

Hi :))

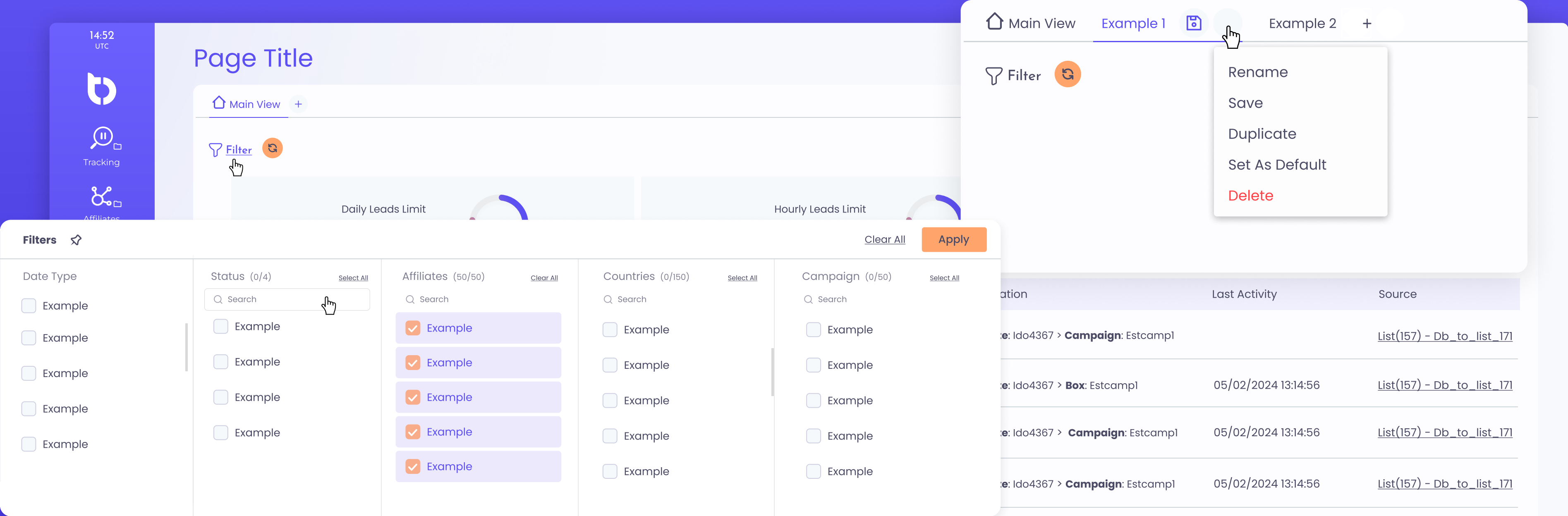
I am Keren Shalev
Senior Product Designer
over the last 7 years

Specializing in crafting user-friendly and visually engaging designs for SaaS solutions. Adept at balancing business goals with user needs, delivering scalable and clear solutions.
When i'm done changing the world for the day, I like to bake :)



Trackbox


New filter & Board view





Before the changes, we had...


In 2022, Trackbox introduced a new brand for the iGaming industry


14:52 UTC





Tracking


Affiliates


Marketing


Billing


Advertisers

Billing

Filter

Rev Share Plan x +3 ^

DateLast Month x v

Advanced Filter

Affiliate Manager 1

Payment Plan

Date

Status

Q Search

Domain 1

Domain 2 ✓

Domain 3

Net Profit

18,473\$

Last Month 2,887

-0.1%

Credit Vs. Debit

• 1,073 • 1,073

ROI

18,473\$

Last Month 2,887

-0.1%

| Affiliate Name | Commission v | Payment Plan v | Country v | - Debit v | + Credit v | Payment v | Balance v | ROI v | |
|----------------|--------------|----------------|-------------|-----------|------------|-----------|-----------|-------|----------|
| Wade Warren | ● 405\$ | CPL | Israel, +3 | - 211 | + 213 | 123 \$ | 230\$ | 78 | ↓ 0.7% ⋮ |
| Jane Cooper | ● 210\$ | Revshare , CPA | UK, USA, +1 | - 0 | + 4 | 123 \$ | 230\$ | 78 | ↓ 0.7% ⋮ |
| Jane Cooper | 95\$ | Hybrid | Israel, +3 | - 0 | + 0 | 123 € | 23 € | -13 | ↑ 0.7% ⋮ |
| Jane Cooper | ● 210\$ | Revshare , CPA | UK, USA, +1 | - 0 | + 4 | 123 \$ | 230\$ | 78 | ↓ 0.7% ⋮ |

On the other hand...

