

GSS and Banker Chat / PRJ19990
Desktop & Tablet Landscape / Tablet Portrait
Mobile Web / Mobile App

GSS Wireframes | PRJ19990

Release: June 5, 2017

user experience

Last Updated: Jun 7, 2017



Desktop & Tablet Landscape / Tablet Portrait Mobile Web / Mobile App

GSS (Guided Self Search) and Banker Chat Wireframes / PRJ19990

Note: Wireframes display UI Flow and behavior only.

Please refer to:

- **Content Docs** for Content / Copy
- **Design Spec** for Visual Design
- **Accessibility Document** for Accessibility Rules
- **BRD** for business and other rules

Chat

Online Chat with a Banker (Service)

GSS

Guided Self Service, Bot Chat and [24]7

Widget

Window that can contain GSS or Sales chat on OLB

Widget Tab

Minimized Widget



Dialogue

This is the section of the expanded Widget where questions / answers and dialogue appears

Viewport

The framed area on a display screen for viewing information

Widget Square

Minimized Widget which appears on Mobile versions



Mobile Web / Mobile App / Mobile Devices

Mobile

When we are referring to “Mobile”, we are referring to the phone-sized display of the Mobile Web

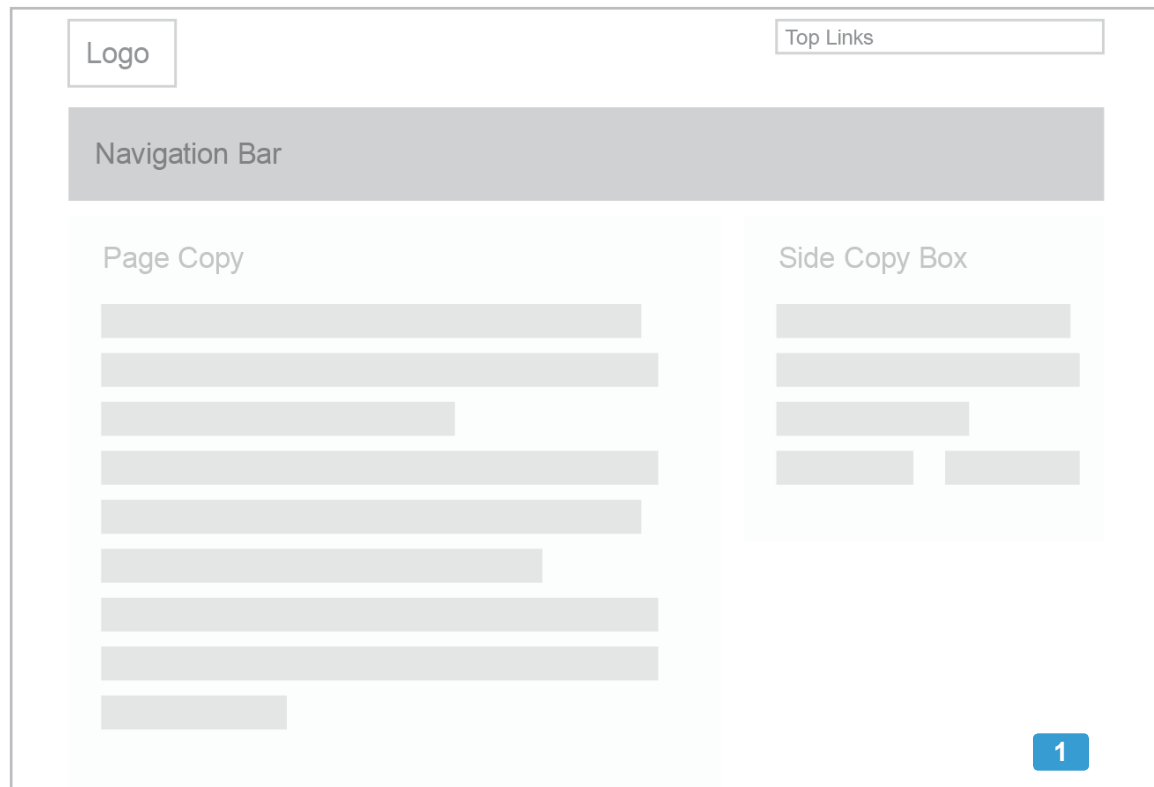
Devices

When we refer to “Devices”, we are talking about Tablets or Mobile Phones

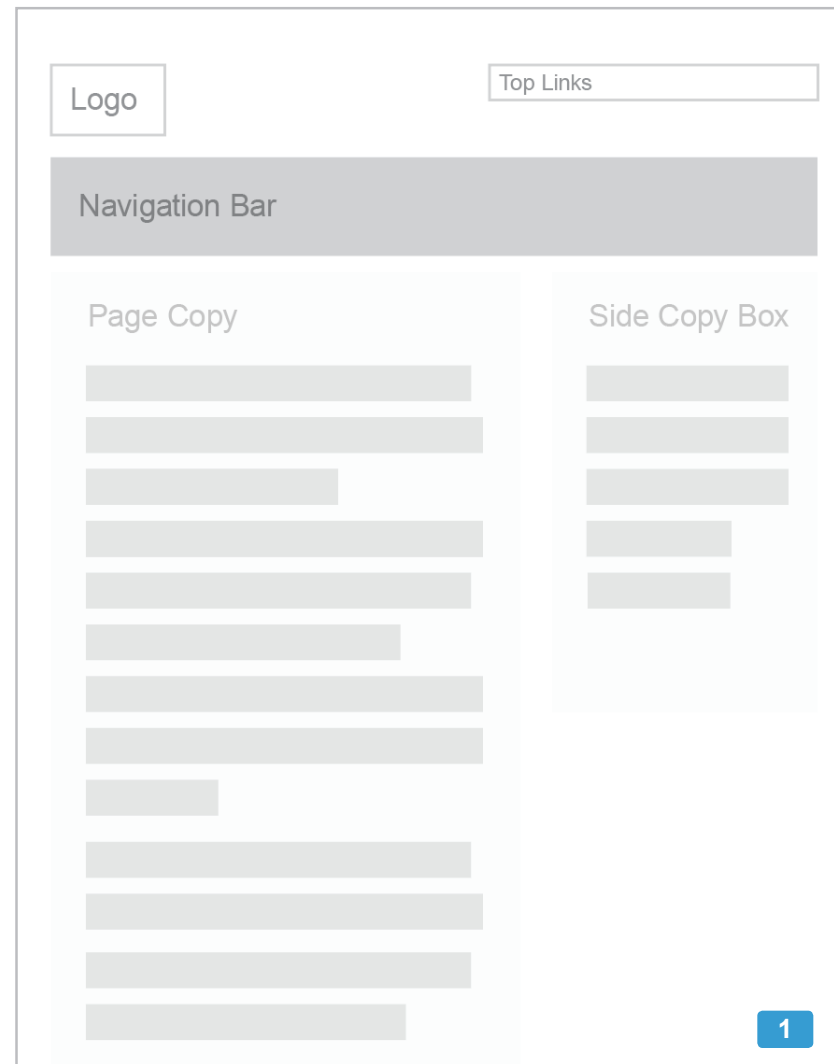
Mobile App

When we say “App”, we are referring to the mobile-specific US Bank app

Desktop and Tablet Landscape



Tablet Portrait



Mobile Web



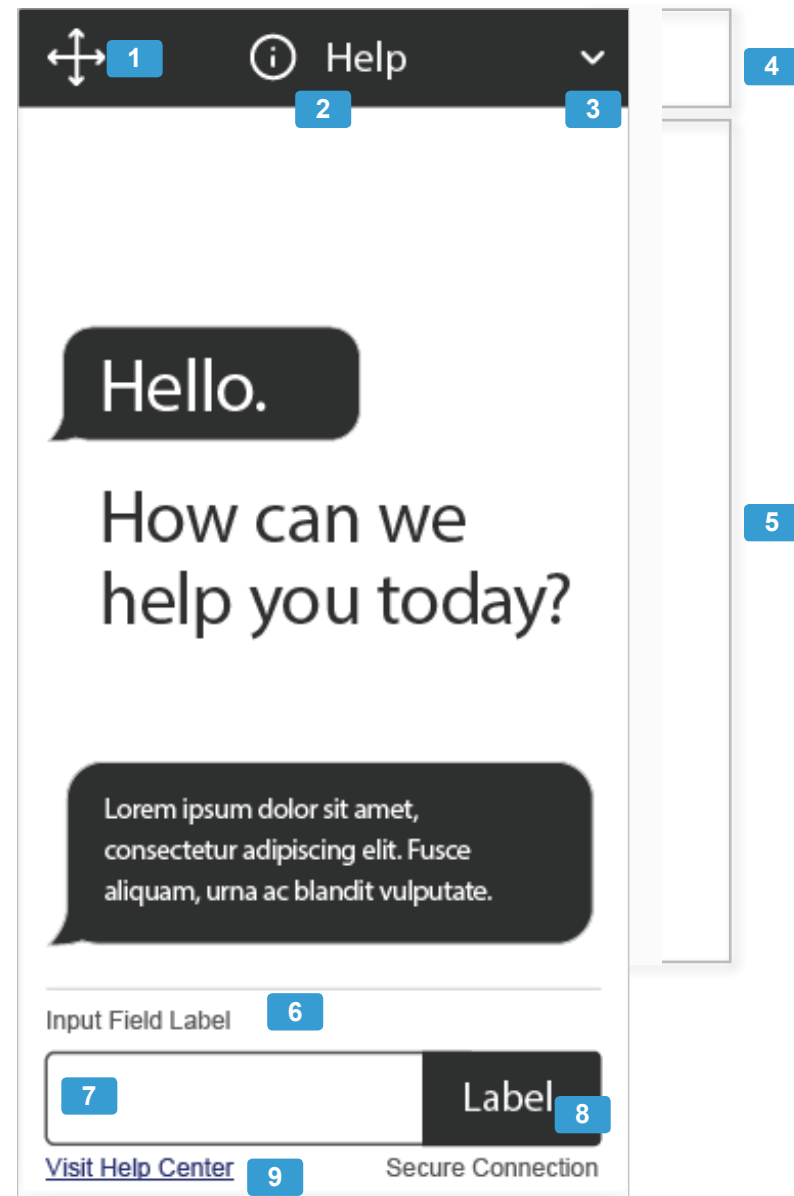
Mobile App



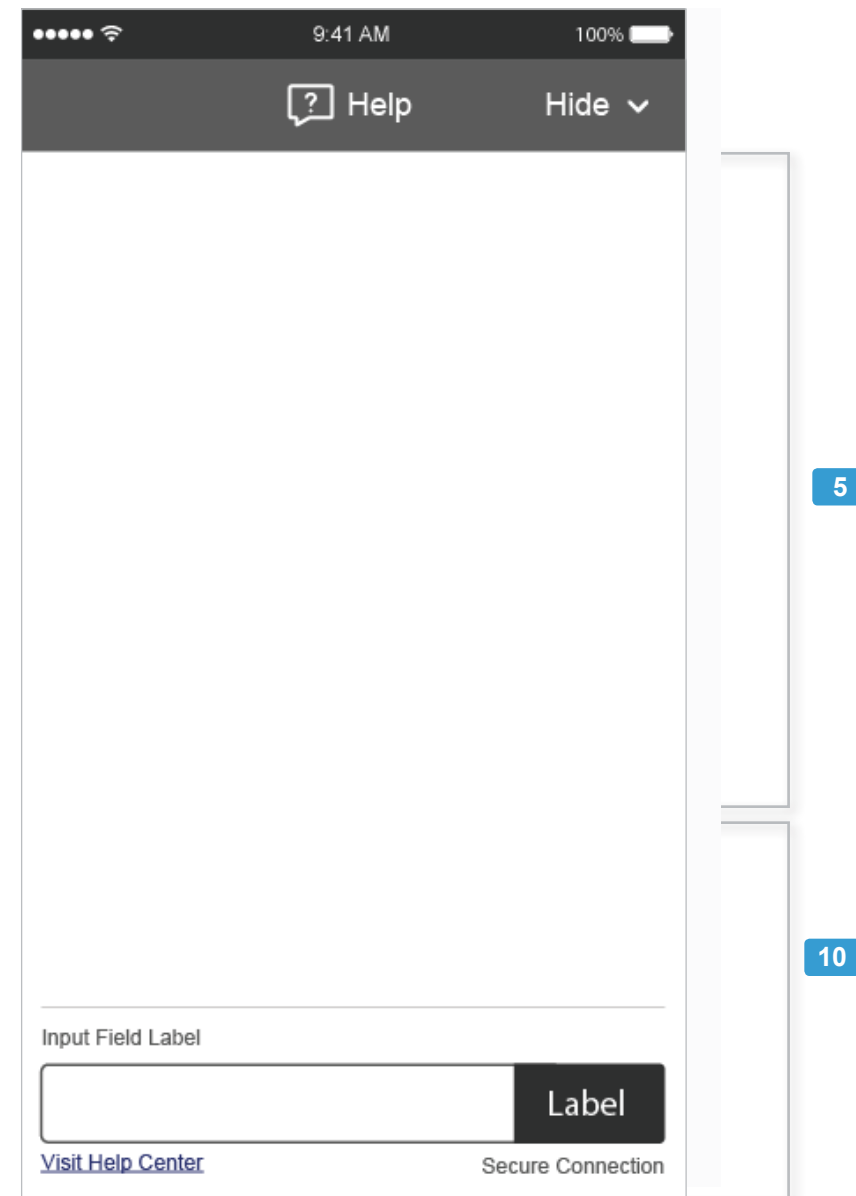
1. Widget locks to the bottom of the viewport on Desktop and Tablet.
↳ Refer to Design Spec Document
2. Widget locks to upper left placement on Mobile Web and App. Placement is determined by page content, and defined in the Design Spec Document.
↳ Refer to Design Spec Document

