

# PayPal Ready Business Application Interaction Specs

Version 1.1

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Forms ..... 17-22, 32-36, 40-43, 47  
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## Known Issues

The create Reports experience (in Money) has yet to be designed.

## Change Tracking

All the latest thinking and design has been included.

*Look for helpful tips in the lower left of pages throughout the document. They're color coded as shown below.*

### Update Needed!!

This is incomplete, wrong, or out of date.

### Nice to have!

This feature is optional.

### Watch: MovieName.mov

A motion example exists.

### Something to note.

This information is worth highlighting.

# Gesture Legend



Double Tap



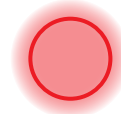
Tap



Rotate



2 Finger Pinch



Tap & Hold



Swipe Left



Swipe Right



Swipe Up



2 Finger Swipe Up



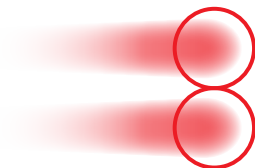
2 Finger Spread



Time Passes



2 Finger Swipe Left



2 Finger Swipe Right



Swipe Down



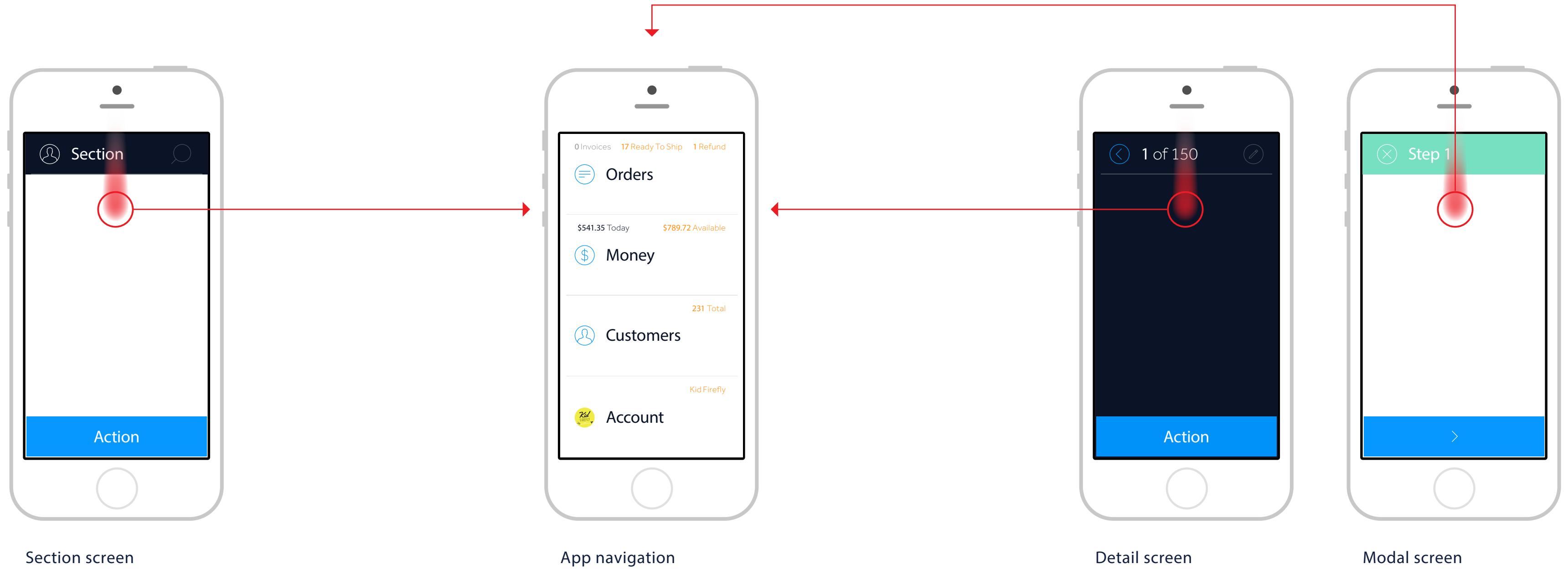
2 Finger Swipe Down

# Miscellaneous

# Map of Experiences

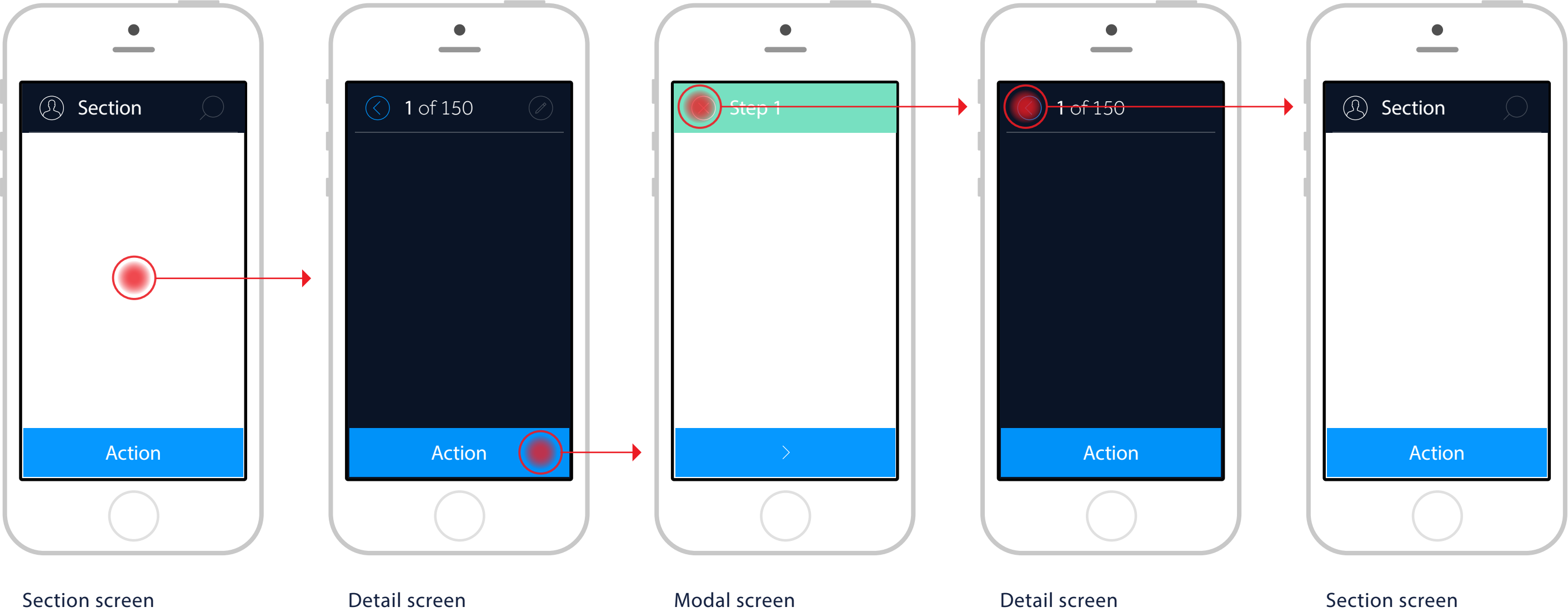
	"Nav"	"Sections"	"Details"	"Modal"	
	Search				
	Navigation →	Orders →	Order Detail → <ul style="list-style-type: none"> <li>→</li> <li>→</li> <li>→</li> <li>→</li> <li>→</li> <li>→</li> </ul>	Create Order Invoice Ship Refund Dispute Edit	
		Money →	<ul style="list-style-type: none"> <li>→</li> <li>→</li> <li>→</li> <li>→</li> </ul>	Add Withdraw Bill Pay Report	
		Customers →	Customer Profile → <ul style="list-style-type: none"> <li>→</li> <li>→</li> </ul>	Create Customer Edit	
		Account →	<ul style="list-style-type: none"> <li>→</li> <li>→</li> <li>→</li> <li>→</li> <li>→</li> <li>→</li> </ul>	Employees Edit Timezone Language Currency Logout	

# App Navigation Pattern



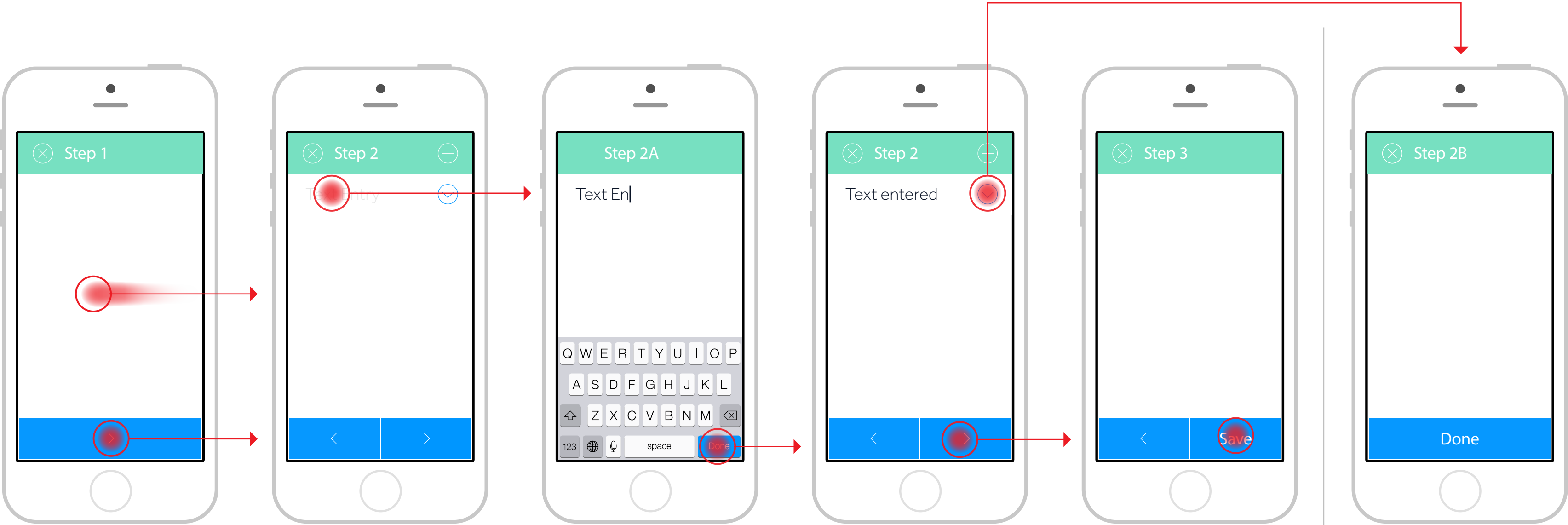
Pull down the header anywhere in the app to open the nav.

# Section Navigation Pattern



Section nav is either a back arrow or cancel 'x' in the top left of the header.

# Modal Navigation Pattern



**Begin flow**

Swiping left and right will also step through process screens.

**In page options**

**Keyboard open ("Done")**

**In page options**

Text has been entered.

**Save and close**

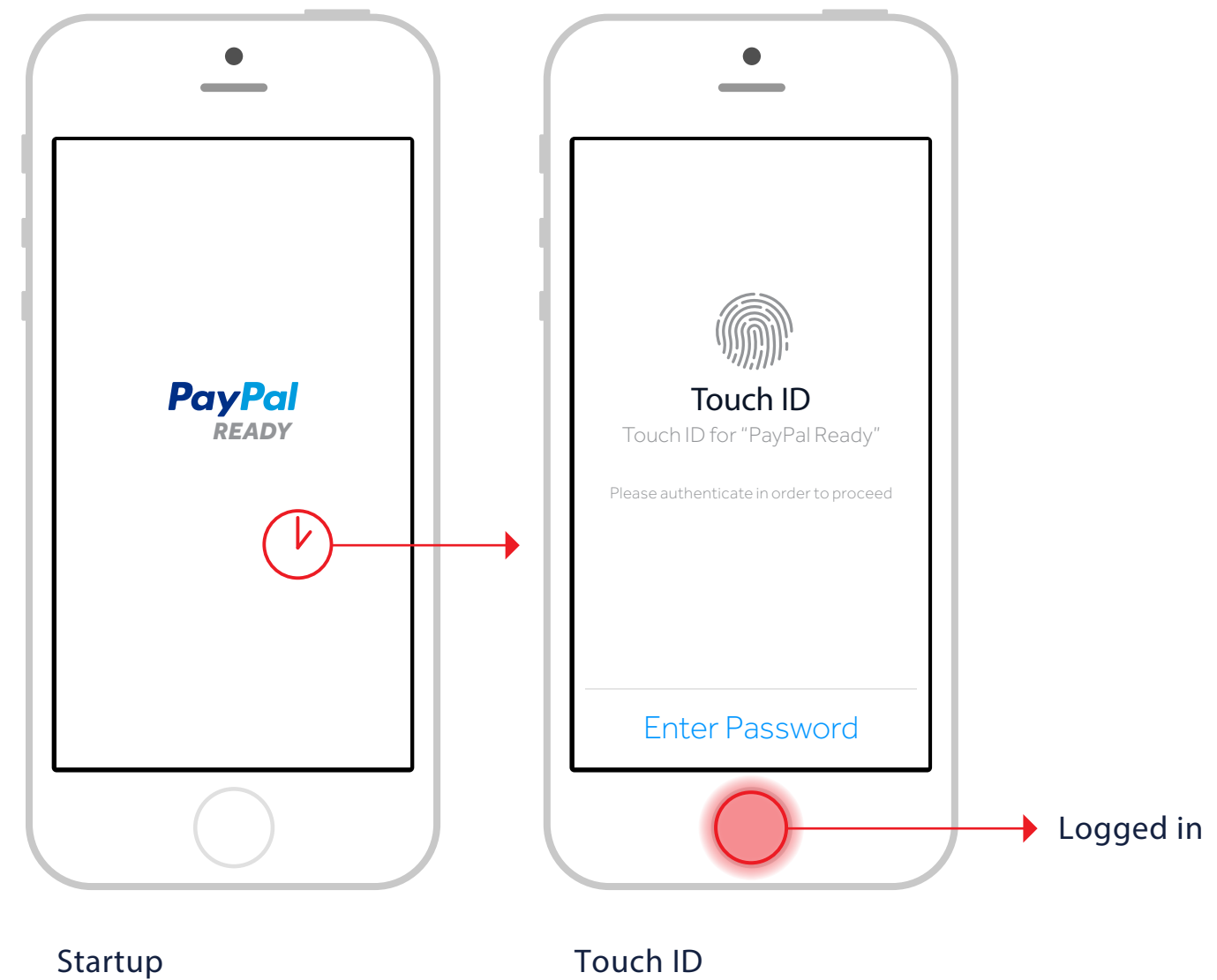
**"Done" screen**

Modal navs are stepped processes with certain steps that require a "done" before continuing.



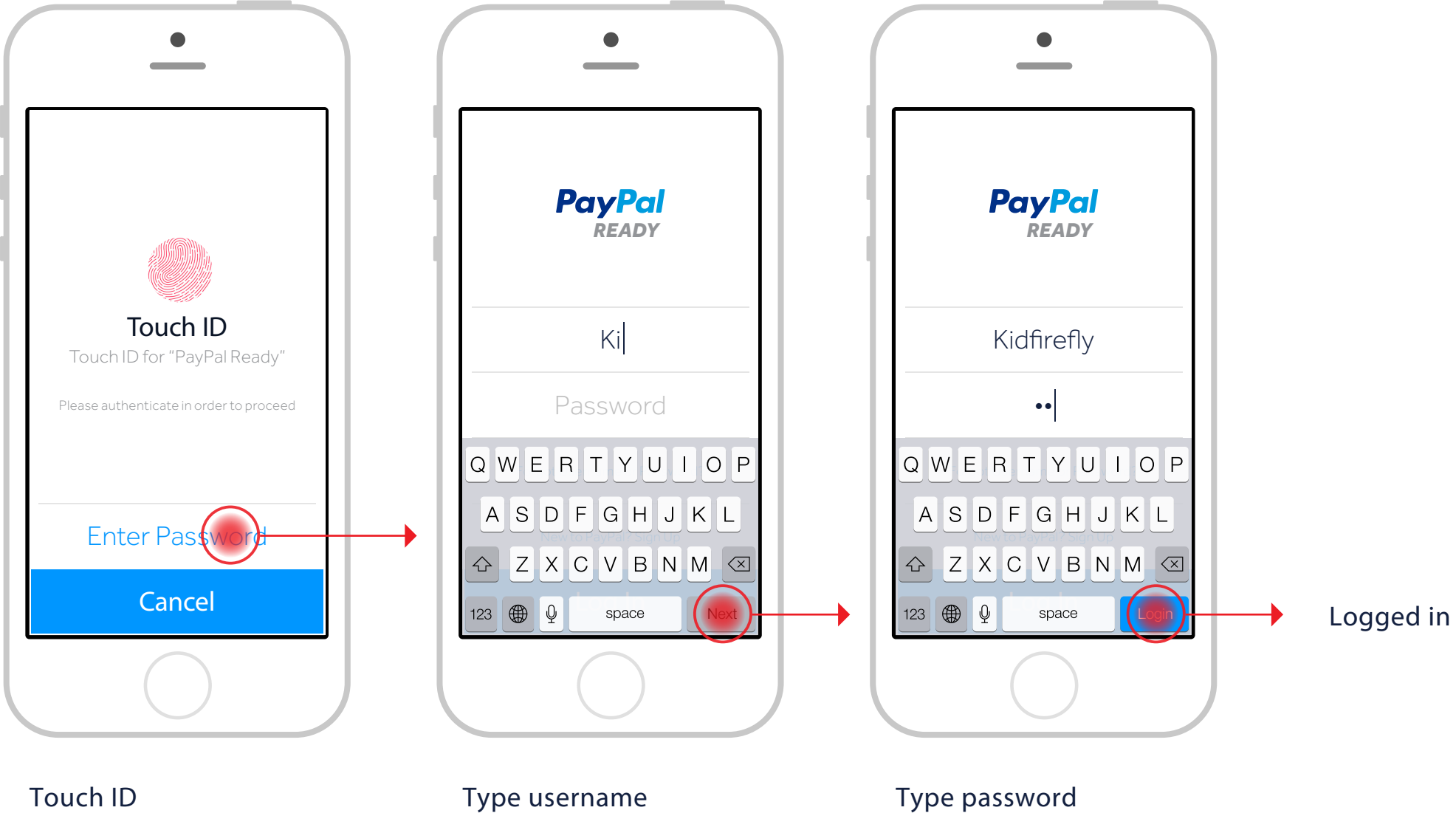
# Startup & Touch ID Login

The startup screen transitions into the login screen (unless already logged in) after a second or two. Touch ID fingerprint recognition is the preferred login experience. If Touch ID fails, or if the user would rather type their login, they are taken to an alternate login. Touch ID for third party use will be available in iOS 8 (due out this year).



Nice to have! Watch: [Startup.mov](#)

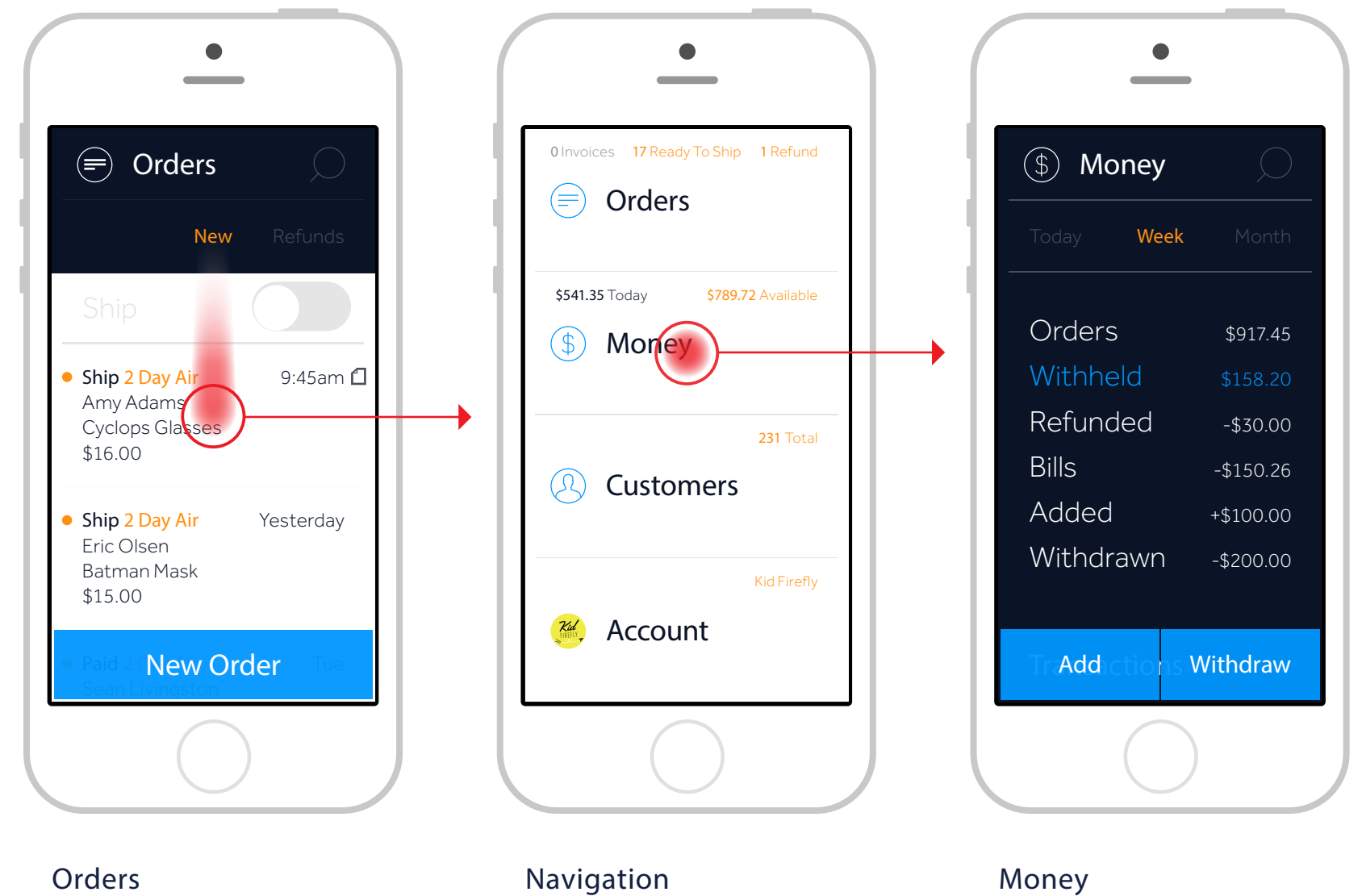
# Keyboard Login



Based on the PayPal Here login experience.

