Transaction Details: Round 2

9/13/19 – Ryan Graves

Disclaimers...

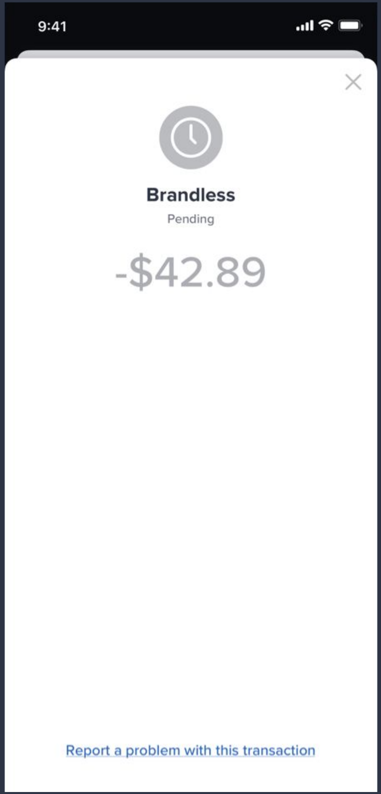
This deck represents thinking that hadn't been "thunk" as of 24 hours ago. As such, there are probably holes to poke. **Poke them.** Work like this needs to be robust, covering edge cases and providing smart solutions.

Additionally, as per usual, this work could potentially be applied to the redesign, but all current exploration has been done within the confines of our current design language. :)

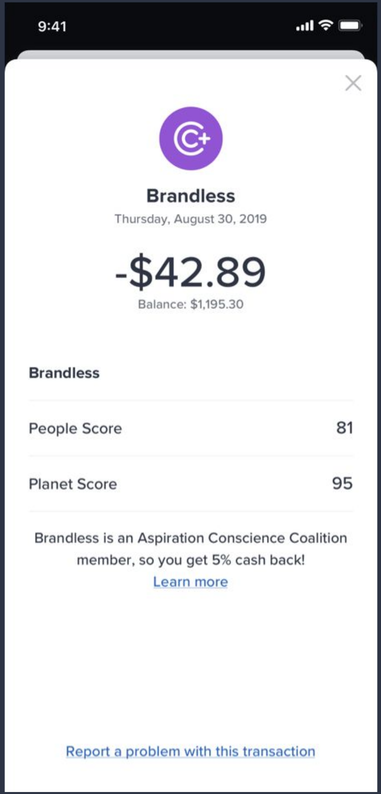
Initial Goals

- We'll soon have AIM and CC data for **pending transactions**, and we'd like to accommodate that in the transaction detail view
- We'd like to include an **overall Aspiration Impact Measurement,** either in addition to the People and Planet scores or in place of them
- We'd like to display **earned cash back** amounts for transactions

Pending (today)



Posted (today)



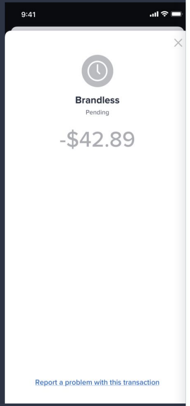
First Pass

The initial solution seemed simple:

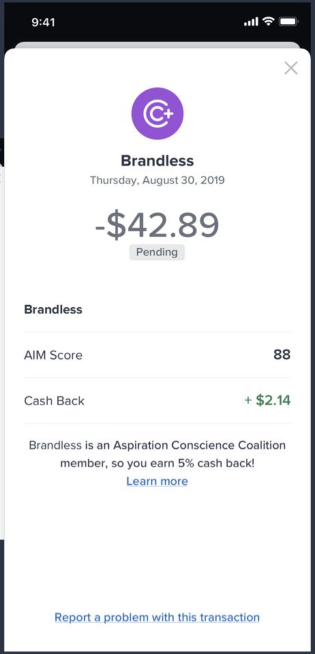
- Replace pending icon with CC icon
- Add Pending badge under transaction amount
- Replace People and Planet with AIM score
- Add new row for Cash Back

Great! But how would this need to be handled on the Activity view?

