

Finding an account v1

Search methods

I utilised email addresses as the primary identifier for finding accounts.

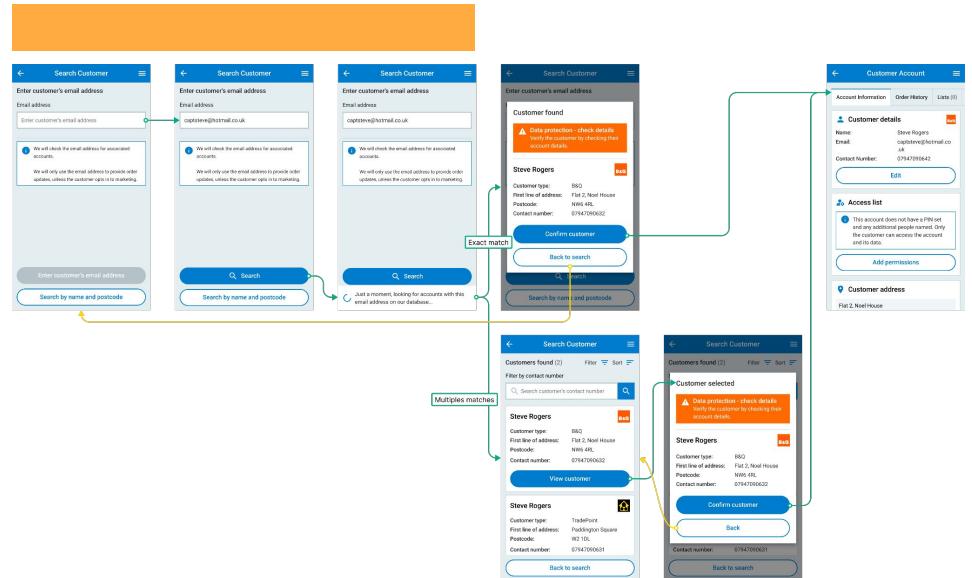
Pain point addressed: the aim was to alleviate the pain point of having excessive search parameters leading to lengthy results lists.

Justifications:

- The majority of our customers (90%) have an associated email address, minimising potential disruptions.
- Having one search parameter aligns with practices adopted by other institutions, such as the NHS and Holland and Barrett.

Doing this allows instant match results to come up more frequently.

We also allowed the ability to search by a customer's last name and postcode as a fallback option. And this also used forms. See following slides for this but this interaction is not too different.



Finding an account v1

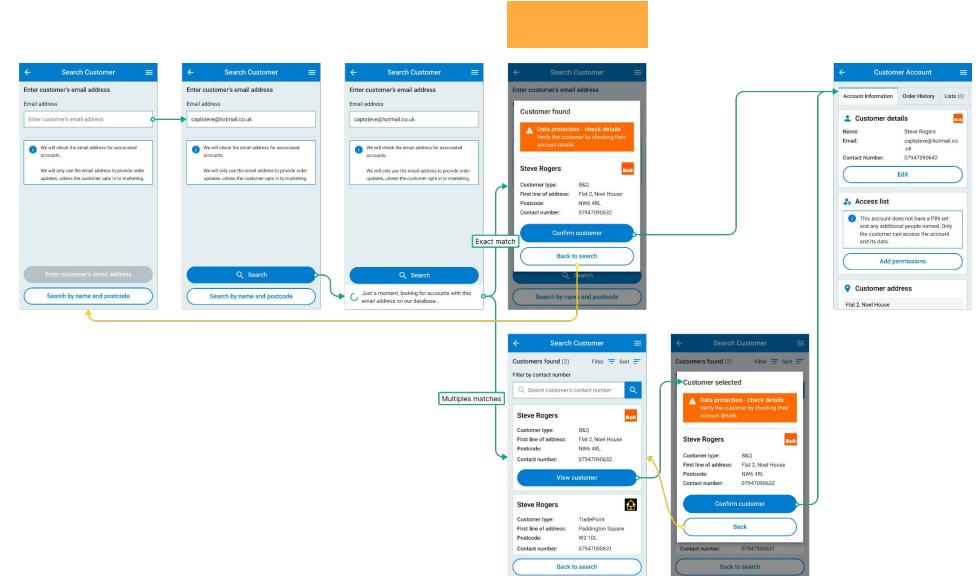
Identifying the correct account type

I added brand logos to search results to clearly indicate retail (B&Q) or trade (TradePoint) accounts.

Pain point addressed: on the legacy platform identifying what brand an account belongs to isn't clear enough.

Justification:

The logo will be a visual cue (/outlier) to distinguish between account types, enhancing user clarity and reducing errors.



Finding an account v1

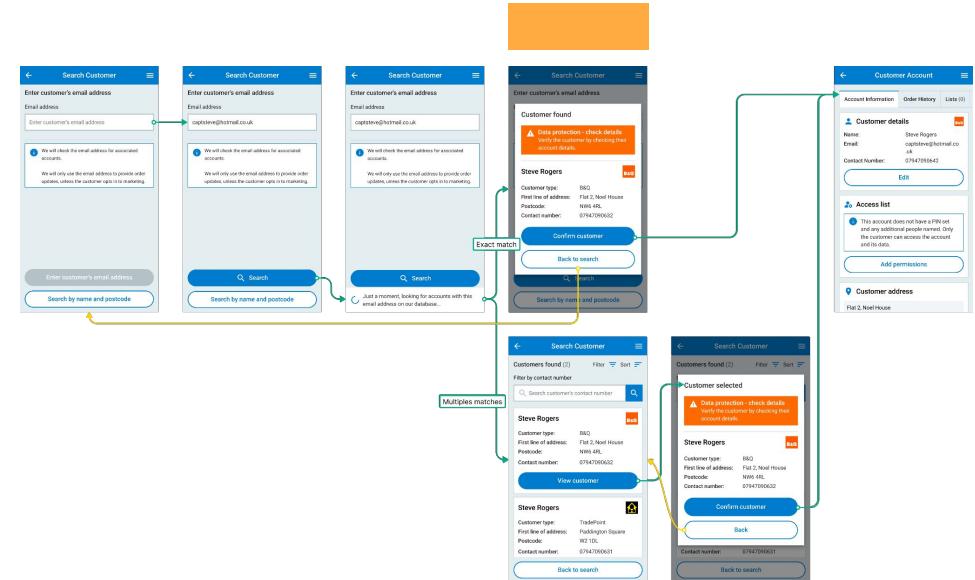
Ensuring Data Protection

I added a 'DPA (Data-protection-act) modal' and proposed this step to be used as a customer verification step. Colleagues will need to ask customers to verify 2 out of the 3 pieces of personal information on the modal.

Paint point addressed: this should then alleviate the wrong people from access to the account. And then stop any fraud.

Justification for modal:

- As suggested by [Material Design](#), modals allows users attention to be focussed and its content becomes direct.

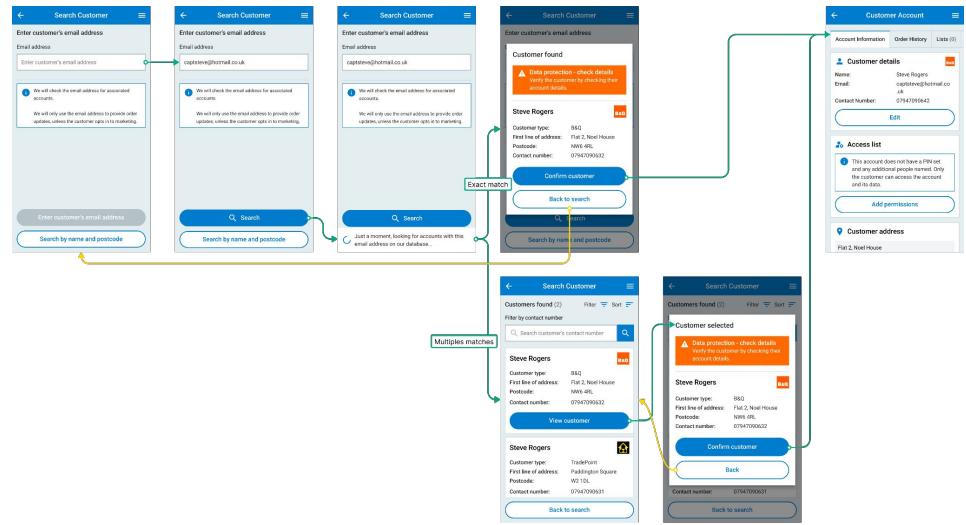


DPA modal shown on the 4th screen and the unhappy path.

Finding an account v1

Chunking

Rather than a long-form, I chose to make the Find and Create Account journey chunked to follow the conversation colleagues have with customers when finding or creating an account. This should lead to a more delightful interaction for colleagues.



Justification:

- Long forms seemed to me very complex and could add unneeded cognitive load on our colleagues.
- This interaction is less overwhelming.

This wasn't picked up as a Pain Point during research but as part of my reviews in discovery.

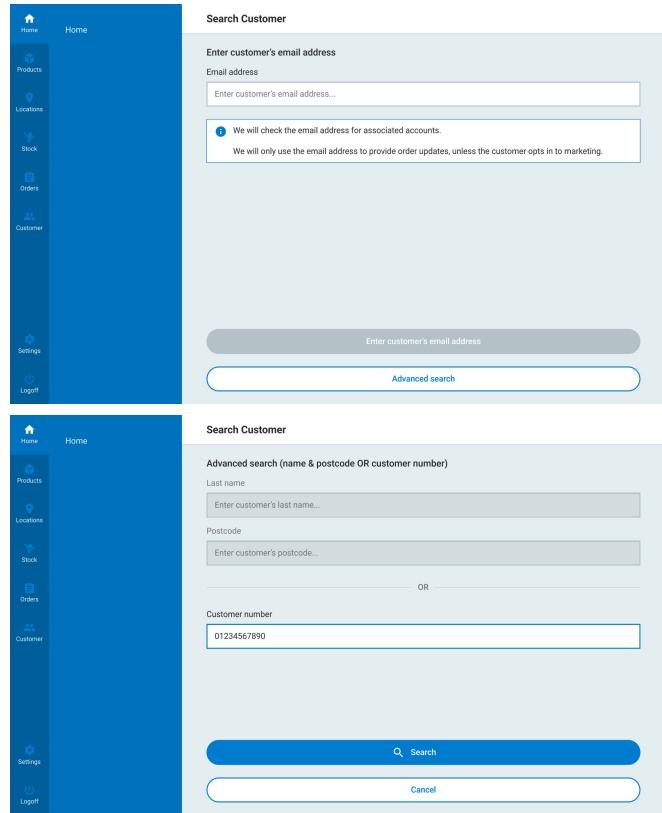
Colleagues will be going through a linear journey opposed to a long form. In the example above colleagues: search, confirm and then have access to an account. All of the 'steps' are on separate screens.

Finding an account v2

Advanced search - additional field

Following feedback from both the business and participants in User Testing, we retained the ability to search by customer number and creating an advanced search page that allow two fallback search methods.

This was vital for colleagues assisting customers, who often utilise account numbers from external systems and pasted it onto the legacy platform. Removing it would significantly hinder their efficiency in resolving queries. Also sometimes entering emails could be very difficult over the phone etc.



The image displays two screenshots of a software interface, likely a web application, showing the 'Search Customer' page. Both screenshots feature a blue sidebar on the left with icons for Home, Products, Locations, Stock, Orders, Customer (selected), Settings, and Logoff.

Top Screenshot (Basic Search):

- Header: 'Search Customer'
- Text: 'Enter customer's email address'
- Form: 'Email address' input field with placeholder 'Enter customer's email address...'.
- Note: 'We will check the email address for associated accounts.'
- Note: 'We will only use the email address to provide order updates, unless the customer opts in to marketing.'
- Buttons: 'Enter customer's email address' (disabled), 'Advanced search' (disabled).

Bottom Screenshot (Advanced Search):

- Header: 'Search Customer'
- Text: 'Advanced search (name & postcode OR customer number)'
- Form: 'Last name' input field with placeholder 'Enter customer's last name...'.
- Form: 'Postcode' input field with placeholder 'Enter customer's postcode...'.
- Text: 'OR'
- Form: 'Customer number' input field with placeholder '01234567890'.
- Buttons: 'Search' (disabled), 'Cancel'.

Changes made: 'Advanced search CTA added' and additional parameter, customer number, added on the page.

Finding an account v2

Privacy

The business were keen on making personal information hidden as much as possible. To uphold data privacy best practices, we've implemented changes to hide personal information. This information will only be revealed upon deliberate action by colleagues, minimizing unnecessary exposure. Consequently, updates have been made to the DPA modal to reflect these enhancements.

