# CP UI/UX Review

## 1.0 RESEARCH

1.1 Major Takeaways So Far

- Prioritize data clearly and concisely.
- Keep critical information at the top/most prominent.
- Separate out critical/actionable data from just "interesting" data that is not the most critical.
- What would users do with the actionable data?
- Don't just define metrics, show how data relates to other data. Strive for a holistic, comprehensive view, i.e., not just throwing metrics into a grid… this gives it a hodgepodge appearance, can appear like a laundry list of unrelated metrics.

1.2 Key UI / UX Design Patterns

- Full width, fluid in all screen resolutions/sizes.
- Design for "at-a-glance" monitoring or overviews.
- Intended for a smaller group of people with specific tasks in mind, such as checking data, or updating a profile.
- Clean, simple design, focus is on the content.
- Use of color to draw attention to areas that require the most attention.
- Reduce physical effort and mental effort.
- Give users a single view of complexity wherever possible – i.e., display various states of current status in a single overview.
- Progressive disclosure
- Use of alerts
- A linear task flow for the newbies (i.e., wizard), open-ended set of commands for experts.
- Downplay knowledgebase in lieu of helpful hints and descriptions within the main interface, on-screen instructions, beefed-up super-tooltips, and click-tips.
- Emotional design – make it fun, sense of playfulness, use of micro-interactions.
- Personalization – Deliver to the user the content that matches their role!

## 2.0 IMPLEMENTATION

### 2.1 Global

2.1.1 Shopping navigation

- Remove main website navigation and make control panel enclosed, with navigation and functions pertaining only to the control panel. When the user is here, they have specific and crucial tasks to complete and information to review. CP-related functions (blue top menu) are separated by shopping-related functions (main menu with links that all take you to another interface) followed by more CP-related functions (all secondary menus and page elements.) It hinders usability by adding a whole set of complicated interface options. The retail customer has reached the control panel because they have already purchased a product, so the decision/purchase process is already complete, and so "Shop for Certificate" at this point should be a secondary goal, focusing on the specific tasks of managing current certificate lifecycle and payment/profile-related actions. On a similar note, remove "Shop Now" from sub-menu or demote to last menu item. In the event the retail customer needs to purchase another cert, present options at time of need, for instance, when cert has expired, and a new cert must be purchased.

### 2.1.2 Blue "Account" navigation

- "Incomplete orders" is both here and in box indicators below. Both are global elements, so it seems redundant to repeat. Use valuable screen real estate for Message Center or Alerts.
- "New Stuff" is vague and might give the user pause… requiring mental/physical effort (i.e., click) to determine what information this refers to and whether it's relevant or useful. User might question, is "New Stuff" related to my certificates? Company news? New certificates? Remove, or if needed, rename to aid comprehension and/or move to a less prominent location.
- Add ability to "Add Funds" close to "Account Balance"
- Add Chat Now.
- Add Cart pop-down menu if possible.
- Display ticket status (if any are status: "Waiting for Customer") and/or actionable message/alerts.

### 2.1.3 Main status boxes/category quick links

- Are total orders crucial information for the retail customer? For resellers, this could be "interesting" data, but it's rare for the retail customer to have a large number of orders. Additionally, it takes a position of prominence that could be better used for other data.
- Incomplete Orders – This is the most actionable and important data. Some more information in terms of what stage of incompletion the order is in would be helpful, i.e., is action required from the user? Is the user is awaiting configuration or response? And how could this be understood at a glance for multiple orders in different stages?
- "Cancellation Report" – Are there many cancellations generated and is this critical information? Consider changing this to Message Center.
- Add "SSL Installation Service" to one of the global menus.
- New boxes:

| | | | | |
|---|---|---|---|---|
| Next Steps (Actionable: I need to do something asap) | In Process (Waiting to hear back from others – i.e., tech person or CA – but process is not complete.) | Expires Soon (I have to renew pretty soon) | Messages/Alerts/ Open Tickets (If a message is waiting for me I want to know) | SSL Installation Service |

### 2.1.4 Chat

- Move to lower right-hand side of browser window and follow conventions with styling.

2.1.5 SSL Helpdesk Graphic

- This is linking to knowledge base. Should go to chat/helpdesk or change graphic.

2.1.6 Labeling / Terminology (Global)

- Anywhere were it says "Buy Now" or "Shop Now", change to "Obtain Certificate" or "Request Certificate", as we only sell one type of product. I would say "Buy" is appropriate if buttons do go to purchase pages.