Note: Archetype pages are meant for quick visual reference of GSS Window on array of device sizes. Pages that contain the launch point will be listed in the **BRD (Business Requirement Document)**

GSS - Dialog Box Anatomy - All Devices

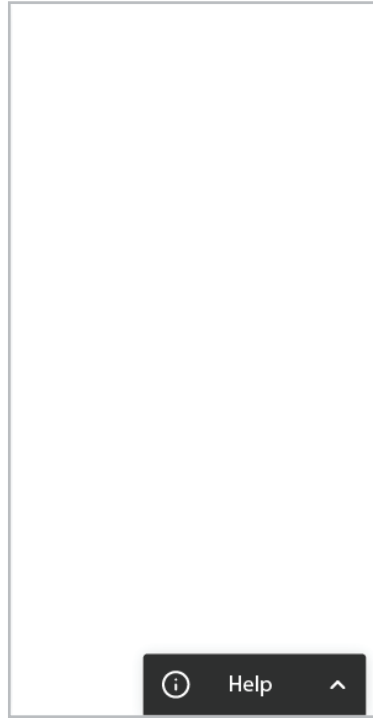


GSS - Mobile - Use of Native Keyboard



1. **Handle:** Allows user to move Widget via click / drag or tap / drag, allowing users to view content on the website that may be behind the GSS Dialogue Box. **(Available on Desktop and Tablet only)**
↳ Refer to Design Spec Document
2. **Title / Name Button:** Title is also a button (Clickable / Tapable, etc), which expands and activates the Widget.
Note: The exact copy has not been defined. Please refer to the Content Document for final copy, and refer to the Design Specs for updated placement.
↳ Refer to Content Document
3. **Minimize Arrow Button:** Arrow is clickable and used to minimize Widget. Arrow rotates to expanded state when Widget is expanded.
4. **GSS Dialogue Header**
5. **GSS Dialogue:** This area is the chat conversation area. Chat history continuously scrolls vertically upwards as chat dialogue continues at bottom.
6. **Input Field Label:** Input Field Label identifies the Input Field and assists accessibility.
↳ Refer to Content Document
7. **Input Field:** Input for the user's question. Users will type questions and information within this box.
Note: For Accessibility, offscreen text should provide instruction for users.
↳ Refer to Content Document
8. **Submit Button:** User clicks or taps button to submit the question or statement. Submit can also be completed by pressing Enter.
Note: For Accessibility, offscreen text should provide instruction for users.
↳ Refer to Content Document
9. **Help Center Link:** This link will guide the user to further information and assistance.
↳ Refer to Content Document
10. **Native Keyboard:** Keyboard and features native to device.

01 Floating CTA



Widget Position: Minimized Widget is fixed on the lower right corner of the viewport (initial state).

See 02 for Expanded Widget.

When Widget is minimized (after expanded state), it will snap back into position.

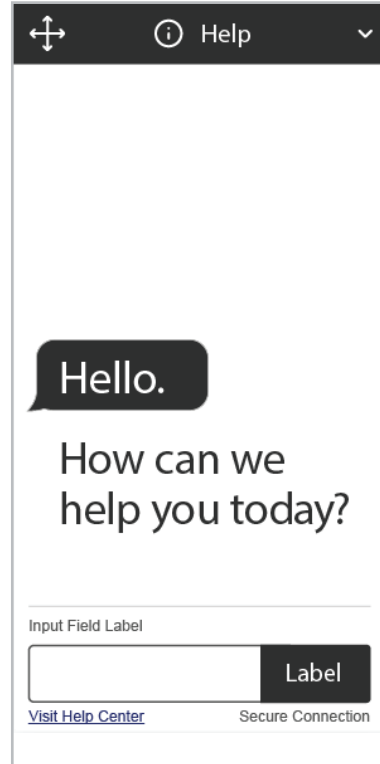
On Non-Responsive Pages: Widget is fixed to the lower right bottom of the viewport.

Minimize button (arrow rotates to maximize when Widget is expanded).

Arrow is clickable and used to minimize Widget.

Refer to the Interaction Video for visual reference.

02 Widget Default / Empty



Widget Position: Expanded Widget is fixed on the lower right corner of the viewport (initial state).

See 01 for Minimized Widget.

Handle (Left): Allows users to move Widget via click and drag. Mobile does not support drag so does not have the move icon at 767px wide and less.

Arrow is clickable and used to minimize Widget.

Dialogue: Chat history continuously scrolls vertically upwards as chat dialogue continues at bottom.

Refer to the Interaction Video for visual reference.