# Orders to Nav to Money

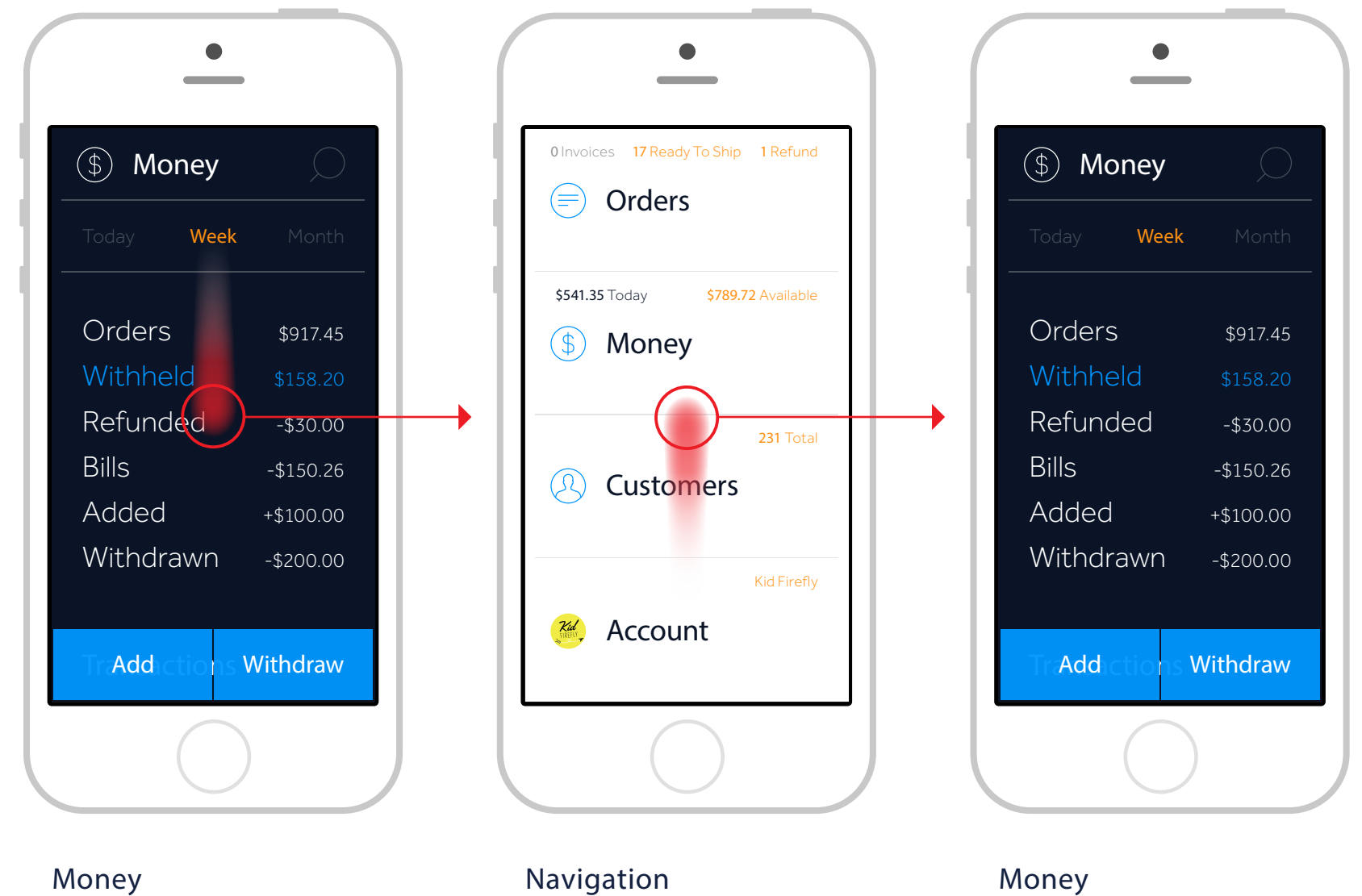
The main navigation is available from any screen by **swiping down** from the header or **swiping down** anywhere on the screen as long as the scrolled position of the visible screen is at the top (scrolled all the way up). **Tapping** one of the items in the nav will close the nav and open that section.



Watch: [Navigation\\_Then\\_Section.mov](#)

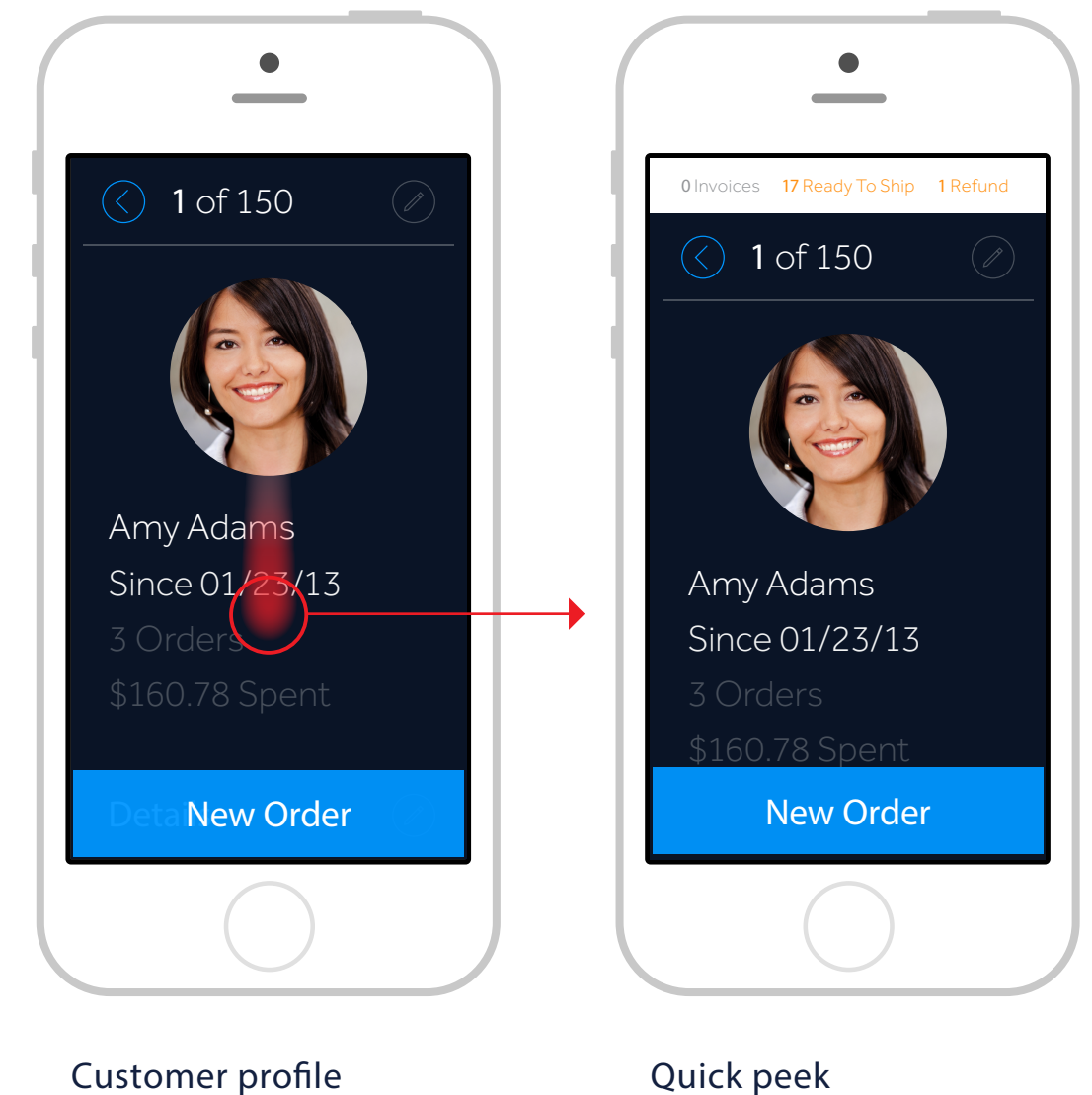
# Money to Nav to Money

The main navigation is available from any screen by **swiping down** from the header or **swiping down** anywhere on the screen as long as the scrolled position of the visible screen is at the top (scrolled all the way up). **Swiping up** without having tapped on a nav link will return to the previous screen.



Watch: [Navigation\\_Then\\_Back.mov](#)

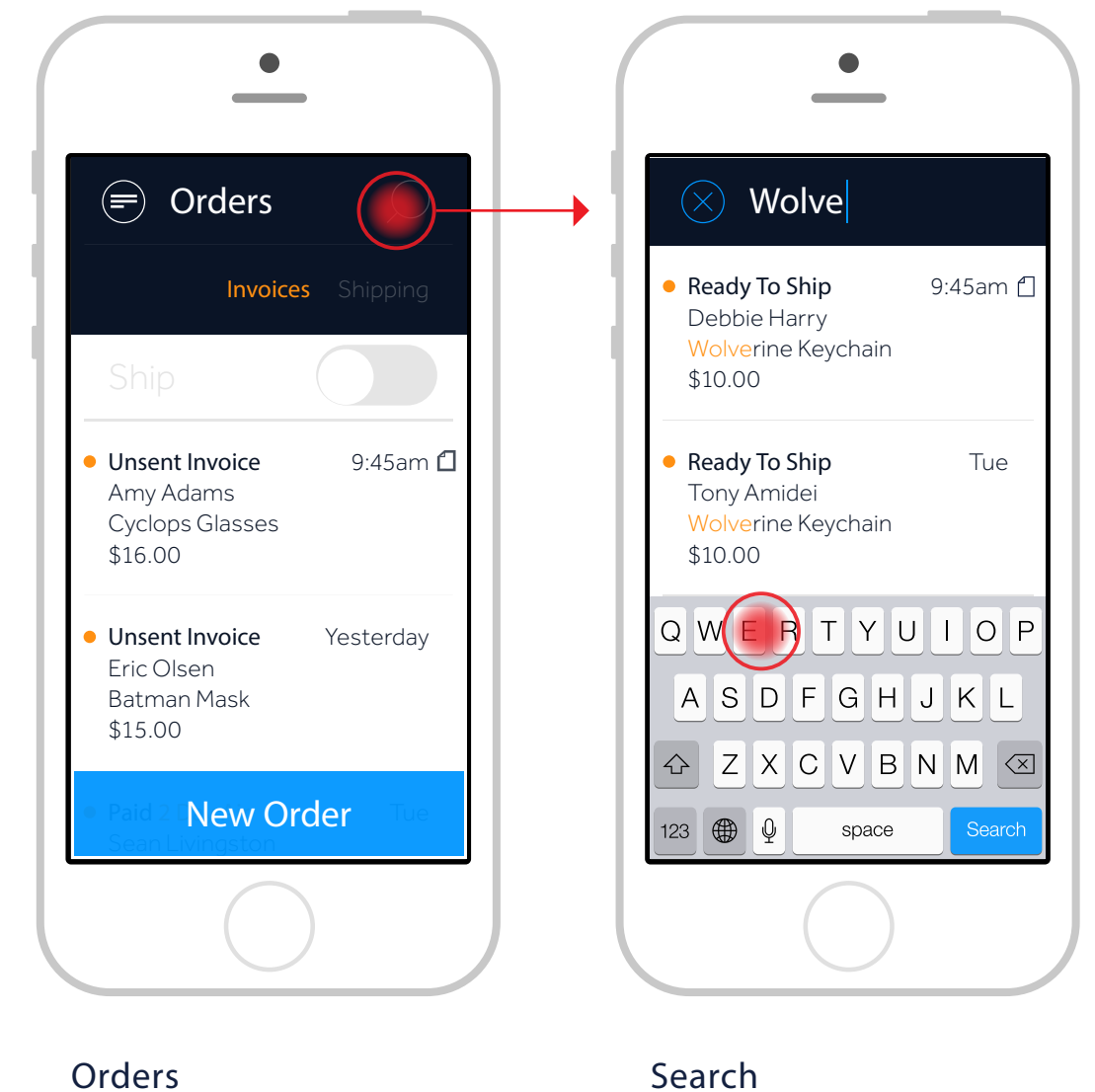
From any screen within the app, pulling down the screen will reveal the main navigation. **Pulling down** only a little bit will give a quick peek at the most important information about your Orders. The peek information shown is the total money made today, the number of new orders ready and the number of new refunds ready.



Watch: [Peek\\_Account.mov](#) (There are 5 additional peek videos as well)

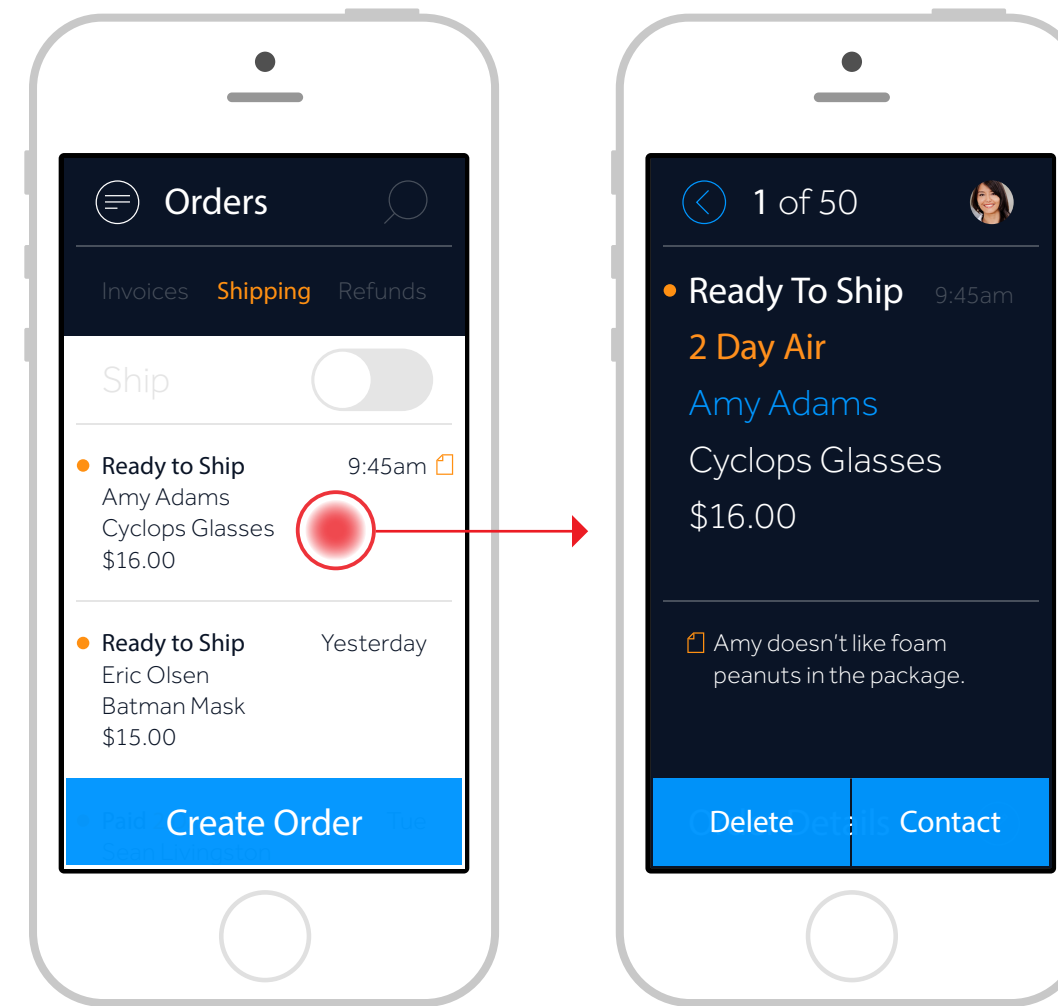
# Search

Search is available from the main screens within the app (modal screens are not included). Searching will be contextual based on the screen where search takes place. For example, searching from within the Orders section will show orders as the results. Items that can be searched include customer names, product and service descriptions, tracking numbers, transaction ids, dates, and amounts.



# Orders

The Orders section can be filtered by Invoices, Shipping, Refunds and Active orders. Once an action (highlighted in orange to the right) is taken on an order within Invoices, Shipping and Refunds, they disappear from the list. Orders within Active stay until the order no longer has anything to do. An orange dot means that an order hasn't been viewed since a new action is presented as ready to do.



Orders

Order detail

All Statuses

Unsent Invoice

Unpaid Invoice

Overdue Invoice

Ready to Ship

In Transit

Delivered

Refund Requested

Responded to Refund

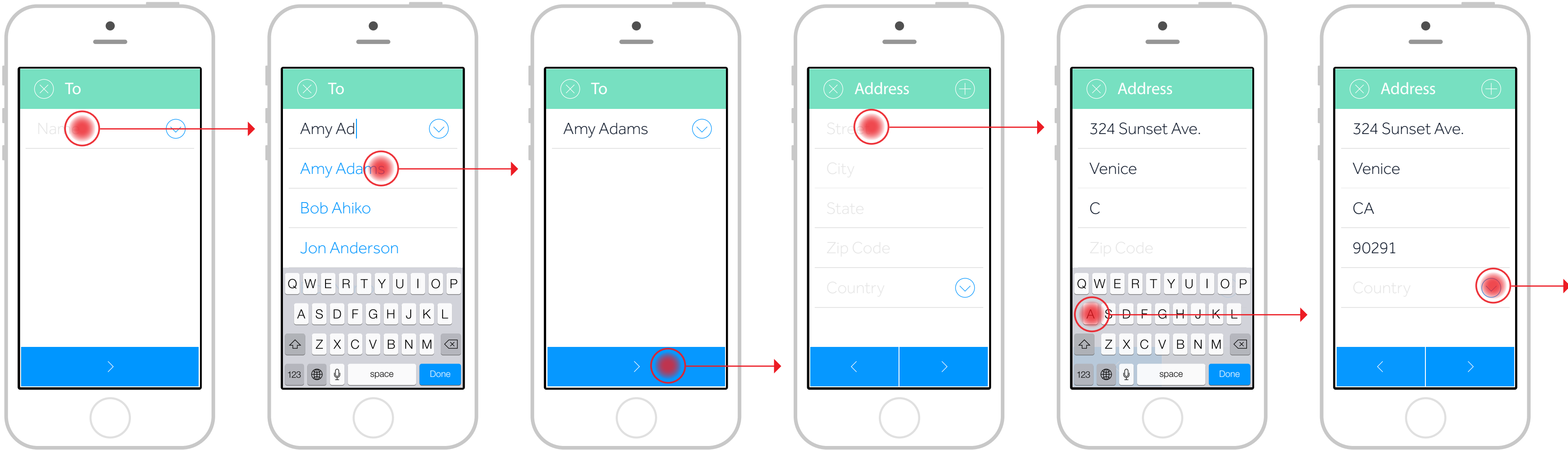
Refund Disputed

Refunded

Orders are inactive 60 days after payment or 90 days without payment.