Customer Data Check



 Steve Rogers 

 **Data protection - check details**
Verify the customer by checking their account details.

First line of address:	***** *, ***** *****
Postcode:	*** ***
Contact number:	***** ***** ***** *****

Personal information on the DPA modal is now hidden.

Creating an account v1

As a team we thought it was best to make colleagues search for a customer account first. Account creation is offered only when all search results indicate no existing account.

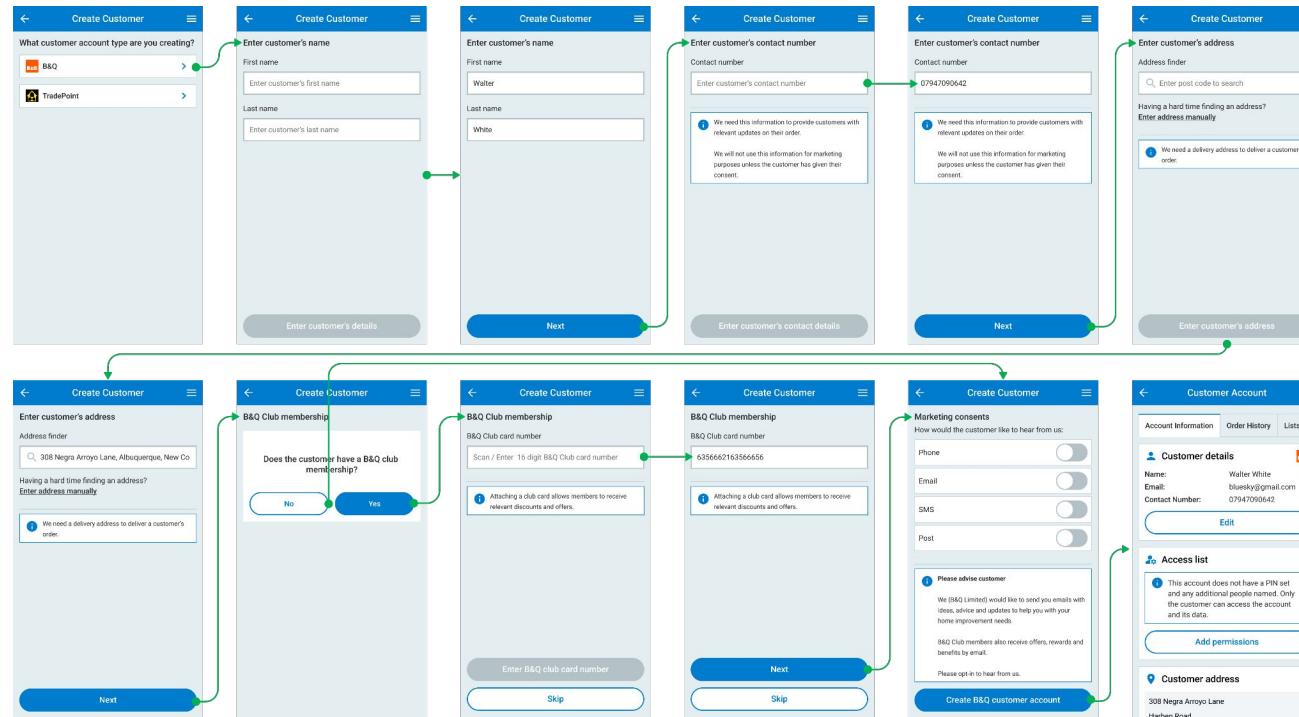
This was done mainly to stop a customer from having multiple accounts in their name with multiple emails.

A separate 'Create Customer' feature was deferred for the initial iteration. Although it had been raised by the Product Team multiple times.

The following slides shows the Search journey, B&Q account creation flow and then the TradePoint account creation flow.

Creating an account v1

B&Q account creation flow

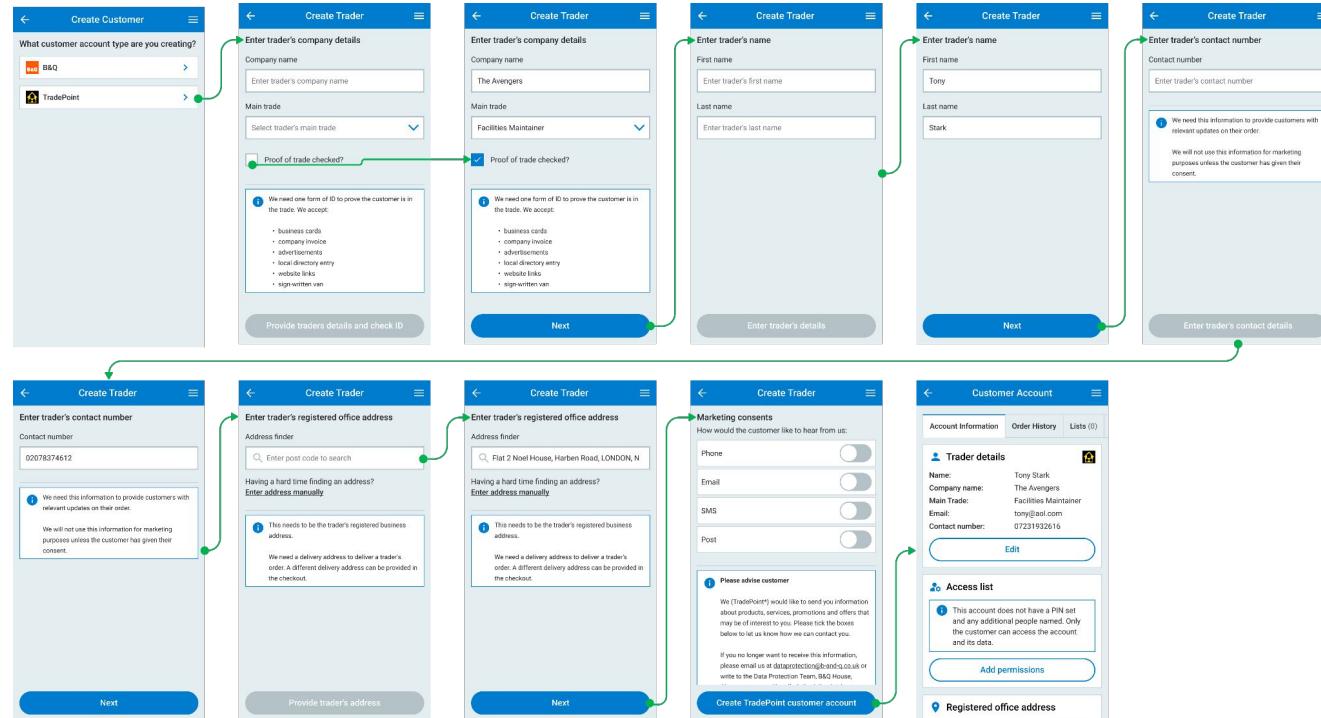


To try maximise enrolment, I moved the marketing consents prompt from after account creation to the account creation journey itself.

This was a move to empower colleagues to ask marketing consents at an appropriate time. Instead of it being overlooked. I picked this up during my discovery prior to the project proper kick off.

Creating an account v1

TradePoint account creation flow



We eliminated the need for colleagues to specify the type of ID used for trader verification, simplifying the process and reducing redundant data collection. This was identified as a pain point during research.

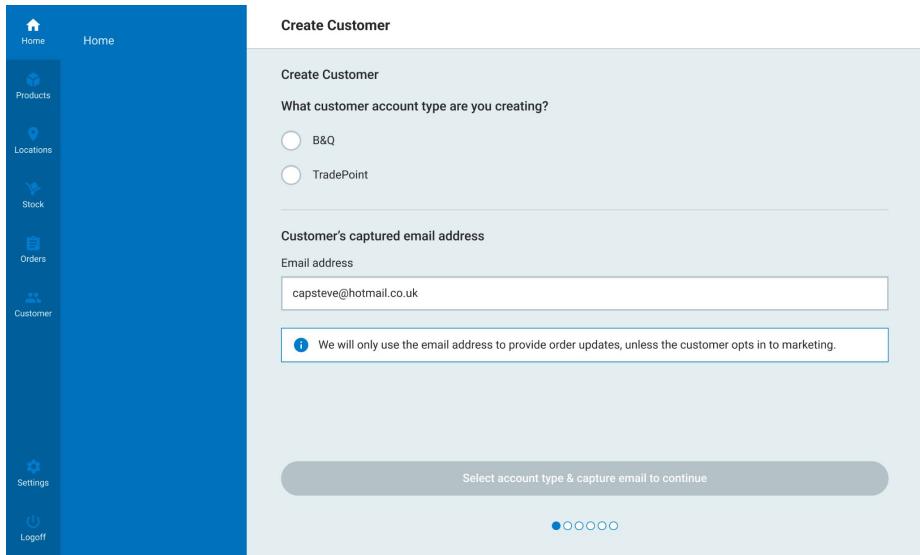
I designed clear labels for customer and trader address fields, ensuring accurate address capture for order fulfillment purposes. Often trader's would give the address of their client as the account address which leads to issues down the line.

Creating an account v2

Email capture and radio buttons

User Testing revealed a gap - an email wasn't captured for account creation after an unsuccessful Last Name and Postcode search. So I made amendments to the Search Account flow to make sure an email is always captured. At the beginning of the Create Account flow a 'captured email' is displayed and the colleague needs to clarify the email.

Cards were replaced with radio buttons on the first screen to improve user decision-making as colleagues thought they were opening a "separate feature" following their selection. Which led to some hesitation from participants.



The amended first screen following User Testing sessions.

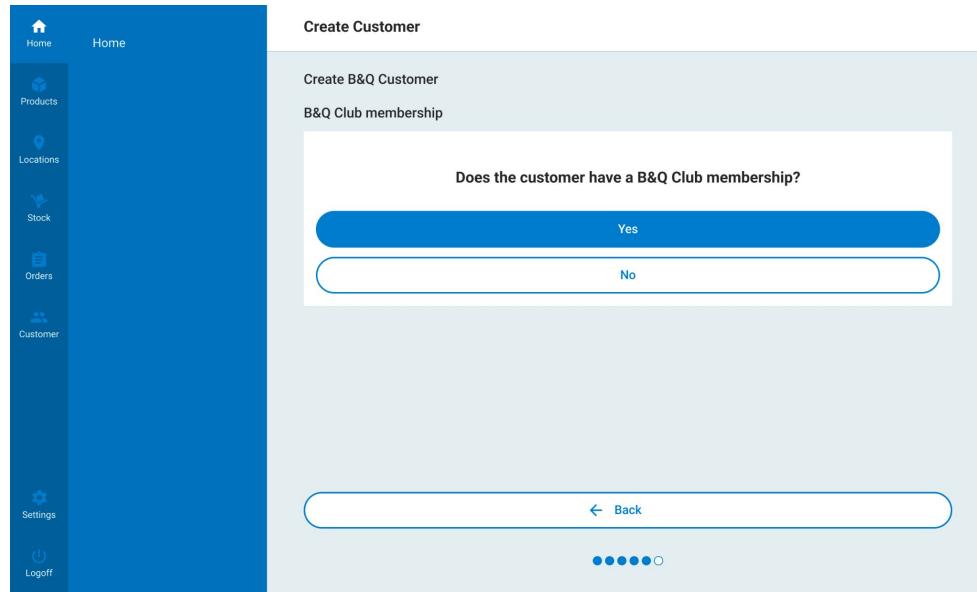
Creating an account v2

Progression Dots

To follow mainly what other features have done on the DCA app. We introduced the use of Progression Dots to the feature. This allows consistency between 'longer' features. I.e features with many pages.

On top of that, Progression Dots allows colleagues to know how many sections they have left in the Create Account flow.

The progression dots can be seen at the bottom of the page.