A decision was made to align Trackbox existing system with the new design, updating features and improving infrastructure.

The screenshot displays the Trackbox Billing dashboard. The top navigation bar includes icons for Campaigns, Boxes, Reports, CRM, Marketplace, Partners, and Falcon, along with a user profile and the time 16:45 UTC. The main section is titled "Billing" and features a filter bar with options for Report Type (Activity & P/L), Date Range (01/04/22-30/04/22), Plan (All plans), Countries (All countries), Type (All types), and Entity Type (Select entity type). Below the filter bar, three summary cards show Revenue (€0.00), Payout (€1,720.00), and Net Profit (€-1,720.00) for today and the current month. A table below these cards lists transactions with columns for ID, Created, Updated, Unique Id, Affiliate, Campaign, Country, Payment Model, Revenue, Payout, Brand, Profit, Type, and Plan. The table shows four rows of data, including transactions for Kazakhstan and Albania.

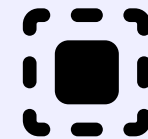
| ID | Created | Updated | Unique Id | Affiliate | Campaign | Country | Payment Model | Revenue | Payout | Brand | Profit | Type | Plan |
|-------|----------------|----------------|--------------------|--------------|----------|------------|------------------|---------|--------|-------|--------|------------|------------|
| 26031 | 19/04/22 14:27 | 19/04/22 14:27 | 91d9ffa042dcf04... | testerNewAPI | QaPure | Kazakhstan | CPL | | 0.00 | Qa_1 | 0 | Payout | |
| 26030 | 19/04/22 14:27 | 19/04/22 14:27 | 91d9ffa042dcf04... | testerNewAPI | QaPure | Kazakhstan | CPL | 0.00 | | Qa_1 | 0 | Revenue | |
| 26029 | 19/04/22 12:50 | 19/04/22 12:50 | 476d88dc2031a4d... | testerNewAPI | QaPure | Albania | CRG | | 0.00 | Qa_1 | 0 | Payout | CRGtest |
| 26028 | 19/04/22 12:50 | 19/04/22 12:50 | 476d88dc2031a4d... | testerMA | QaPure | Albania | Commission (CPA) | | 100.00 | Qa_1 | -100 | Commission | commission |

Users pain points & needs

We gave our focus group (6–8 users) a test to observe how they use it daily.



The number of clicks
for the search was **high**



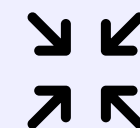
The filter row takes
up **too much space**



Inability to
Compare



Users **cannot see** the
filter **parameters**
immediately




Users didn't see how to
collapse the filter row


The goal is to
simplify the filtering process,
making it **faster** and
customizable.


Copying – it's easy, but not very smart


There were also several issues here


14:52
UTC





Tracking



Affiliates




Marketing




Billing




Billing

 Filter

Rev Share Plan  +3 

Date Last Month  

 Advanced Filter

Affiliate Manager 1


Payment Plan

Date

Status

Q Search

Domain 1


Domain 2 

Domain 3



Net Profit


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 1,073  1,073

















ROI

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Last Month 2,887


 -0.1%


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1


The filter was **split** into multiple topics (dates, pivot).
Also, the filter's **summaries** on the screen caused distractions.


14:52
UTC





Tracking



Affiliates



Marketing



Billing


Advertisers


Billing


 Filter


Rev Share Plan 


+3 


Date

Last Month 

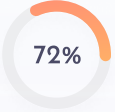


Levels 

 Advanced Filter

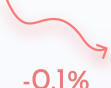
Budget 

11,500\$ / 9,870%


72%

Net Profit


18,473\$

Last Month 2,887 
-0.1%

Credit Vs. Debit

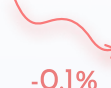
1,073















1,073



ROI

18,473\$

Last Month 2,887 
-0.1%

| Affiliate Name | Commission  | Payment Plan  | Country  | - Debit  | + Credit  | Payment  | Balance  | ROI  | |
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| Jane Cooper |  210\$ | Revshare , CPA | UK, USA, +1 | - 0 | + 4 | 123 \$ | 230\$ | 78 |  0.7%  |

2

The advanced filter was placed elsewhere.