# Create New Order



Name blank

Typing name

Name entered

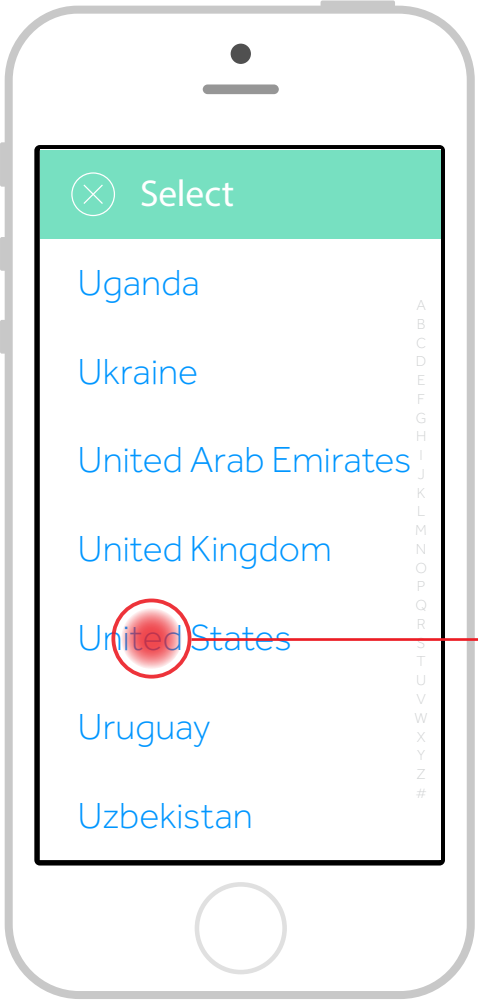
Address blank

Typing address

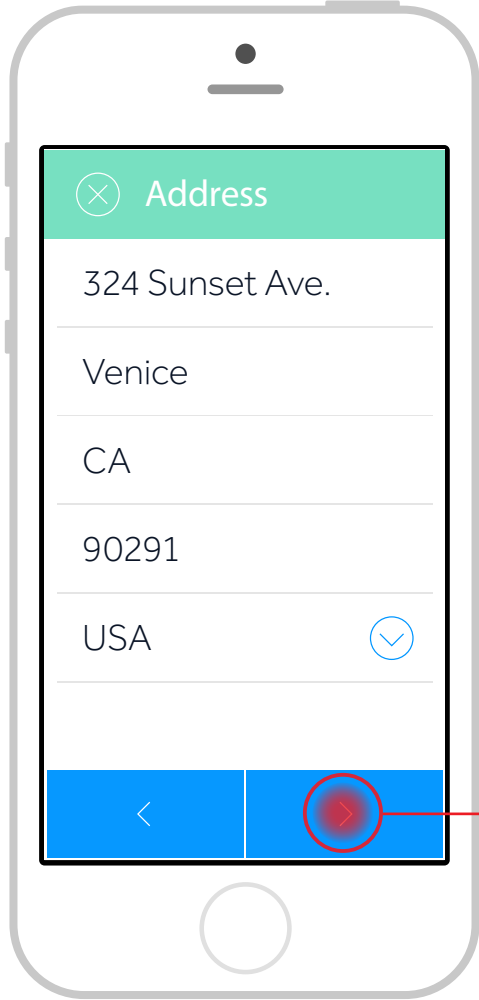
Country blank

Many of the screens will be prepopulated. This shows worst case scenario for creating a new order.

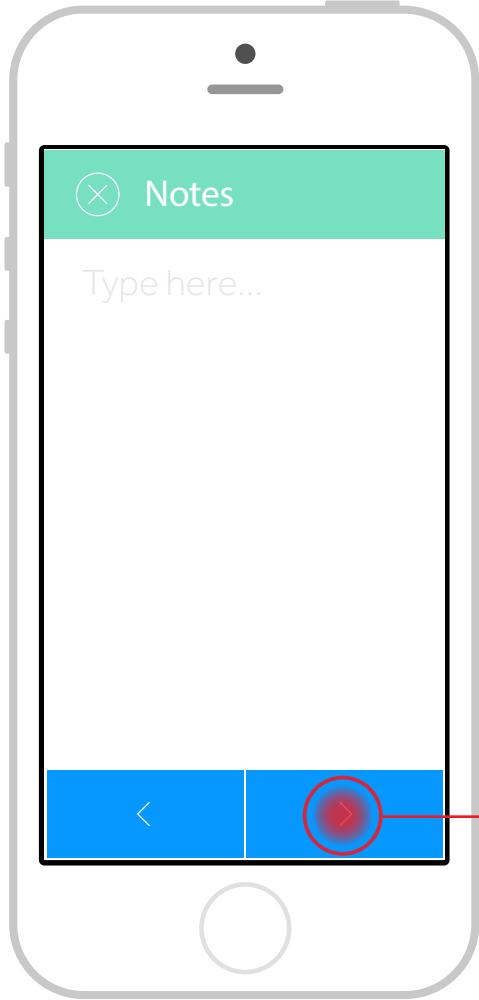
# Create New Order (Cont)



Select country

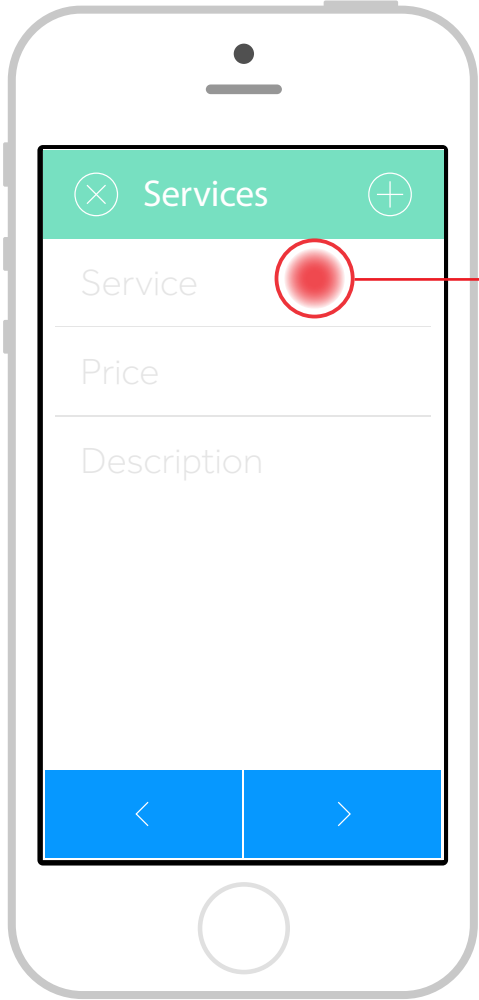


Address entered

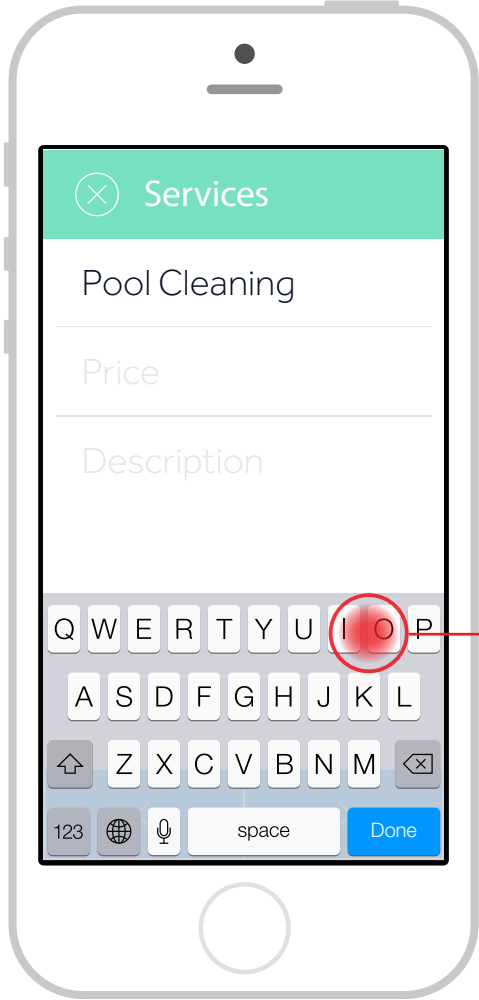


Notes blank

The notes text area is tapped, keyboard opens, the note is typed, done is tapped, the keyboard closes revealing the previous and next arrows.

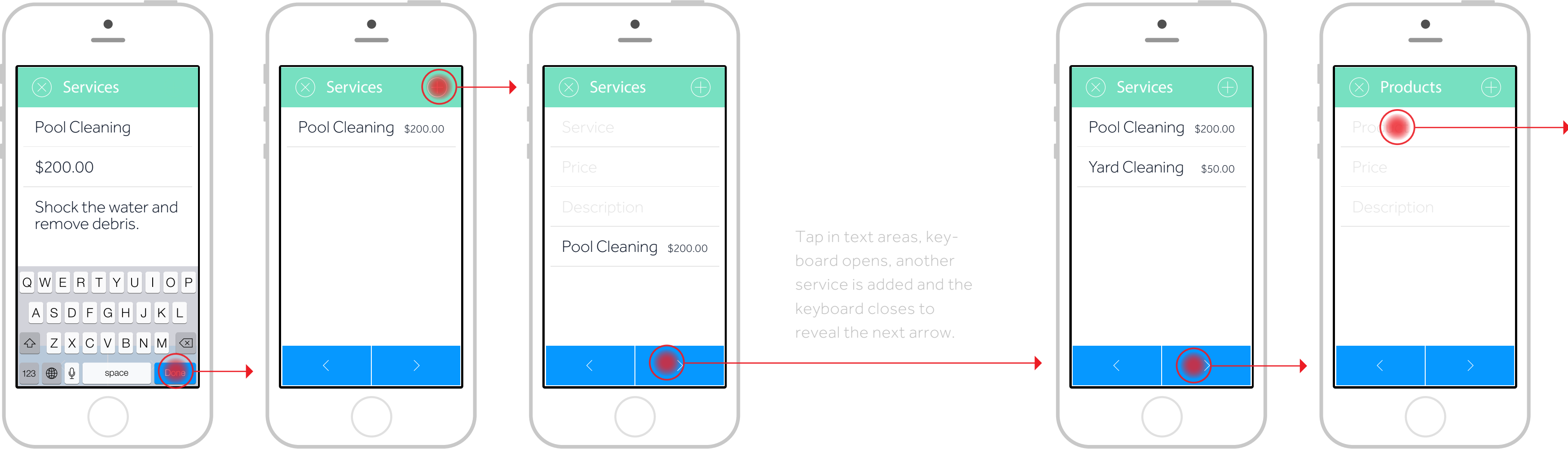


Services blank



Keyboard showing  
When the keyboard is up, the add icon hides.

# Create New Order (Cont)



Tap in text areas, keyboard opens, another service is added and the keyboard closes to reveal the next arrow.

**Keyboard typing**  
The 'Add Service' icon hides away while the keyboard is shown.

**Service entered**

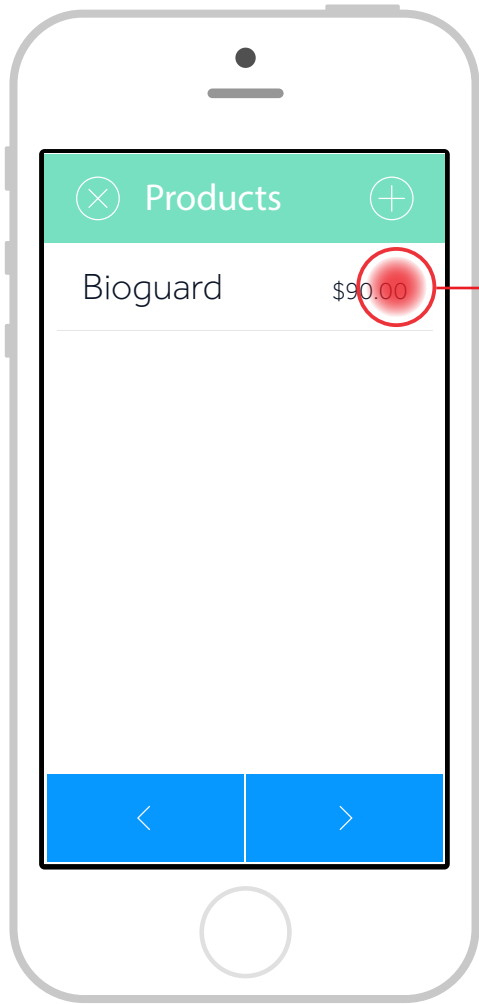
**Add new service**

**Services entered**

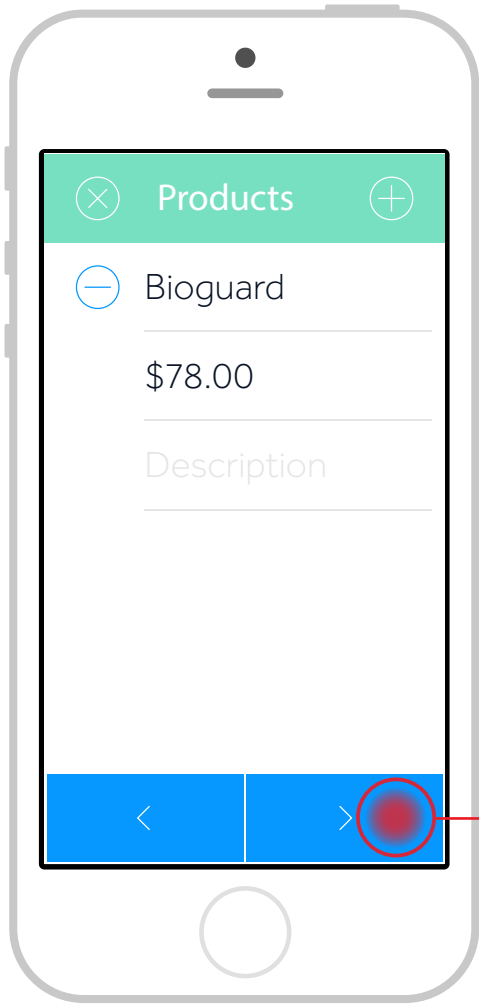
**Products blank**

# Create New Order (Cont)

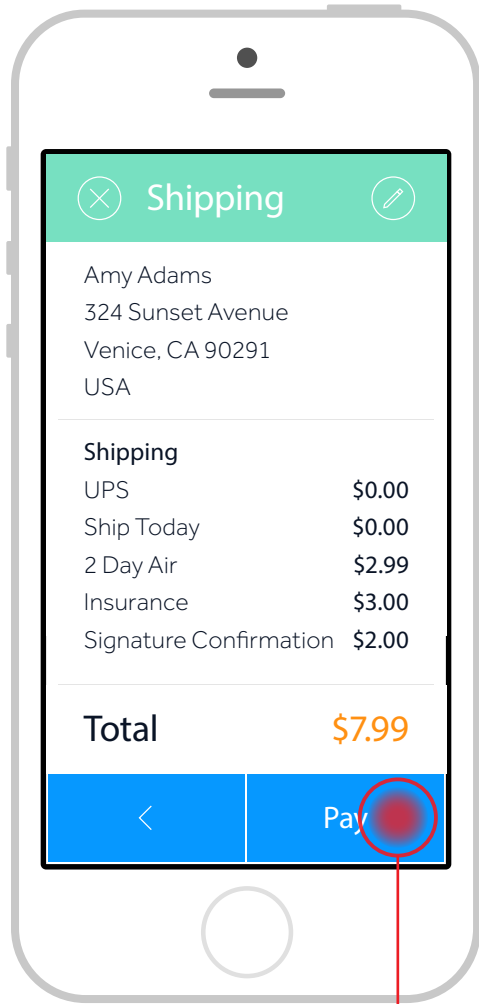
Entering the product, price and description happens and when the keyboard hides the three text areas collapse into 1 line lockups.



Product line item

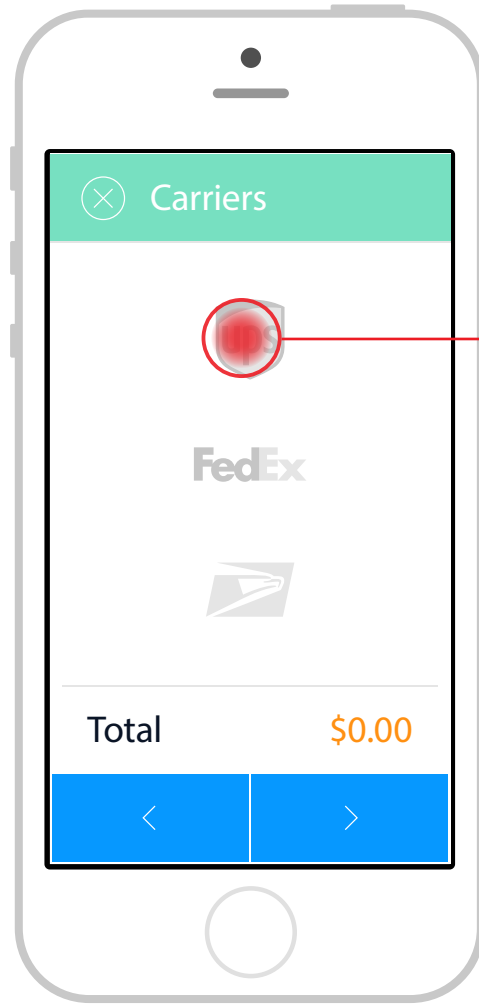


Line item edit

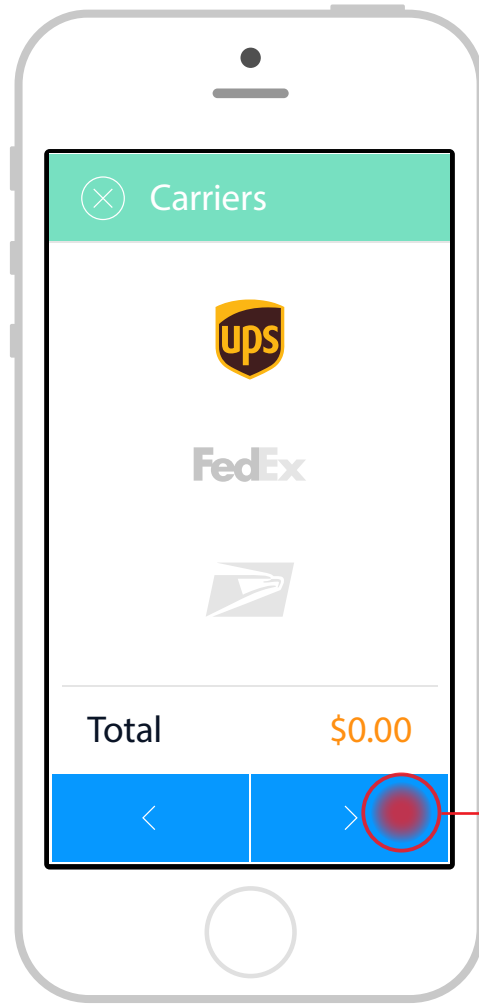


Shipping summary

The shipping options are prepopulated based on the app's best guess. Jump to 'Order Details' screen on page 22.



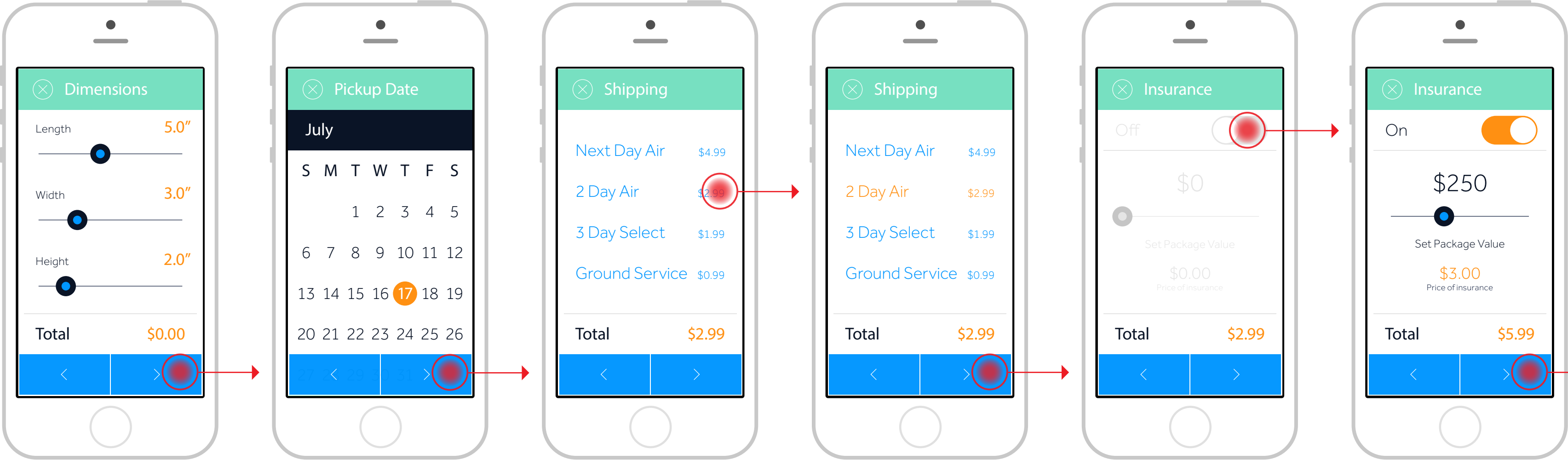
No carrier selected



Carrier selected

Watch: [Carrier\\_And\\_Dimensions.mov](#)

# Create New Order (Cont)



Package dimensions

As sliders near the right edge they lock into place and the number increases to allow unlimited sizes.