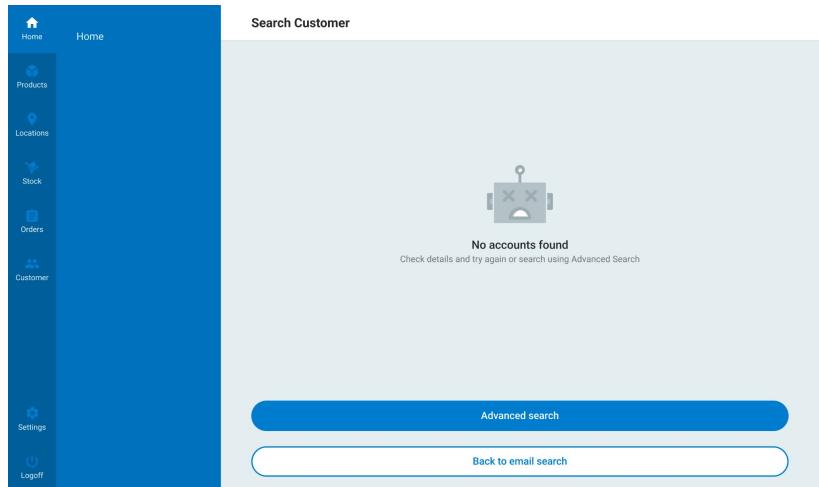


Creating an account v2

Alert message change

User Testing indicated that using the Snackbar 'alert' for nonexistent accounts presented usability challenges. As a result of this observation, we designed a dedicated 'Not found' page, enhancing transparency and eliminating the transitory nature of Snackbar alerts.

 Couldn't find any customer accounts with that email address. Search by name and postcode or re-enter the email address.



Top: error message we got rid of. Bottom: new screen designed.

Creating an account v2

Error prevention

Responding to feedback from colleagues, I designed an explicit back button to enhance clarity. This addition allows colleagues to return to the previous pages easily and facilitates their preference to "flick" through the flow to check any details. This can be seen towards the bottom of pages.

I also designed a 'review step' where colleagues can check all the details they have entered before creating an account. This allows colleagues to sense-check details with a customer.

Create Customer

Create B&Q Customer

B&Q Club membership

B&Q Club card number

635662163566656

Attaching a club card allows members to receive relevant discounts and offers.

Next

Skip

Back

Create Customer

Create B&Q Customer

Review Customer details

Customer's name

First name: Steve
Last name: Rogers

Customer's email

Email: captaine@hotmail.co.uk

Customer's contact number

Contact: 0376794112

Customer's address

Address: Flat 2, Nest House
123 High Street
LONDON
W1W 4RL

Postcode:

Customer's B&Q Club membership

B&Q Card? Yes
Member no: 635662163566656

Customer's marketing consents

Phone: No
Email: Yes
Text (SMS): No
Post: No

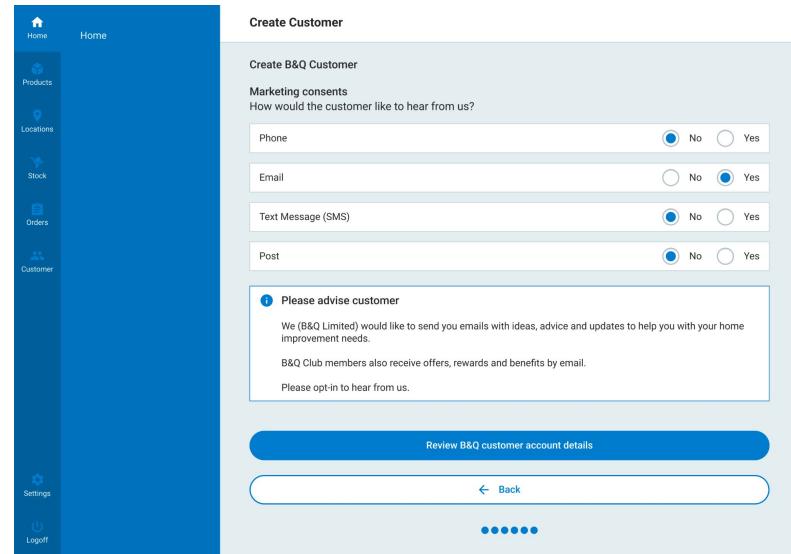
Confirm Customer details

Screenshots of Next/Back buttons example and Review page

Creating an account v2

Explicit marketing consent

Based on business feedback, we designed a user interface update for marketing consent options. Previously presented as toggle switches, these interactions are now represented by radio buttons. This revised design encourages colleagues to actively engage with and confirm customer preferences regarding communication channels.



New marketing consents page using radio buttons.

Account Information page v1

Applying the 'Aesthetic-usability effect', the Customer Account Information page underwent a comprehensive facelift to elevate its visual appeal and usability.

Conscious of the page's high frequency of use, the redesign prioritised both aesthetic enhancement and intuitive functionality.

Due to unresolved business requirements, work to do with an Account Activation section was deferred and not explored.

Addressing a critical pain point, the 'Access List' feature was designed. This feature empowers colleagues to designate authorised people for order management, effectively mitigating fraud risks and easing order handling and amendment processes. This feature is particularly valuable for trade customers who often share accounts. A lot of efforts was spent on designing this feature.

Account Information page v1

Customer Account

Account Information Order History Lists (0) Account History

Customer details

Name: Walter White
Email: bluesky@gmail.com
Contact Number: 07947090642

Access list

This account does not have a PIN set and any additional people named. Only the customer can access the account and its data.

Billing address

308 Negra Arroyo Lane
Albuquerque
New Complus
SW1 1AA

B&Q Club Card membership

A B&Q Club Card isn't attached to this account. Attach a club card using the button below.

Marketing preferences

Phone Email SMS Post

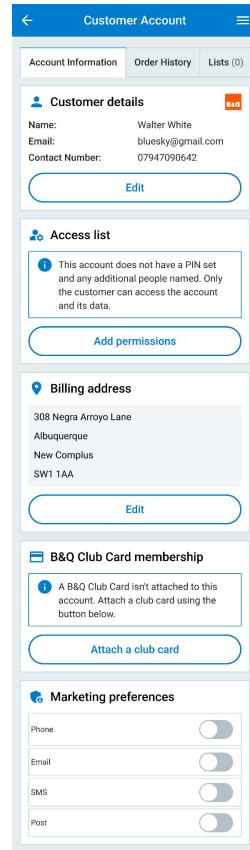
Home Products Locations Stock Orders Customer Settings Logoff

[B&Q Account Information page](#)
(Desktop)

Colleagues can:

- Edit the customer's details
- Manage the customer's access list
- Edit the customer's billing address
- Manage Club Card membership
- Change marketing preferences (through switches)

Account Information page v1



B&Q Account Information
page (Mobile)

Account Information page v1

Customer Account

Account Information Order History Lists (0) Account History

Trader details

Name: Mario Mario
Company name: Mario Bros LTD
Main Trade: Facilities Maintainer
Email: supermario@nintendo.com
Contact Number: 07947090642

Access list

This account does not have a PIN set and any additional people named. Only the customer can access the account and its data.

Registered office address

Mario Bros' House
Wii
Mushroom Kingdom
SW1 1AA

TradePoint membership

Membership number: 2910 0788 1971 0001

Marketing preferences

Phone

Email

SMS

Post

Home Products Locations Stock Orders Customer Settings Logoff

[TradePoint Account Information page](#)
(Desktop)

Colleagues can:

- Edit trader's details
- Manage the trader's access list
- Edit the trader's office address
- Manage TradePoint membership, i.e print a new card or order a new card by simply pressing the buttons. Appropriate feedback is added to address the pain point raised but not shown in this portfolio.
- Change marketing preferences (through switches).

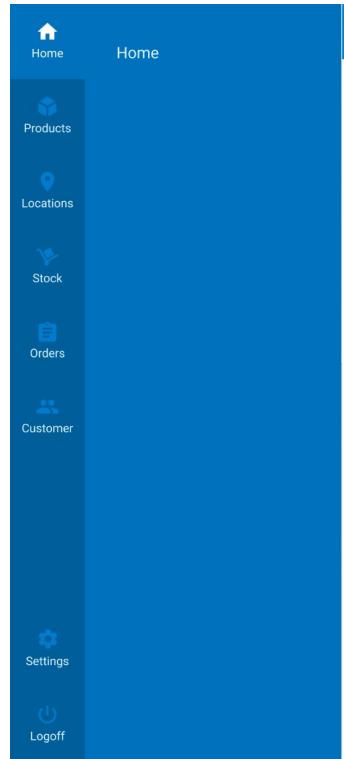
Account Information page v1

The screenshot displays the 'Customer Account' interface on a mobile device. The top navigation bar includes a back arrow, the title 'Customer Account', and a menu icon. Below the navigation is a tab bar with 'Account Information' (selected), 'Order History', and 'Lists (0)'. The main content area is organized into several sections:

- Trader details**: Shows contact information for 'Mario Mario' at 'Mario Bros LTD' with 'Facilities Maintainer' as the main trade. The email is 'supermario@nintendo.com' and the contact number is '07947090642'. An 'Edit' button is present.
- Access list**: A note stating 'This account does not have a PIN set and any additional people named. Only the customer can access the account and its data.' with a 'Add permissions' button.
- Registered office address**: Details 'Mario Bros' House' at 'Wii Mushroom Kingdom SW1 1AA'.
- TradePoint membership**: Displays the membership number '2910 0788 1971 0001' and buttons for 'Print temporary card' and 'Request replacement card'.
- Marketing preferences**: Allows the user to toggle preferences for 'Phone', 'Email', 'SMS', and 'Post'.

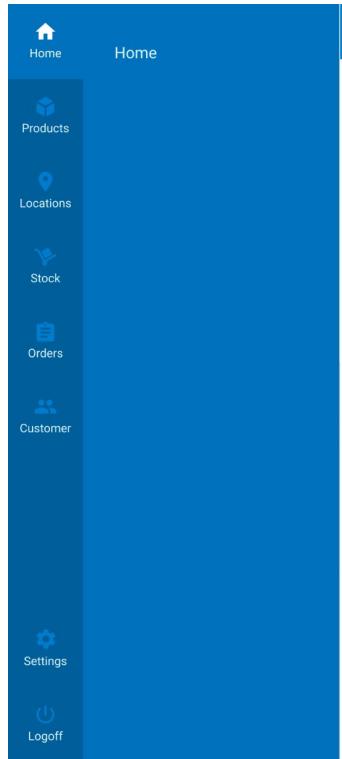
TradePoint Account
Information page (Mobile)

Edit account details v1



After selecting 'Edit' on the customer/trader details card within the Account Information page, a slide-out panel will appear, allowing colleagues to modify the relevant details. Upon completing the desired edits, colleagues confirm the changes to amendments.

Edit address v1



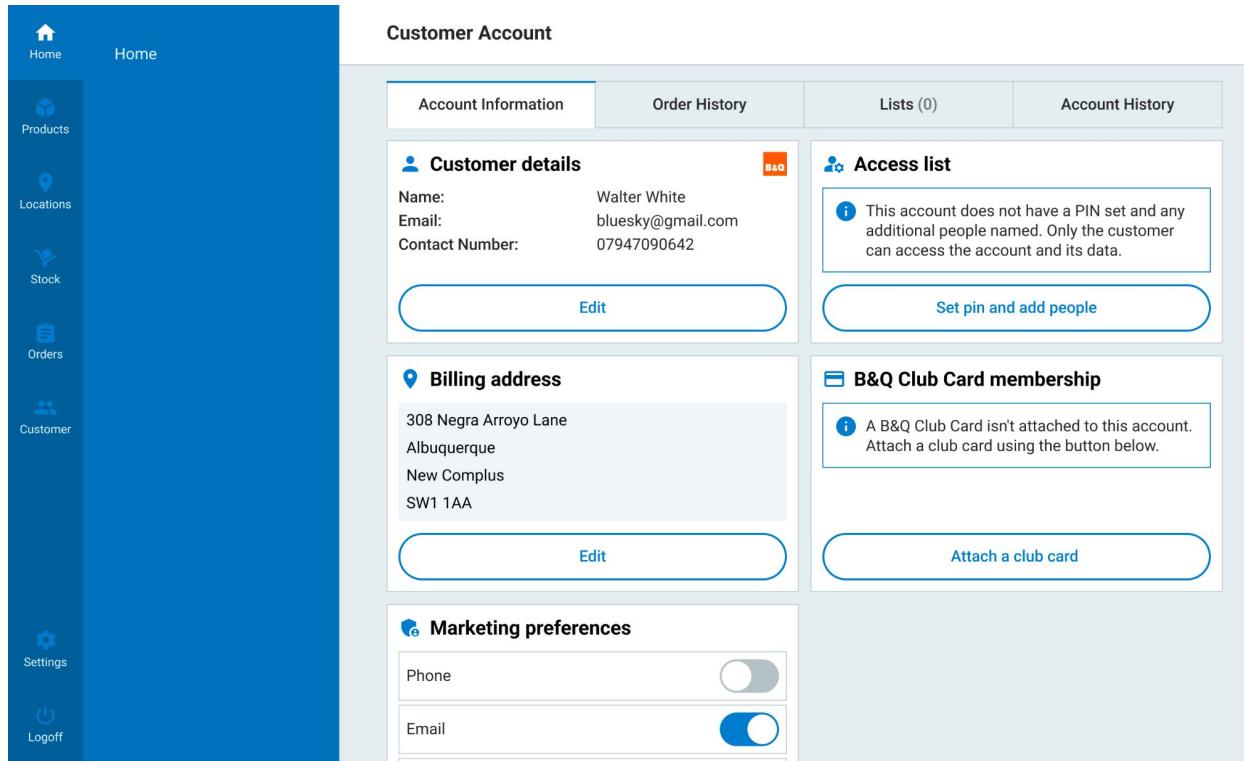
After selecting 'Edit' on the Billing Address/Registered Office Address card within the Account Information page, a slide-out panel will appear, allowing colleagues to modify the relevant details. Upon completing the desired edits, colleagues confirm the changes made.