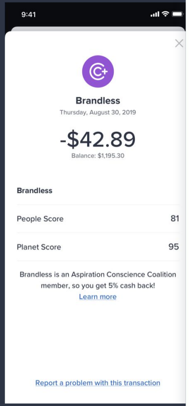
Pending (today)



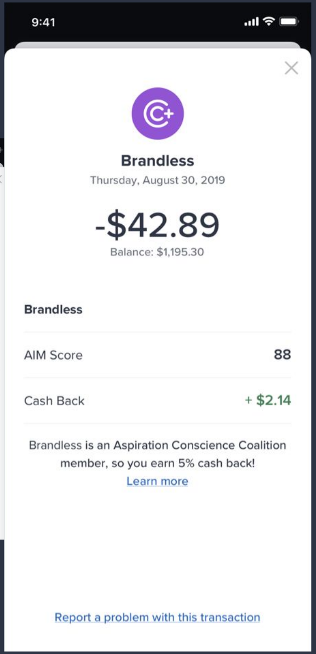
Pending (proposed)



Posted (today)



Posted (proposed)

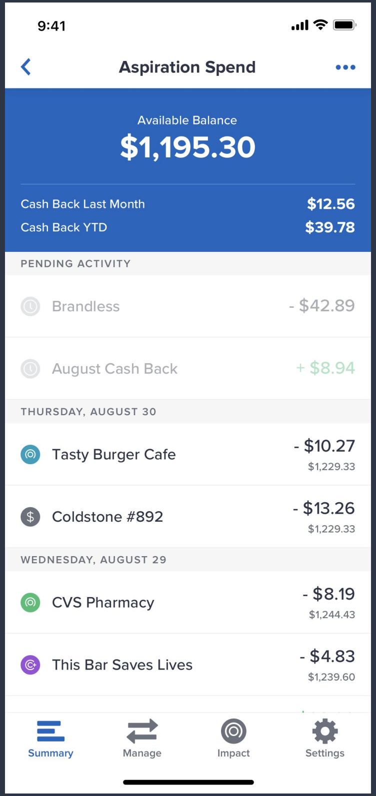


First Pass

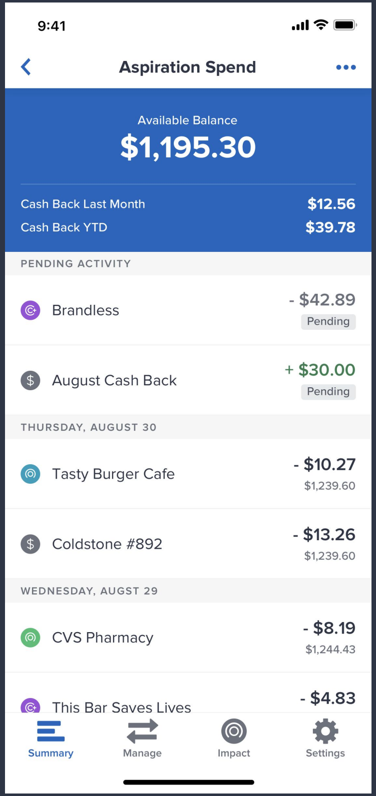
For the Activity view, my first pass involved:

- **Add the correct transaction type icon** instead of the pending icon
- **Add a pending tag** to help make clear that transactions haven't posted
- **Increase row height from 64 to 72** (they were feeling a little snug, I've wanted to do this since we added running balance)
- **Increase pending transaction opacity** from 40% to 100% (to address outstanding accessibility issues)
- **Darken positive transaction values** from Mint 500 to Mint 700 (to address accessibility issues)

Activity View (today)



Activity View (proposed)