Ship date

No carrier selected

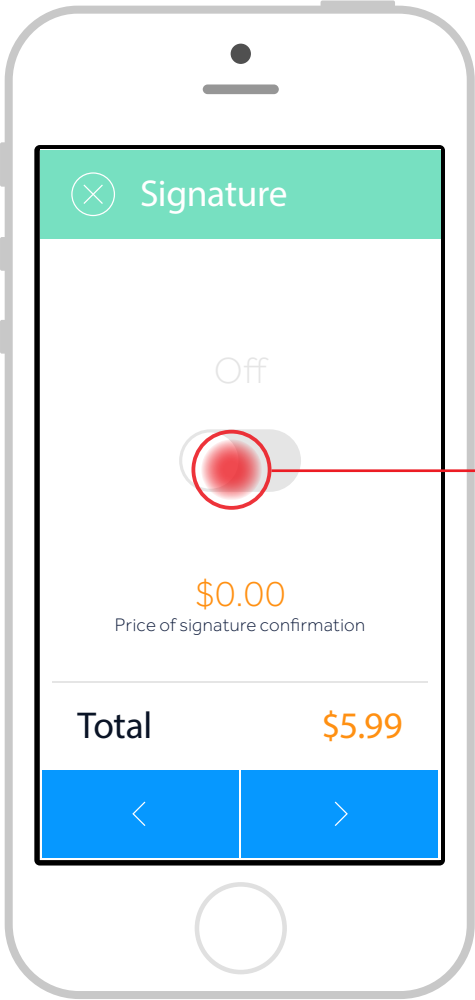
Carrier selected

Insurance off

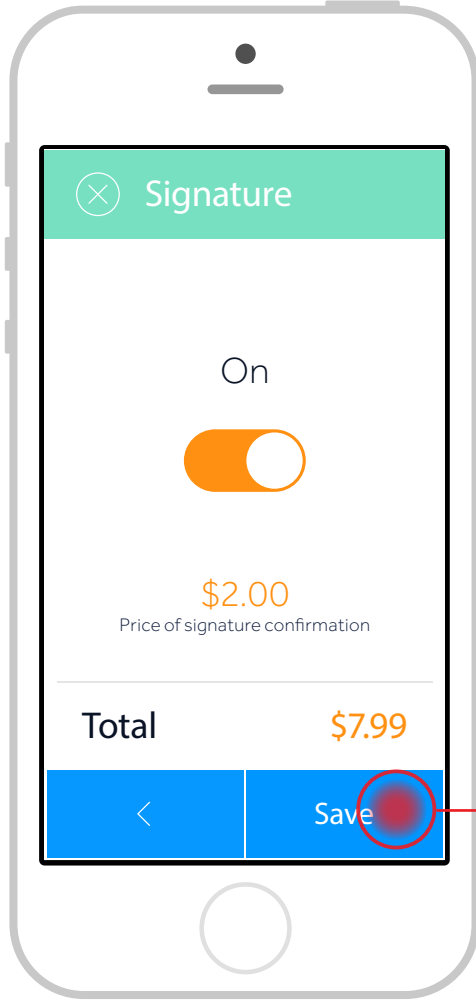
Insurance on

Watch: [Insurance.mov](#)

# Create New Order (Cont)

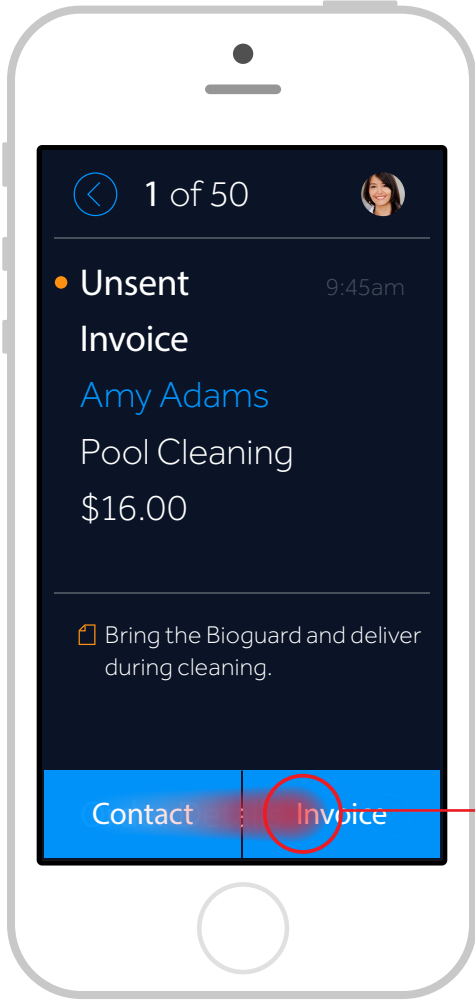


Signature off

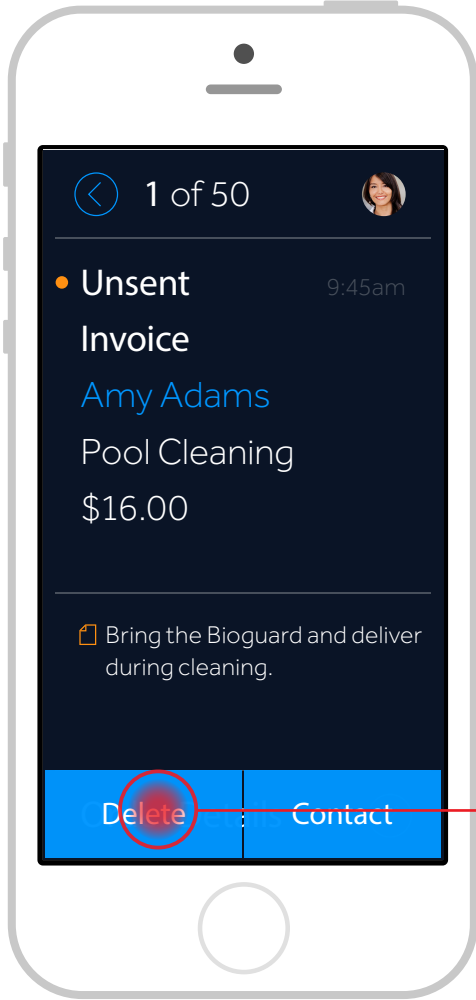


Signature on

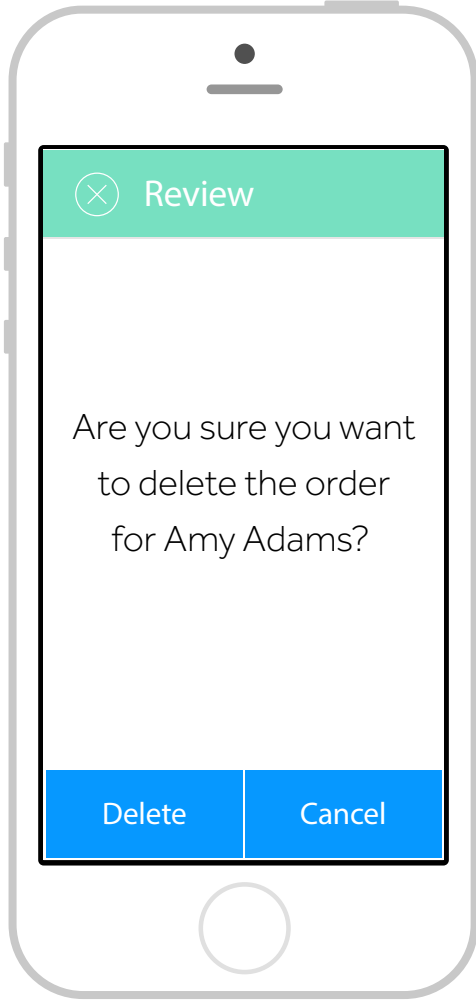
Once the order is saved, the modal experience closes to reveal the newly created order.



Order details

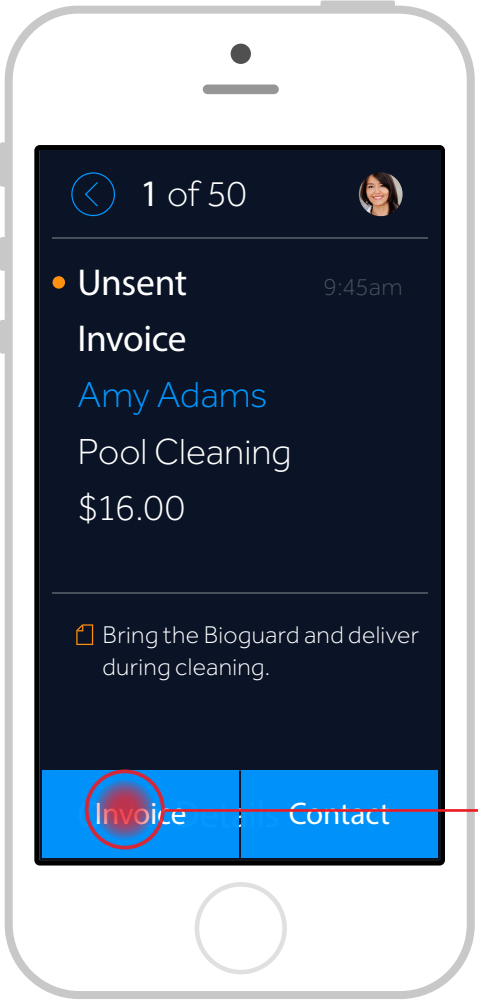


Actions scrolled

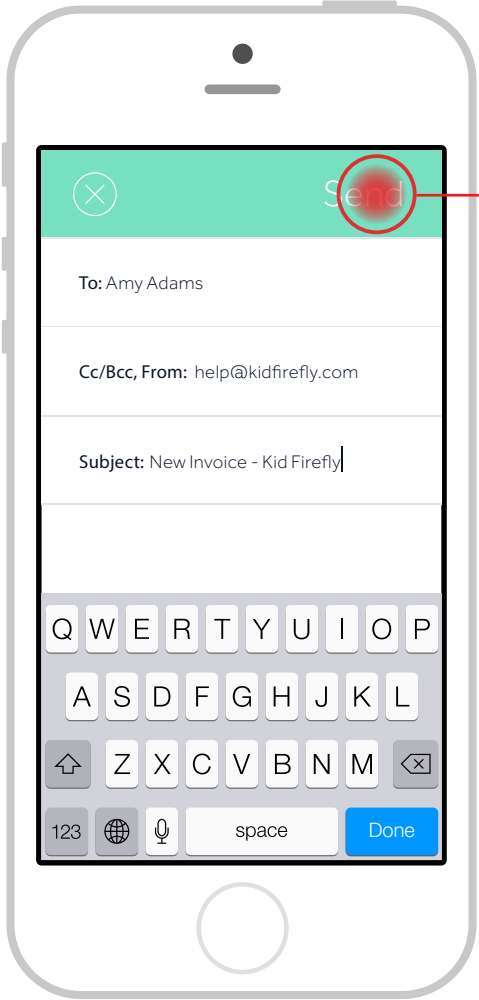


Confirm delete order

# Send Invoice



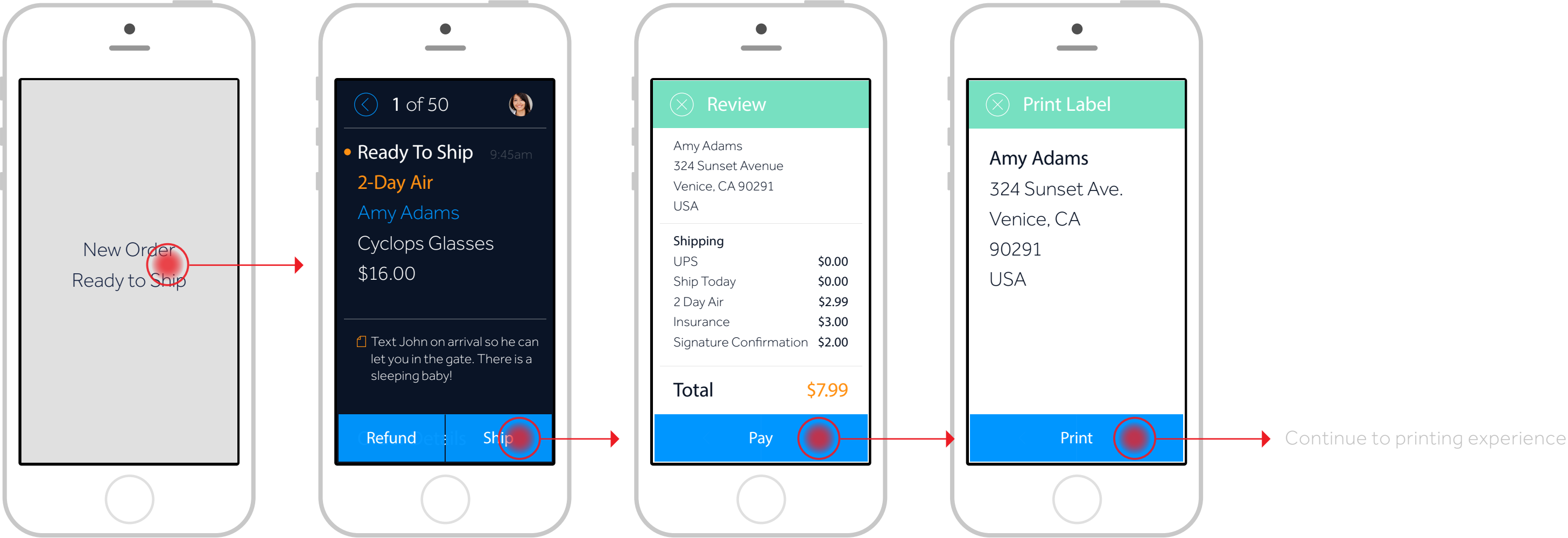
Order Details



Email

The invoice is sent as an attachment.