03 General Conversation



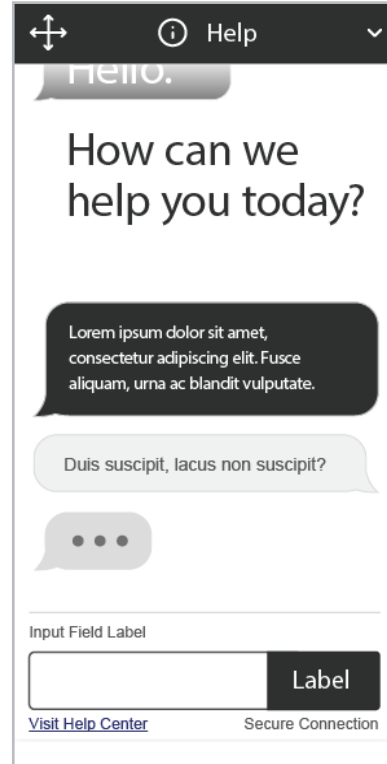
Input Field: User responses can be submitted via click, tap or Enter.

Vertical Scroll: Conversation continues to scroll upwards and persists until the session ends or is cleared after a Banker Chat.

See 07 for Vertical Scroll Example.

Refer to the Interaction Video for visual reference.

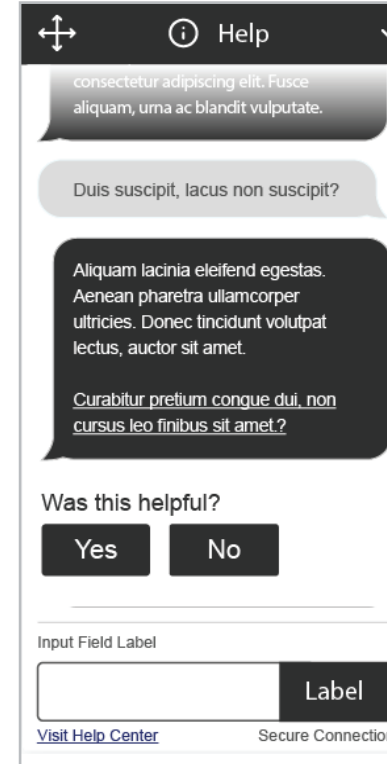
04 General Response



Typing Awareness Indicator: Three dots in a chat bubble are a loading animation that indicates to users that GSS will be responding.

Refer to the Accessibility Document for specific rules regarding implementation of the Typing Awareness Indicator, including timing of dots and color contrast.

05 Response: Yes / No



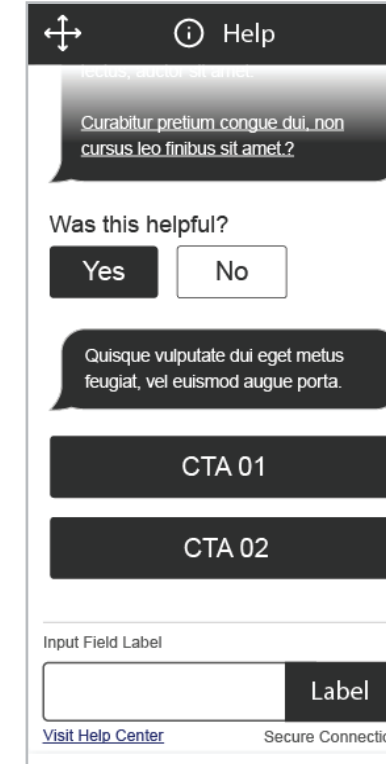
Answers: Answers displayed will be provided and defined by [24]7.

Refer to the BRD for specific rules and guidelines regarding implementation.

Yes/ No: and other CTAs may appear with graphics or in a bubble.

Refer to the Design Spec Document for visual reference.

06 Escalation Options

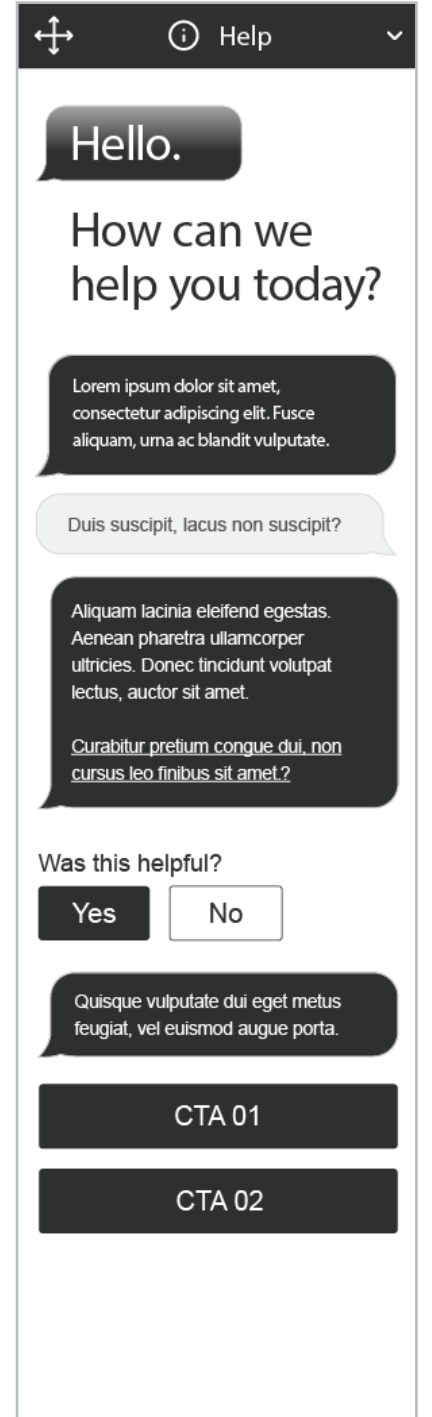


CTAs: CTAs displayed will be provided and defined by [24]7.

Note: Visual style of CTAs will be defined by Interaction Design.

Refer to the Design Spec Document for visual reference.

