UX best practices to create your module

Usability Team

Topics

1. Usability guidelines

2. Onboarding

3. Which view ?

4. User interface elements

5. Wizards and modals

6. How do I know I'm ready to publish my module ? Testing

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Usability guidelines

Objectives :

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3. Ergonomics and intuitive interface: having the same philosophy in the whole eco-system (colors, where do I put a button,...), easy to learn

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3. Do not invent new concepts, use the ones that are already known by the average user.

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5. Is the business process smooth ? If not, what breaks the flow ?

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5. Satisfaction

   How pleasant is it to use the design ?

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Simple Usability Rules

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8. But pay attention to details !

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Onboarding

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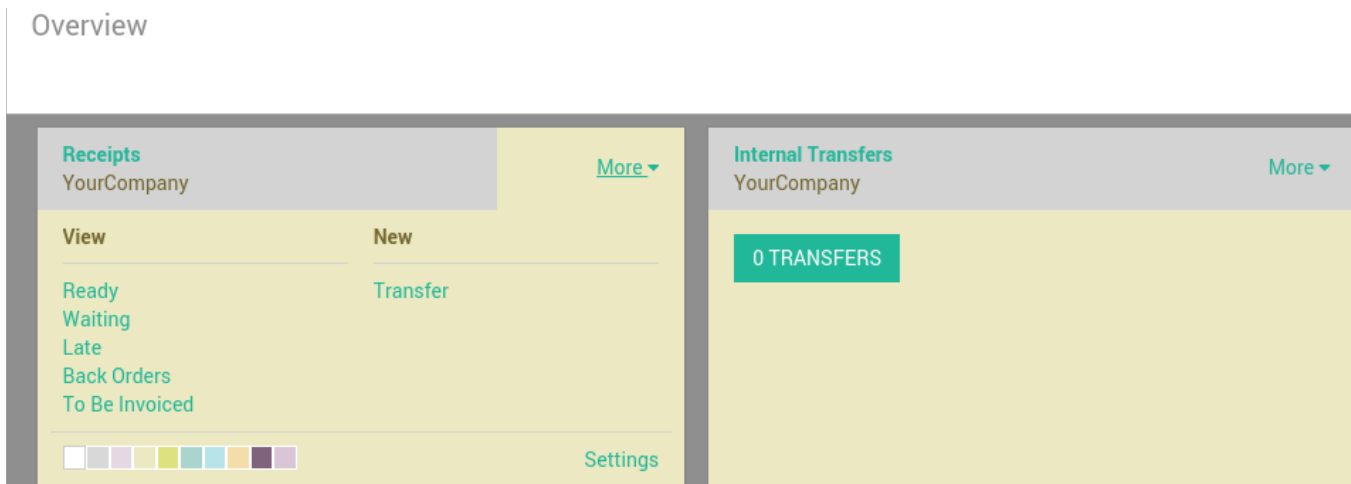
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    - Menu tip

Products

CREATE

Click to define a new product.

You must define a product for everything you sell, whether it's a physical product, a consumable or a service you offer to customers.

The product form contains information to simplify the sale process: price, notes in the quotation, accounting data, procurement methods, etc.

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    - Popup tips

Sales Teams / Opportunities / Interest in your products

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Use the breadcrumb to go back to preceeding screens. This is super useful to navigate between documents.

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    - Tooltip
    - Menu tip
    - Popup tips
    - Placeholders

Name ☐ Is a Company?

Name

Company ▾ Components Buyer ✖ Partner

Address   Street...
             Street 2...
             City   State   ▾
             Country

Website   e.g. www.odoo.com

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- Think of the main business cases. If particular cases : put it as an option in the settings or in customizing.

Sale Features

☐ Allow online quotations and templates

☐ Display margins on sales orders

☐ Allow to categorize sale order lines

☐ Choose MTO, drop shipping,... on sales order lines

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- Guide the user by highlighting buttons (next step = colored button)

Sales Orders / SO007

EDIT   CREATE

SEND BY EMAIL   PRINT   CREATE INVOICE   CANCEL ORDER

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View selection

Use a <u>gallery</u> for context (project, sales team, …)

Use a <u>kanban</u> if a business process is used for this feature (e.g. opportunities)

- o   show columns in background
- o   let the quick create available

Which View

Use exceptionally a <u>form</u> if the everyday use is a one click need (e.g, order a lunch)

- o   the user has to click in one button and then it is done neither more nor less
- o   The form view should be as close as possible from the real business document (e.g. a sale order)
- o   Use less field as possible. Other info should be precompleted by default value
- o   Hide secondary fields in an option or in tabs

Lunch   My Lunch   Manager   Configuration

New

SAVE   DISCARD

NEW   RECEIVED

| User | Administrator | Date | 05/29/2015 |

Lunch must be ordered before 10:30 AM

This is the first time you order a meal

Select a product and put your order comments on the note.

Your favorite meals will be created based on your last orders.

Don't forget the alerts displayed in the reddish area

Select your order

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Which View

Use a calendar view if you want to link an object to a date or a period.

Leave Request (Week 21)

← | TODAY | → | DAY | WEEK | MONTH

Search...