# Ship Order



Push notification

Order summary

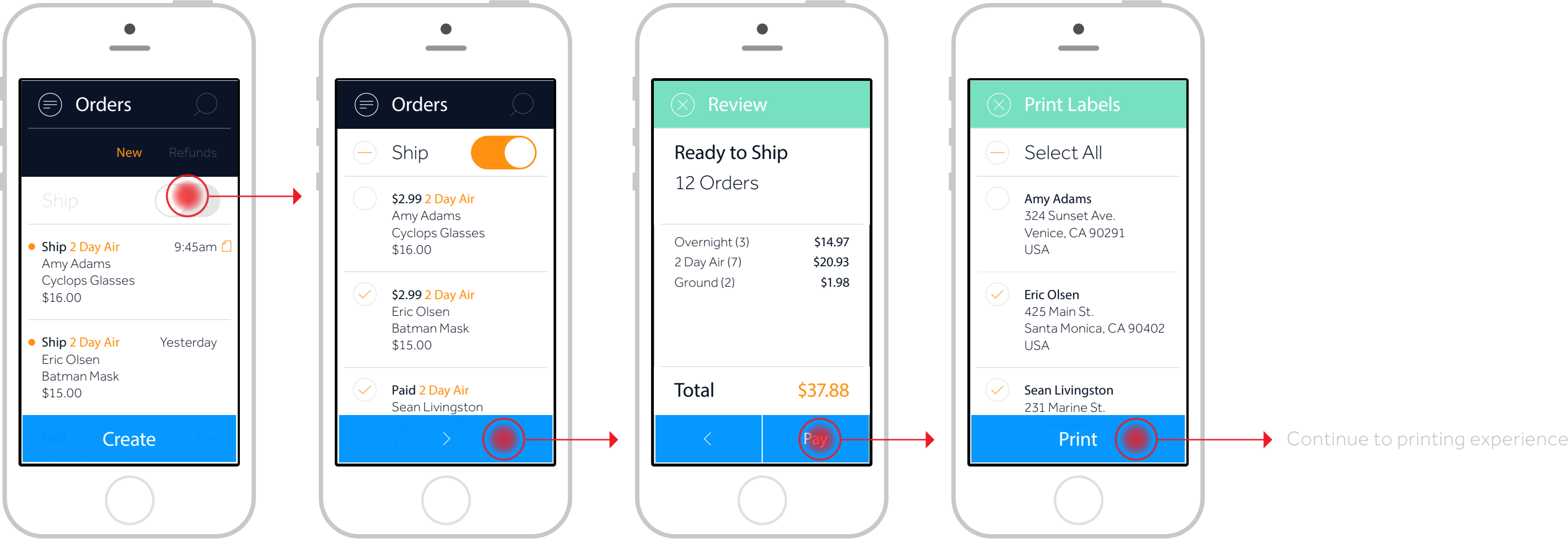
Review shipping

Print label

Watch: Ship\_Order.mov



# Batch Ship



Orders

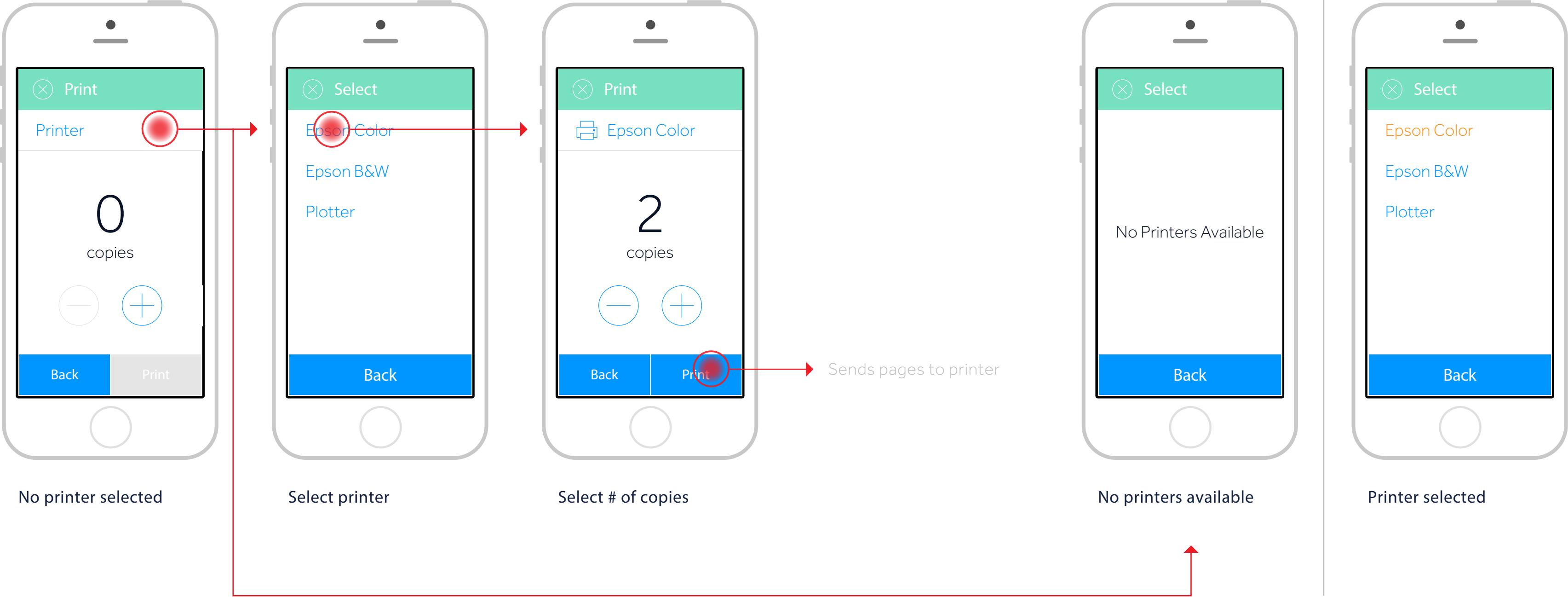
Batch ship mode

Review shipping

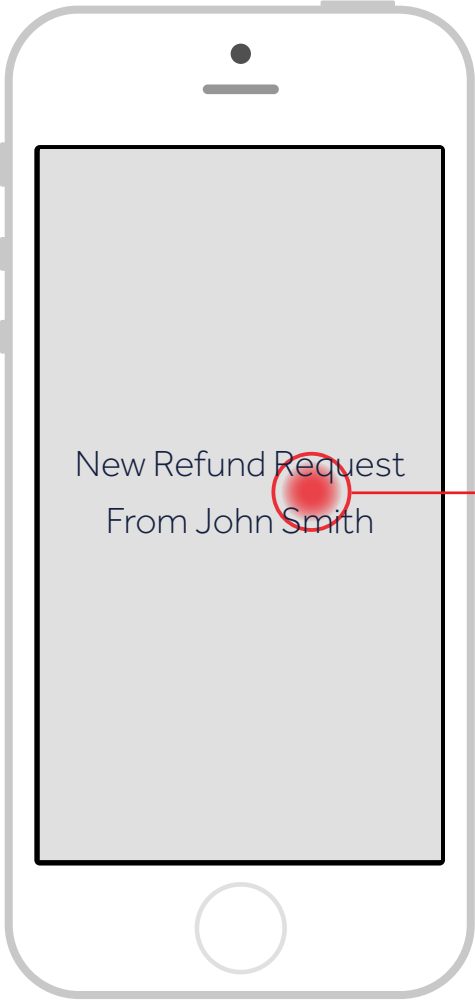
Review addresses

Watch: Orders\_Batch.mov

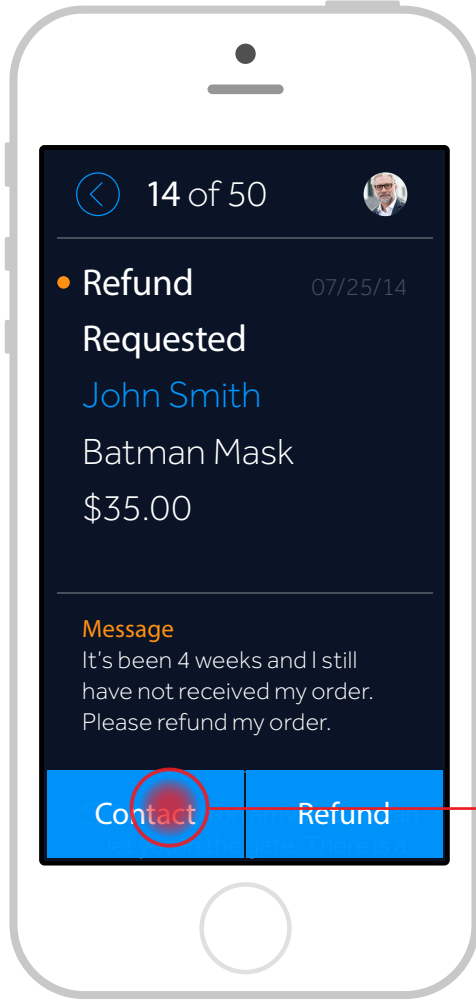
# Printing



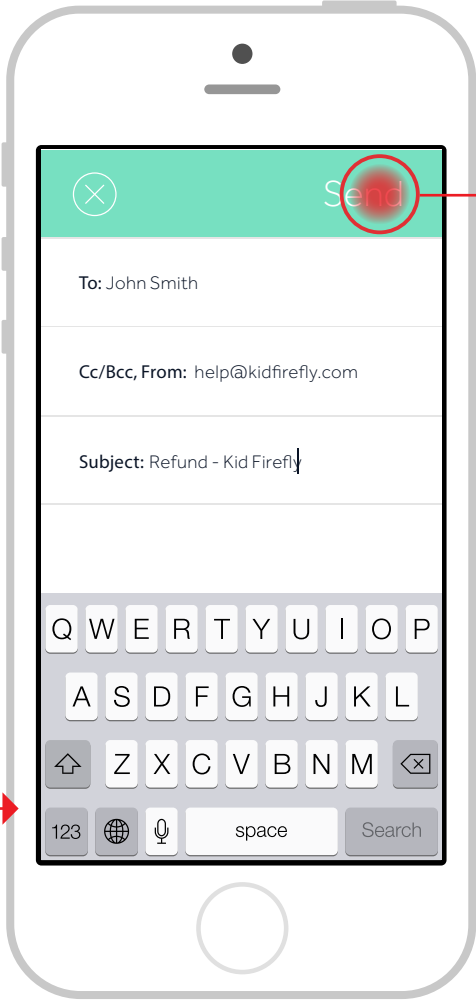
# Respond to Refund Request



Push notification



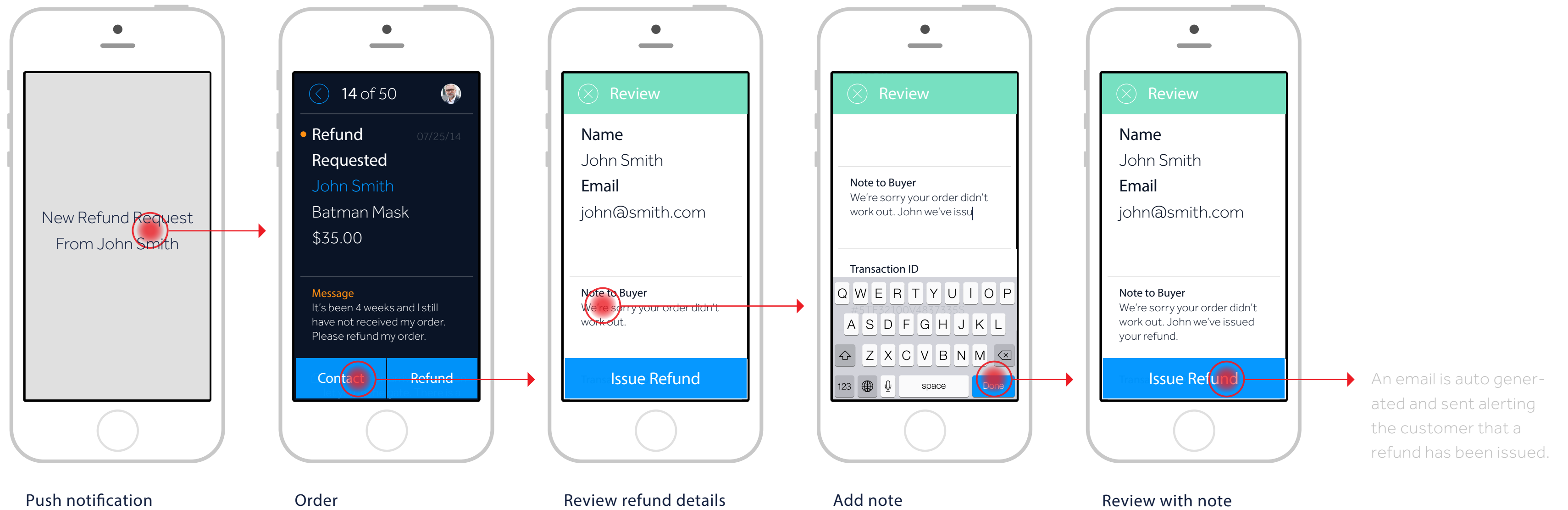
Order



Compose message

Sends email

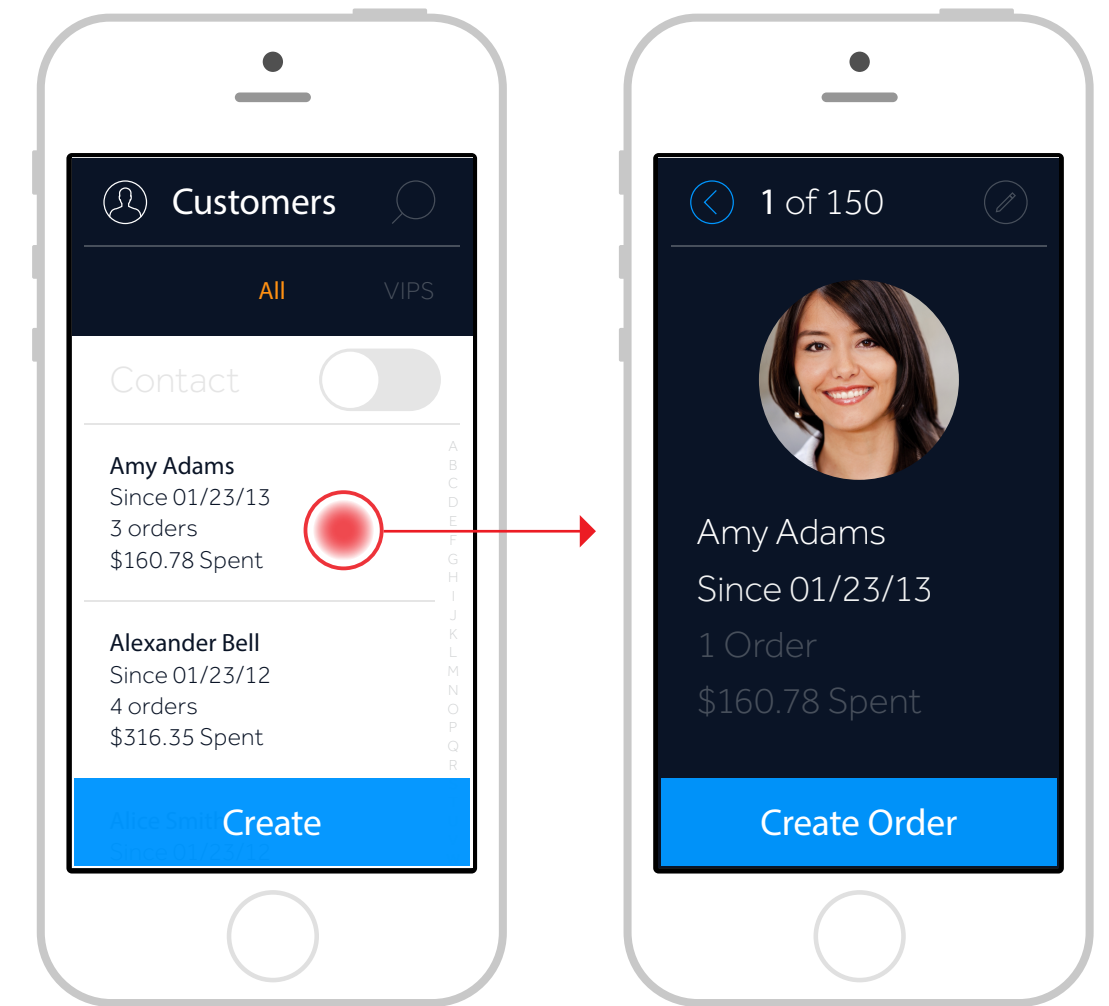
# Issue Refund



# Customers

# Customers Overview

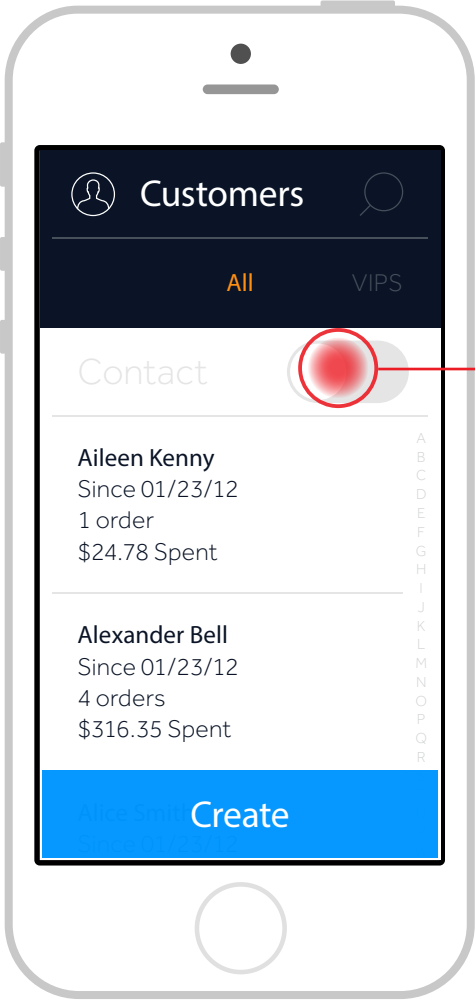
Customers is the address book for your business. It's organized by alphabetical order, but can also be seen as groups by using the filter. For initial launch, the only group available is VIPs, which are all of your best customers. It would be made up of people that are repeat buyers and big spenders. The usefulness in having this group is that you can batch message them special offers or other messages.



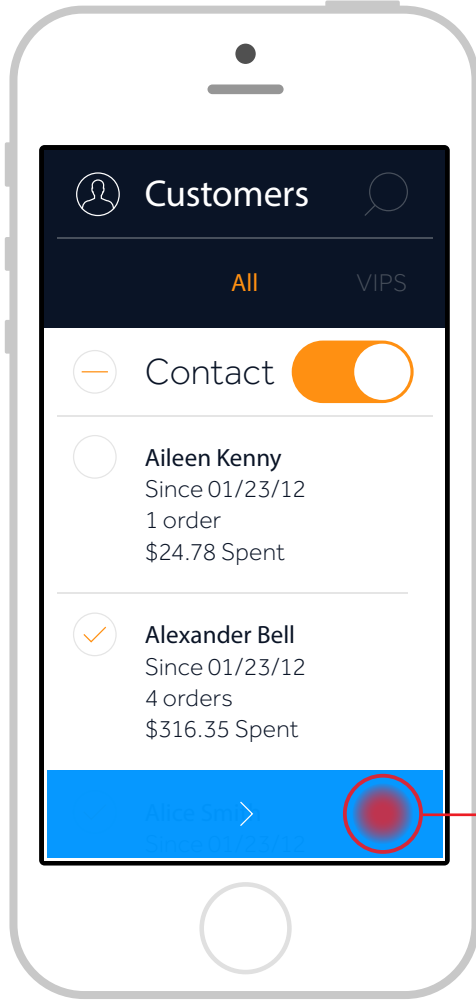
Customers

Customer profile

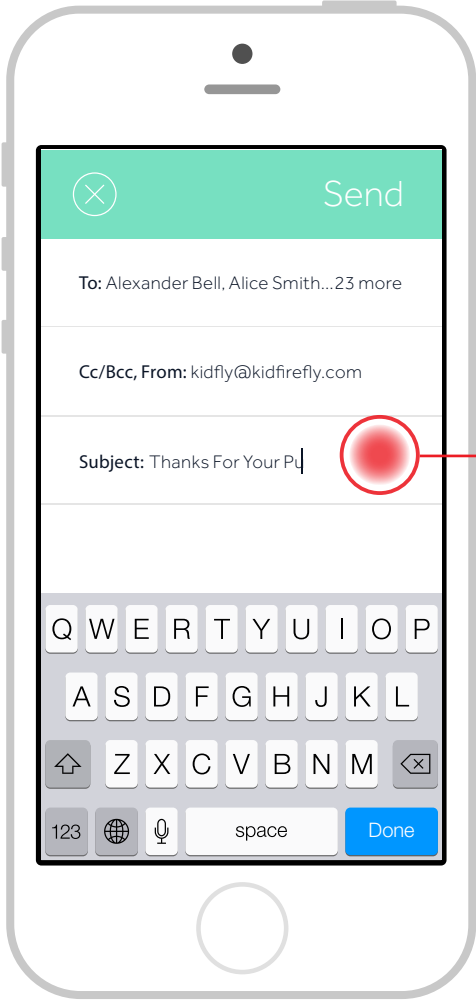
# Batch Message Customers



Customers



Batch on

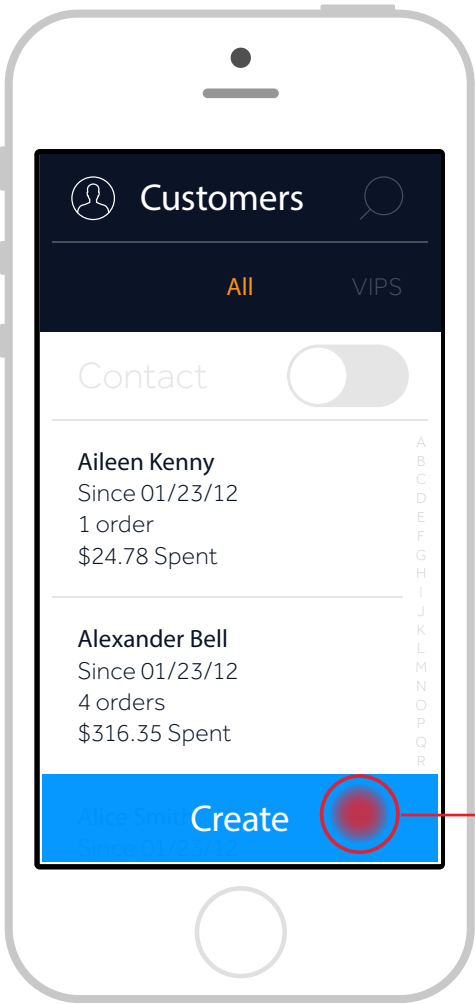


Compose message

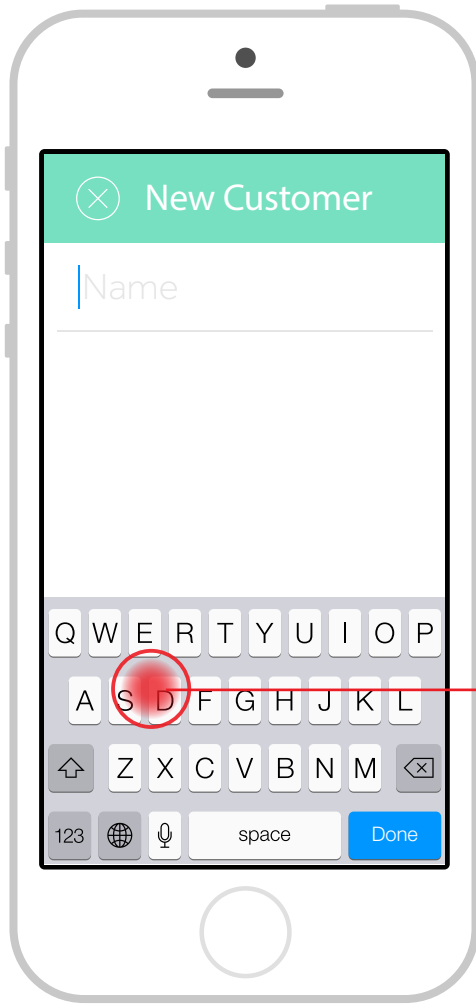
When the message is received by your customers, they only see their address (not everyone in the list).

Once the message is composed, tap send to send it and return to the Customers screen.