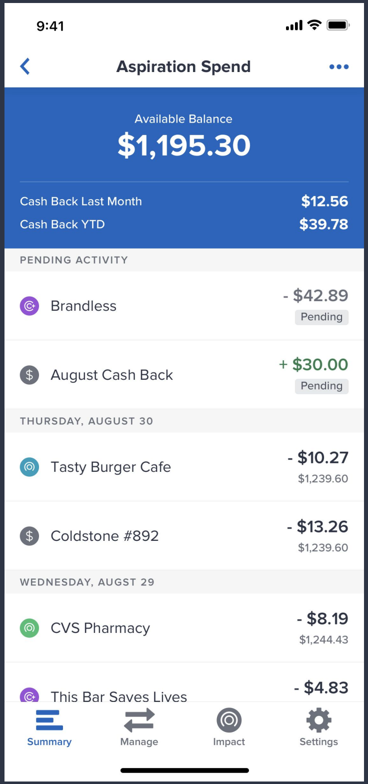


Feedback from First Pass

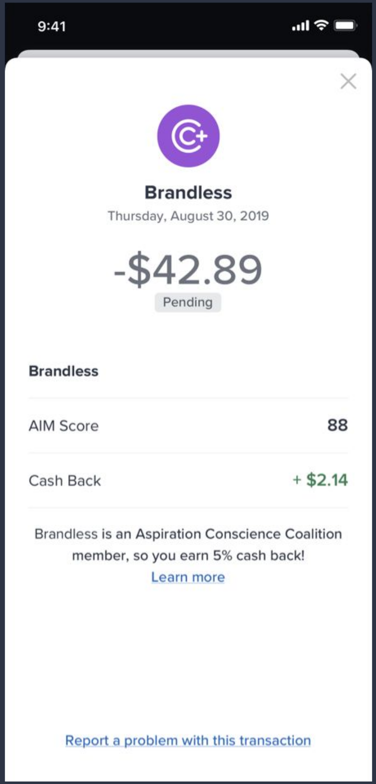
Product feedback based on the screens to the right:

- Could we find a way to include the People and Planet scores in addition to the overall score?
- **Existing from shipped version:** there's redundancy around having the Company name twice, especially when it also comes through cleanly as the transaction name
- **Existing from shipped version:** It's difficult to make the connection between the icon and the CC text down below
- **Personal**: I've gotten sick of the cotton candy coloring of the transaction icons and they feel heavy
- **Personal:** I wanted to explore shifting the "report a problem" link to a subtle button style, adopting a potential 6px border radius.

Activity (first pass proposed)



Pending Txn (first pass proposed)



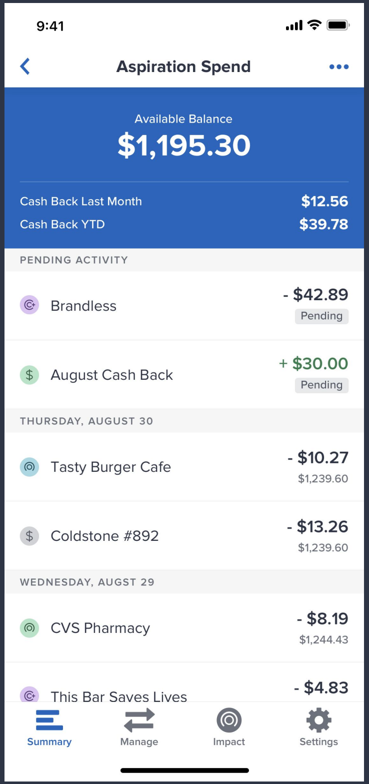
Icon Colors

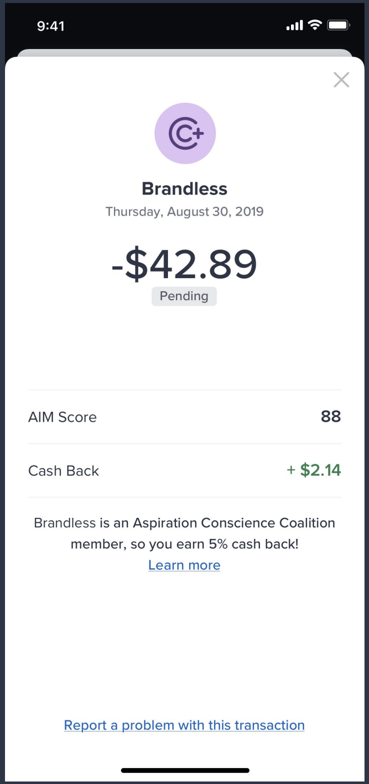
The first thing I tackled was the **icon colors**.

I pulled from the Marketing team's extended palette in order to shift from dark icons with light glyph to a light icon with dark glyph, which helped reduce the weight and saturation.

It didn't take too long to get these to a place where I felt much better about them, and so they remained like this for the rest of the exploration. Some work still needs to be done to nail these down a little.

One note: Gerry helped arrive at the idea of having a "generic" icon in green for positive transactions, in addition to the grey one we use for negative transactions. To me, this seems obvious and smart.

