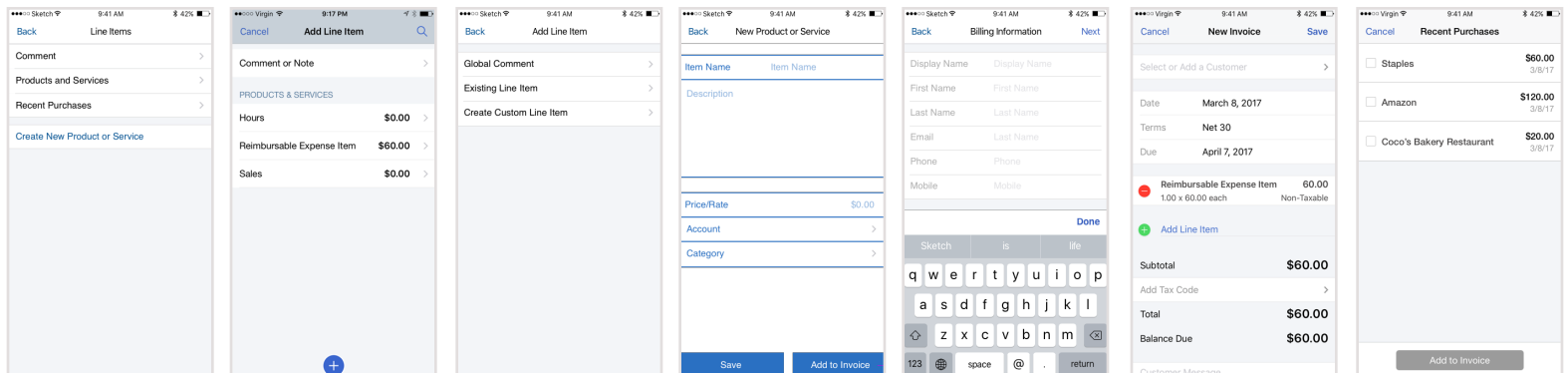
create the base use case

first step of the creation process

what kind of change is it?

adding a new item to invoice

adding a new item to invoice

invoice screen for review

final status screen