

# POPSIXLE ONBOARDING REDESIGN

Design Specification for Prototyping

<b>Version:</b>	1.0
<b>Date:</b>	January 2025
<b>Source:</b>	Veb Bansal UI/UX Recommendations (Big Moves Marketing)

# **Executive Summary**

This document translates Veb Bansal's UI/UX recommendations into actionable design specifications for rebuilding the Popsicle Shopify app onboarding experience. The goal is to increase activation rates by creating a Shopify-native, trust-building experience with clear path-to-value.

## **Key Problems to Solve**

- Current UI feels "early-stage" and lacks Shopify-native polish
- Pricing screen creates cognitive overload and decision paralysis
- Onboarding doesn't communicate "path to value" clearly
- No persistent guidance when merchants return after interruption
- Dashboard shows empty metrics before setup is complete

# Screen 1: Welcome & Pricing

**Location:** Post-install landing screen

**Goal:** Reduce cognitive load, shift focus from billing to activation

## Design Requirements

### 1.1 Simplified Pricing Card

Element	Specification
Headline	"Start free trial" (primary CTA style, 18-20px bold)
Primary Price Line	Single dominant price: "\$X/month" or "\$0 today" (24-28px)
Usage Line	Plain language: "Then \$Y per \$1,000 processed (after first \$10K)" (14px, secondary color)
Reassurance	"Cancel anytime. No long-term contract." (12px, muted)
Details Link	"See pricing details" text link → opens modal/accordion

### 1.2 Remove from Initial View

- Eliminate separate "Base Fee" and "Usage Fee" sections
- Remove competing typography sizes
- Move detailed pricing breakdown to expandable section
- Convert long text paragraphs to bullet points in modal

### 1.3 Screen Layout (Wireframe)

**HEADER**  
Welcome to Popsixle  
*1-line value prop: "Server-side tracking that actually works"*

**MAIN CARD**  
"Get set up in 5 minutes"  
Step 1: Connect channels [buttons]  
Step 2: Enable app embed [button]  
Step 3: Verify events [button]

**RIGHT RAIL / BELOW**  
Pricing Preview (collapsed by default)  
*"Free trial: X days" + "\$X/mo + usage" + "See details"*

**FOOTER**  
"View setup guide" | "Contact support"

# Screen 2: Guided Onboarding Flow

**Location:** Main onboarding wizard

**Goal:** Single guided flow with 4-5 steps max, clear progress, reduced cognitive load

## Design Requirements

### 2.1 Step Structure

Step	Primary Outcome	UI Elements
Step 1	Connect Channels	Facebook, Google, TikTok buttons + "Set up manually" option
Step 2	Enable App Embed	REQUIRED - Deep link to Shopify theme editor, screenshot preview
Step 3	Configure Events	Smart defaults pre-selected, optional customization
Step 4	Validate Setup	Test event button, real-time confirmation, success state
Step 5	Go to Dashboard	Success celebration, CTA to dashboard with meaningful data

### 2.2 Progress Indicator Requirements

- Display "Step X of 4" prominently (16px, bold)
- Visual progress bar or step dots at top of each screen
- Completion percentage: "2/4 complete" visible at all times
- Left sidebar showing all steps with status indicators (like AIMerce pattern)

### 2.3 Navigation Controls

Control	Behavior
Next Button	Primary action, always visible. Gate ONLY for required steps (App Embed).
Skip	Text link for optional steps. Show warning: "You can do this later from dashboard"
Back	Secondary button, left-aligned, allows returning to previous step
Skip to Dashboard	Top-right corner link: "Skip to Dashboard >" (like AIMerce)

# Screen 3: Dashboard (Post-Onboarding)

**Location:** Main dashboard / home screen

**Goal:** Activation-first layout, persistent setup guide, no empty metrics

## Design Requirements

### 3.1 Component Order (Top to Bottom)

Order	Component	Description
1	<b>Setup Checklist</b>	Persistent accordion: "0/4 complete" with 1-click actions
2	<b>System Status</b>	Health check: "Waiting for first event" / "Receiving events" / "Issues detected"
3	<b>Connections Module</b>	Platform cards with status + "Connect" CTA
4	<b>Proof of Setup</b>	"Last event received", "Events in last 24h", "Test event" button
5	<b>Impact/Reporting</b>	ONLY show after data exists. Empty state: "Connect a channel to start seeing impact"