14:52
UTC

Tracking

Affiliates

Marketing

Billing

Advertisers

Billing

Filter

Rev Share Plan

+3

Date

Last Month

Levels

Advanced Filter

Budget

11,500\$ / 9,870%

Net Profit

18,473\$

Last Month 2,887 -0.1%

Credit Vs. Debit

1,073

1,073

ROI

18,473\$


Last Month 2,887 -0.1%


| Affiliate Name | Commission | Payment Plan | Country | - Debit | + Credit | Payment | Balance | ROI | |
|----------------|------------|----------------|-------------|---------|----------|---------|---------|-----|------|
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3


It was very **difficult to filter** and understand what was filtered.


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UTC





Tracking



Affiliates



Marketing



Billing


Advertisers


Billing


 Filter


Rev Share Plan 


+3 

Date

Last Month 



Levels 


 Advanced Filter

Affiliate Manager 1


Payment Plan

Date

Status

 Search

Domain 1


Domain 2 

Domain 3

Net Profit

18,473\$


Last Month 2,887

 -0.1%

Credit Vs. Debit

1,073


1,073

















ROI

18,473\$

Last Month 2,887

 -0.1%

| Affiliate Name | Commission  | Payment Plan  | Country  | - Debit  | + Credit  | Payment  | Balance  | ROI  | |
|----------------|--|--|---|---|--|---|---|---|--|
| Wade Warren |  405\$ | CPL | Israel, +3 | - 211 | + 213 | 123 \$ | 230\$ | 78 |  0.7%  |
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Research

Data system

Competitors

amazon

ebay



Gmail

WIX

monday.com



ClickUp



CAKE

affise

getlinked.io



EVERFLOW



iREV

Overview Filters

Clear all

Apply

Where

Assignee

Is

Select assignee

+ Add nested filter

Select filter

+ Add filter

In selected location(s)

Archived

Assigned comment

Assignee

Created by

Date closed

Date created

Date done

Date updated

Folders

No Folders to show

Bulk changes

Single changes

Period 2023-01-05

Timezone Europe/Kiev

Offer All

Add Filters

Reset Filters

| User | When | Type | Offered object | Details | Note |
|------------------|---------------------|-------|--|--------------|------|
| kate.b@gmail.com | 05.01.2023 17:44:19 | Offer | 8) 992 Starbucks - iOS - US (IDFA) (Private) | Show details | - |
| kate.b@gmail.com | 05.01.2023 17:38:18 | Offer | 9) 810 Starbucks - Android - US (GAID) (Private) | Show details | - |

Enter Search Item

Reports

Buyers

Advertisers

Affiliates

Setup

Accounting

Settings

Contacts

Alerts

Verticals

List Managers

Filter Types

| Filter Type Name | Lead Field | Operator |
|------------------------|-------------------------------|--------------------------|
| Min Debt Amount | Debt Settlement - Debt Amount | Greater Than Or Equal To |
| Max Debt Amount | Debt Settlement - Debt Amount | Less Than Or Equal To |
| Contains State | State | List Contains |
| Min Tax Debt | Tax Settlement - Tax Debt | Greater Than Or Equal To |
| Max Tax Debt | Tax Settlement - Tax Debt | Less Than Or Equal To |
| Tax Agency Contains | Tax Settlement - Tax Agency | Contains |
| Sub ID Equals | Sub Affiliate ID | Equals |
| Does Not Contain State | State | List Does Not Contain |

All of our new and completed requests.

