

INTRO

Hello, thank you for participating! The UX Team is currently designing an email payment form where users can pay multiple invoices all at once. We want to make sure the payment form is easy to use on a phone and have some tasks for you to complete.

If possible, please verbalize your thoughts out loud during the exercise so we can understand your thought process!

We want to emphasize that there are no right or wrong ways to go about these tasks so don't worry about making any mistakes. If you get stuck feel free to let us know and we'll note down that there was difficulty in completing the task so we can adjust the workflow.

Additionally, since this is just a prototype and not a fully developed product, you will be unable to actually type out data. We have structured it so that data will auto fill for you when needed.

Do you have any questions before we begin?

TASK SCENARIO

“You’re a customer of an AR merchant. You want to pay your open invoices via email payment form.”

User Goal 1: Browse and find Invoice Total and Remaining Balance

Task: Here’s the payment webform on a phone. There are some invoices that are preselected for you.

- Feel free to browse the webform and let us know your initial thoughts on it.
- Can you browse and find Invoice Total and Remaining Balance for invoice # Inv001?

User Goal 2: Find invoices to pay, select, and adjust payment amount

Task: Can you add invoice # Inv005 to your list of invoices to pay? And adjust the payment amount to \$500?

User Goal 3: Pay with saved card

Task: Now, you’re ready to select a payment method. Can you show me how you go about paying with a saved card ending in 2094?

User Goal 4: Pay with new card

Task: You just realized that you don’t have enough funds on your saved card so you decide to pay with a new card. Can you show me how you would pay with a new card? *wait for user to complete task here

- Can you select Sept. for the month, 2028 for the card expiration year, U.S. for country, and California for state?

User Goal 5: Understand payment details

Task: Can you find the payment amount breakdown? Can you tell me what Payment Amount, Surcharge, and Total Amount mean to you?

User Goal 6: Pay the invoices

Task: Now you’re ready to pay the invoices. Can you show me how you do that?

User Goal 7: Receipt

Task: Can you show me how you would send emails to multiple recipients?

User Goal 8: Additional feedback

Is there any additional information you would like to see here or anything that you feel is missing?

WHAT USER MUST BE ABLE TO DO ON MULTI-INVOICE FORM?

- Pay multiple invoices on a payment form
- Select multiple invoices to pay
- View invoice details of each record
- Edit Payment Amount
- Select payment method
- Enter new payment method
- View payment details
- Pay the invoices