### 3.2 Persistent Setup Accordion Specs

- **Visibility:** Always visible for new installs until 100% completion
- **Progress:** Show "X/4 completed" with progress bar
- **Steps:** Listed vertically with status and 1-click CTA for each
- **Behavior:** Collapses to "Setup complete ✓" when done
- **Pattern:** Reference OnePixel's dashboard setup guide card

### 3.3 Blocker Banner

When critical action is incomplete (e.g., app embed not enabled), show sticky warning banner at top:

#### ⚠ Enable app embed on theme

To start tracking events, please enable the Popsixle app embed block in your theme settings. [\[Enable app embed\]](#)

# Component Library: Status Indicators

## 4.1 Connection Status Chips

Normalize all status UI across the app with consistent chips and icons:

Status	Visual Style	Usage
Connected	● Green chip	Channel successfully connected and receiving events
Not Connected	○ Gray chip	Channel not yet connected
Needs Attention	● Yellow chip	Connected but requires action (e.g., token expiring)
Error	● Red chip	Connection failed or events not flowing

## 4.2 Help System Components

### Inline Tooltips

Add "What is this?" icon tooltips next to:

- Pixel ID fields
- Event settings
- Customer matching options
- Consent/privacy settings
- Permission request explanations

### "Show Me How" Links

Each complex action should have a "Show me how" link that opens a modal with:

- 2-3 numbered steps
- Screenshot or GIF
- Link to full help article

### Persistent Help Panel

Add a persistent "Need help?" element that is contextual to the current step. Include: "Book a free onboarding session" CTA and "Watch onboarding walkthrough" video link.

# Visual Design System

## 5.1 Shopify-Native Alignment

The UI must feel like a native Shopify Admin extension. Reference Polaris design system guidelines:

Element	Specification
Layout	Consistent spacing (16px base), card-based components, clear visual hierarchy
Typography	Consistent font sizes, clear hierarchy, no competing type styles
Cards	Subtle shadows, rounded corners (8px), consistent padding (20px)
Buttons	Primary (filled), Secondary (outlined), Tertiary (text link). Consistent sizing.
Whitespace	Reduce "blank canvas" feel. Use single dominant onboarding card with clear focus.

## 5.2 Label Recommendations

### Navigation Bar Updates

Current Label	Recommended Label
(Review current nav)	Dashboard, Connections, Events, Settings

### Action-Oriented CTA Labels

Avoid	Use Instead
"Start trial"	"Enable tracking" (value-focused)
"Submit"	"Connect Facebook" (specific action)
"Configure"	"Enable app embed" (outcome-focused)

# Competitor Reference Patterns

Use these competitor patterns as visual references during prototyping:

## 6.1 AlMerce

- Left-hand navigation with step progress
- "Skip to Dashboard" option in top-right
- Onboarding video prominently featured
- "Book a free onboarding session" CTA in sidebar

## 6.2 OnePixel

- Persistent "Setup guide" accordion on dashboard
- Top banner for critical missing requirements
- Progress indicator: "0/4 completed"
- Channel count widgets below setup guide

## 6.3 Elevar

- Step-by-step wizard flow
- Auto-detect pixel ID option
- "How do I get it?" inline help links
- Optional step to check events manager

# Implementation Priorities

Recommended order for prototype development:

Priority	Change	Impact
P0	Simplify pricing screen	Highest drop-off point
P0	Guided onboarding flow (4-5 steps)	Core activation driver
P1	Persistent setup accordion on dashboard	Reduces abandonment
P1	Reorder dashboard (setup first)	Eliminates empty state confusion
P2	Shopify-native visual polish	Trust building
P2	Inline help system (tooltips, modals)	Reduces support load
P2	Standardize status chips and labels	Consistency and clarity

— End of Design Specification —