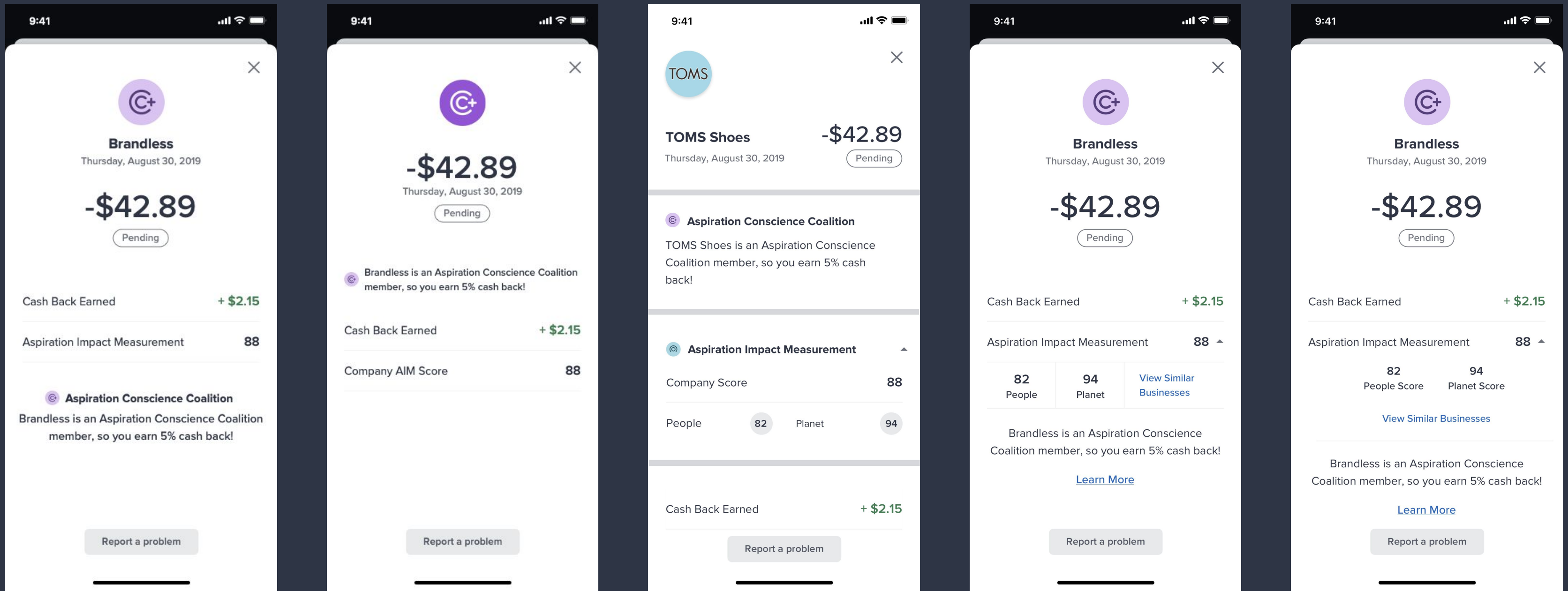




Further Experimentation & Exploration

At this point, Gerry and I hopped on a call, and spent some time together exploring a lot of wild ideas for how to approach solving this.

The ideas drifted between “fine” and “yikes” as we explored, but nothing quite landed in a good spot:



But then...

It was at about this point that I stumbled onto an idea that suddenly started to tie things together. I was so excited about this that I decided to name it.

It's a feature I've lovingly dubbed... ** drumroll **

Tidbits!

The idea is this: When you’re viewing a transaction, there’s all the ***basic info*** — you know, top-of-the-hierarchy stuff that’s core to the idea of what a “transaction” is for a customer.

But then there’s all of this other stuff. Little tidbits of info that help the customer understand her transactions and spending habits better.

What if we could develop a comprehensive, cohesive system for these tidbits across all of our transactions?

...I think we can!

Applying Tidbits to the Current Problem™

Tidbits provide a way for us to neatly organize all of the second-tier information on a transaction.