**2.2 Dashboard**

2.2.1 Our Plugins

- Remove for retail customer. Specific to Reseller accounts.

2.2.2 Customer ID

- Move or reduce in size. Makes the user feel more like "a number". ID is important and needs to be easily found when speaking to support team, but doesn't need to be so prominent.

2.2.3 Account Type: DEBIT

- Remove, as all retail customers are this account type.

2.2.4 Recent Orders

- This would be useful to see at a glance if there were a large number of orders purchased over a long period of time (i.e., Resellers). For the Retail Customer, this is not a useful metric. Let this be an overview of (possibly tabbed) orders with important statuses instead, i.e., Incomplete or Pending, Expiring etc.. (no Complete Orders) and sort by most recent. Show prominent color callouts if certs are expiring and use friendly dates like "tomorrow", "Wednesday", "Next Week", "In 2 Weeks", etc.

2.2.5 Box Below Recent Orders

- Overall, this box appears like a laundry list of metrics and buttons/links. Needs to be grouped/organized either by type or by category for quicker comprehension. Consider more personalization by populating this box with links to the specific features/pages most frequently used/visited by the user logged in.
- Do Retail Customers normally have a running balance? So far, I haven't seen this as other than $0.00.
- Total Transactions – Is total dollar amount for transactions an important metric? How does the user use this information? Do they need to see this every time they view the dashboard?
- "Eligible for Cancellation" seems like odd phrasing. When I go to that page, the critical information really is the remaining days of refund eligibility. I'd rather see that on the dashboard or showing via some calendar. Otherwise, change text to "All 30-Day Money Back Orders."

- Since a number of critical data seems to be date related, consider integrating some calendaring feature into dashboard, allowing the user to comprehensively view all critical dates.

2.2.6 vCard

- Using a photo of the support team member is great. I would consider changing this button text to “Get Contact Information” since there is not only vCard format available, but also SMS and QR Code (more current technology.)
- On form page, change button text from “Ans” to “Submit”. Add format field validation to fields. Phone field only accepts a string of numbers without special characters. Took me 3 tries to get it with no feedback.

**2.3 Interior Pages**

2.3.1 Shop Now

- As mentioned, move or eliminate for Retail Customer. Additionally, copy on these pages is geared toward the Reseller (“How to Sell/Position/Market OV to Your Customers”.)
- That said, the brief overview copy that appears at the bottom of each of the category pages that describe the type of certificate along with top 5 FAQs is great and would be informative for the Retail Customer – here in the CP as secondary content, but primarily on the main retail website.

2.3.2 My Orders

- Change “Orders” to “Certificates” throughout. An “order” is a purchase, but the product is a “certificate” to the user. It’s the product/certificate that is “pending” or “expired” not the order. Make the distinction between certificate status and order status if there is one.

- *Statuses*
    - Currently statuses are: “Active”, “Pending” and “Expired.”
    - Have a key available for all statuses.
    - See Process Flow for suggested statuses.

- *Pending*
    - When you click “Incomplete Orders” those that have a status of “Pending” are filtered here. The difference in terminology could be a source of confusion. Consider changing “Incomplete Orders” to “Pending Orders.”
    - When an order is “Pending” (generation process has not been complete) – this is when the user is most likely to cancel their order. So, for Pending orders, it needs to be more clear that it’s urgent that action is taken by the user. Additionally, user needs to know what stage has been completed already and what the “micro steps” are in the process (See Process Flow.)

- *Send Invitation Link* – This is odd phrasing/confusing. As a retail customer, I’m not sure what kind of invitation this is referring to, who I would send it to, or why (see Img 1). In my account, these links actually start the Certificate Generation process, which would be confusing if the user had an expectation that they would be going to a page where they could "send an invitation." Change button text to "Start Generation Process". Add popover for additional clarity. Seems like a reseller feature (i.e., user expected to go to page and copy the link to send to customer. Instead, provide automated feature that sends the link in an email.)

- *Table of Results Set*
  - Date: Change to "Purchase Date."
  - Use shorter date format 12/12/18.
  - Separate product name from domain, and allow sorting so you can sort each independently.
  - Change "Transaction ID" to "Receipt" so user understands where this link goes to.
  - FAQ goes to top 5 FAQs at the bottom of an Order Details page (anchor link.) Show FAQ's in sidebar, modal or separate page instead. When linking via anchor link to the bottom of a page, the page needs to be long enough to allow browser to position the anchored section at the very top of the browser window. Some pages are too short.
  - Add column for "Next Steps" with available actions. You could display available actions + CTA in a dropdown – i.e., "Generate CSR (+ button),"Notify my Technical Contact" (+ button), "Renew Now" (+ button), etc. You could also add "Get Help" (+ button) & "Install For Me" (+ button.)