▼ Filters ▾ ≡ Group By ▾ ★ Favorites ▾

W21	Sun 05/24/2015	Mon 05/25/2015	Tue 05/26/2015	Wed 05/27/2015	Thu 05/28/2015	Fri 05/29/2015	Sat 05/30/2015
All day							
12 A							
1 A							
2 A							
3 A							
4 A							
5 A							
6 A		6:00 A - 11:15 A John Scofield, Sick Leaves					
7 A							
8 A							
9 A							

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UI Elements

Buttons

o Action button

Buttons

o   Action button
o   Stat button

Buttons

o   Action button
o   Stat button
o   Stage buttons

DRAFT QUOTATION > QUOTATION SENT > SALES ORDER SALE TO INVOICE > DONE

Buttons

- o Action button
- o Stat button
- o Stage buttons
- o Hamburger

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Buttons

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Search field

- o Filters

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Buttons

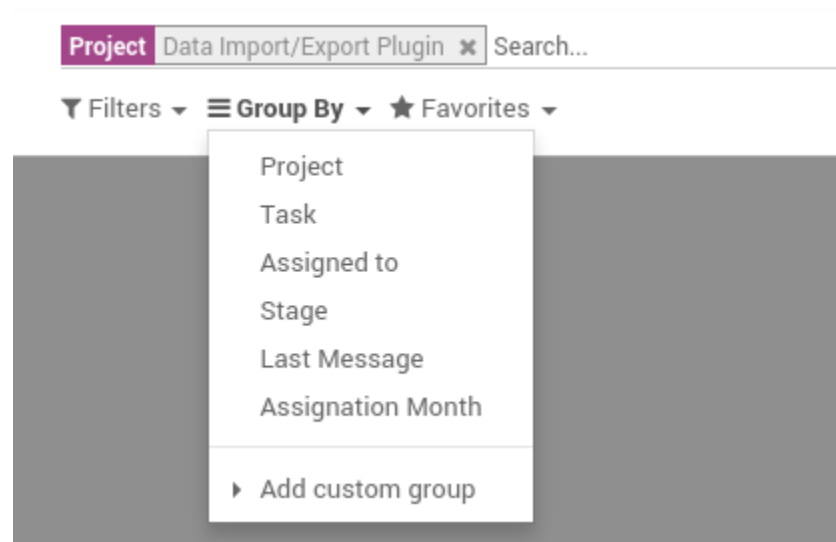- o Action button
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User interface elements

Fields

o   selection

Fields

- o selection
- o checkbox

Product Type	Service
Digital Content	☑
Sale Price	4.50

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Fields

o   selection
o   checkbox
o   radio button

Amount Computation

○ Balance
◉ Percent
○ Fixed Amount

Enter a value
0.000000

Enter a percentage between 0 and 100 % of the amount you want to pay.

User interface elements

Fields

- o selection
- o checkbox
- o radio button
- o datepicker

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Fields

o selection
o checkbox
o radio button
o datepicker
o toggle

Status	
To Approve	○
Approved	●

Fields

o   selection
o   checkbox
o   radio button
o   datepicker
o   toggle
o   monetary

Untaxed Amount :	14981.00€
Taxes :	0.00€
Total :	**14981.00€**

Fields

- o selection
- o checkbox
- o radio button
- o datepicker
- o toggle
- o monetary
- o percentpie

✉ 4 Emails Sent	60% Received	60% Opened	40% Replied	0% Clicks	20% Bounced

From	Administrator <admin@yourcompany.example.com>
Subject	First Newsletter
Recipients	47 selected records SEE SELECTION →

User interface elements

Fields

- o selection
- o checkbox
- o radio button
- o datepicker
- o toggle
- o monetary
- o percentpie

Breadcrumb

Sales Dashboard CRM Sales Reports Configuration

Sales Orders / SO008 / WH/OUT/00006 / Luminous Technologies, Laura Castro

EDIT CREATE

Fields

- o   selection
- o   checkbox
- o   radio button
- o   datepicker
- o   toggle
- o   monetary
- o   percentpie

Breadcrumb

Tags

Tags   (saas6 ✖) (Deadly bug ✖) (Hour ✖) | ▼

Contact's suggestion
Feature request
Experiment
Usability
Little problem
PBCK
Deadly bug
Search More...
Create and Edit...

Fields

- o selection
- o checkbox
- o radio button
- o datepicker
- o toggle
- o monetary
- o percentpie

Breadcrumb

Tags

Icons

1 Transfers   1 Invoices

Sales Order SO008

Customer

Luminous Technologies

Constitución, 80

08078 Barcelona

Spain

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Fields

o   selection
o   checkbox
o   radio button
o   datepicker
o   toggle
o   monetary
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Breadcrumb

Tags

Icons

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- o   selection
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Breadcrumb

Tags

Icons

Additional Info : http://www.usability.gov/how-to-and-tools/methods/user-interface-elements.html

Wizards and Modals

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Wizards and modals

o Try not to use it. Only if necessary. It breaks the flow and isn't mobile responsive.
o Wizard is for usually for advanced process
   o Thinking of 2 processes : one simple and one complicated
   o Option to flag in customize or settings
o Modals : Try to avoid it, unless there are too many information.
   o In list : it is better to use editable list than opening a modal

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How do I know I'm ready to publish my module ?

o   Testing :

o Testing :
  o In new databases

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- o Focus on the main processes, not on the 1% case (except if you develop something really specific)
- o Be coherent with the other Odoo applications. Use the conventions we have.