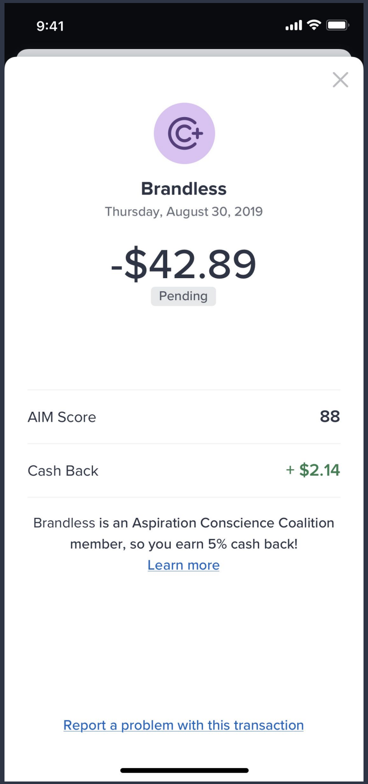
Iconography provides an opportunity to **help the customer make connections** between tidbits of info and other pieces of the app. For example:

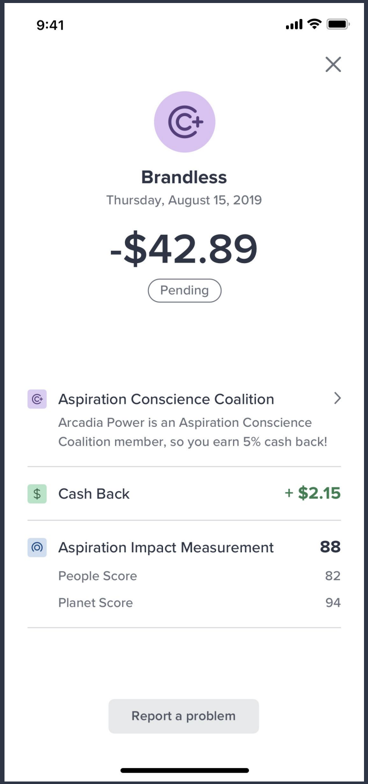
- The Conscience Coalition Tidbit is **clearly associated with the CC icon**, and **reinforces the Aspiration Conscience Coalition name**.
- The Cash Back Tidbit has a green dollar icon, which **helps the customer understand** this is money coming back to them. It's also positioned **directly below the CC note about earning cash back**. How convenient!
- The AIM Tidbit has visual connection to the **Impact tab icon** in the app

To accommodate different device sizes and align the platforms, we ditch the iOS two-card layout in favor of a scrollable view.

And all of this gets packaged up in a neat evolution of the current design, while taking on sort of a real-world receipt view. Fun!

So how do we take this further?





Extending Tidbits: Haven!

Our upcoming Haven integration is going to provide us with even more tidbits we can incorporate.

Among other things, Haven will provide:

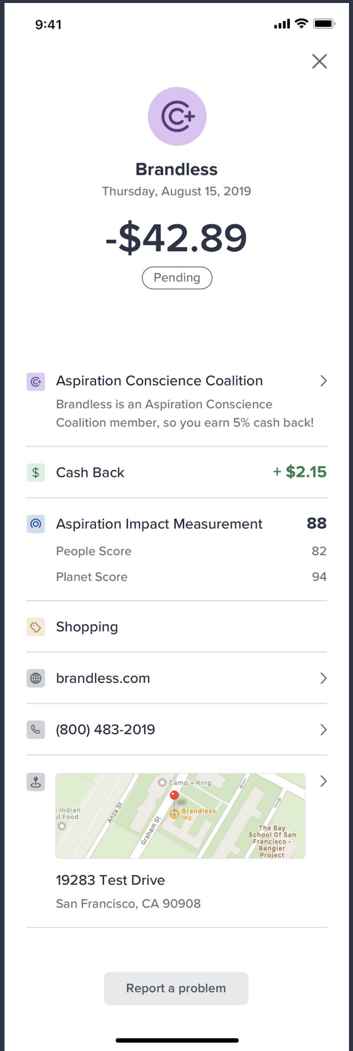
- Clean company names
- Transaction categories
- Company URLs
- Contact info such as phone numbers and addresses

Wenner and I experimented with pulling this info into transactions as Tidbits, which demonstrates how extensible this system can be.