Main TableFormAdd View

New ItemSearchPersonFilterSortFilterView

New Requests

Quick filters Showing all of 8 items

Name

People

Priority

Status

Take Marketing ... 1

Jess 3

High 4

Working on it

Change backgr... 1

Cassandra 3

Low 2

Done

Alter the lighting 1

Noy 6

Medium 2

Stuck

Up the contrast 1

Ariel 1

Blank

In progress

UX/UI changes 1

Unassigned

Blank

Enhance design... 1

Blank

Turn headshots into a group photo 1

Blank

Filter your sites

Plan

All

Premium

Free

Published

Editor type

Agency ownership

Wix apps

No filters applied

Clear

Reporting / Impression

Impression Report

(GMT+00:00) UTC

04/01/202204/14/2022

Add Filter

Clear

Run Report

Detailed Report

| Date | Offer | Partner | Revenue | Payout | Sub1 | Country | Proxy | IP Address | Transaction ID |
|-------------------------|-------------------------------------|-----------------------------------|---------|---------|------|---------------|-------|-------------|----------------------------------|
| 04/06/2022 18:19:58 UTC | TL_Test_Offer_DoNotEdit_CPC (12019) | TL_Test_Partner_DoNotEdit (20493) | \$0.000 | \$0.000 | - | United States | NO | 74.68.59.80 | 0233b1a0f25846ac92cd25f903260dae |
| 04/06/2022 18:22:03 UTC | TL_Test_Offer_DoNotEdit_CPC (12019) | TL_Test_Partner_DoNotEdit (20493) | \$0.000 | \$0.010 | - | United States | NO | 74.68.59.80 | 58b146a289cd4116a7dd11fd813e0bc0 |
| 04/06/2022 18:22:08 UTC | TL_Test_Offer_DoNotEdit_CPC (12019) | TL_Test_Partner_DoNotEdit (20493) | \$0.000 | \$0.020 | - | United States | NO | 74.68.59.80 | 123dbd7126064c438bb5912f2ae89ae2 |

3 Total

Affiliate Manager Performance

Reports / Affiliate Manager Performance

Today

Yesterday

This Week

Last Week

All Whitelabels

Search Managers

Filter

| Affiliate Name | Leads | Conversions |
|----------------|-------|-------------|
| Beth Alyssa | 4055 | 228 |
| Winter Kegan | 2469 | 128 |
| Maria Brando | 1010 | 400 |

