**Summary of Findings from User Study Round 3**

# Participants

6 people total
- 4 Product users
  - Jay
  - Nicole
  - Chris
  - Nic
- 2 Non-Product users
  - Karine (QB ProAdvisor)
  - Ellen (pilot test)

# Results & Recommendations

## Overall
- Users were excited about the application and its functionality for small businesses, including the 3rd party application connections and integration with QuickBooks
  - *(Nicole) This is a lot different from what Neat has now, but definitely better. Synching with QuickBooks is a big plus and is something we've been wanting to do for a long time.*
- We observed some usability issues, as detailed below.

## Dashboard
- Overall, users liked the Dashboard page and the action-oriented tasks.
- Suggested Tasks vs. Alerts
  - A few people weren't sure of the difference between Suggested Tasks and Alerts and thought they might prefer them combined into one module.
  - 1 person preferred them separate, but thought Alerts should be called "Activity Feed" instead.
  - *RECOMMENDATION*: Rename Alerts to Activity Feed to better differentiate between this functionality.
- Needs Review
  - Need to change the language when no files need review so it doesn't say "ready to go." People were confused and thought, "Ready to go where?"
  - *RECOMMENDATION*: Update language to just say "Great job! All your files are reviewed."

## Search & Filters

- Various Concepts
  - 5 people preferred filters at top next to the search box
    - 3 people preferred the simpler filters overlay (i.e. one column down the right), 2 people preferred having the common filters across the top with a right panel overlay for more filters
      - *(Karine) I like having filters next to the search box. I think of them as related.*
      - *(Nicole) Filtering is a go-to action and I use it a lot. It's very prominent here at the top and that's where I want it. I also like everything in one spot so I don't have to click around.*
      - *(Nic) Top is preferred - you nailed it. It's on top so I know it's controlling what's under it and I have the most common ones across the top. I don't like the filters on the left because I didn't want it to move around the screen so much. I want an overlay.*
      - *(Chris) Having filters on the top is better because adding filters to the right of the core data is less intrusive on the data itself. Not crazy about the filters coming off the side. Having filters on the side feels encroaching. When pushing core content to the right it feel like you are squeezing it into a corner.*
  - 1 person preferred filters on left with the folders
  - *RECOMMENDATION*: Keep filters at the top next to the search bar and recommend using the simpler filter design with one column of filters down the right.
    - Surface the most common filtering options at the top, and provide the lesser used filters at the bottom, collapsed by default.
- Filters
  - Amount slider
    - People want to have an option to enter a specific amount as well as a range.
  - A few people wanted a more prominent "clear filters" option from within the filters panel
  - A few people wanted to be able to easily filter on the stuff that went to QB or not.
  - *RECOMMENDATION*: Further refine the filters design to include an option to enter a specific amount in additional to a range, and provide a "clear filters" option. Also update filters to provide an option for filtering by 3rd party services and whether items have been submitted or not.

## Files Page

- Users continued to rave about the Files page and clicked around with ease to view, edit, and take action on items

- People want to be able to customize the "Description" column for mixed content and/or the columns that appear in the table view.
- **Actions Toolbar**
  - People were able to multi-select to take actions on selected items (either via Ctrl+click, Shift+click, and/or right click)
  - Expense
    - Most people clicked "Expense" from the Files menu as a means to create a new expense report.
      - 1 person wanted this to say "Expense report" or "Add to expense report" instead
      - *RECOMMENDATION*: Rename "Expense" action to be "Add to expense report"
- **Tags & Auto Tags**
  - Only had time to test with 1 user and she wanted Tags and Auto Tags to be kept separate in cases where there could be exact overlap on tag names (i.e. there is the same tag as both a manual Tag and as an Auto Tag)
    - *(Ellen) When it messes with my stuff and I can't tell the difference, then that's trouble because it's not going to be 100% right. Even if it were right 90% of the time and only 10% of the time it was wrong, I would feel it corrupted my data.*

