

Pretsl Dashboard Prototype Plan

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Pretsl was created to help small brick-and-mortar businesses bring their business online and manage their online storefront through a suite of easy to use digital tools including a customer facing storefront, tablet kiosk, a fulfillment application and company dashboard.

To better understand the small-brick-and-mortar business environment and the needs of the Pretsl users I put myself in their shoes and completed a cognitive walkthrough of the Pretsl dashboard. Additionally, I observed 3 contextual inquiries with participants experienced in using similar software.

Key Findings

- **Inventory** - Doing inventory is a very important, yet arduous task for managers who often have a lot on their plate and prefer to get it over with quickly so they may move on to their next task. Multiple participants during the contextual inquiries noted difficulty locating the amount of inventory available which would make an already arduous task more painful.
- **Product/Category Organization** - The ability to quickly locate and update specific products within Pretsl is difficult with the expectation that most small businesses will have hundreds if not thousands of products and there is currently no ability to search or filter within the dashboard.
- **Dashboard Home Page** - In my cognitive walkthrough I noticed the home page of the dashboard provides little to no information that can provide value to business owners or managers. Additionally, all 3 contextual interviewees pointed out the importance and lack of ability within the Pretsl dashboard to see high level data such as sales quotes, open orders, inventory information or current sale items.

User Stories & Improvements

Story 1: As the manager of a small grocery store Robert wants to quickly and effectively manage his product inventory so that he can assess the need for ordering additional products and return to assisting his staff and customers in a timely manner.

Inventory Improvements:

- Create button on top of home dashboard to new "Inventory" page
- Showcase low inventory items on dashboard home page with option to "See All"
- Showcase current sales on dashboard home page to further alert users of potential products more apt to run low soon
- Within the "Inventory" page give users the ability to set notifications based on product quantities
- Within the Products page show product quantities and allow users the ability to filter by quantity

Story 2: Phil, the day manager at his local neighborhood bodega wants to quickly update his online customers that a recent sale item is no longer in stock so he can eliminate confusion and save himself the effort of dealing with potentially unhappy customers in search of sale items.

Product/Category Organization:

- Create a search function within the main dashboard that carries through to all dashboard pages
- Add the ability to filter products alphabetically, by inventory or by product category.

Story 3: As the owner of a small convenience store in a busy neighborhood, Felicia wants to quickly assess her store's online earnings, inventory, and other high level data so she can effectively manage all the needs of her store.

Dashboard Home Page:

- Showcase high level information and allow users to click into each section for more information about earnings, inventory, current orders and sales/promotions.

Scenario

When Robert hears from another small grocery store manager how easy it is for them to see pertinent information including their earnings, inventory, current orders and sales/promotions with Pretsl he decides to test drive this new product to see for himself.

He logs into the test prototype and immediately sees large icons labeled "Earnings" "Inventory", "Orders" and "Sales" with some corresponding high level information including 3 products under "Inventory" marked as low. Knowing that updating inventory has always been a bit of pain for him he's intrigued and decides to dig a bit deeper.

Upon clicking "See More" below the low inventory items he sees that he has the ability to set notifications for individual products based on quantities and recognizes that after setup this functionality will save him loads of time and effort.

After being impressed with the ability to quickly identify low inventory items and see high level information he decides to look at the Products page knowing all too well that his little store houses thousands of products that are always changing.

He recognizes right away and likes the ability to filter his long list of products alphabetically, by category, quantity or select the search function to quickly locate his favorite treat, a Snicker's bar. This experience he feels will make his life as a store manager much easier and as satisfied as his first bite of a Snicker's bar.

Sketches

Products

Filter By: A to Z | Z to A | Category | Inventory: Low-High | Inv. High-Low

| Name | Category | Quantity | Deal | Edit | View | Delete |
|--------------|------------|----------|------|------|------|--------|
| Broccoli | Vegetables | 32 | - | | | |
| Asparagus | Vegetables | 19 | - | | | |
| Honeycrisp | Fruits | 201 | - | | | |
| Rice Pudding | Grains | 229 | - | | | |
| Grapes | Fruits | 286 | - | | | |
| Chicken | Meat | 401 | - | | | |

Dashboard

Earnings - Today's totals

SEE MORE

| Order # | Customer | Status | Total | Assesee | Expected Pickup |
|---------|----------|---------|----------|---------|-----------------|
| 16782 | Phil | Pending | \$67.24 | Greg | 3:00-6:00 PM |
| 19284 | J.M | Pending | \$59.86 | Jance | 12:00-3:00 PM |
| 21110 | Archie | Pending | \$106.01 | Nate | 9:00-12:00 PM |

SEE ALL

Inventory

| Product | Category | Quantity |
|---------------|------------|----------|
| Porkles | Vegetables | 7 |
| Pork Shoulder | Meat | 10 |
| Hon | Meat | 11 |

Sales

| Product | Category | Deal | Start | End | Final Price |
|-------------|----------|---------|--------|---------|-------------|
| Jim Beam | Liquor | 60% off | 9/7/20 | 9/11/20 | \$6.29 |
| White Bread | Bread | 25% off | 9/8/20 | 9/19/20 | \$4.99 |

SEE ALL