Conclusions



Collapse filter



The filter opens
as a modal, or
sidebar



Inability to **Compare**



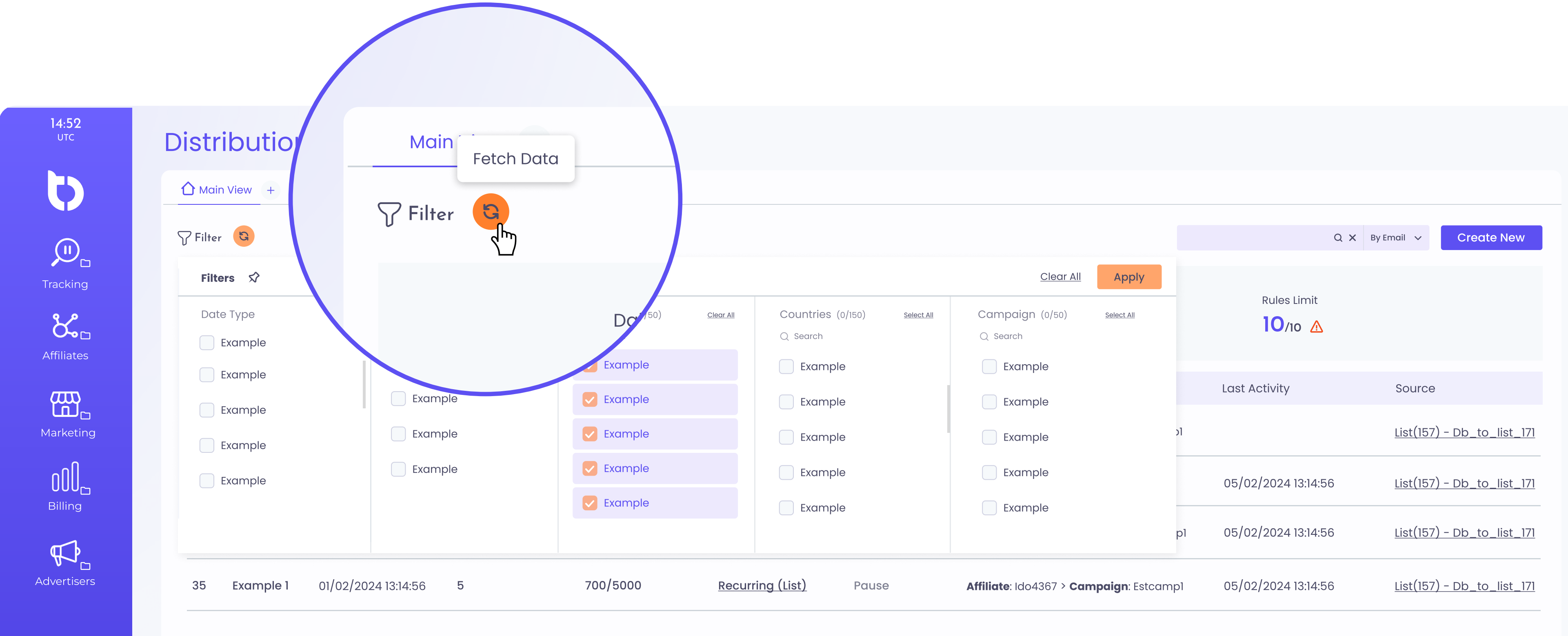
Dont show applied
filters

First step

**Filter out the noise,
and let the good
results shine!**

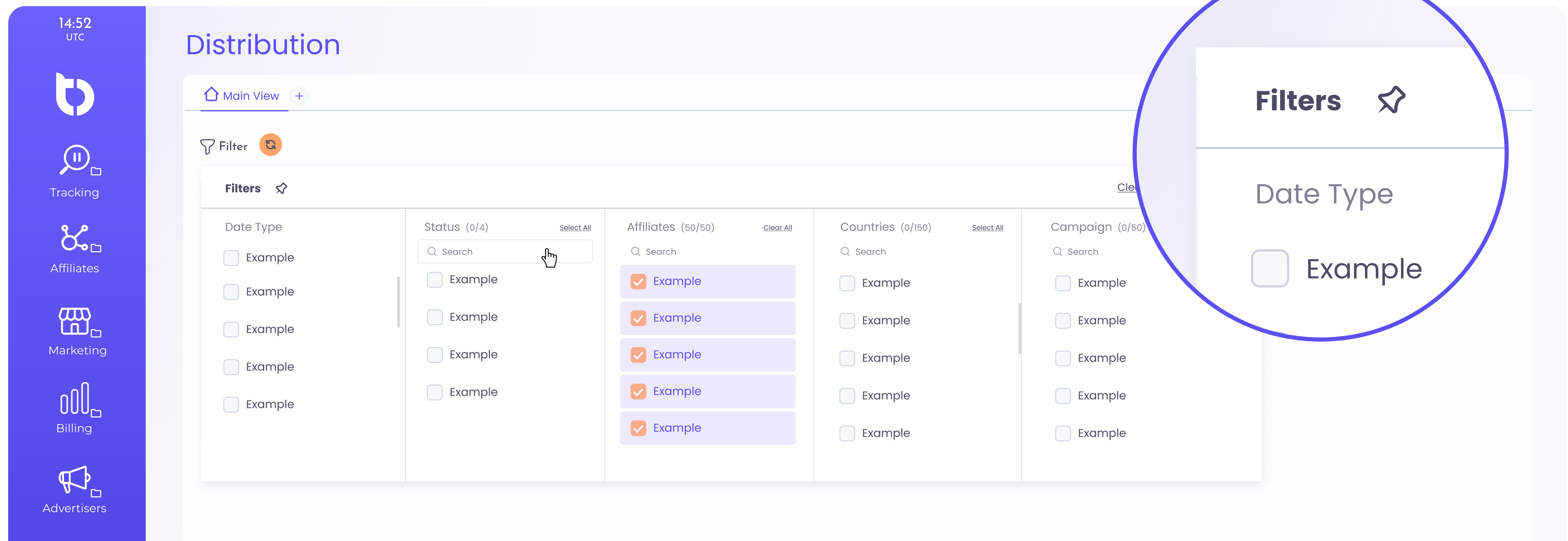
Collapse filter

We kept the collapse filter design and added a refresh button next to it




Floating modal & Pin option


Floating modal for easy searching, with an option to pin it for a smoother transition to the new design.





Example of pinned filter


14:52
UTC






Tracking



Affiliates


Marketing


Billing


Advertisers





Distribution

🏠 Main View

+

🔍 Filter

🔄

🔍 X

By Email

▼

Create New

Filters

★

Clear All

Apply

15/5/2024-25/5/2024

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Status (1/4)

Select All

🔍 Search

☐ Example

☐ Example

☐ Example

☐ Example

Affiliates (50/50)

Select All

🔍 Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Countries (150/150)

Clear All

Na

✕

☒ Example

☒ Example

☒ Example

☒ Example

☒ Example

Campaign (20/50)

Select All

🔍 Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Campaign (20/50)

Select All

🔍 Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Campaign (20/50)

Select All

🔍 Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Daily Leads Limit

651/1000

90%

Hourly Leads Limit

651/10,000

90%

Rules Limit

10/10

⚠️

| Id | Name | Created | Success Leads | Sent Leads | Timing | Status | Destination | Last Activity | Source |
|-----|-----------|---------------------|---------------|------------|-----------|---------|---|---------------------|----------------------------|
| 562 | Example 1 | 01/02/2024 13:14:56 | 12 | 20/50 | Now | Running | Affiliate: Ido4367 > Campaign: Estcamp1 | | List(157) - Db_to_list_171 |
| 23 | Example 2 | 01/02/2024 13:14:56 | 12 | 90/150 | Recurring | Done | Affiliate: Ido4367 > Box: Estcamp1 | 05/02/2024 13:14:56 | List(157) - Db_to_list_171 |
| 45 | Example 1 | 01/02/2024 13:14:56 | 3 | 700/5000 | Now | Running | Affiliate: Ido4367 > Campaign: Estcamp1 | 05/02/2024 13:14:56 | List(157) - Db_to_list_171 |