Attach a club card v1



After selecting 'Attach a club card' on the B&Q Club Card membership card within the Account Information page, a slide-out panel will appear, allowing colleagues to modify the relevant details. Upon completing the desired edits, colleagues confirm the changes made.

Access list - setting pin and adding people to access account



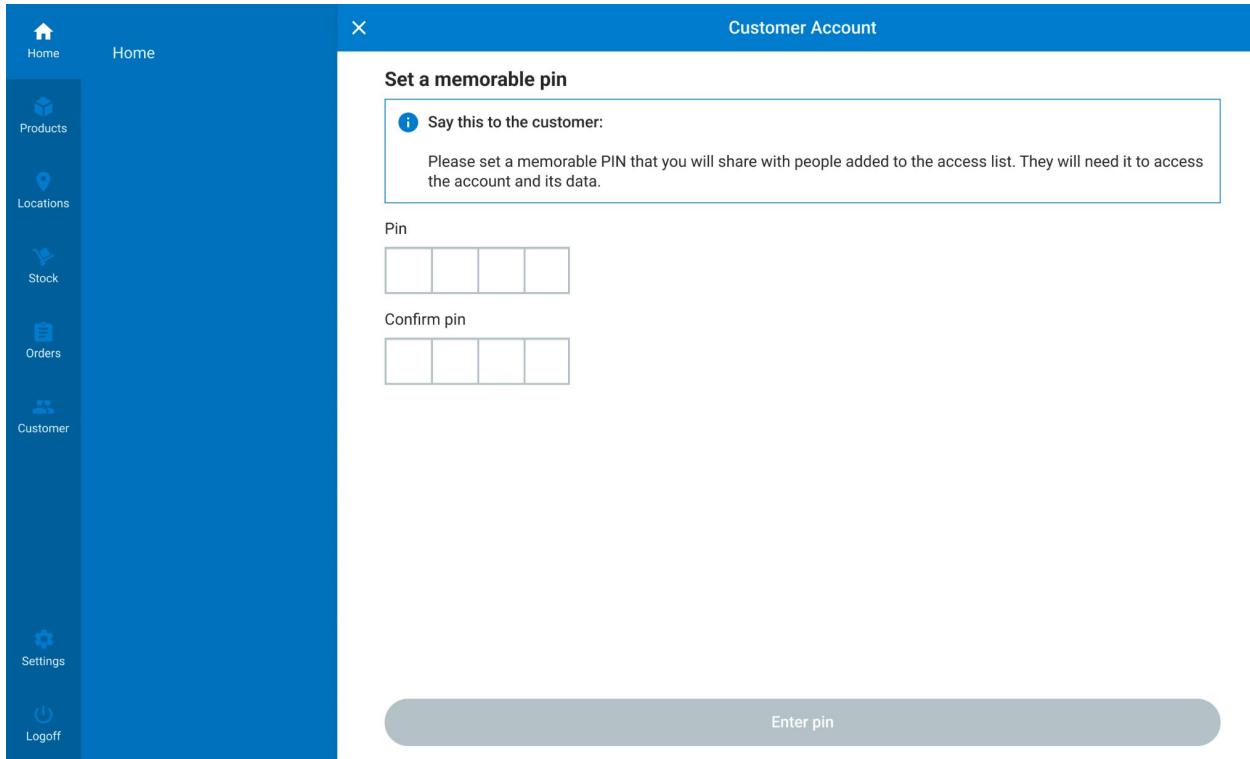
The screenshot shows the 'Customer Account' page. The left sidebar has icons for Home, Products, Locations, Stock, Orders, Customer, Settings, and Logoff. The main content area has a 'Customer Account' title. Below it is a navigation bar with 'Account Information', 'Order History', 'Lists (0)', and 'Account History'. The 'Customer details' section shows Name: Walter White, Email: bluesky@gmail.com, and Contact Number: 07947090642. The 'Access list' section contains a message: 'This account does not have a PIN set and any additional people named. Only the customer can access the account and its data.' Below it is a 'Set pin and add people' button. The 'Billing address' section shows the address: 308 Negra Arroyo Lane, Albuquerque, New Complus, SW1 1AA. The 'B&Q Club Card membership' section shows a message: 'A B&Q Club Card isn't attached to this account. Attach a club card using the button below.' Below it is an 'Attach a club card' button. The 'Marketing preferences' section has two toggle switches: 'Phone' (off) and 'Email' (on).

I needed to design a feature for authorised personnel to modify orders, eliminating multiple workarounds used on the legacy platform/in stores today.

I'm not showing how to add and remove people and edit names on the portfolio as these are very basic interactions.

First, the colleague needs to click on 'Set pin and add people'.

Access list - setting pin and adding people to access account



Customer Account

Set a memorable pin

Home

Products

Locations

Stock

Orders

Customer

Settings

Logoff

Pin

Confirm pin

Enter pin

Then the colleague liaising with the customer needs to set-up a memorable pin that will be shared with people authorised on the account.

Access list - setting pin and adding people to access account

Customer Account

Set a memorable pin

Info Say this to the customer:

Please set a memorable PIN that you will share with people added to the access list. They will need it to access the account and its data.

Pin

•	•	•	•
---	---	---	---

Confirm pin

•	•	•	•
---	---	---	---

Save pin

Access list - setting pin and adding people to access account

Customer Account

Pin set for customer's account. You can now add additional people to the account.

Add person

People with access to this account

No additional people have been added to this account. To add people, use the form above.

Reset pin

New pin

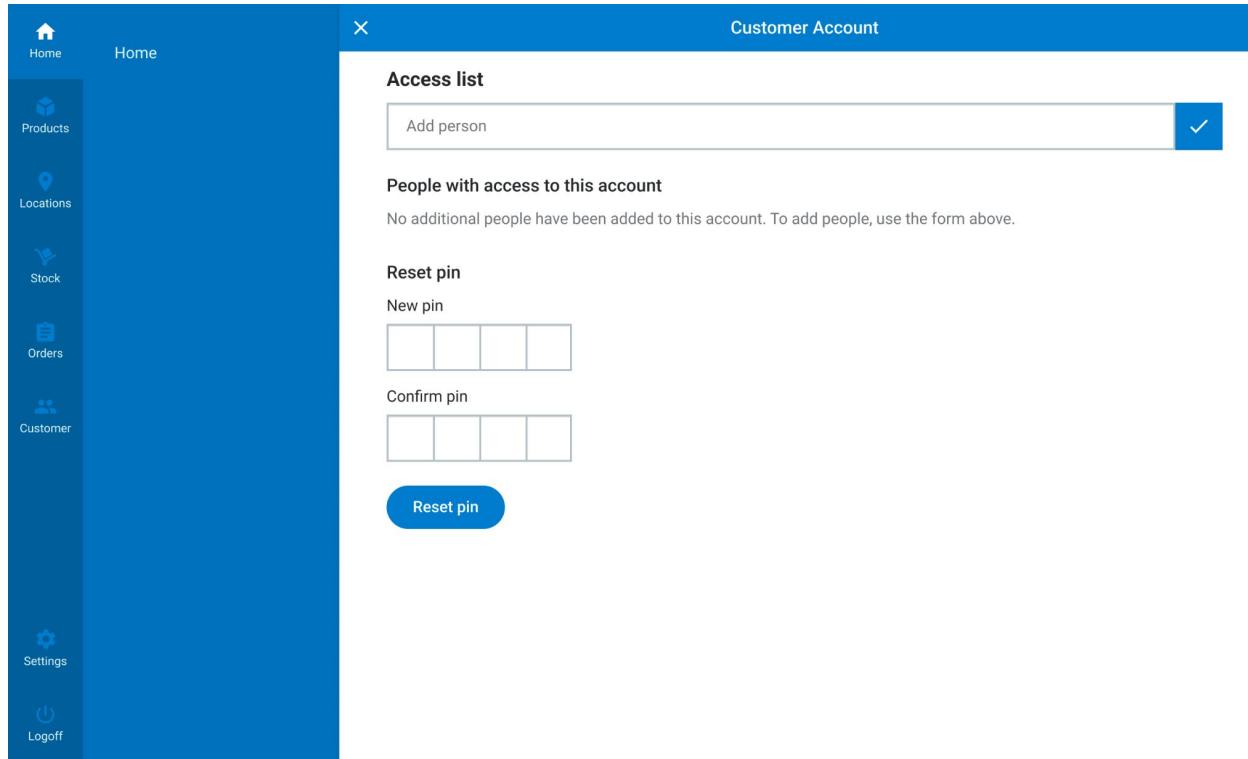
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Confirm pin

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Reset pin

Access list - setting pin and adding people to access account



The screenshot shows a software interface with a blue sidebar on the left containing icons for Home, Products, Locations, Stock, Orders, Customer, Settings, and Logoff. The main area has a 'Customer Account' header with an 'X' button. Below the header is a section titled 'Access list' with a 'Add person' button. The next section, 'People with access to this account', contains a message stating 'No additional people have been added to this account. To add people, use the form above.' Below this are 'Reset pin' and 'Confirm pin' fields, each consisting of four empty input boxes. A 'Reset pin' button is located at the bottom of the pin input area.

Following the pin being created, a colleague can then add a person to the account.

Access list - setting pin and adding people to access account

Customer Account

Access list

Jesse Pinkman

People with access to this account

No additional people have been added to this account. To add people, use the form above.

Reset pin

New pin

Confirm pin

Reset pin

Access list - setting pin and adding people to access account

The screenshot shows a web-based application interface. On the left is a vertical sidebar with icons and labels: Home, Products, Locations, Stock, Orders, Customer, and Settings. The 'Customer' icon is highlighted with a blue background. The main content area has a blue header bar with the text 'Customer Account' and a close button 'X'. Below the header is a section titled 'Access list' containing a list box with the name 'Jesse Pinkman' and a blue checkmark icon to its right. Underneath this is a heading 'People with access to this account' with a subtext: 'No additional people have been added to this account. To add people, use the form above.' Below this are sections for 'Reset pin' and 'Confirm pin', each with a 4x2 grid of input fields. A blue button labeled 'Reset pin' is positioned below the 'Reset pin' section. At the bottom of the page, a status message 'Adding person to access list...' is displayed next to a circular progress icon.

Customer Account

Access list

Jesse Pinkman

People with access to this account

No additional people have been added to this account. To add people, use the form above.

Reset pin

New pin

Confirm pin

Reset pin

Adding person to access list...

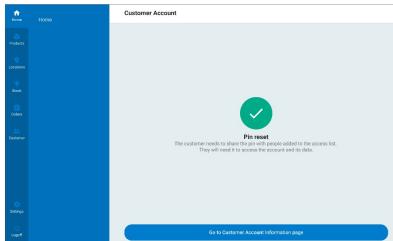
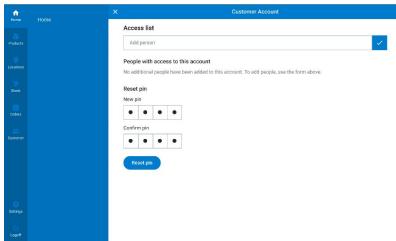
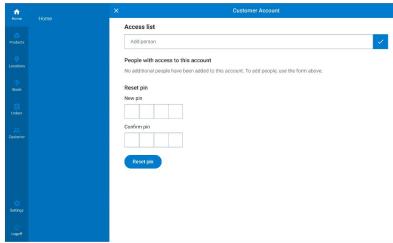
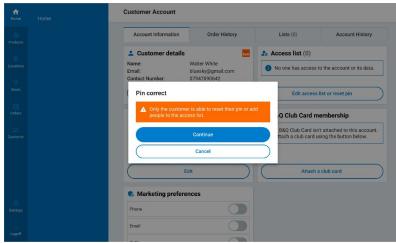
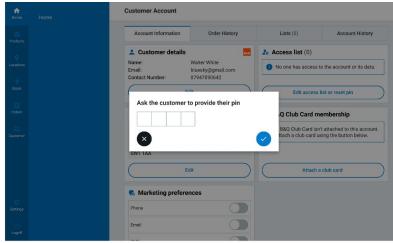
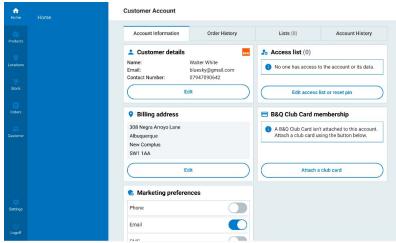
Access list - verifying people with access

The screenshots illustrate the 'Access list' feature across four different account pages. Each page has a header with 'Customer Account' and a sidebar with 'Products', 'Locations', 'Stock', 'Tasks', 'Customer', 'Settings', and 'Logout'.