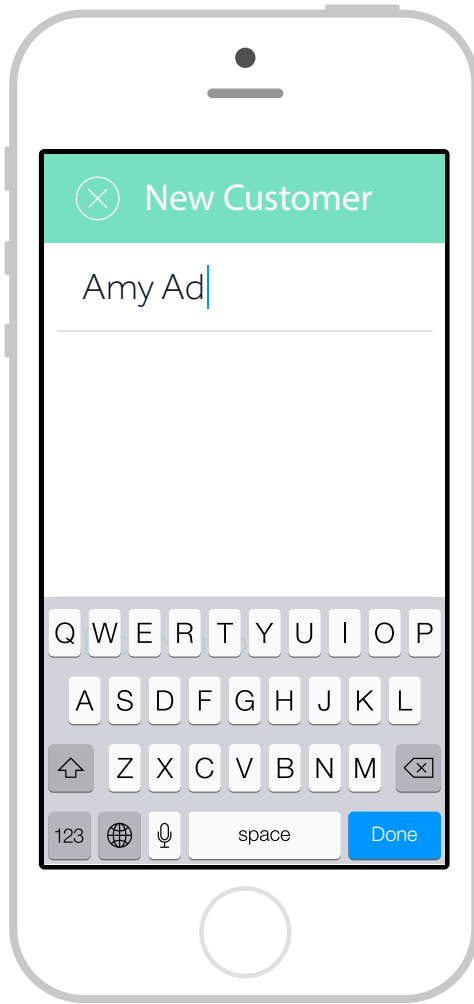
# Create New Customer



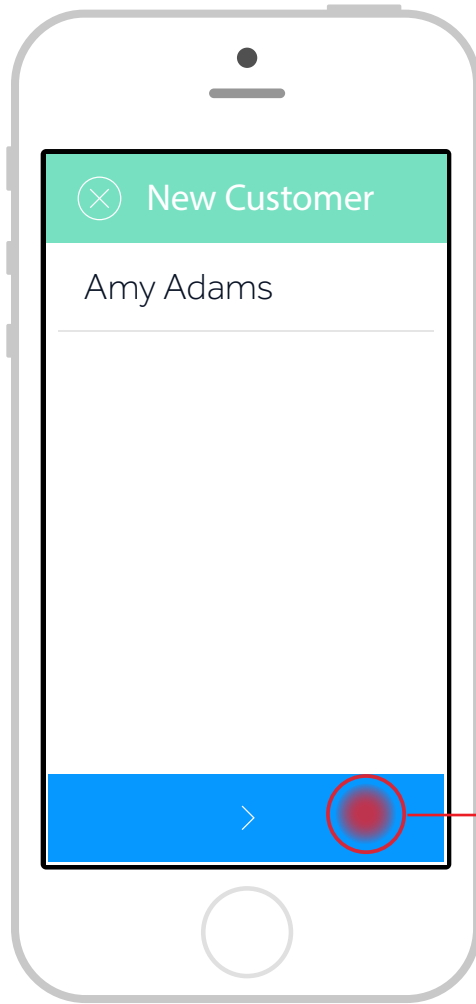
Customers



Name blank



Typing name

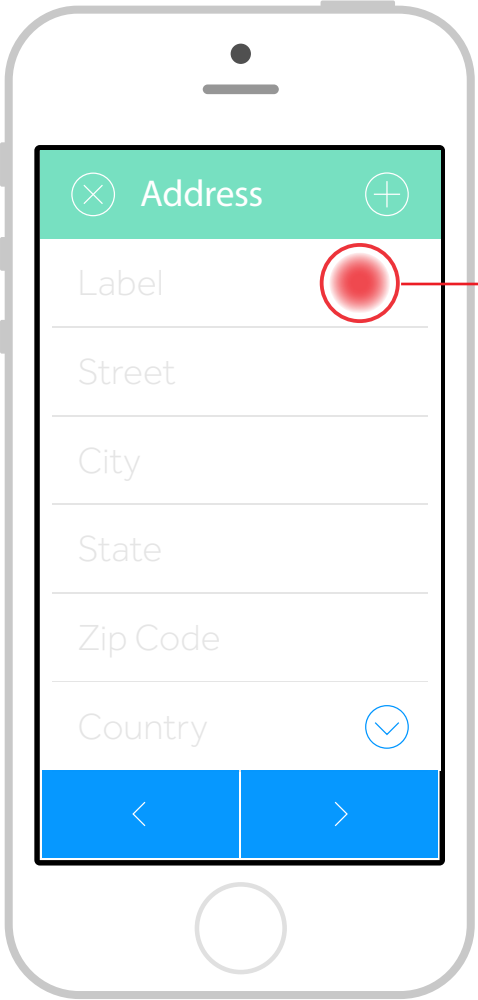


Name entered

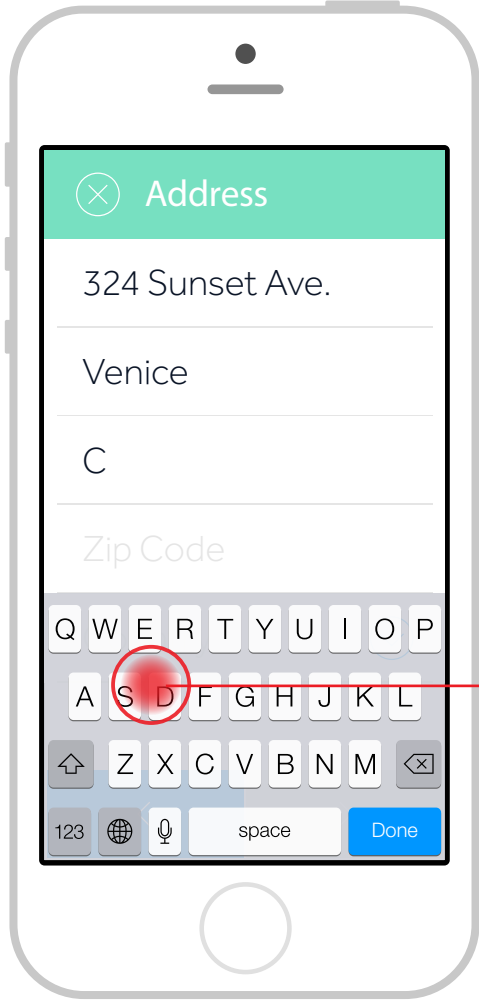
Continue to next page



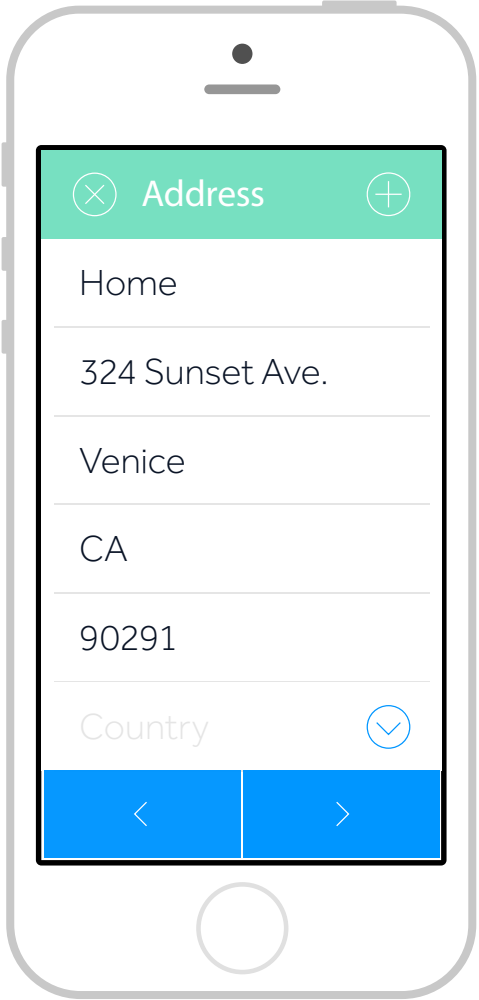
# Create New Customer (Cont)



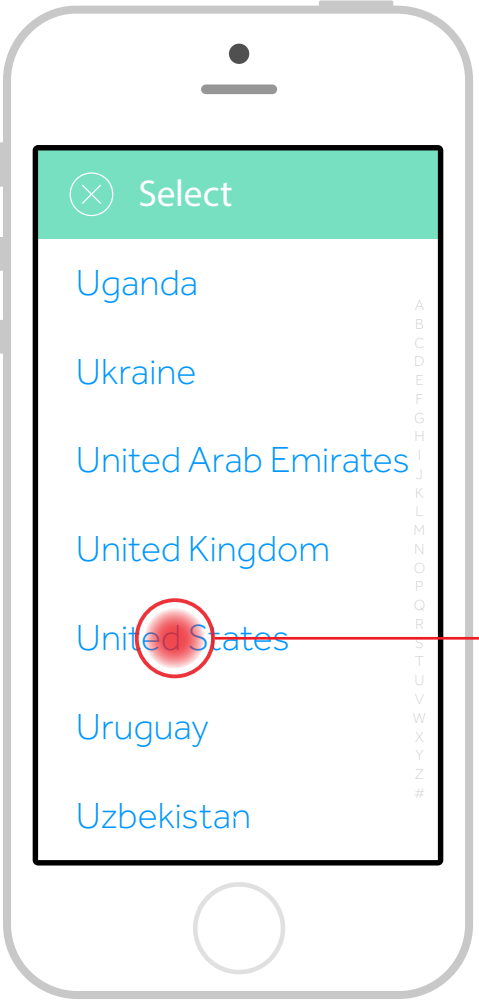
Address blank



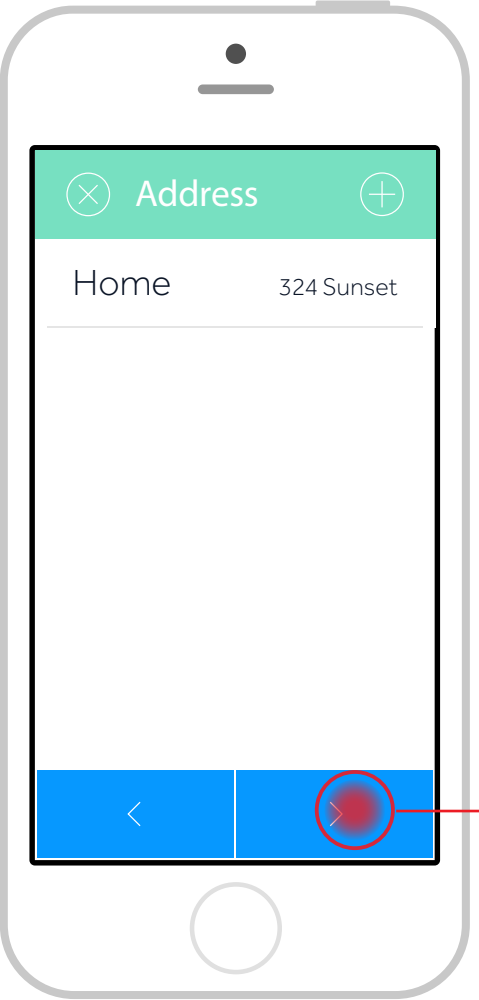
Typing address  
When the keyboard is up, the add icon hides.



Country blank



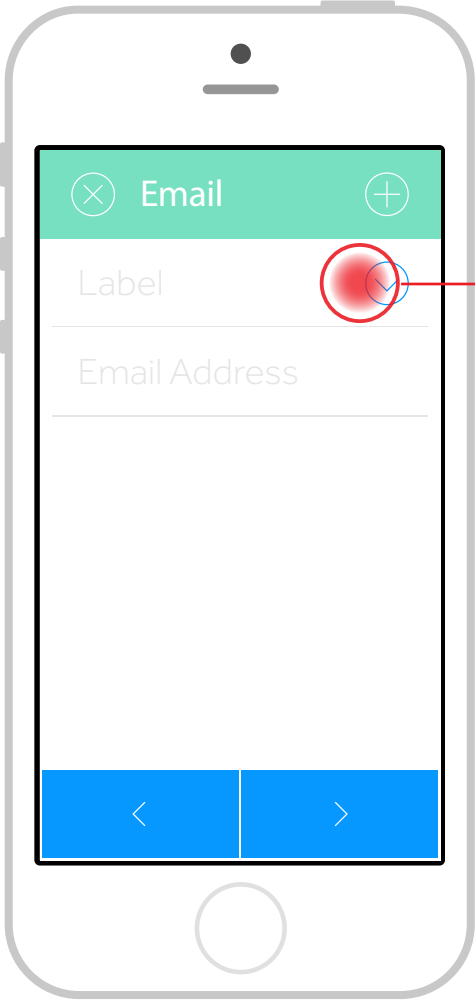
Select country



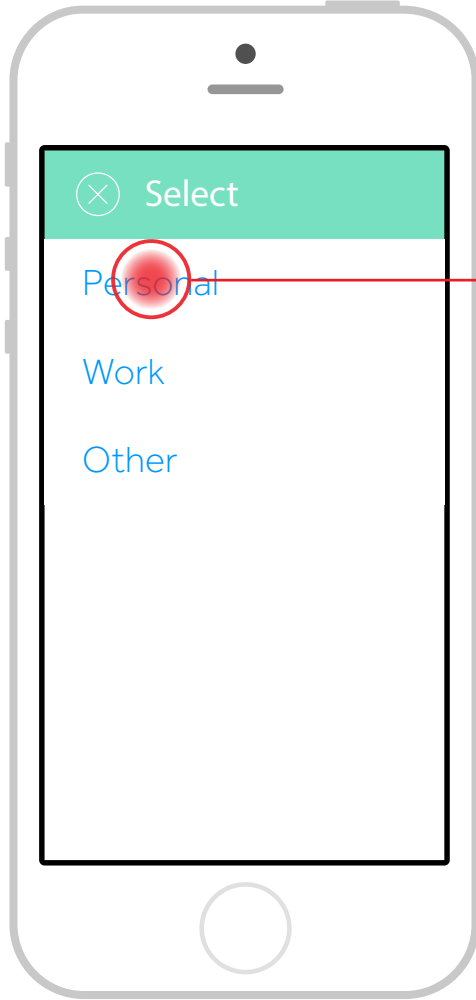
Address entered

Continue to next page

# Create New Customer (Cont)

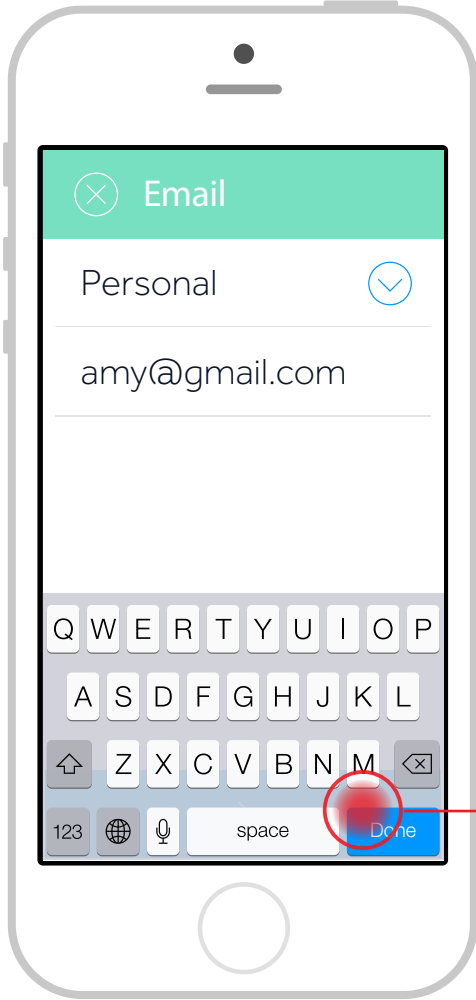


Email address



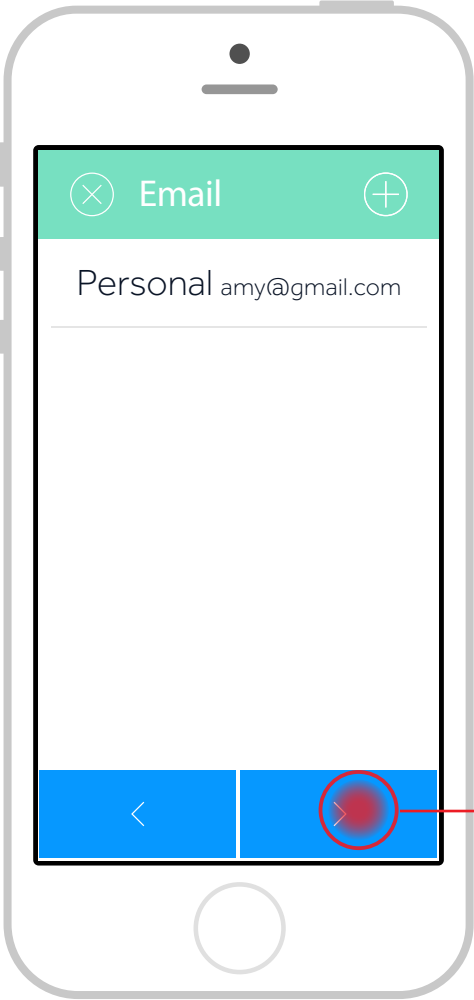
Labels

The label is selected, then the email address is entered.



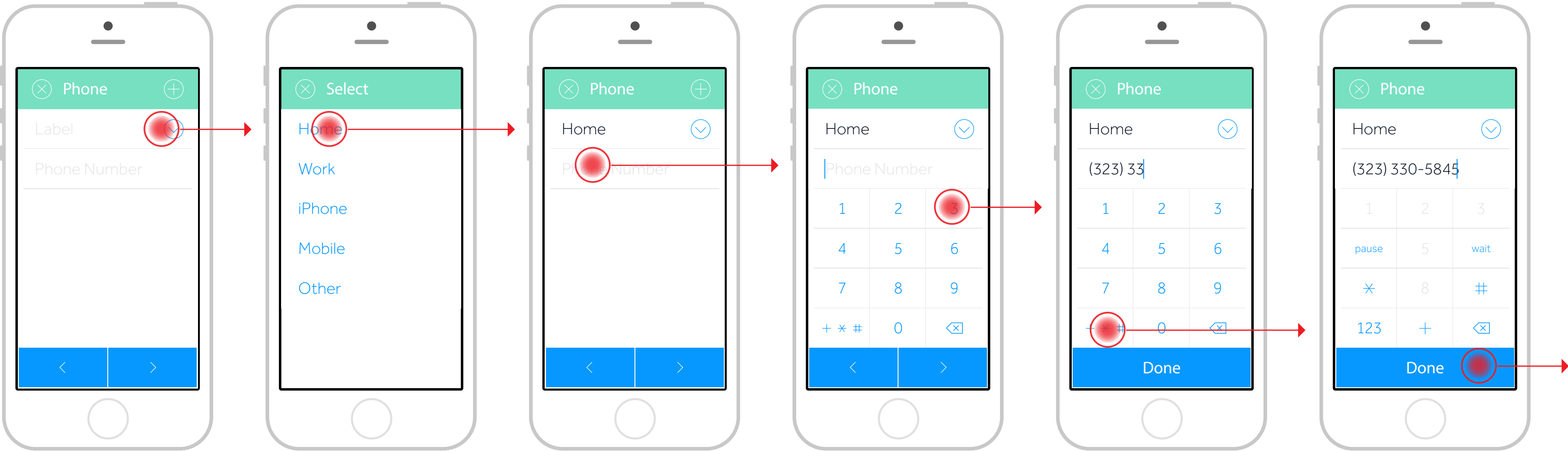
Keyboard showing

When the keyboard is up, the add icon hides.



Keyboard hides

# Create New Customer (Cont)



Email address

Labels

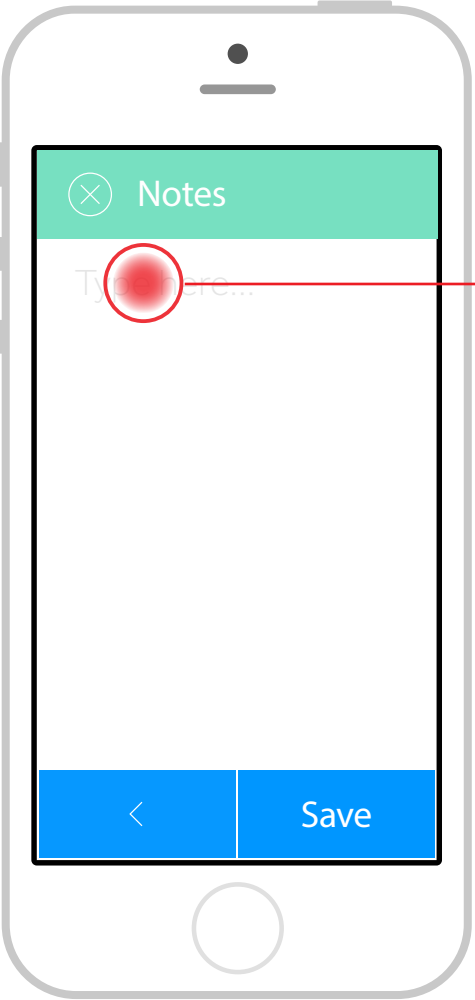
Label complete

Number keypad

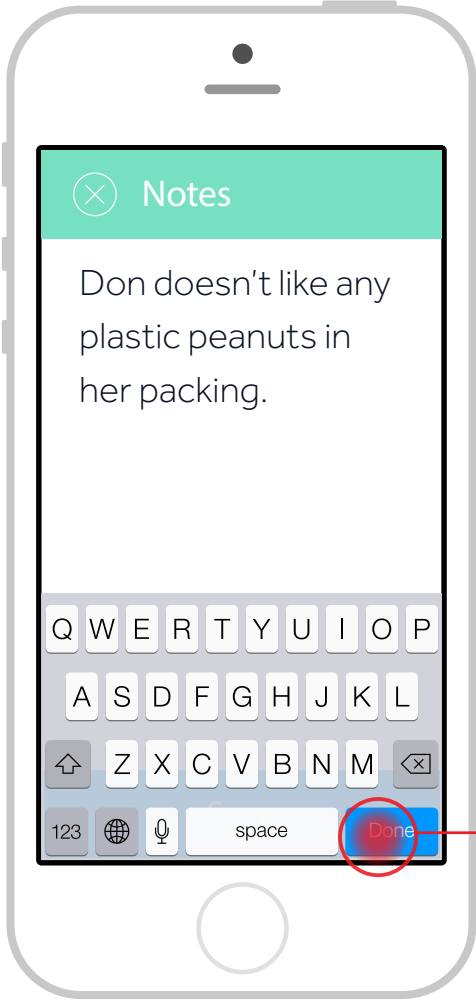
Typing number

Alternate keypad

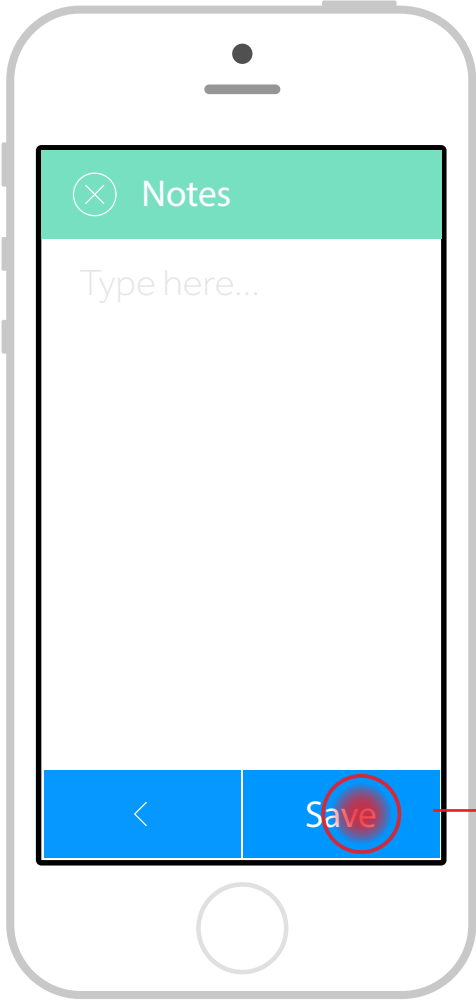
# Create New Customer (Cont)