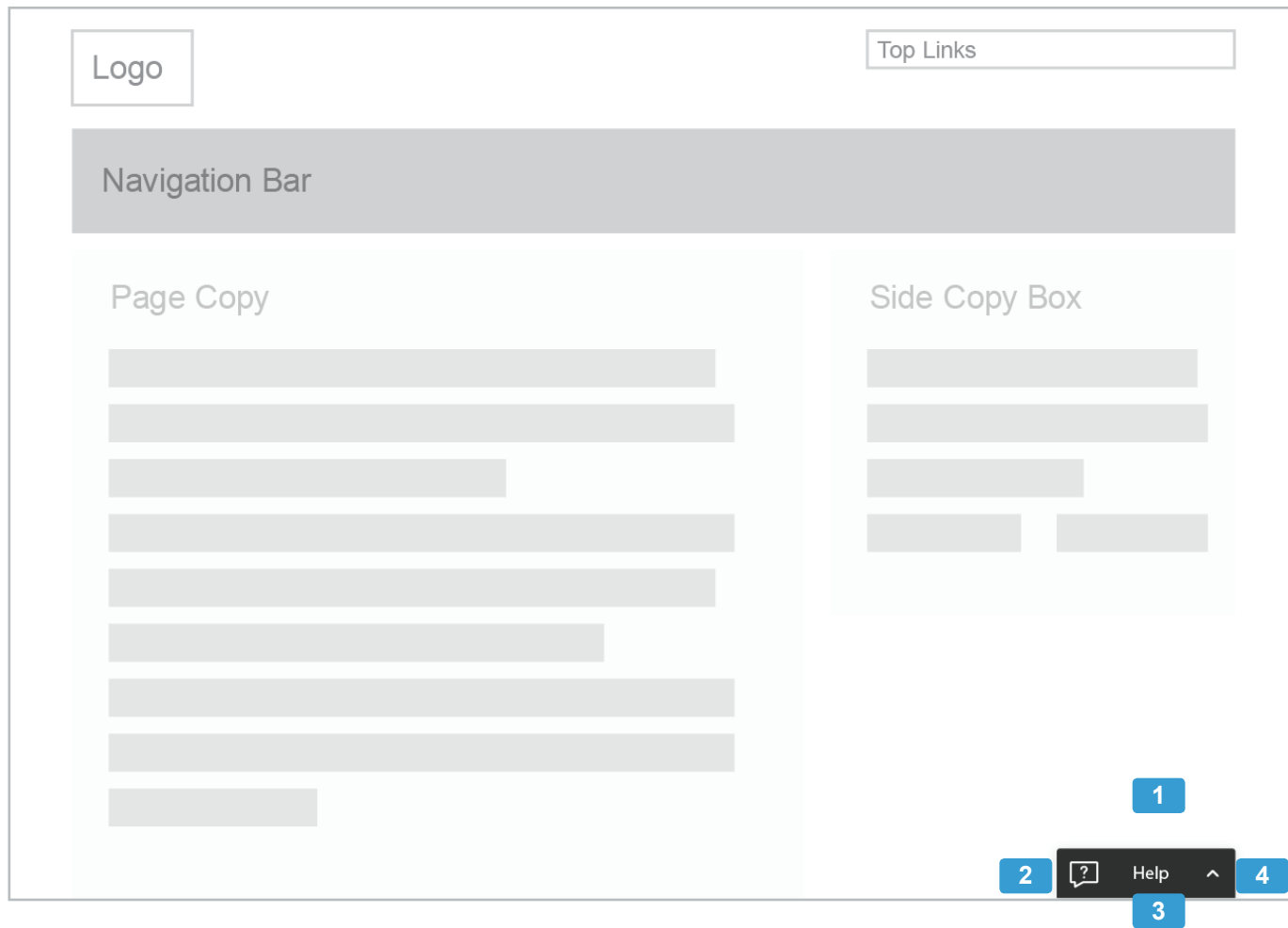
07 Vertical Scroll



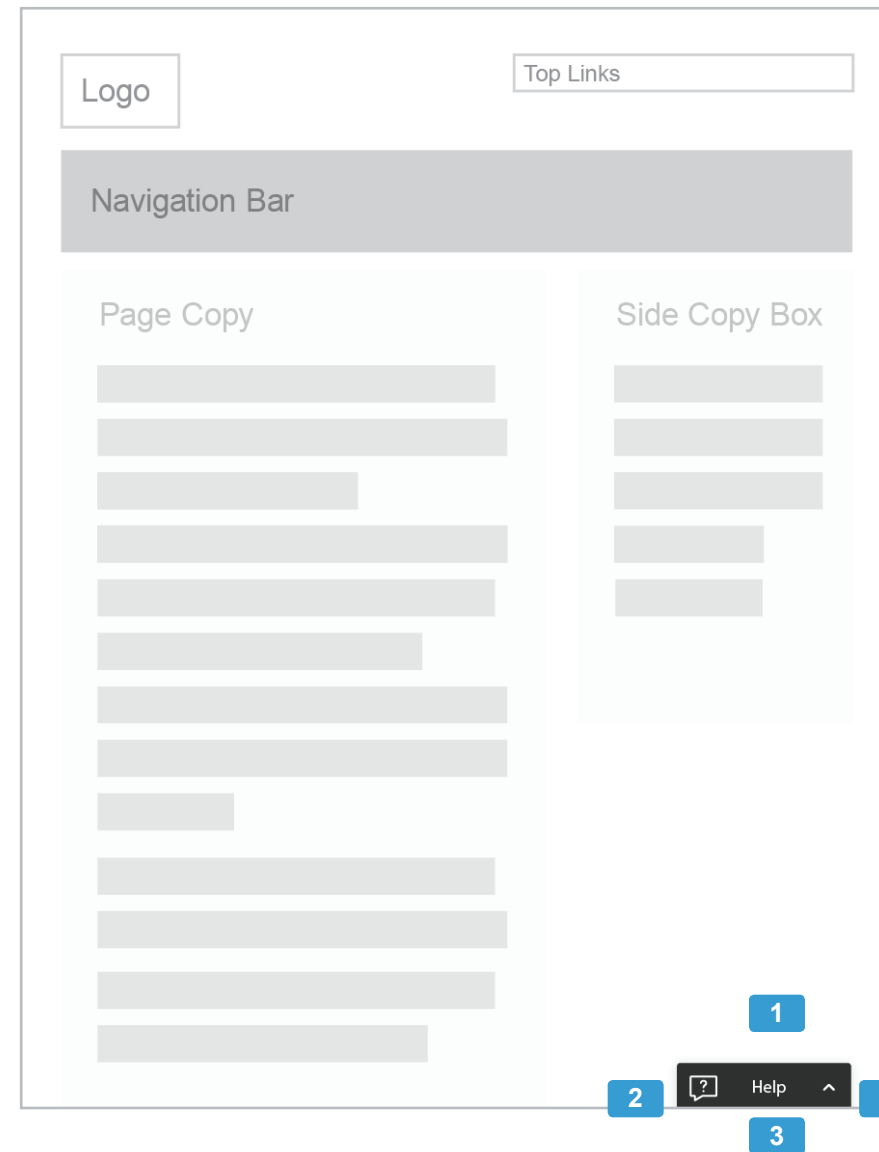
Vertical Scroll Example: Conversation continues to scroll upwards and persists until the session ends or is cleared after a Banker Chat