## Business Center
- **Overall IA**
  - A few people were a bit confused about the intentions for the Business Center and tried to make sense of the functionality that was grouped under this tab.
    - *(Nicole) I don't understand the Business Center part. Is this just expense reports? I'm not sure why this area is separated here.*
  - Most people did not initially look under the Business Center to connect and manage 3rd party services. They first tried looking:
    - Under the application File/Help menu first (i.e. top settings bar)
    - On the Dashboard
    - Searching for apps, like "QuickBooks"
    - Under Account
    - Once they found the Connections tab, the location under Business Center still didn't seem entirely intuitive to most.
      - *(Nic) Why is Connections under Business Center? It seems like it should be it's own tab at the top or under Account. Pretty much everyone else has it under Account, such as Zapier and Contactually. Connections are a setting.*

- ○ *RECOMMENDATION*: To aid findability, we recommend promoting the Connections area prominently on the Dashboard, the application File menu, and elsewhere in the application. Also include it as an option from under the Account menu.
- **Expense Reports**
  - ○ Landing page
    - ■ People liked the design and the content shown, especially the submitted/paid status column
  - ○ Creating an Expense Report
    - ■ Most people went to the Files page to create a new expense report.
    - ■ A few people noticed the ability to start a new expense report from items that were ready directly from the Expense Reports page and liked that feature as well.
  - ○ Report format
    - ■ Table view vs. Thumbnail view
      - ● People generally liked having the option of table view or thumbnail view, but Table view will likely be used most often and should be the default view.
      - ● *RECOMMENDATION*: Change Table View to be the default view.
- **Connections**
  - ○ "Connections" Terminology
    - ■ Half of the people were initially confused about the terminology "Connections" and thought it meant Contacts and/or people connections because the word has a social media context to it.
    - ■ *RECOMMENDATION*: Rename this functionality to be "Integrations" or "Connected Apps"
  - ○ 3rd party Cloud Storage services
    - ■ A few people did NOT want any connected cloud storage services to import and duplicate their items to a NeatCloud storage location. Instead, they wanted Neat to simply layer on top of the cloud storage services of their choice as another UI to be able to view, edit, access, and take action on those files.
      - ● For example, they wanted to be able to scan items into Neat and have those files sync back out to their 3rd party cloud storage services, like Google Drive, as the actual storage location for those files, not Neat.
    - ■ *RECOMMENDATION*: Consider supporting this type of behavior with 3rd party cloud storage applications in the future.
  - ○ Evernote Contacts & partnership with LinkedIn
    - ■ A few people mentioned how great Evernote is at handling contacts (i.e. auto-synching with Address Books and cross

referencing data/photos with LinkedIn) and had seemed to abandon using Neat for contact management as a result.

■ *RECOMMENDATION*: Suggest reviewing this behavior in Evernote to see how Neat can be most competitive in terms of helping people to manage their contacts and integrate with 3rd party services.

## QuickBooks Workflows

- *\*Note that the feedback and recommendations below do NOT include the updates we had previously discussed with Neat as being needed to the QuickBooks workflows (and which Neat had asked us not to do). The feedback below reflects only the new issues/feedback that came up during this round of fast insight testing.*
- **QB Setup**
  - Overall sync concerns
    - ■ A few people were unclear how sync would work with QuickBooks and they wanted assurance that Neat would sync with updates to QB in a reasonable manner during ongoing use.
      - *(Chris) If I just added a new vendor in QB or a new expense category, will Neat be checking for this and updating quickly within the app?*
      - *If I update my client list in QB later, will it appear in Neat immediately?*
    - ■ *RECOMMENDATION*:
      - Include language about how sync/updating will work between QuickBooks and Neat application early in the workflow so that users understand this behavior and are assured it will work as desired.
  - Choose User
    - ■ Multiple users
      - A few people were confused about how to set up QB for multiple users at this step. If the Neat account has multiple users, can an Admin do the setup for each user all at once during the setup workflow, or would they need to login as each user? They were unclear on how this would work.
      - *RECOMMENDATION*: Update language to be clearer about what this is doing and how this will work for accounts with multiple users, and provide link to setting up users in case this has not been done yet.
  - Expense Categories
    - ■ Two people wanted to see QuickBooks account codes in addition to the text description and felt this was a critical feature.