- Screenshot 1:** Shows the 'Customer details' section with fields for Name (Water White), Email (bluwy@gmail.com), and Contact Number (0794791642). Below this are sections for 'Billing address' (208 Negra Amaya Lane, New Complex, SW1 TAA) and 'Marketing preferences' (Phone: 0794791642, Email: bluwy@gmail.com).
- Screenshot 2:** Shows the 'Access list' section with a sub-section for 'B&Q Club Card membership' which states 'A B&Q Club Card isn't attached to this account. Attach a club card using the button below.'
- Screenshot 3:** Shows the 'Access list' section with a sub-section for 'B&Q Club Card membership' which states 'B&Q Club Card isn't attached to this account. Attach a club card using the button below.'
- Screenshot 4:** Shows the 'Access list' section with a sub-section for 'B&Q Club Card membership' which states 'B&Q Club Card isn't attached to this account. Attach a club card using the button below.'

Authorised individuals must initiate account access by providing the account holder's information first. Then colleagues will verify identity by viewing the "Access List" and confirming the authorised individual's inclusion. Authorisation concludes upon the authorised individual sharing the designated PIN with the colleague.

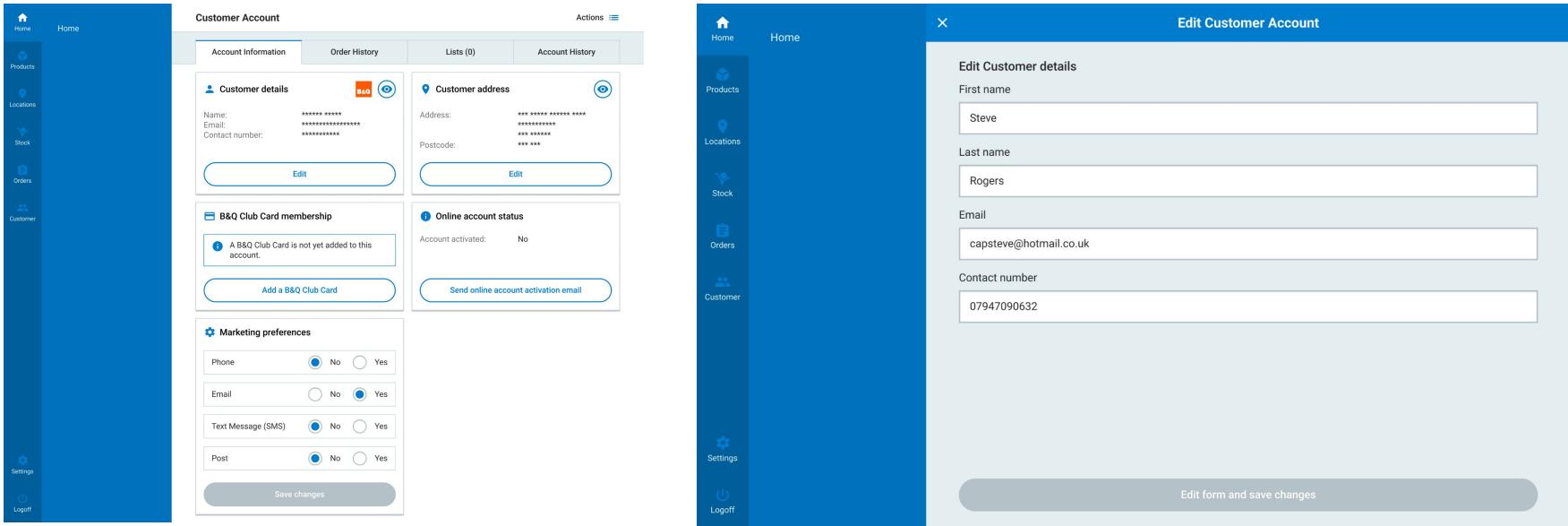
Access list - resetting pin



The PIN reset procedure involves the following steps:

1. Customer accesses account (following relevant verification).
2. Customer requests PIN edit.
3. Customer provides current PIN.
4. Colleague confirms account holder status.
5. Colleague resets PIN.

Account information page changes (v2)

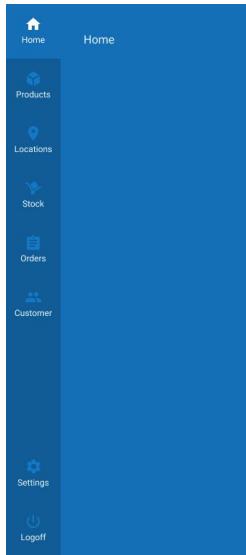


The image displays two screenshots of a customer account information page. The left screenshot shows the main account page with a sidebar containing Home, Products, Locations, Stock, Orders, Customer, Settings, and Logoff. The main content area has tabs for Account Information, Order History, Lists (0), and Account History. It shows sections for Customer details (with eye icons for personal information), Customer address, B&Q Club Card membership (with a placeholder message and a 'Send online account activation email' button), and Marketing preferences (with radio buttons for Yes/No). The right screenshot shows a modal window titled 'Edit Customer Account' with fields for First name (Steve), Last name (Rogers), Email (capsteve@hotmail.co.uk), and Contact number (07947090632). A 'Save changes' button is at the bottom.

Updates were made to the account information page based on stakeholder feedback and feedback from design colleagues. Key changes include:

- Access list being relocated from account-level to order-level (business decision). And this was designed by another colleague. An online account status placeholder was subbed in.
- Enhanced information hierarchy through adjusted heading font sizes.
- Reduced glare for colleagues with blue slide-out backgrounds. A white background was added to the main page to match the tab.
- Improved privacy with eye icon reveal for personal information.
- Small content refinements, marketing consent design alignment, and session closure option added.

Lists



Customer Account

Account Information

Order History

Lists (2)

Account History

Lists (2)

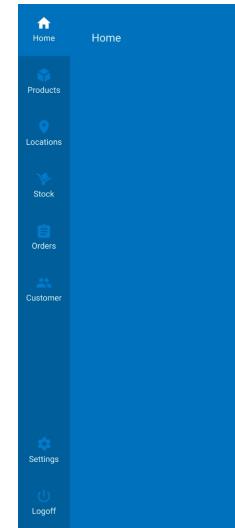
Xmas gifts



Bedroom decoration project



+ Create new list



Customer Account

Account Information

Order History

Lists (2)

Account History



This page does not contain any lists yet
Scan / type an EAN and select 'Add to list' or create a new list below

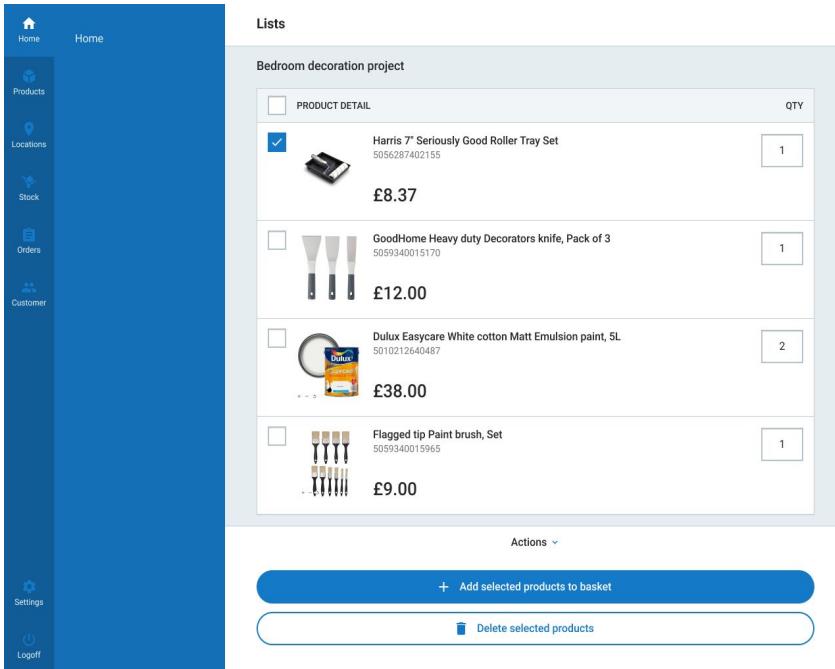
+ Create new list

The existing 'Lists' design enables colleagues to access and manage customer-created lists (online) and colleague-created lists (in-store). However, due to an oversight, creating new lists directly within the feature was not designed.

The next page shows how a colleague adds a product(s) into the basket.

Colleagues went through these designs with no real issues. And the business was happy with the designs.

Lists - adding an item to the basket



Home

Products

Locations

Stock

Orders

Customer

Settings

Logoff

Lists

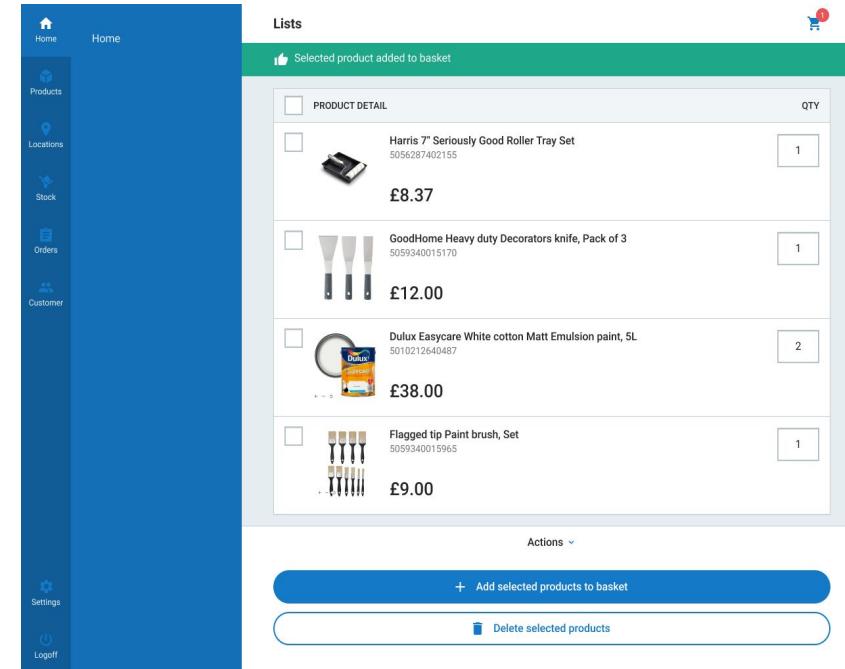
Bedroom decoration project

PRODUCT DETAIL	QTY
<input checked="" type="checkbox"/> Harris 7" Seriously Good Roller Tray Set 5056287402155	1
<input type="checkbox"/> GoodHome Heavy duty Decorators knife, Pack of 3 5059340015170	1
<input type="checkbox"/> Dulux Easycare White cotton Matt Emulsion paint, 5L 5010212640487	2
<input type="checkbox"/> Flaged tip Paint brush, Set 5059340015965	1

Actions ▾

+ Add selected products to basket

Delete selected products



Home

Products

Locations

Stock

Orders

Customer

Settings

Logoff

Lists

Selected product added to basket

PRODUCT DETAIL	QTY
<input type="checkbox"/> Harris 7" Seriously Good Roller Tray Set 5056287402155	1
<input type="checkbox"/> GoodHome Heavy duty Decorators knife, Pack of 3 5059340015170	1
<input type="checkbox"/> Dulux Easycare White cotton Matt Emulsion paint, 5L 5010212640487	2
<input type="checkbox"/> Flaged tip Paint brush, Set 5059340015965	1