Refer to the Interaction Video for visual reference.

Minimized Widget: Desktop and Tablet Landscape

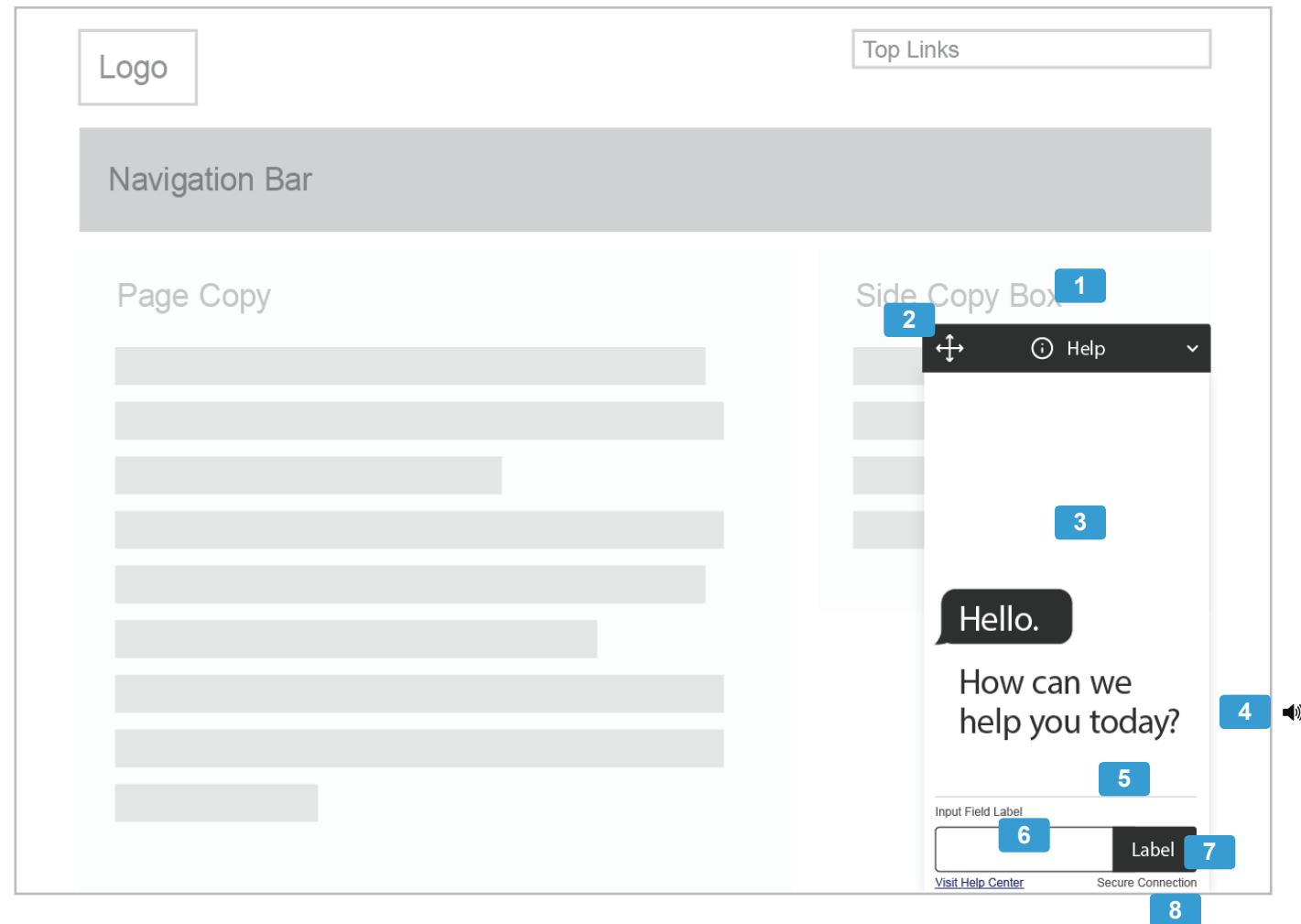


Minimized Widget: Tablet Portrait

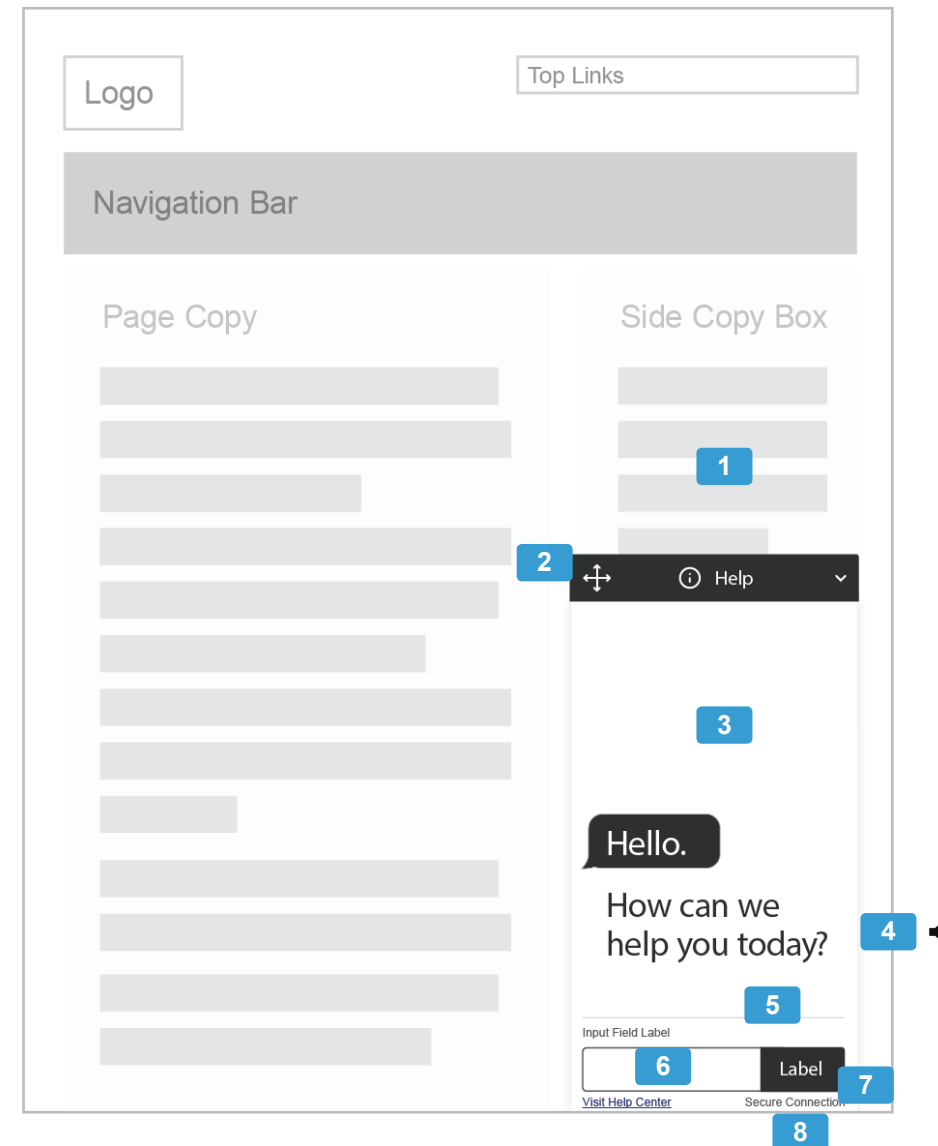


1. **Widget (Minimized):** Widget Heading is positioned to lower right corner of viewport (Desktop and Tablet).
Widget Position: Widget is fixed on the lower right corner of the viewport (initial state). When Widget is minimized (after expanded state), it will snap back into place (Desktop and Tablet).
On non-responsive pages, Widget is fixed permanently to the lower right corner of the viewport.
Note: The exact copy has not been defined. Please refer to the Content Document for final copy, and refer to the Design Specs for updated placement.
↳ Refer to Content Document and Design Specs
2. **Information Icon:** Provides information for the users, opens tool tip.
3. **Title / Name Button:** Title is also a button (click / tap / enter), which expands and activates the Widget.
4. **Expand Button:** Arrow is clickable (click / tap / enter) and used to expand Widget. Arrow rotates to minimized state when Widget is expanded.