- 1 person wanted to see the QuickBooks expense description here as well
        - *RECOMMENDATION*: Display QB account codes in the dropdown menus as well, if possible
    - Vendors
        - Language needs updating. The question is not, "Do you use QuickBooks for invoicing?" as users might use QB for creating invoices, but don't put invoices they receive into Neat.
        - *RECOMMENDATION*: Change language to something like "Do you put invoices in Neat that you want to pay in QuickBooks?"
    - Other Fields
        - A few people wanted language here to assure them that their lists would continue to be synced overtime.
        - One person (the QB ProAdvisor) thought that "Class" should be an option here as well.
        - *RECOMMENDATION*:
            - Consider adding "Class" as another field.
            - Include language about sync/updating between QuickBooks and Neat
    - Done
        - One person (the QB ProAdvisor) was concerned about using the language "Reconciliation" here and was worried that this might mean reconciliation was not going to happen later in QuickBooks. She wanted it to just say "Send your files to QuickBooks"
        - *RECOMMENDATION*:
            - Update language to be "Send files to be reconciled" instead
    - Lists design throughout QuickBooks Setup workflow
        - *RECOMMENDATION*: Recommend updating the design for matching Neat lists to QB lists to use the latest design we included under the Account section. All screens in the QuickBooks Setup workflows need to be updated to use this design instead.
- **Edit QB Settings**
    - Only a few people had time to view this page for feedback during testing, but it tested well.
- **Sending Files to QB**
    - Review page
        - One person wanted the first time through this flow to display the "How will this work?" text and then collapse it during subsequent visits through the flow as the user only really needs to see this language once
        - *RECOMMENDATION*: Update design so that explanatory text is shown by default only during the first time through the flow.

- **Sending Expense Reports to QB**
  - A few people weren't sure if expense reports should be sent to QB as checks or not
    - *(Karine) Should it go into QB as a Check or a Bill? You don't want to generate a check number, but you want the option to print check as "To Be Printed". Needs to also be marked in some way so people are aware they need to take action.*
    - *(Jay) Submits expense reports for himself for reimbursement. Wants to reimburse himself for his expense report items that are on his own personal credit card via money transfer, not a check.*
    - One person thought a check was fine for expense reports, but still wanted to be able to send those expenses directly into QB as transactions so that he could run reports later in QB on those expenses as well and track his spending.
      - *(Nic) Wants to reimburse himself for expense report items via check, but still wants to submit those receipts into QB directly as transactions so that he can run reports on his expenses.*
    - *RECOMMENDATION*: Put expense reports into QB as Bills by default.
  - Review page
    - One person wanted the first time through this flow to display the "How will this work?" text and then collapse it during subsequent visits (as noted above)
    - *RECOMMENDATION*: Update design so that explanatory text is shown by default only during the first time through the flow.
  - Locked items
    - A few people thought they needed a way to unlock submitted expense reports / items that had been sent into QB in order to make changes and then resubmit again to QB. They thought errors would happen and this would be necessary.
    - *RECOMMENDATION*: Provide an ability to unlock and re-submit an expense report / files to QB if people make a mistake.

## Account

- Multiple users
  - A few people had privacy concerns about employees seeing everything in the Neat account and wanted to instead have actual user roles and permissions.
- List management

- The design for managing lists (and matching items with QuickBooks) under the Accounts area was working well.
- *RECOMMENDATION*: Update the lists shown in the QuickBooks flow to use this design for lists instead, as noted above.