Actions ▾

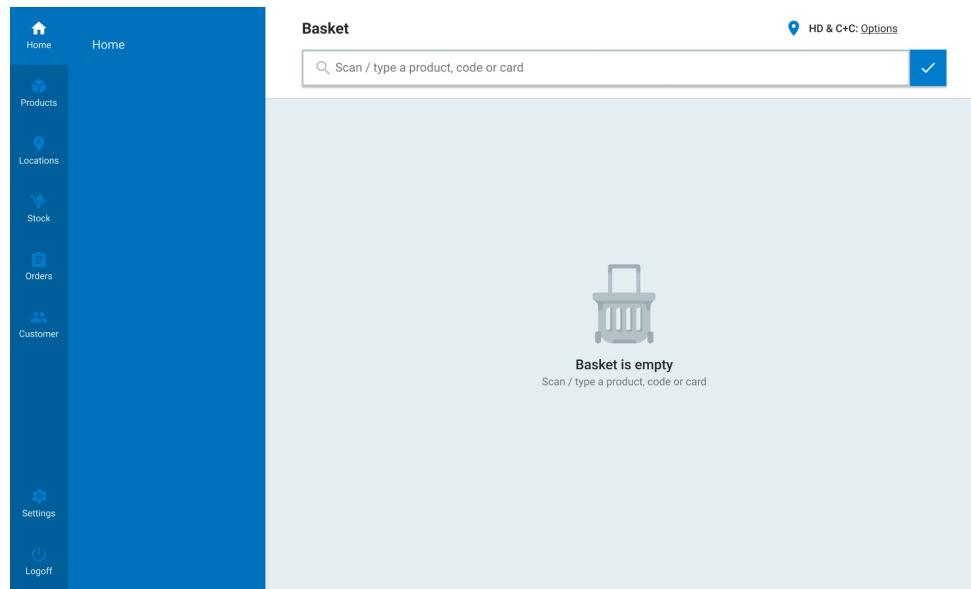
+ Add selected products to basket

Delete selected products

Basket - landing page

The Basket Landing Page serves as an introductory screen...for the basket! This minimal interface appears for a brief period (approximately 2 seconds!)

Its simple design intentionally mirrors the existing customer and colleague checkout experiences on other products, ensuring consistency and facilitating intuitive user interaction. The Page successfully 'passed' user testing with no negative feedback, indicating effectiveness in achieving its intended purpose.

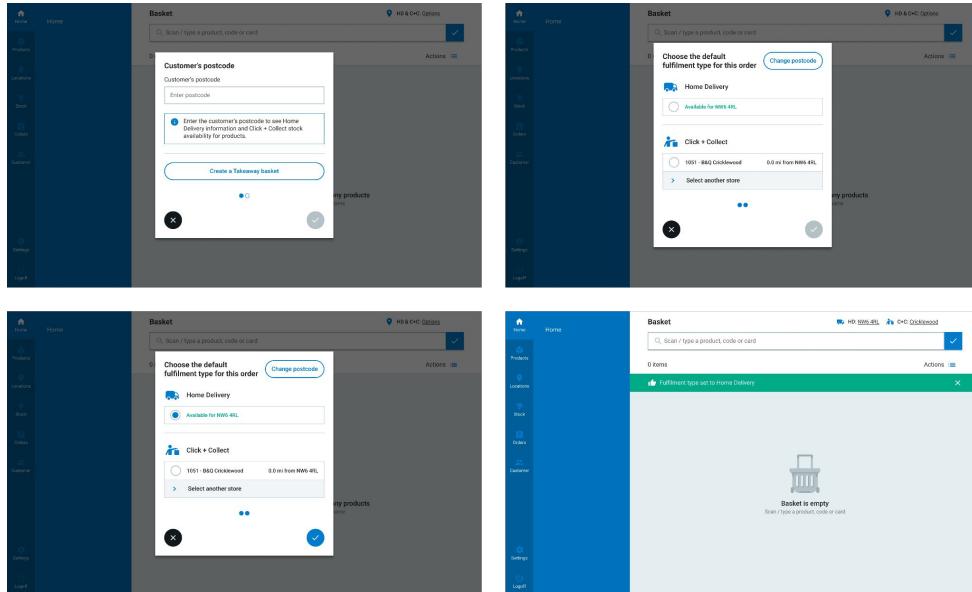


Basket - setting a default fulfilment

The 'Postcode Checker' pop-up, inspired by e-commerce practices, ensures accurate fulfillment information by prompting colleagues to set a default fulfillment method for baskets. It appears automatically two seconds after opening the Basket feature. For Cut-to-size products, a separate "takeaway basket" workflow exists and it is owned by another team.

Colleagues enter the customer's postcode and choose Home Delivery (if applicable) or Click and Collect store, setting the basket's default fulfillment.

User testing was positive, with no objections. The feature aims to reduce checkout errors and customer-colleague friction by proactively addressing fulfillment issues during basket building.



Basket - change default fulfillment

The screenshots illustrate the process of changing default fulfillment settings in a POS system.

Screenshot 1: Basket Screen

The basket screen shows a single item: Dulux Walls & ceilings Pepper red Matt Emulsion paint, 2.5L. The total is £21.00. The delivery method is set to "Home Delivery". The "Actions" menu is open, showing options: Set default fulfillment, Payme, and Cancel basket.

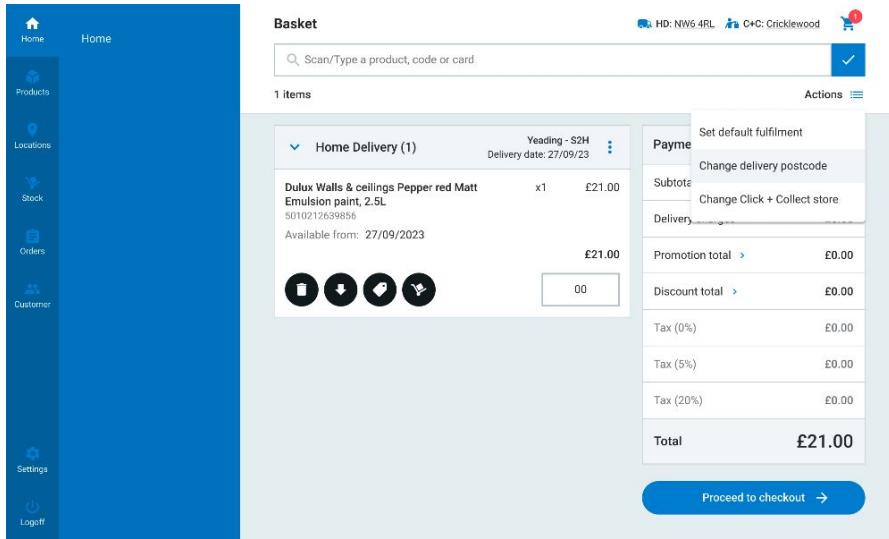
Screenshot 2: Set default fulfillment dialog

A modal dialog box titled "Set default fulfillment" is displayed. It contains a message: "Any products you scan after confirming will have this fulfillment type." Three radio buttons are shown: "Home delivery" (selected), "Click + Collect", and "Takeaway". A "Proceed to checkout" button is at the bottom.

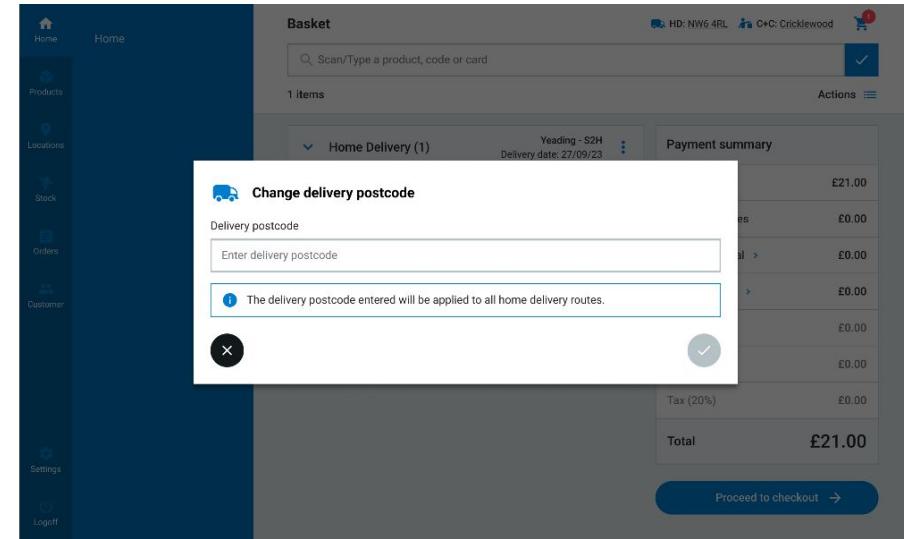
Screenshot 3: Basket Screen after confirmation

The basket screen now shows the "Set default fulfillment" dialog has been confirmed. The "Home delivery" radio button is highlighted with a checkmark. The total amount is £21.00. The "Proceed to checkout" button is at the bottom.

Basket - change delivery postcode

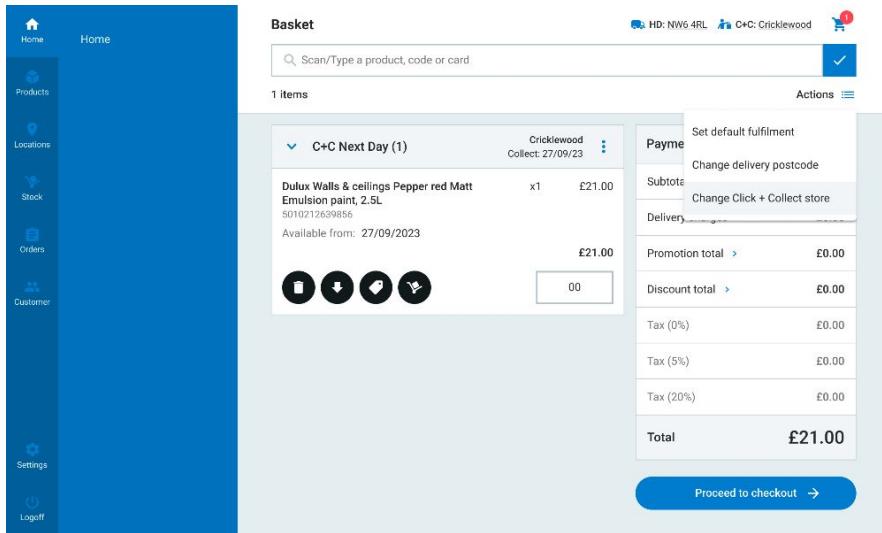


The screenshot shows a user interface for a shopping basket. On the left, a vertical sidebar lists navigation options: Home, Products, Locations, Stock, Orders, Customer, Settings, and Logoff. The main area is titled 'Basket' and displays a single item: 'Home Delivery (1)'. The item details are: 'Dulux Walls & ceilings Pepper red Matt Emulsion paint, 2.5L' with code '5010212639856' and a delivery date of '27/09/23'. The total price is £21.00. Below the item, there are four circular icons with icons for a box, a download arrow, a key, and a trash can. To the right of the item, a 'Actions' menu is open, showing options: 'Set default fulfilment', 'Change delivery postcode', 'Subtotal', 'Change Click + Collect store', 'Delivery', 'Promotion total', 'Discount total', 'Tax (0%)', 'Tax (5%)', 'Tax (20%)', and 'Total £21.00'. At the bottom is a blue 'Proceed to checkout' button.



The screenshot shows the same basket interface as the first one, but with a modal dialog box overlaid. The dialog is titled 'Change delivery postcode' and contains a text input field labeled 'Enter delivery postcode'. Below the input field is a message: 'The delivery postcode entered will be applied to all home delivery routes.' At the bottom of the dialog are a close button (X) and a checkmark button (✓). The background of the basket page is dimmed to indicate the modal is active. The 'Proceed to checkout' button is visible at the bottom of the page.