Expanded Widget: Desktop and Tablet Landscape



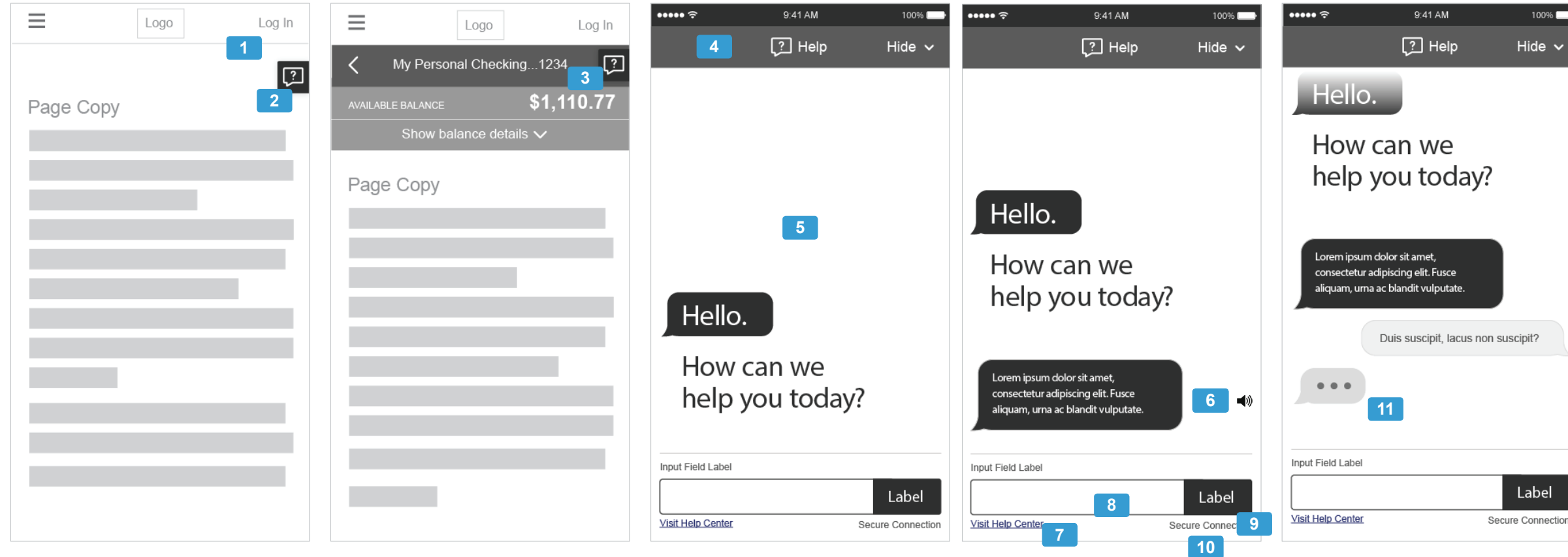
Expanded Widget: Tablet Portrait



1. **Widget Position:** When the user moves to a new page, Widget snaps back to its original position in the lower right corner of the viewport (Desktop and Tablet).
2. **Handle:** Allows users to move expanded Widget within the viewport via click and drag (Desktop and Tablet).
Note: Mobile does not support the GSS Display to be moved and does not have the move icon at 767px wide and less.
3. **GSS Dialogue:** The center section contains the dialogue history, continuously scrolling until the user requests to clear the history (type "clear" and follow the prompts) or until the user enters an escalation (e.g. Banker Chat) and then closes that chat, which would clear all chat history for the session.
4. **Audio Notification:** when new chats appear, a subtle notification chime will play. This will be useful to users from an accessibility perspective.
5. **Support Link:** Links to Help Center.
6. **Input Field:** Input for the user's question. Users will type questions and information within this box.
Note: For Accessibility, offscreen text should provide instruction for users.
↳ **Refer to Content Document**
7. **Submit Button:** User clicks or taps button to submit the question or statement. Submit can also be completed by pressing Enter.
Note: For Accessibility, offscreen text should provide instruction for users.
↳ **Refer to Content Document**

When user clicks **Submit Button**, their text entry appears in Dialogue at the bottom of the conversation.
Note: Users should be able to focus the conversation to the bottom of the dialogue where the most recent conversation updates occur.
↳ **Refer to Accessibility Document**
8. **Secure Connection Indicator:** Message will appear indicating to the user that the Banker Chat Session is secure.
↳ **Refer to Content Document**

Widget: Mobile Web

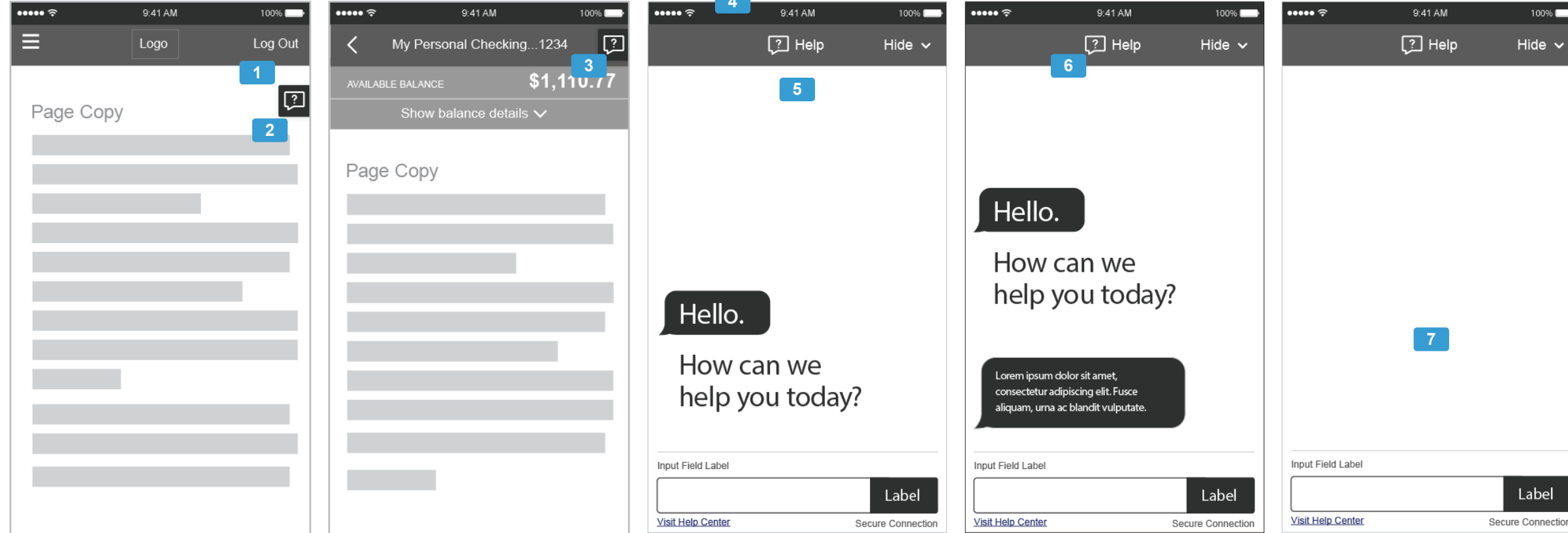


1. **Widget Square:** Mobile Versions display Widget Square for users to access GSS. Widget Square will either display at either the upper content area [2], or in the heading area [3]. When the Widget Square button is selected, GSS will open within mobile viewport [4].