Notes blank

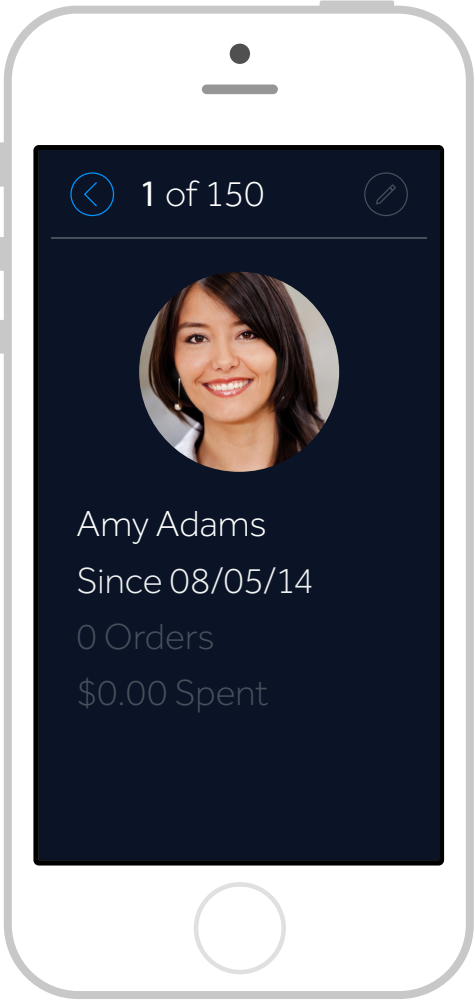


Typing notes



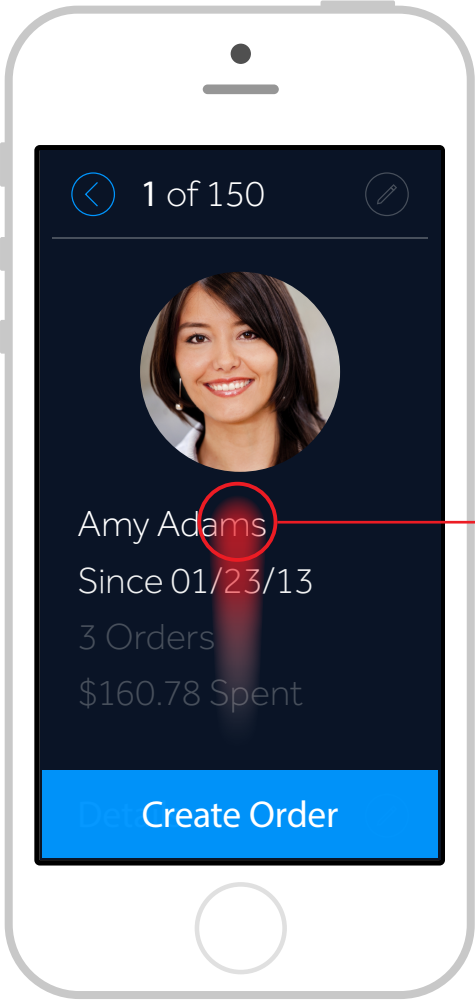
Notes added

Once the customer is saved, the modal experience closes to reveal the newly created customer profile.

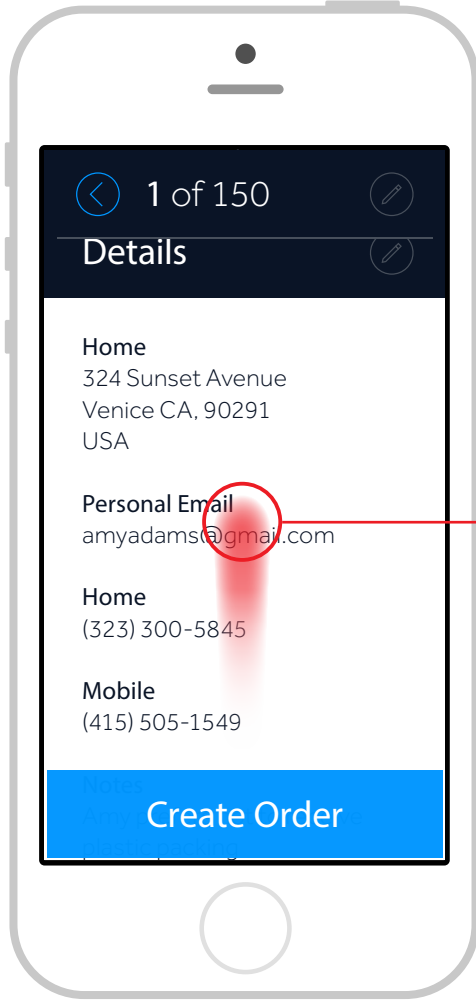


Customer profile

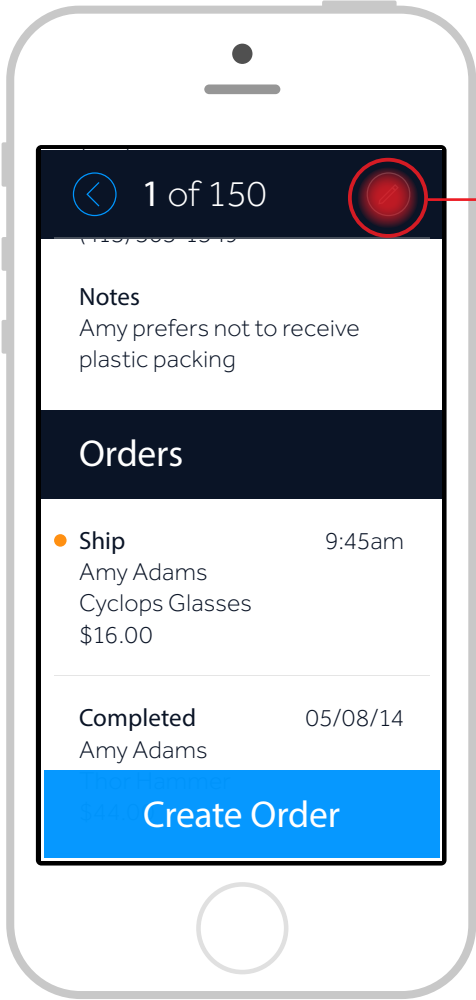
# Customer Profile



Customer profile

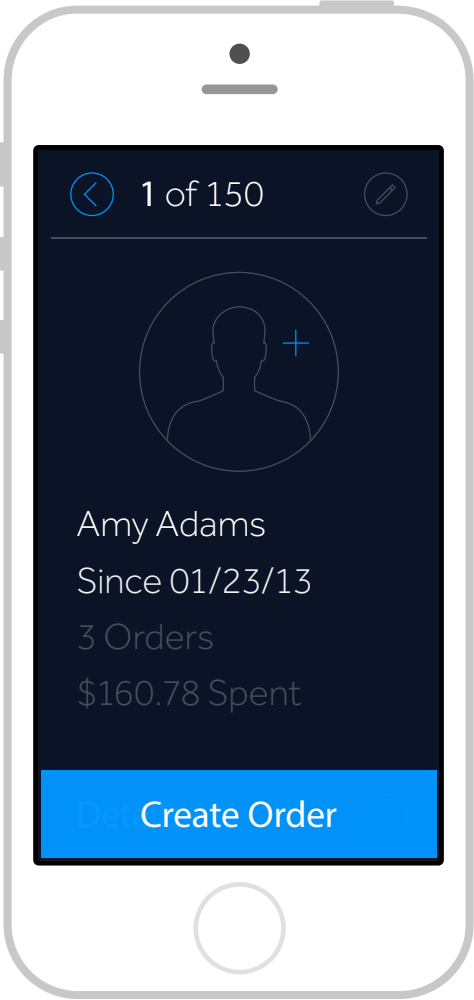


Profile scrolled



Profile scrolled

Editing a profile opens up the new customer experience with all known information already populated.



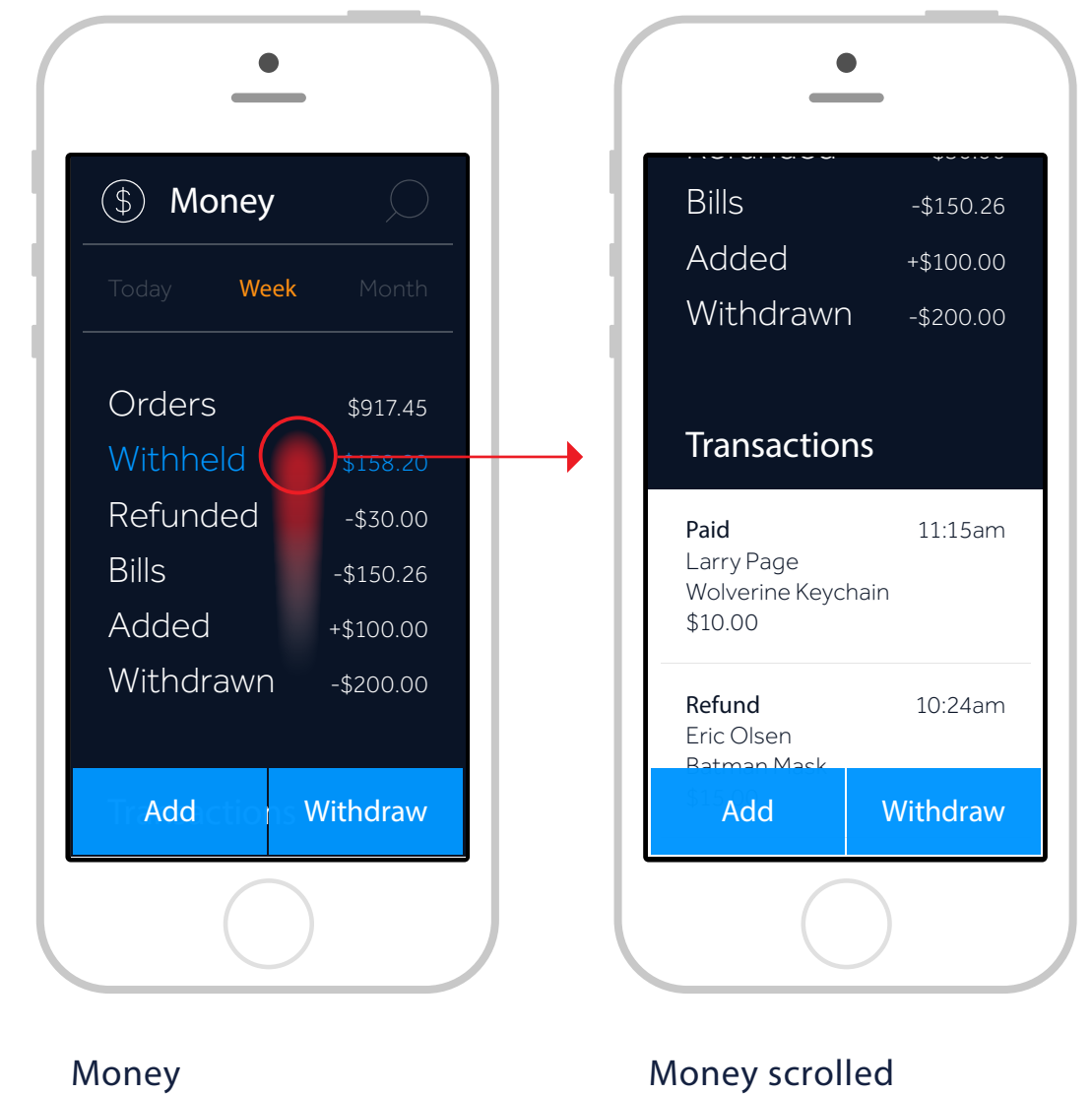
No customer image

# Money

# Money Overview

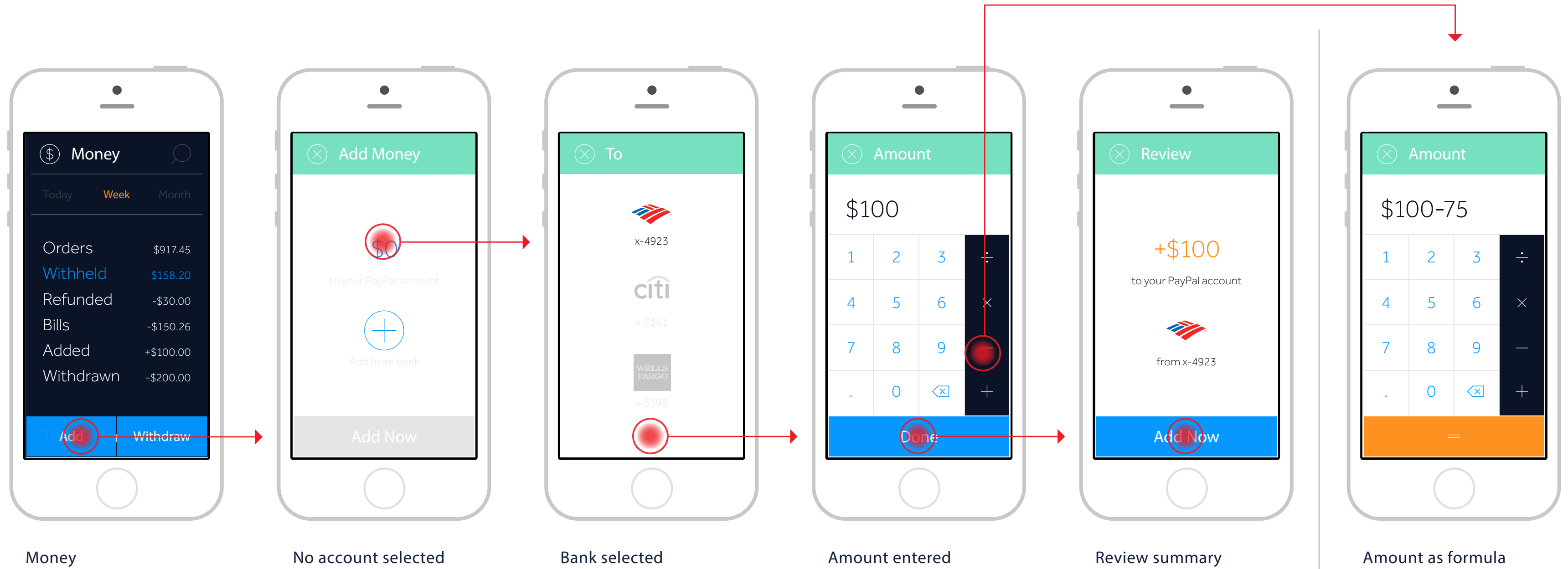
Money is categorized and totalled into a summary. However, the details of all transactions are listed below the summary. The screen can be filtered by time period (e.g today, week, month, quarter, year or all).

There are also four actions that can be taken...Add, Withdraw, Bill Pay and Report.



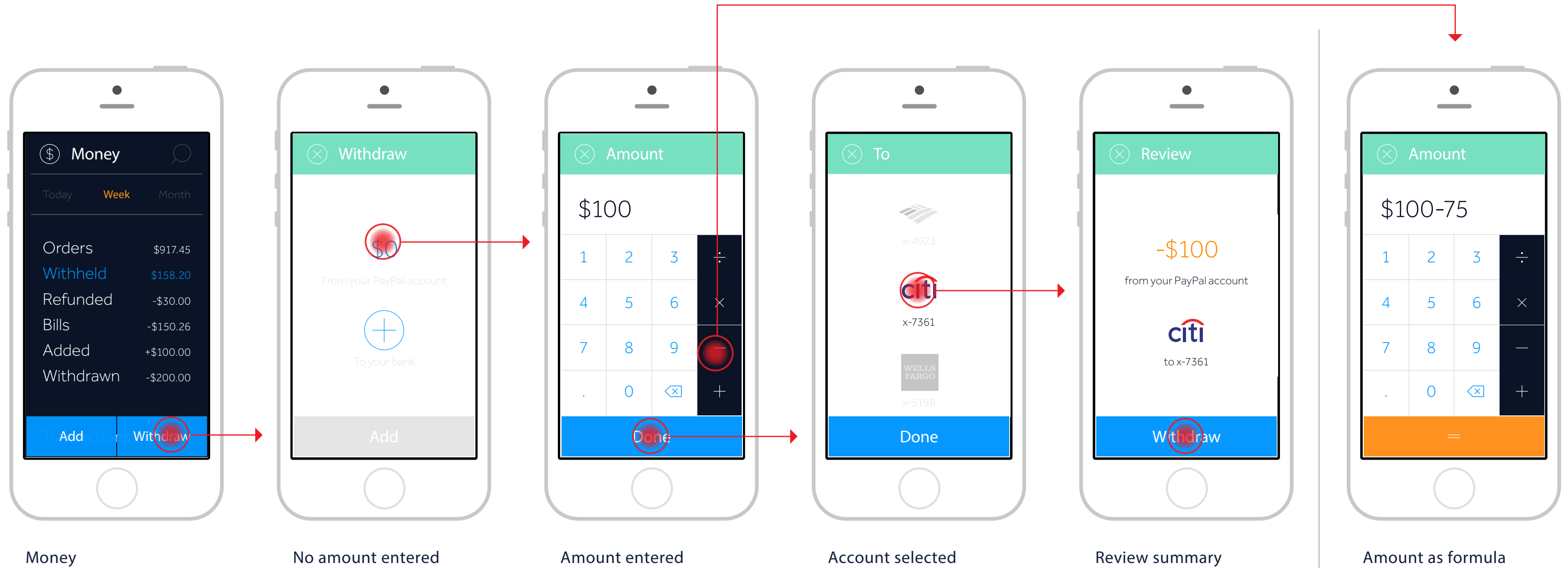
Watch: [Money.mov](#) and [Money\\_Scroll.mov](#)