Next step

14:52
UTC

Tracking

Affiliates

Marketing

Billing

Advertisers

Distribution

Main View

+

Filter

Q X

By Email

▼

Create New

Filters

Clear All

Apply

15/5/2024-25/5/2024

☐ Example

☐ Example

☐ Example

☐ Example

Status (1/4)

Select All

Q Search

☐ Example

☐ Example

☐ Example

Affiliates (50/50)

Select All

Q Search

☐ Example

☐ Example

☐ Example

Countries (150/150)

Clear All

Na

X

☒ Example

☒ Example

☒ Example

Campaign (20/50)

Select All

Q Search

☐ Example

☐ Example

☐ Example

Campaign (20/50)

Select All

Q Search

☐ Example

☐ Example

☐ Example

Campaign (20/50)

Select All

Q Search

☐ Example

☐ Example

☐ Example

Daily Leads Limit

651/1000

90%

Hourly Leads Limit

651/10,000

90%

Rules Limit

10/10

| Id | Name | Created | Success Leads | Sent Leads | Timing | Status | Destination | Last Activity | Source |
|-----|-----------|---------------------|---------------|------------|------------------|---------|---|---------------------|----------------------------|
| 562 | Example 1 | 01/02/2024 13:14:56 | 12 | 20/50 | Now | Running | Affiliate: Ido4367 > Campaign: Estcamp1 | | List(157) - Db_to_list_171 |
| 23 | Example 2 | 01/02/2024 13:14:56 | 12 | 90/150 | Recurring | Done | Affiliate: Ido4367 > Box: Estcamp1 | 05/02/2024 13:14:56 | List(157) - Db_to_list_171 |
| 45 | Example 1 | 01/02/2024 13:14:56 | 3 | 700/5000 | Now | Running | Affiliate: Ido4367 > Campaign: Estcamp1 | 05/02/2024 13:14:56 | List(157) - Db_to_list_171 |
| 35 | Example 1 | 01/02/2024 13:14:56 | 5 | 700/5000 | Recurring (List) | Pause | Affiliate: Ido4367 > Campaign: Estcamp1 | 05/02/2024 13:14:56 | List(157) - Db_to_list_171 |

Content is open by default

We reduced clicks by making all filter content open by default

Number of options

Filters

☆

Search

Clear All

Apply

Date Type

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Status (0/4)

Select All

Q Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Affiliates (50/50)

Clear All

Q Search

☒ Example

☒ Example

☒ Example

☒ Example

☒ Example

Countries (0/150)

Select All

Q Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Campaign (0/50)

Select All

Q Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Advanced filter

The Time & Advanced filters were merged with the main filter

Filters ☆

[Clear All](#)

Apply

Date Type

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Status (0/4) [Select All](#)

Q Search

☐ Example

☐ Example

☐ Example

☐ Example

Affiliates (50/50) [Clear All](#)

Q Search

☒ Example

☒ Example

☒ Example

☒ Example

☒ Example

Countries (0/150) [Select All](#)

Q Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

Campaign (0/50) [Select All](#)