Basket - change click and collect store



Basket

HD: NW6 4RL C+C: Cricklewood

Scan/Type a product, code or card

1 items

C+C Next Day (1) Cricklewood Collect: 27/09/23

Dulux Walls & ceilings Pepper red Matt x1 £21.00

Emulsion paint, 2.5L 5010212639856

Available from: 27/09/2023

£21.00

00

Actions

Set default fulfilment

Change delivery postcode

Change Click + Collect store

Delivery

Promotion total > £0.00

Discount total > £0.00

Tax (0%) £0.00

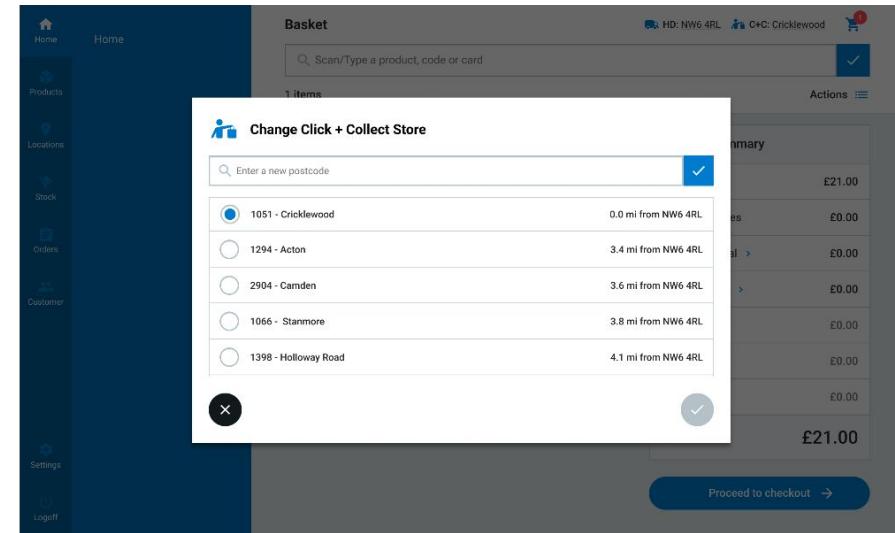
Tax (5%) £0.00

Tax (20%) £0.00

Total £21.00

Proceed to checkout →

Home Products Locations Stock Orders Customer Settings Logoff



Basket

HD: NW6 4RL C+C: Cricklewood

Scan/Type a product, code or card

1 items

Change Click + Collect Store

Enter a new postcode

1051 - Cricklewood 0.0 mi from NW6 4RL

1294 - Acton 3.4 mi from NW6 4RL

2904 - Camden 3.6 mi from NW6 4RL

1066 - Stanmore 3.8 mi from NW6 4RL

1398 - Holloway Road 4.1 mi from NW6 4RL

X

Proceed to checkout →

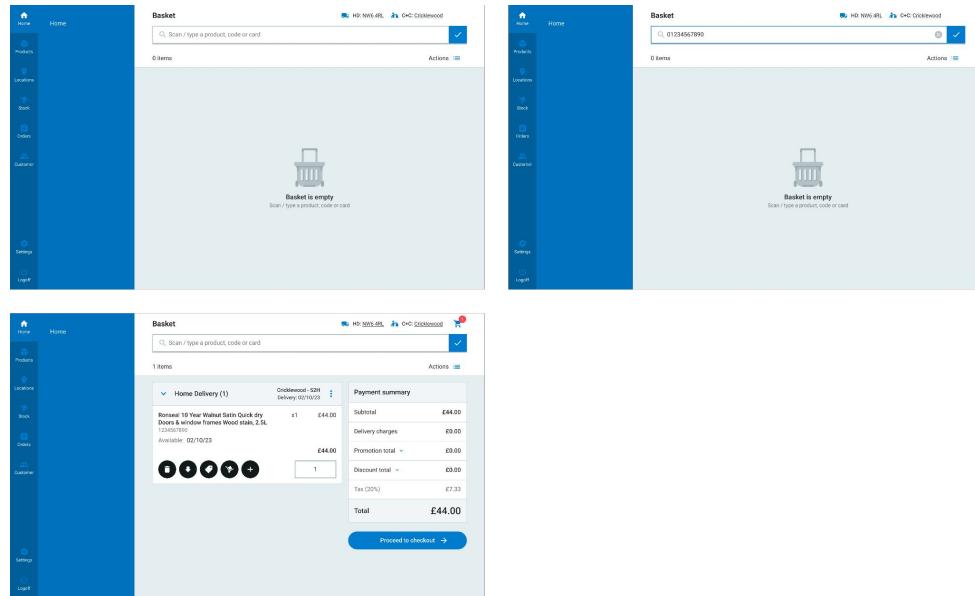
Home Products Locations Stock Orders Customer Settings Logoff

Basket - adding a product to the basket

Adding products into the basket is an efficient and familiar process.

Colleagues can either directly scan products into the basket or enter the product's code via the provided form. This familiar flow follows traditional in-store checkouts and what is used in-store. This minimises learning curves for colleagues.

The product card prominently displays item availability and the group header specifies the estimated delivery or collection date, ensuring clear order transparency. This clear messaging was lacking on the legacy platform. In cases with mixed fulfillment methods, the system automatically groups products by type (e.g., Home Delivery and Click & Collect), enhancing order clarity and streamlining conversations with customers.



Basket - age restricted products alert

The screenshot shows a web-based retail application interface. On the left is a dark sidebar with navigation links: Home, Products, Locations, Stock, Orders, Customer, Settings, and Logoff. The main area is titled 'Basket' and shows a search bar with placeholder text 'Scan / type a product, code or card...'. A message '1 items' is displayed. A prominent modal window is open, titled 'Age-restricted product'. It contains the text 'Challenge 25' and a red circular badge with the number '25'. Below this is an orange box with a warning icon and the text: 'Does the customer look at least 25? If not ask them to prove they are at least 18 and their date of birth is on or before <DD Month 2005>'. Three blue buttons are shown: 'Customer visibly 25 or over', 'Customer verified as 18 or over', and 'Customer unable to prove age'. To the right of the modal is a 'Payment summary' table:

Payment summary	
Subtotal	£44.00
Delivery charges	£0.00
Promotion total	£0.00
Discount total	£0.00
Tax (20%)	£7.33
Total	£44.00

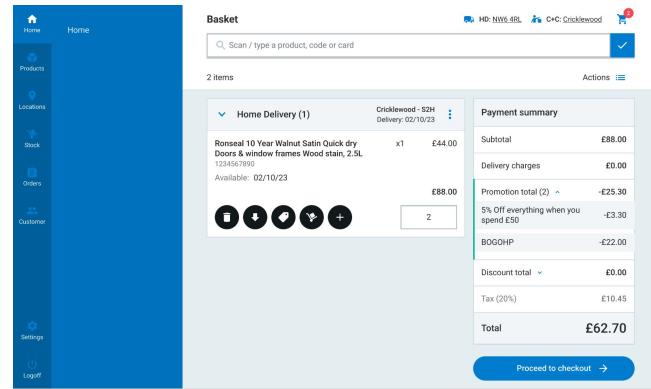
At the bottom right is a blue 'Proceed to checkout' button with a right-pointing arrow. The top right of the main area shows delivery information 'HD: NW6 4RL', collection point 'C+C: Cricklewood', and a shopping cart icon with a red '1'.

Basket - promotions and discounts

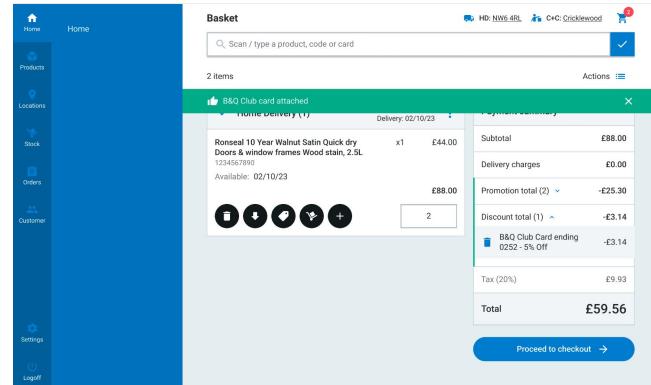
Upon triggering, promotions are automatically applied and reflected on the Payment Summary. Loyalty cards and discounts can (mostly) conveniently be scanned in or entered manually, similar to adding a product.

User Testing revealed potential confusion regarding applied promotions and discounts. To address this, I designed a numerical indicator displaying the number of active promotions and a green marker denoting their application. These enhancements promote transparency and prevent any potential ambiguity.

Note: in case you are wondering, for technical reasons we are not able to show promotions related to a product!



The screenshot shows the B&Q mobile app's basket screen. The sidebar menu includes Home, Products, Locations, Stock, Orders, Customer, Settings, and Logoff. The main area shows a basket with one item: Ronseal 10 Year Walnut Satin Quick dry Doors & window frames Wood stain, 2.5L (2045678901). The basket summary shows a subtotal of £88.00, delivery charges of £0.00, and a promotion total of £25.30. The payment summary shows a subtotal of £88.00, delivery charges of £0.00, a promotion total of £25.30, a discount of £3.30, and a total of £62.70. A 'Proceed to checkout' button is at the bottom.



The screenshot shows the B&Q mobile app's basket screen with a green marker indicating a B&Q Club card is attached. The sidebar menu is the same as the previous screenshot. The basket summary shows a subtotal of £88.00, delivery charges of £0.00, and a promotion total of £25.30. The payment summary shows a subtotal of £88.00, delivery charges of £0.00, a promotion total of £25.30, a discount of £3.14 (B&Q Club card ending 0232 - 5% Off), and a total of £59.56. A 'Proceed to checkout' button is at the bottom.

Basket - setting delivery dates

Basket

HD: NW6 4RL C+C: Cricklewood

Scan / type a product, code or card...

1 items

Actions

Home Delivery (1) Cricklewood - S2H Delivery: 02/10/23

Ronseal 10 Year Walnut Satin Quick Dry Doors & window frames Wood stain 1234567890

Available: 02/10/23

£44.00

1

Set delivery date

Payment summary	
Subtotal	£44.00
Delivery charges	£0.00
Promotion total	£0.00
Discount total	£0.00
Tax (20%)	£7.33
Total	£44.00

Proceed to checkout →

Basket

HD: NW6 4RL C+C: Cricklewood

Scan / type a product, code or card...

1 items

Actions

Home Delivery (1) Cricklewood - S2H Delivery: 02/10/23

Ronseal 10 Year Walnut Satin Quick Dry Doors & window frames Wood stain 1234567890

Available: 02/10/23

£44.00

1

Set delivery date

Payment summary	
Subtotal	£44.00
Delivery charges	£0.00
Promotion total	£0.00
Discount total	£0.00
Tax (20%)	£7.33
Total	£44.00

Proceed to checkout →

Basket - 'Can't be delivered' products 1 of 2

Fulfilment often fails due to various reasons, but the legacy system poorly alerted staff about these 'problem products', hiding essential information. I addressed this by designing:

- Clear warning messages and highlighting problem products with a dedicated orange marker (consistent with other features like picking journeys and promotions/discount designs).
- Unambiguous labels: Products are now simply labeled "Unavailable" with readily available remedies. The remedies is handled mostly in a pop-up.

This focus on clear error messaging and actionable solutions was well received, except for some user confusion regarding acronyms like "CBD" and "FFT." This will be redesigned by other colleagues down the line.

The screenshots illustrate the evolution of the application's handling of unavailable products in the basket:

- Screenshot 1:** Initial basket screen showing a warning message: "Some items cannot be delivered/collected (1) ▲ Change item fulfilment. Click + Collect store or remove items from the basket." The item is marked with an orange icon.
- Screenshot 2:** The same screen after clicking the "Change item fulfilment" button, showing the same warning message.
- Screenshot 3:** A modal dialog titled "Change item fulfilment" is displayed, listing three options:
 - Home delivery - unavailable (radio button is unselected)
 - Click + Collect from Cricklwood (radio button is selected)
 - Takeaway (radio button is unselected)
- Screenshot 4:** The basket screen after the item has been changed to "Click + Collect from Cricklwood". The warning message is gone, and a green success message at the top states: "Product fulfilment changed. Dulux Easycare Willow tree Matt Emulsion paint, 2.5L fulfilment changed." The item is no longer marked with an orange icon.