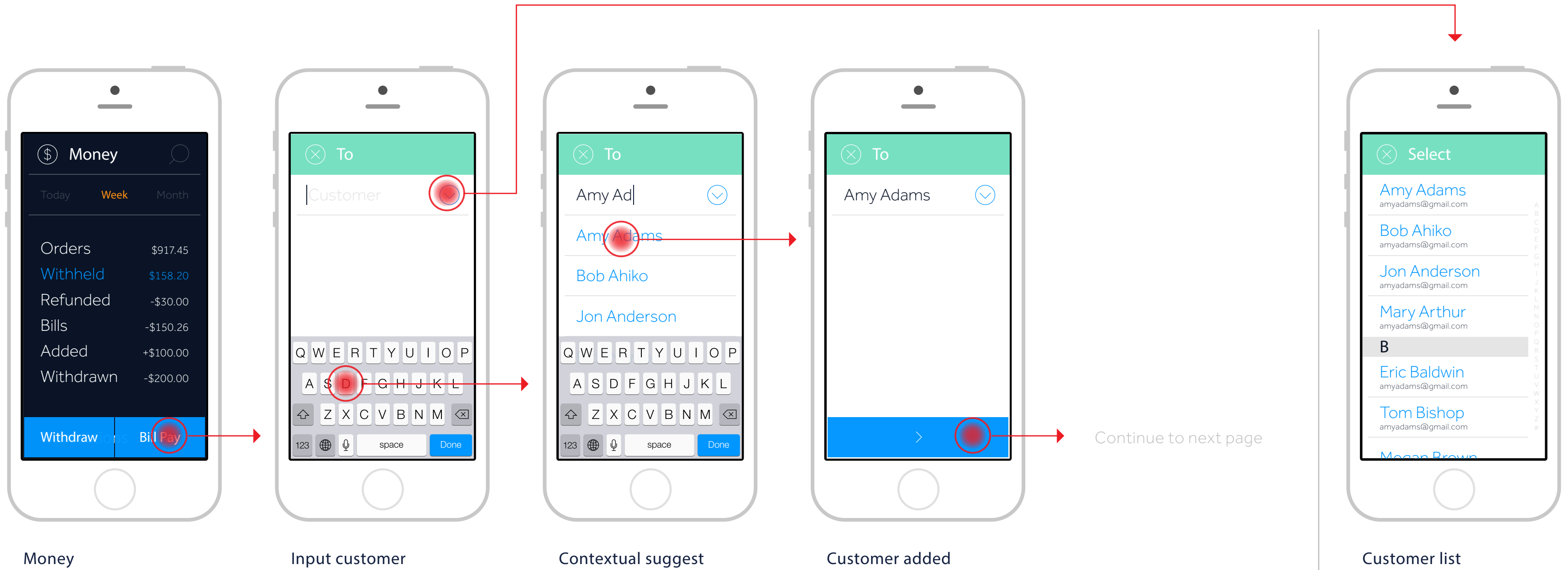
# Add Money



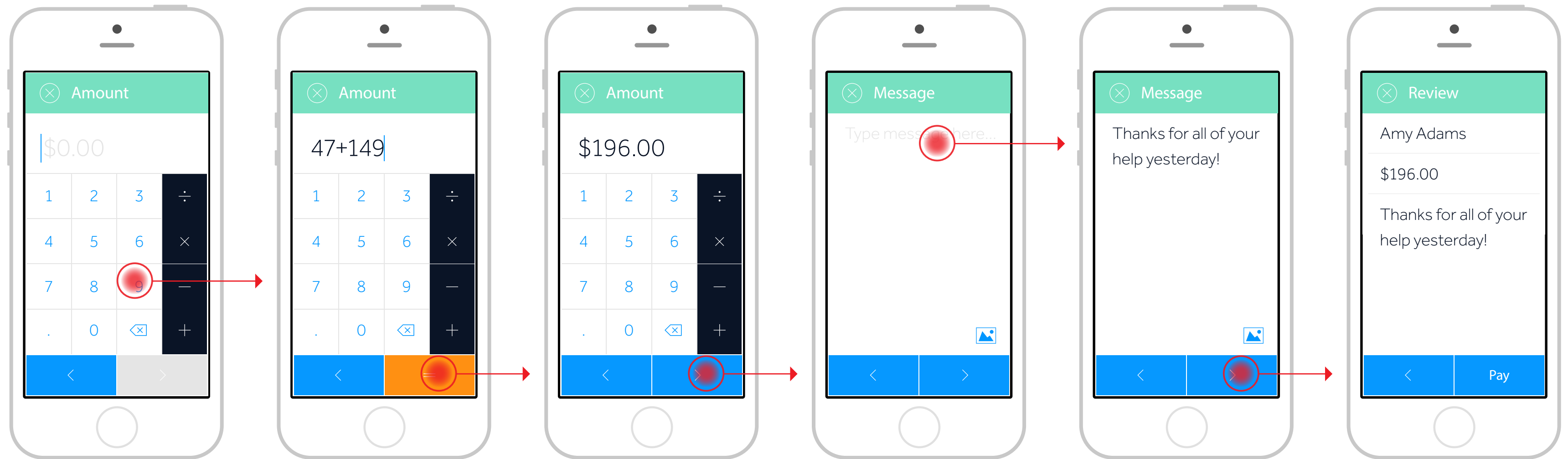


# Withdraw Money





# Bill Pay (Cont)



Amount

Equation entered

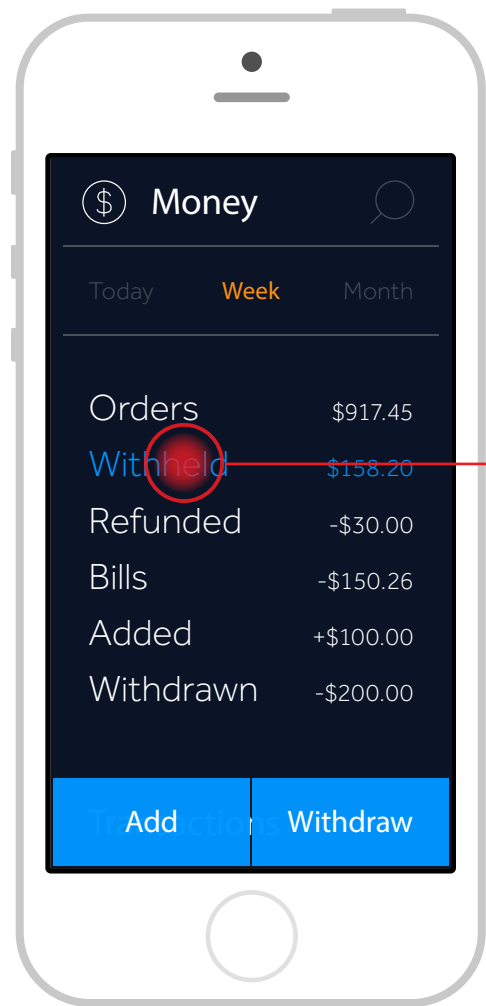
Amount total

Add message

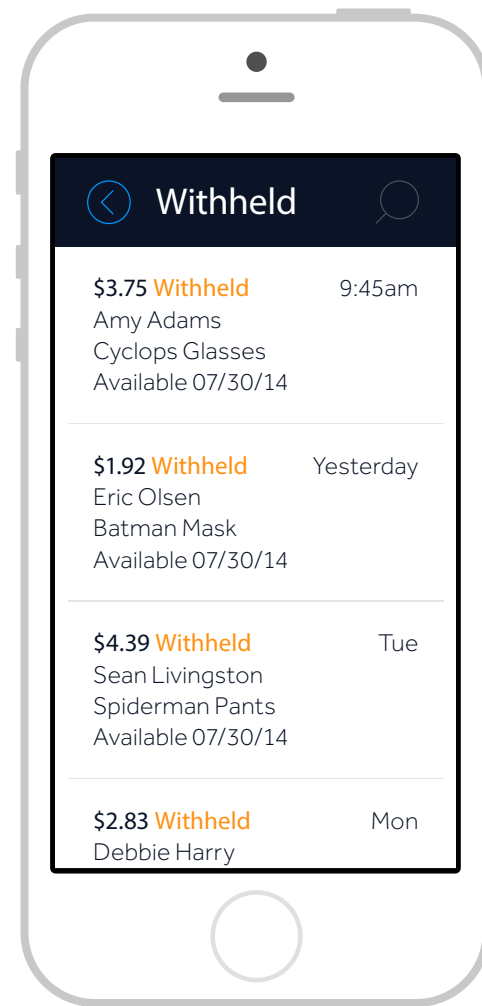
Messages added

Review bill pay

Tap on the picture icon in the lower right to add a photo to accompany your message.



Money

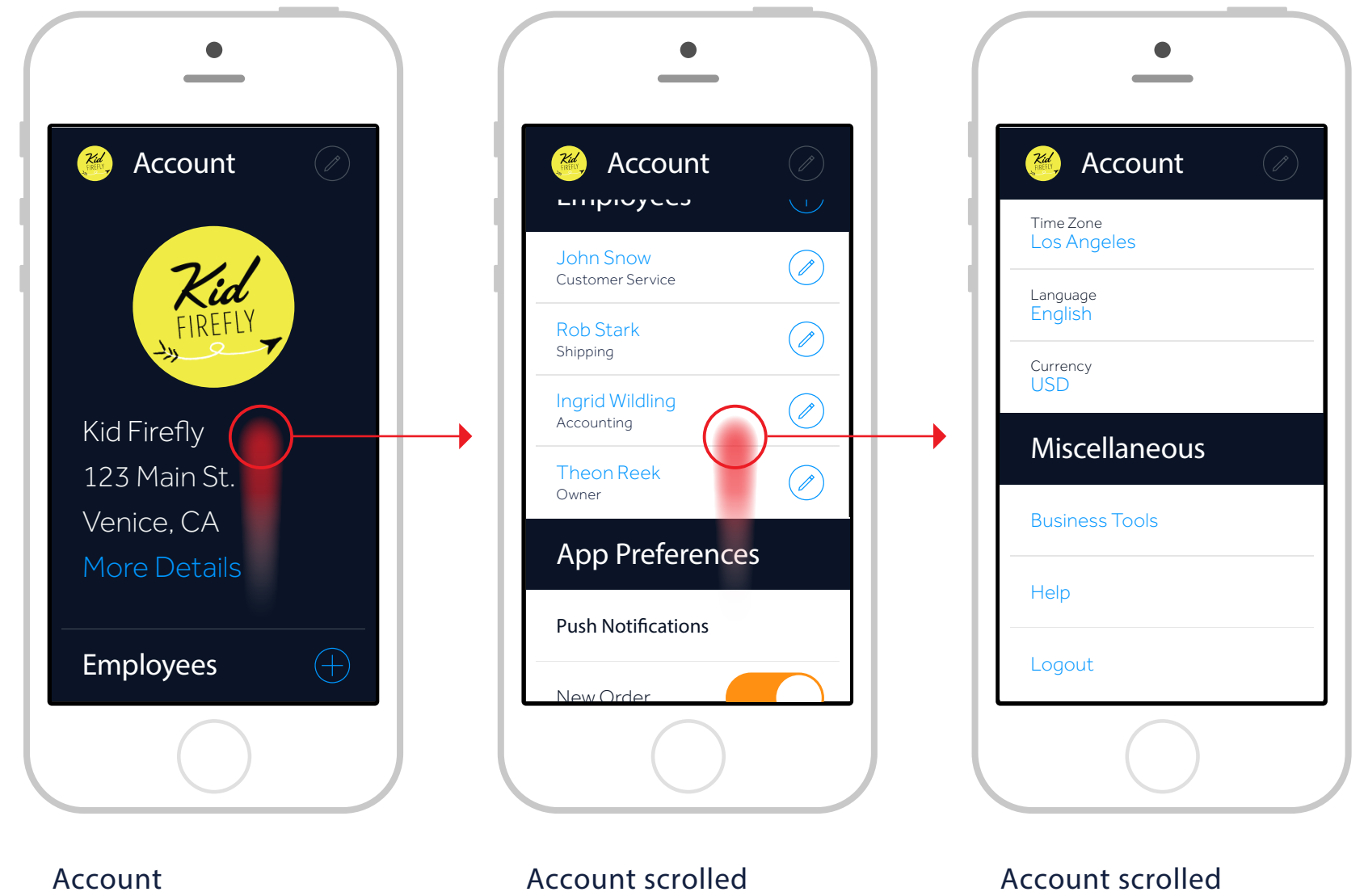


Withheld

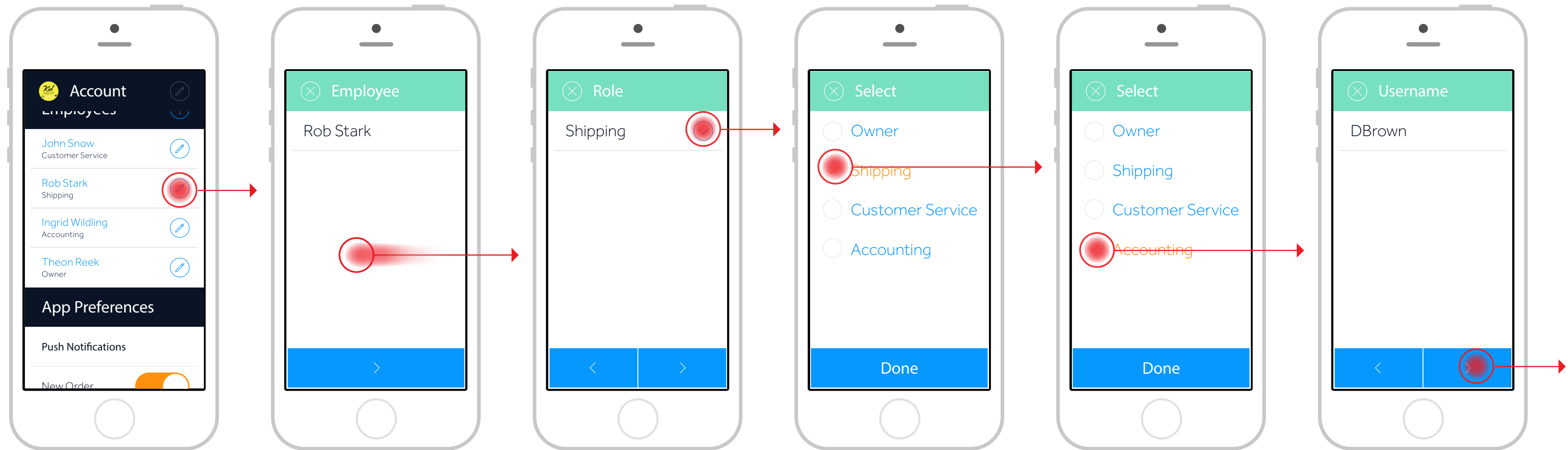
# Account

# Account Overview

Account is a place to manage the employees that are using the app, as well as a way to adjust settings and navigate to deeper account information.



# Edit Employee



Account

Employee entered

Role entered

Role selected

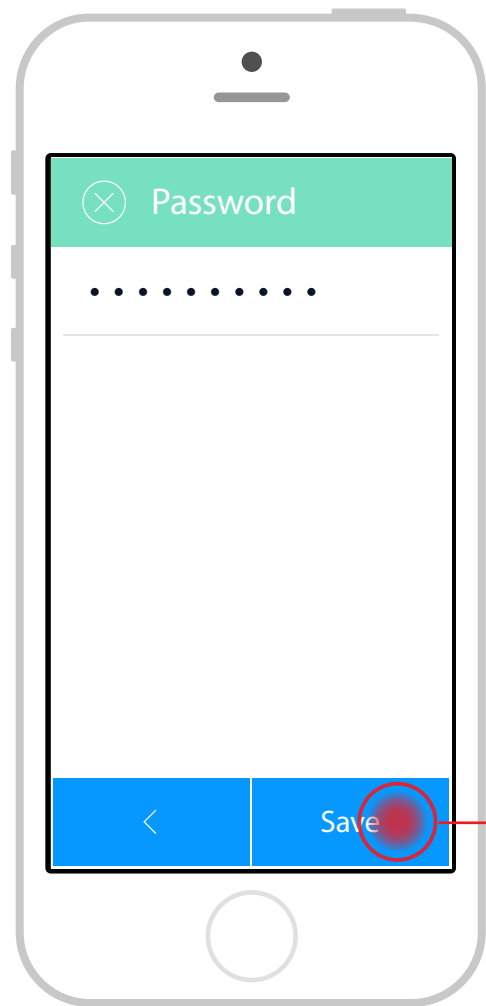
Multiple roles are possible to select.

Role changed

Username entered

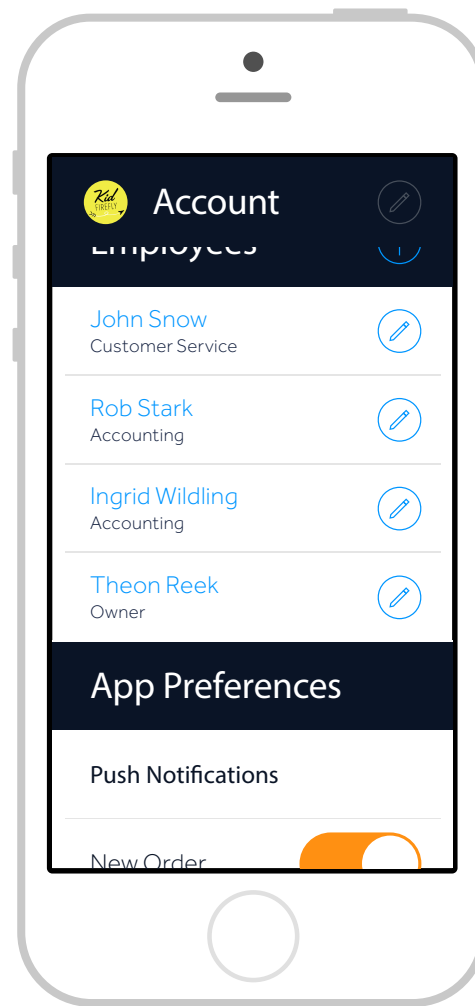
See 'Forms' for more details on editing.

# Edit Employee (Cont)



Password

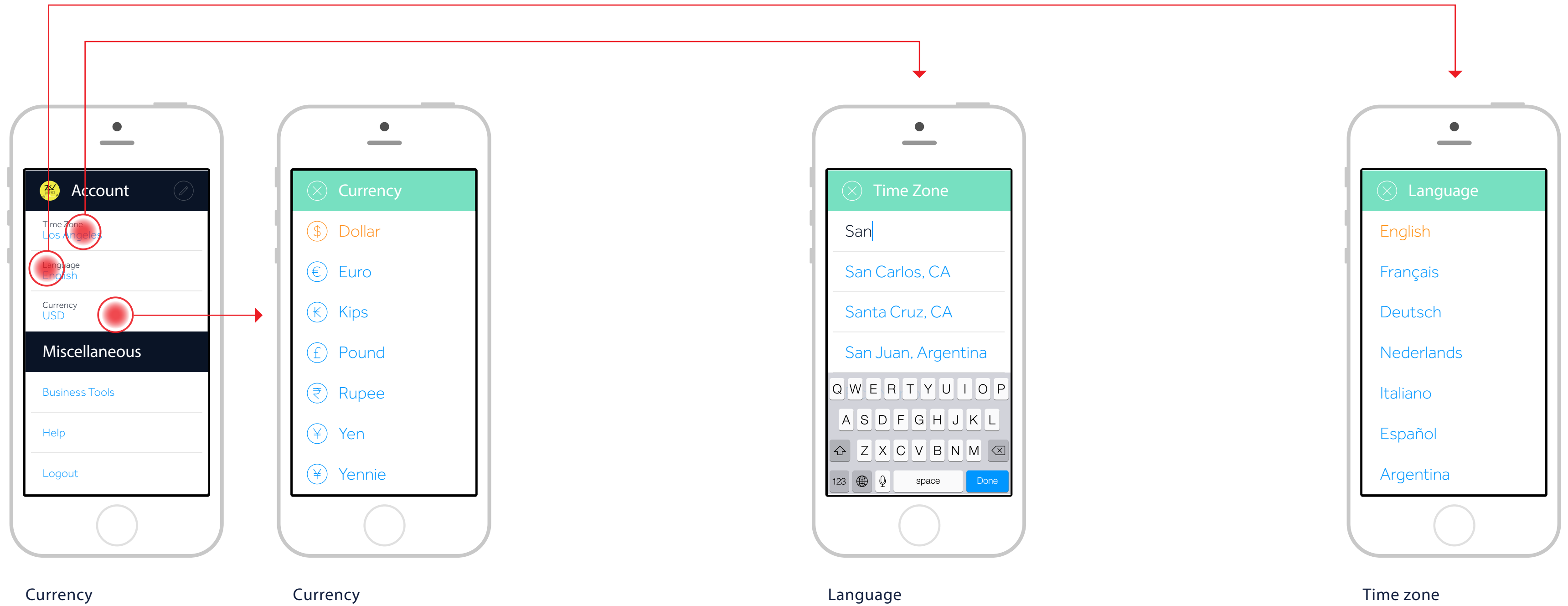
Once save is tapped, the modal screen closes and the previous page it revealed.



Account scrolled

See 'Forms' for more details on editing.

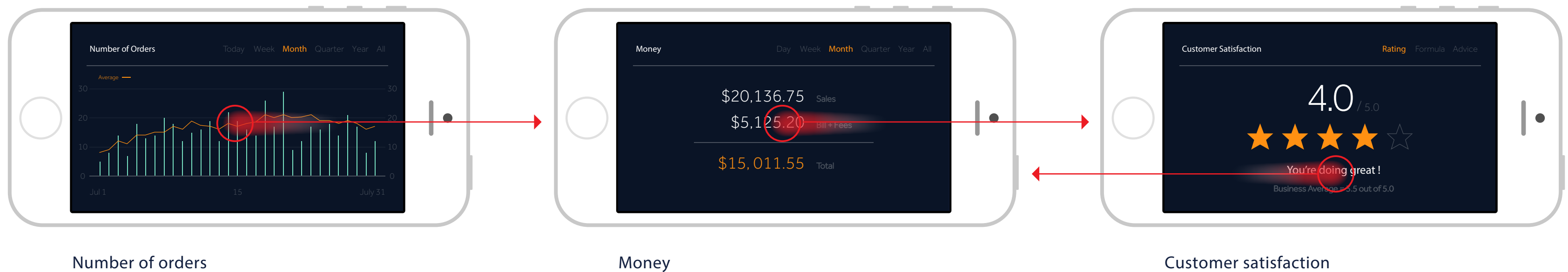




Watch: [Currency.mov](#)

# Insights

Insights are available as a horizontal experience that can be accessed from anywhere by simply **rotating** the phone. Once in landscape, the various insights can be **swiped** through in a carousel format. Each individual insight allows a bit of control refining the data.



Watch: [Insights.mov](#)

A customer satisfaction rating is formulated using a handful of variables.  
Depending on the rating, advice is suggested to help increase your rating  
and in turn make your customers more satisfied.



Nice to have!