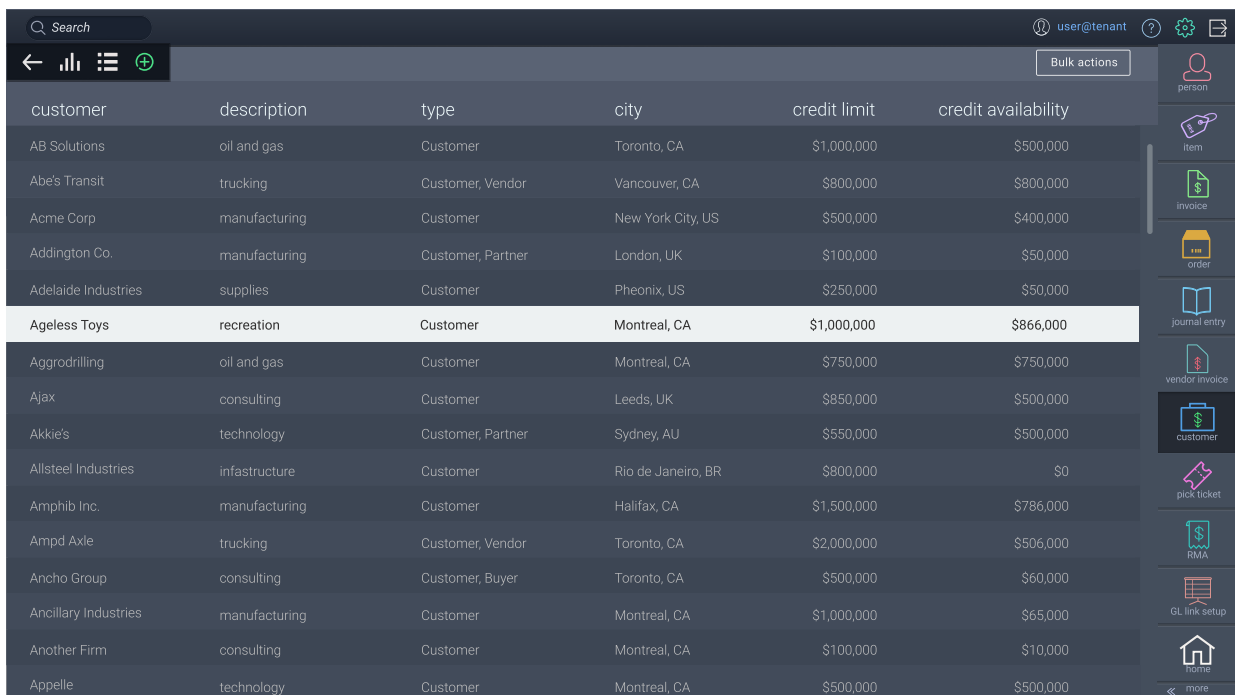


Filter and Bulk Actions

Allowing Paragon ERP users to locate and make changes to multiple references at once.

Main Challenges

- Users needed the capacity to filter accurately and quickly by category or multiple categories.
- Needed to incorporate new functionality without compromising white space.
- Technological constraints meant that we couldn't combine this functionality with the existing search.
- No user data and no option to collect any.