- *Order Details*
  - Certificate Info > "Order Note" – hide if there is no note associated. Takes up too much screen real estate.
  - "Vendor Status: Completed (ACTIVE)" – hide if the status is active. This information is not necessary to display to user.
  - Put the pertinent CTAs at the top (Download Certificate, Re-Issue Certificate and Manage Reminders buttons.)
  - Admin Details – allow user to edit, preferably in page.
  - Technical Details – allow user to edit, preferably in page.
  - Certificate Options –
    - Renew (on expired Free RapidSSL) – Just goes to the home page. Provide some explanation that user needs to purchase a new certificate. Typical expectation would be that user could click a button and just renew the cert they had previously, which is not the case with an expired certificate. Explain why this is necessary here, provide direction. Additionally, it would benefit the user to communicate this before the certificate expires to encourage renewal while certificate is still active.
    - Manage Reminder – Need to allow the user to change here the email address of the person getting the reminder as well as the technical contact.

#### 2.3.4 *Send Invite Link*

- Remove for Retail Customer – This content is for Resellers.

#### 2.3.5 *List Invite Orders*

- This is actually where you can send the invitation to your technical contact (clicking envelope icon.)  Consider changing link text, and adding popover for additional clarity.
- Again, button appears that says “Invitation Link” that goes to the start of the Generation Process. For Retail Customer, change button text to “Start Generation Process”
- Allow easy way here for user to add/edit email for technical contact to receive the invite.
- Table should look very similar to table design used throughout, i.e., using same column headers, if applicable and the same icons where icons share the same function (e.g., the icon representing “view” is different here than on other tables.) Icons should be labeled (i.e., “View Invite Order”) either within the interface or with hover text.