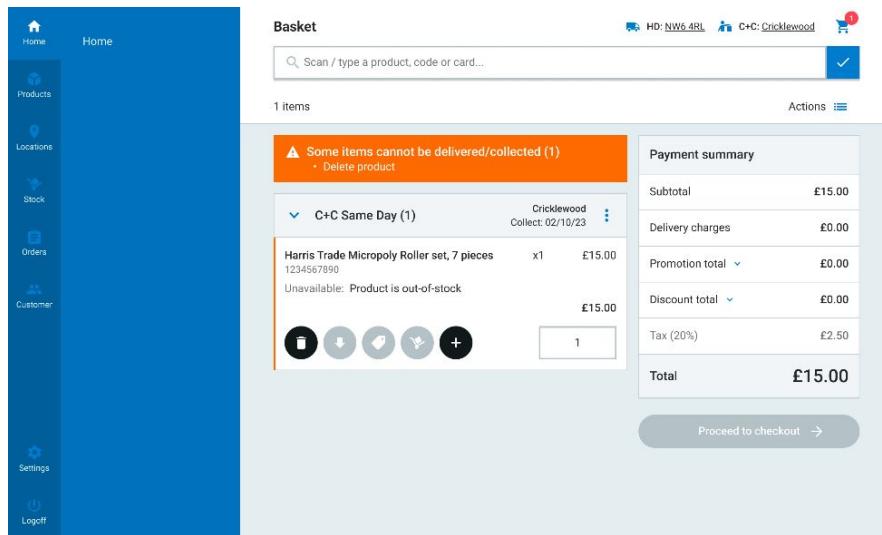
Basket - 'Can't be delivered' products 2 of 2

Technical limitations of a single postcode and store per basket traps colleagues in a dilemma: a home delivery is unavailable for a product, and the chosen Click & Collect store can not fulfil it too, and the customer needing the product.

To solve this I designed a dynamic display of nearby stores and their stock levels, empowering colleagues to collaborate with customers and seamlessly adjust the basket through an informed conversation.

The image displays three screenshots of a software interface, likely a back-end system for managing orders and delivery. The first screenshot shows a 'Basket' screen with a message: 'Some items cannot be delivered/collected (1) Change item fulfilment, Click + Collect store or remove items from the basket.' It lists a 'Home Delivery (1)' item and a 'C+C Same Day (2)' item. The second screenshot shows a 'Basket' screen with a message: 'This item cannot be delivered (1) - This item is unavailable for Click + Collect from Cricklewood. Check other stores (1) This item is unavailable for Takeaway from your store.' The third screenshot shows a 'Change Click + Collect Store' dialog box, listing five stores with their locations and stock levels for the selected items. The stores are: Cricklewood (3.3 mi from M65), Action (2.8 mi from M65), Camden (3.3 mi from M65), Stamford (3.0 mi from M65), and Holloway Road (4.1 mi from M65). Each store has a 'Select store' button and a 'Choose nearest store with stock' button at the bottom.

Basket - stock alerts (out of stock & insufficient stock)



Basket

HD: NW6 4RL C+C: Cricklewood

Scan / type a product, code or card...

1 items

⚠ Some items cannot be delivered/collected (1)

- Delete product

C+C Same Day (1) Cricklewood
Collect: 02/10/23

Harris Trade Micropoly Roller set, 7 pieces
1234567890

Unavailable: Product is out-of-stock

Payment summary

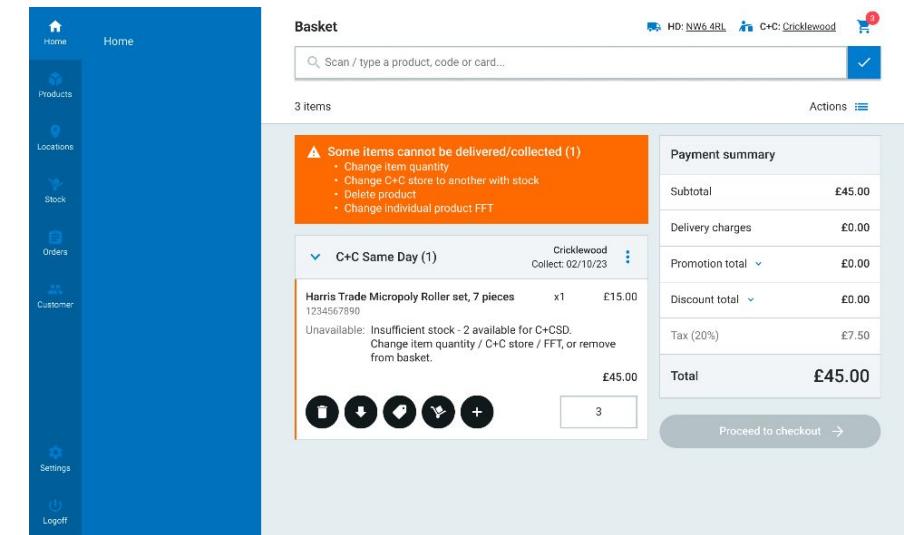
Subtotal	£15.00
Delivery charges	£0.00
Promotion total	£0.00
Discount total	£0.00
Tax (20%)	£2.50
Total	£15.00

1

Proceed to checkout →

Actions

Home Products Locations Stock Orders Customer Settings Logoff



Basket

HD: NW6 4RL C+C: Cricklewood

Scan / type a product, code or card...

3 items

⚠ Some items cannot be delivered/collected (1)

- Change item quantity
- Change C+C store to another with stock
- Delete product
- Change individual product FFT

C+C Same Day (1) Cricklewood
Collect: 02/10/23

Harris Trade Micropoly Roller set, 7 pieces
1234567890

Unavailable: Insufficient stock - 2 available for C+CSD. Change item quantity / C+C store / FFT, or remove from basket.

Payment summary

Subtotal	£45.00
Delivery charges	£0.00
Promotion total	£0.00
Discount total	£0.00
Tax (20%)	£7.50
Total	£45.00

3

Proceed to checkout →

Home Products Locations Stock Orders Customer Settings Logoff

Order History list

The Order History list design prioritises useful information for colleagues.

I removed unnecessary details, focusing only on key information, namely: order type, date creation, status, installation status, order quantity and total.

I supported designing intuitive filters and search functionalities for faster order retrieval.

User Testing confirmed this as 'successful design' with no reported issues.

Customer Account

Account Information Order History Lists (2) Account History

Search Order / Quote number, EAN, Product name...

999 Orders

Order: 1234567890 Created: DD/MM/YY Items: 10 £165.00

Estimate: 1234567890 Created: DD/MM/YY Items: 3 £48.00

Exchange: 1234567890 Created: DD/MM/YY Items: 2 £215.00

Extra: 1234567890 Created: DD/MM/YY Items: 6 £42.00

Return: 1234567890 Created: DD/MM/YY Items: 3 £79.00

POD: 1234567890 Created: DD/MM/YY Items: 4 £50.00

View Order details

Customer Account

Account Information Order History Lists (2) Account History

Search Order / Quote number, EAN, Product name...

999 Orders

This Customer Account does not contain any Orders yet

Customer Account

Filter & Sort

Filter by

Order type

Order Estimate Exchange Extra

Source

Web Store Mobile

Status

Open Closed Cancelled

Installation included?

Yes No

Sort by

Date created (new to old) Date created (old to new) Order value (low to high)

Amend Filter and/or Sort options

Order detail view

This page provides colleagues with a view of an order's details, empowering efficient and accurate resolution of customer inquiries. This page follows mostly how the basket is designed in terms of look and feel.

The design streamlines two core tasks:

- "Where Is My Order" (WISMO) Enquiries
- General Order Queries

This page is accessible via direct search (not shown on portfolio) or through the Order History page, ensuring effortless navigation for colleagues.

We've conceptualised tracking for Home Delivery orders, providing real-time visibility into every step of the fulfillment process. The tracking link would go to a courier webpage.

Product line availability is now readily accessible, enabling accurate estimates of delivery timelines and ensuring customers receive their orders promptly. Just like how the basket works.

Clear labeling of fulfillment types, payment summary, and delivery details clarifies navigation and simplifies order management. This addresses user feedback from colleagues regarding information transparency.

Markers now denote full or partial payments and highlight applied promotions, enhancing communication and reducing colleague confusion. This feature was implemented based on valuable feedback from both business and colleagues.

Payment, delivery, and contact details accordions are closed by default as a proactive measure to safeguard sensitive information, as advised by the business.

We're actively planning to introduce granular status updates at both the fulfillment type and line item levels, further improving order transparency and management efficiency.

Order 6661111999

Search for an EAN/product in this order...

Order Information Order Audit Trail Order Permissions

Order details

<Customer name> Cricklewood

Created: DD/MM/YY
Source: Online
Installation: No

Payment summary

Subtotal £99,999.00

Delivery charges £99,999.00

Promotion total (2) > £99,999.00

Discount total > £99,999.00

Tax (20%) £99,999.00

Total £99,999.00

Paid

Delivery details

Contact details

C+C Same Day (3)

Collect: DD/MM/YY

PRODUCT NAME x999 £9999.99
123456789000
Collect: DD/MM/YY £9999.99

Promotion message £9999.99

PRODUCT NAME x999 £9999.99
123456789000
Collect: DD/MM/YY £9999.99

Promotion message £9999.99

PRODUCT NAME x999 £9999.99
1234567890
Collect: DD/MM/YY £9999.99

Promotion message £9999.99

C+C Next Day (1)

Collect: DD/MM/YY

PRODUCT NAME x999 £9999.99
1234567890
Collect: DD/MM/YY £9999.99

Home Delivery (1)

Cricklewood - S2H
Delivery: 02/10/23
Tracking

PRODUCT NAME x999 £9999.99
1234567890
Delivery: DD/MM/YY £9999.99

Bulk (1)

Boston - FC
Lead time: 4-days

PRODUCT NAME x999 £9999.99
1234567890
Delivery: DD/MM/YY £9999.99

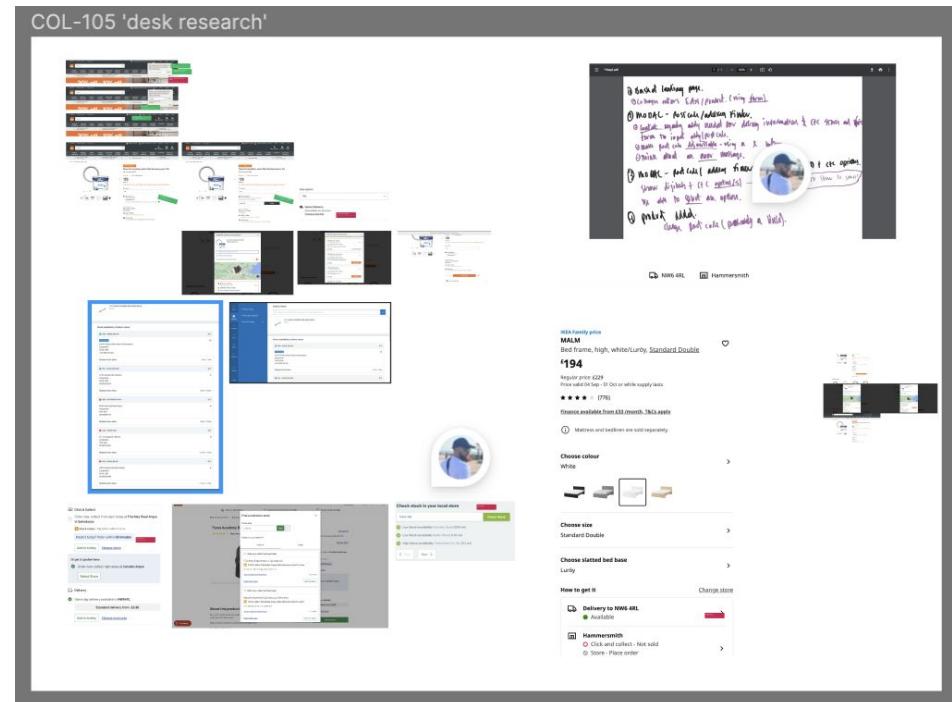
Ideation

Examples

Desk Research - delivery information

I was told to design a basket flow for colleagues to select Click + Collect or Home Delivery fulfilment and take in a customer's delivery postcode. This ensures accurate and immediate delivery information.

Desk Research indicated e-commerce platforms prioritised early address capture to show delivery options. This insight informs the proposed pop-up solution, enabling real-time visibility of fulfillable options specific to the customer's location. Additionally, research emphasizes the importance of offering flexible fulfilment alternatives instead of pre-selecting a single choice, potentially boosting customer satisfaction and order completion rates.



Workshop - Order History Page

To gain deeper insights, we spoke to stakeholders to identify colleague's needs. We confirmed the importance of accurate delivery information and customer query resolution, and this served as a springboard for creative ideation.

So then this helped me lead a workshop to help envision several features currently in development or already designed: a real-time tracking link, dedicated payment and delivery sections for colleagues, and granular product status updates within orders. We believe these features will significantly enhance the customer experience and empower our colleagues to provide efficient and informed support.