customer	description	type	city	credit limit	credit availability
AB Solutions	oil and gas	Customer	Toronto, CA	\$1,000,000	\$500,000
Abe's Transit	trucking	Customer, Vendor	Vancouver, CA	\$800,000	\$800,000
Acme Corp	manufacturing	Customer	New York City, US	\$500,000	\$400,000
Addington Co.	manufacturing	Customer, Partner	London, UK	\$100,000	\$50,000
Adelaide Industries	supplies	Customer	Pheonix, US	\$250,000	\$50,000
Ageless Toys	recreation	Customer	Montreal, CA	\$1,000,000	\$866,000
Aggrodriilling	oil and gas	Customer	Montreal, CA	\$750,000	\$750,000
Ajax	consulting	Customer	Leeds, UK	\$850,000	\$500,000
Akkie's	technology	Customer, Partner	Sydney, AU	\$550,000	\$500,000
Allsteel Industries	infrastructure	Customer	Rio de Janeiro, BR	\$800,000	\$0
Amphib Inc.	manufacturing	Customer	Halifax, CA	\$1,500,000	\$786,000
Ampd Axle	trucking	Customer, Vendor	Toronto, CA	\$2,000,000	\$506,000
Ancho Group	consulting	Customer, Buyer	Toronto, CA	\$500,000	\$60,000
Ancillary Industries	manufacturing	Customer	Montreal, CA	\$1,000,000	\$65,000
Another Firm	consulting	Customer	Montreal, CA	\$100,000	\$10,000
Appelle	technology	Customer	Montreal, CA	\$500,000	\$500,000

Paragon ERP's customer list screen before the new functionality was added.

1 I didn't have a lot of white space to work with, but the filter function was going to be used too frequently to hide it away.

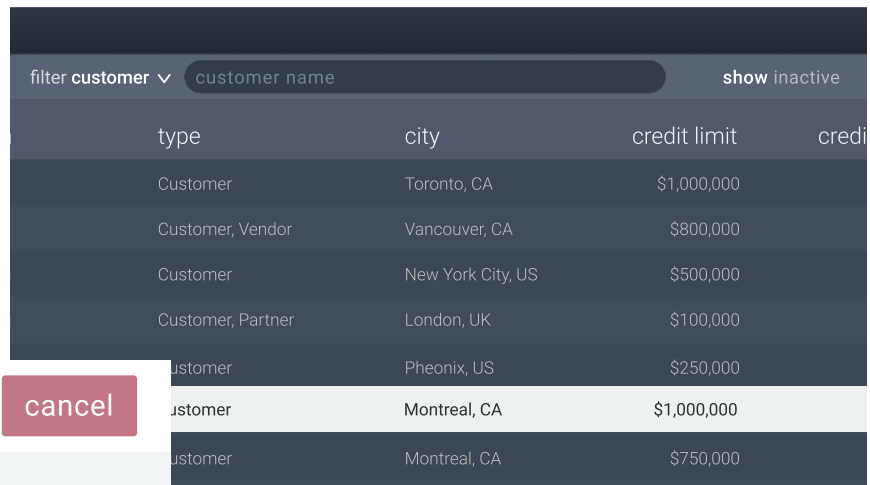
Approach

- Conducted stakeholder interviews with CEO, team leads, and team members with expertise either in the technology or the clients (developers, business development, services).
- Completed competitive analysis of software and websites with similar functionality, ranked their solutions according to findability, ease-of-use, and aesthetic.

Key Product Decisions

- This functionality would be seeing heavy use, so it needed to be readily accessible at all times, on all list pages. In light of this, I added it centrally to the top bar, and rejected other options such as hiding it in an “advanced search” dropdown or menu.

2 To combat the loss of white space, I made the new functionality unobtrusive by using a darker grey for the filter bar.



The screenshot shows a dark-themed interface for a customer list. At the top, there is a filter bar with a dropdown menu set to 'filter customer' and a search input field containing 'customer name'. To the right of the search field is a 'show inactive' link. Below the filter bar is a table with columns for 'type', 'city', 'credit limit', and 'credit'. The table contains several rows of customer data.

type	city	credit limit	credit
Customer	Toronto, CA	\$1,000,000	
Customer, Vendor	Vancouver, CA	\$800,000	
Customer	New York City, US	\$500,000	
Customer, Partner	London, UK	\$100,000	
Customer	Phoenix, US	\$250,000	
Customer	Montreal, CA	\$1,000,000	
Customer	Montreal, CA	\$750,000	

Bulk actions

activate

deactivate

edit

delete

cancel

Paragon ERP's customer list page with new functionality.

3 The ability to filter precisely, in tandem with the bulk actions, made for a powerful new tool and a massive upgrade in UX.

Paragon ERP's bulk actions menu.