We could even establish a ruleset for ordering of Tidbits. Something like:

1. Company Special Programs, like CC or Limited promos (i.e. “This purchase entered you to win a Tesla!”)
2. Customer rewards, such as cash back
3. Aspiration Impact Measurement
4. Haven transaction category
5. Other Haven metadata

Cool. How would Tidbits work with investments?

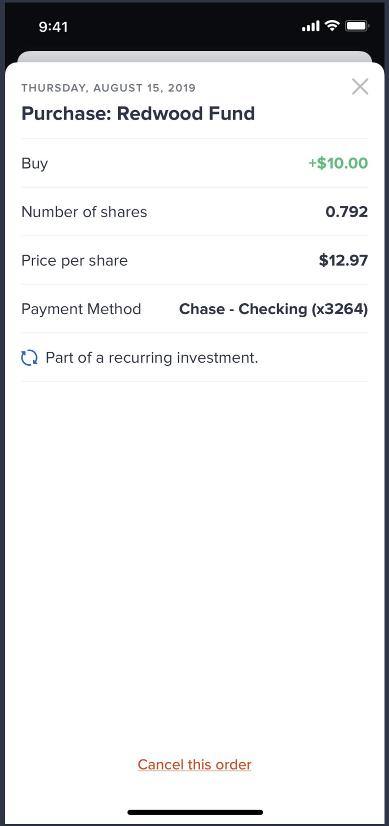


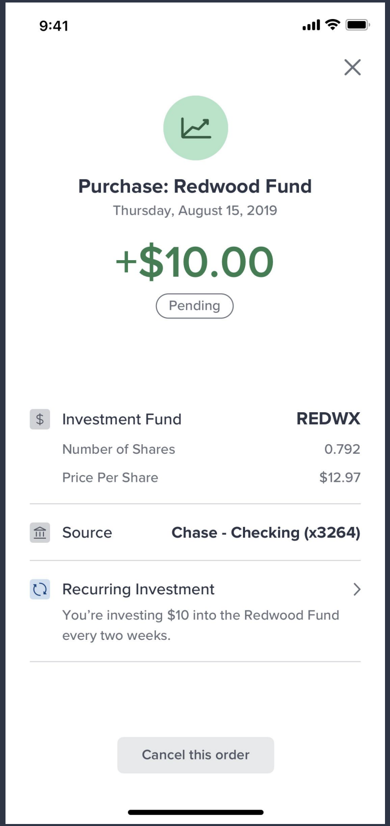
Applying Tidbits to other types of transactions

Here is an example of an investment purchase. On the left is the current version, and on the right, we've reformatted the information using Tidbits.

- There's now a clear hierarchy to the information.
- Related data about the investment purchase is grouped intelligently.
- The tidbit structure allows room to add helpful text to the Recurring Investment note, as well as link out to that investment to manage it further.

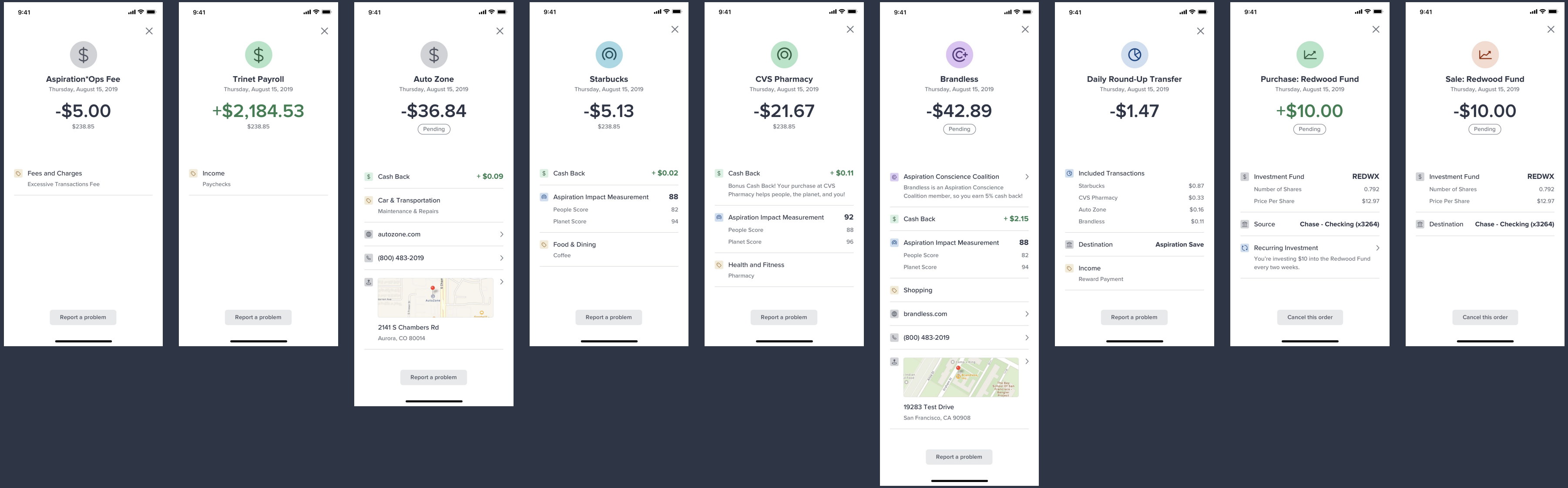
Nice! Let's look at some more examples...