Q Search

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

☐ Example

[Close Advanced Filter](#) ▾

Leads Inforamtion

☐ Only Uniques

☐ Only Duplicates

☐ Show Hidden Affiliate Stats

Search By Parameters

Select Parameter ▾

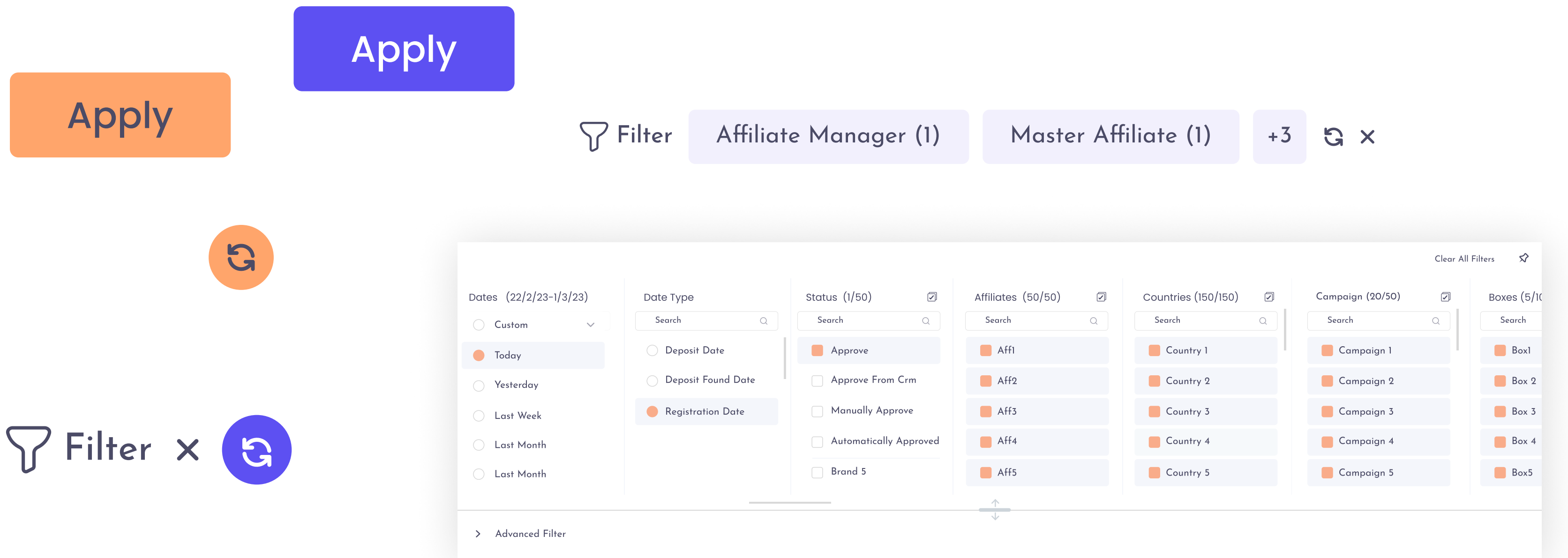
+

Select Day ▾

From ▾

Group Testing

A group testing was conducted on our focus group, which examined the placement of buttons and various elements, as well as their functionality.



Second step

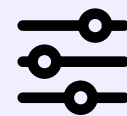
**Save your workspace,
save your energy!**

The board views

What does this actually mean?



Ability to **Compare & Save workspaces**



Visualize your board's information order



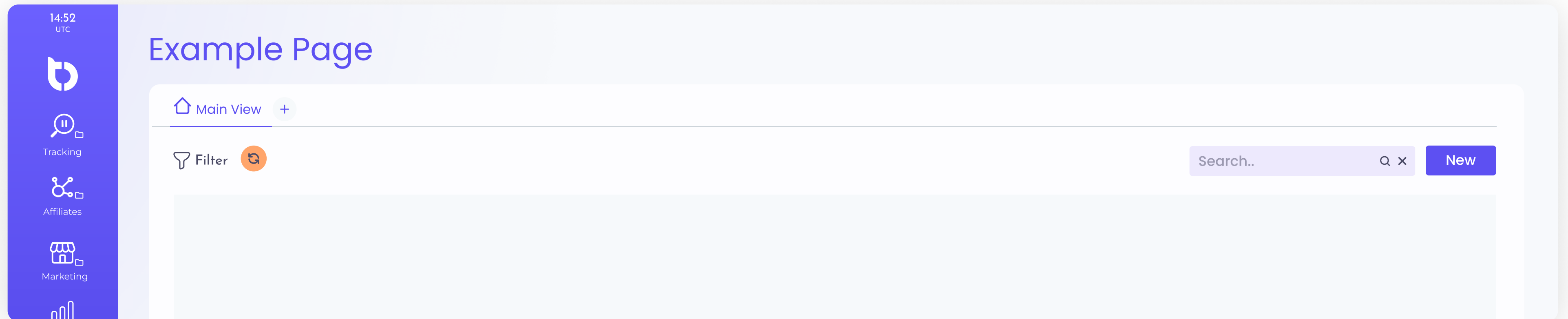
Fixed **column layout**, and table appearance