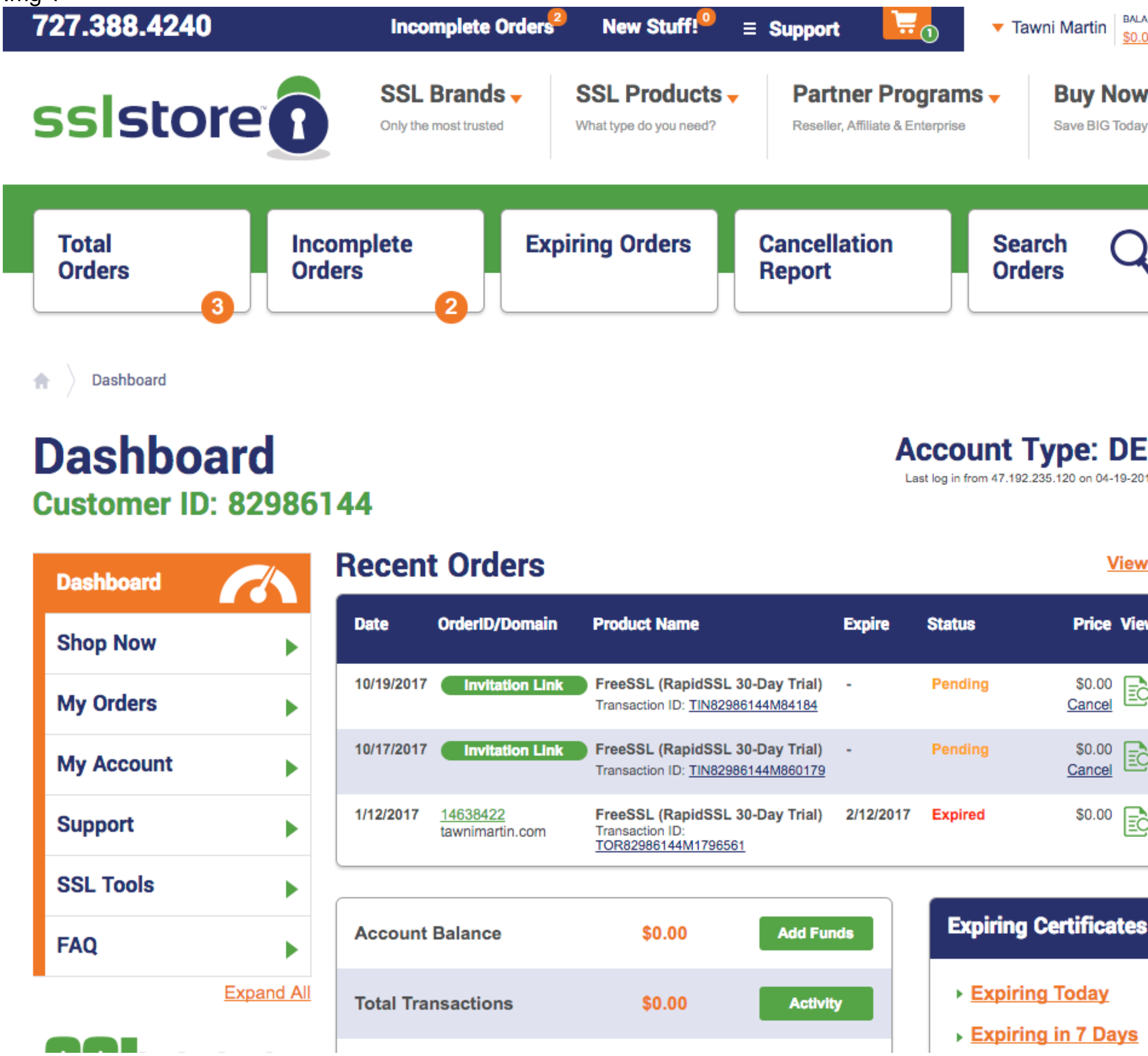
2.3.6 *Support*

- Display ticket status prominently in the navigation and dashboard if the status is open or “Waiting for Customer.”

<u>Other Notes</u>

- Certificate Generation Process – Once a certificate has been purchased, include the actual seal at the top of the page with clear direction as to how to use it and where to find it. People need to know where to find the seal immediately, rather than having to scroll down / hunt for it.
- Messages – I suggest we add an “Alerts” or “Messages” section.. Nick mentioned that retail customers aren’t self-motivated to visit the control panel to proactively manage their certificates. Normally, they receive an email telling them what to do and many of the emails are ignored. For instance, if they received an email with an urgent alert, and they ignored it or missed it, it would show up here.  And when the issue is resolved, it could be greyed out or checked off. I personally have received GoDaddy emails, and just made a mental note that “something” needs to be done with one of my accounts, but I was too busy to read the email, and don’t have the time to look it up in my inbox.. It would be great to just log in and see any alerts/messages pending in one place.
- Let’s look at Google Analytics/Mouseflow for more insights before redesign. We should be looking for high bounce rates and exit rates (on pages that are supposed to provoke action), time on page, and engagement with interface elements (i.e., high engagement: consider factors and work into new design, low engagement: consider removing.)
- Overall – Lets’ think of ways we can utilize system logic for more personalization, to hide content or features that are not relevant to the user type or status.
- Consider adding a tour through the features of the dashboard.

Img 1


727.388.4240
Incomplete Orders 2
New Stuff! 0
Support
1
Tawni Martin
sslstore
SSL Brands
Only the most trusted
SSL Products
What type do you need?
Partner Programs
Reseller, Affiliate & Enterprise
Buy Now
Save BIG Today
Total Orders 3
Incomplete Orders 2
Expiring Orders
Cancellation Report
Search Orders
Dashboard
Dashboard
Customer ID: 82986144
Account Type: DE
Last log in from 47.192.235.120 on 04-19-201
Dashboard
Shop Now
My Orders
My Account
Support
SSL Tools
FAQ
Expand All
Recent Orders
View
Date
OrderID/Domain
Product Name
Expire
Status
Price
10/19/2017
Invitation Link
FreeSSL (RapidSSL 30-Day Trial)
Transaction ID: TIN82986144M84184
-
Pending
$0.00
Cancel
10/17/2017
Invitation Link
FreeSSL (RapidSSL 30-Day Trial)
Transaction ID: TIN82986144M860179
-
Pending
$0.00
Cancel
1/12/2017
14638422
tawnimartin.com
FreeSSL (RapidSSL 30-Day Trial)
Transaction ID: TOR82986144M1796561
2/12/2017
Expired
$0.00
Account Balance
$0.00
Add Funds
Total Transactions
$0.00
Activity
Expiring Certificates
Expiring Today
Expiring in 7 Days