Examples

Tidbits are flexible, and can serve us well on every type of transaction, regardless of how much information we have.



One more thing...

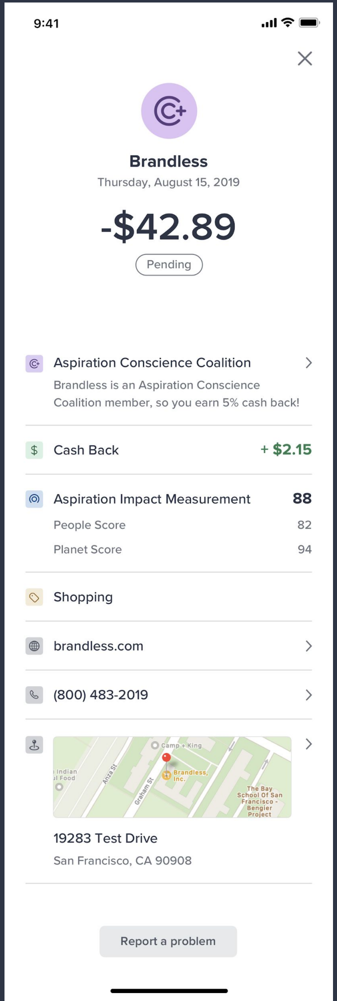
(Sorry. It’s cheesy, but I couldn’t help myself)

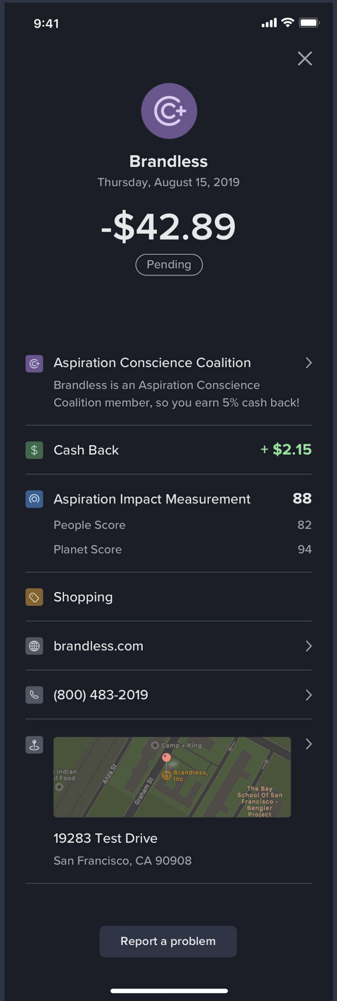
Dark Mode

We don't necessarily have plans to adopt dark mode, but it is supported by iOS 13, as well as Safari and Chrome browsers on macOS.

Thanks to our 100-900 color scales, it's relatively straightforward to adopt a dark appearance for these new transaction views and tidbits.

Of course, we'd want to finesse this a bit, **but it's not bad for five minutes of effort.**





Tada! Tidbits. That’s all.

“Tidbits.” Kind of adorable, right? Makes me think of Tim Hortons.. What are their donut holes called? Tenbits? Timbits? Something like that. Anyway…