Create a **permanent filter**

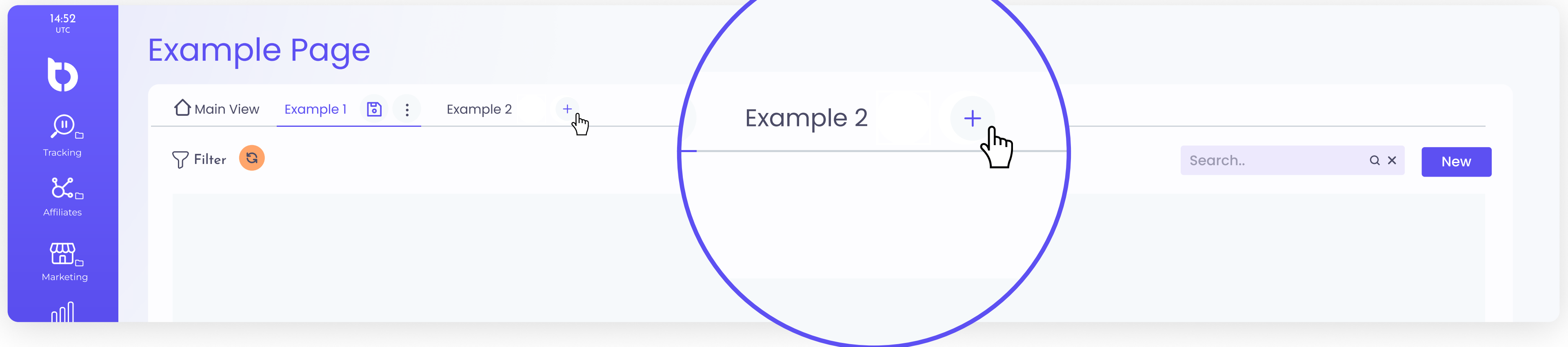
The challenge → visible but not distracting

We added the feature without cluttering the screen,
using a neutral color scheme to keep it clean.



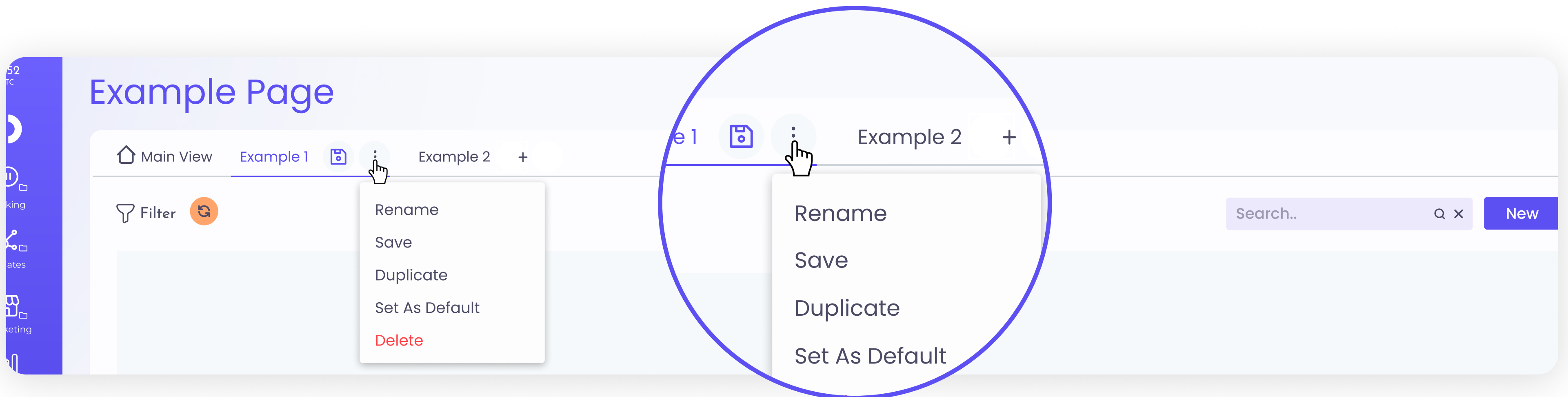
Create “View” quickly

Quickly add a new board view to compare



Easy editing

The user can: rename the board, duplicate, set as his main view and delete.



Thoughts for the future

Make the feature more cooperative

Manage Views

Close

Restore Default View

search.. Q X

My Views

{Viewcampaign}

Finance

Campaign > Affiliate > So

{Viewcampaign}

Traffic

Campaign > Affiliate > So

{Viewcampaign}

Campaign > Affiliate > So

{Viewcampaign}

Campaign > Affiliate > So

{Viewcampaign}

Campaign > Affiliate > So

2 Selected

Delete

Close

Shared Views

{Viewcampaign}

Campaign > Affiliate > So | Created By: GM123

Thank you :)