 - ↳ **Refer to Design Specs**
2. **Widget Square** is displayed at upper content area.
3. **Widget Square** is displayed in heading area.
4. **GSS Widget:** Opened widget expands entire viewport.
5. **GSS Dialogue:** The center section contains the dialogue history, continuously scrolling until the user requests to clear the history (type "clear" and follow the prompts) or until the user enters an escalation chat (e.g. Banker Chat) and then closes that chat, which would clear all chat history for the session.
6. **Audio Notification:** when new chats appear, a subtle notification chime will play. This will be useful to users from an accessibility perspective.
7. **Support Link:** Links to Help Center.
8. **Input Field:** Input for the user's question. Users will type questions and information within this box.
 - Note:** For Accessibility, offscreen text should provide instruction for users.
 - ↳ **Refer to Content Document**
9. **Submit Button:** User clicks or taps button to submit the question or statement. Submit can also be completed by pressing Enter.
 - Note:** For Accessibility, offscreen text should provide instruction for users.
 - ↳ **Refer to Content Document**

When user clicks **Submit Button**, their text entry appears in Dialogue at the bottom of the conversation.

 - Note:** Users should be able to focus the conversation to the bottom of the dialogue where the most recent conversation updates occur.
 - ↳ **Refer to Accessibility Document**
10. **Secure Connection Indicator:** Message will appear indicating to the user that the Banker Chat Session is secure.
 - ↳ **Refer to Content Document**
11. **Typing Awareness Indicator:** Three dots in a chat bubble are a loading animation that indicates to users that GSS will be responding.

Widget Sequence: Mobile App



Note: Aside from the functional variations outlined below, Mobile App will assume the same behaviors as the overall GSS sequence.

- Widget Square:** Mobile Versions display Widget Square for users to access GSS.

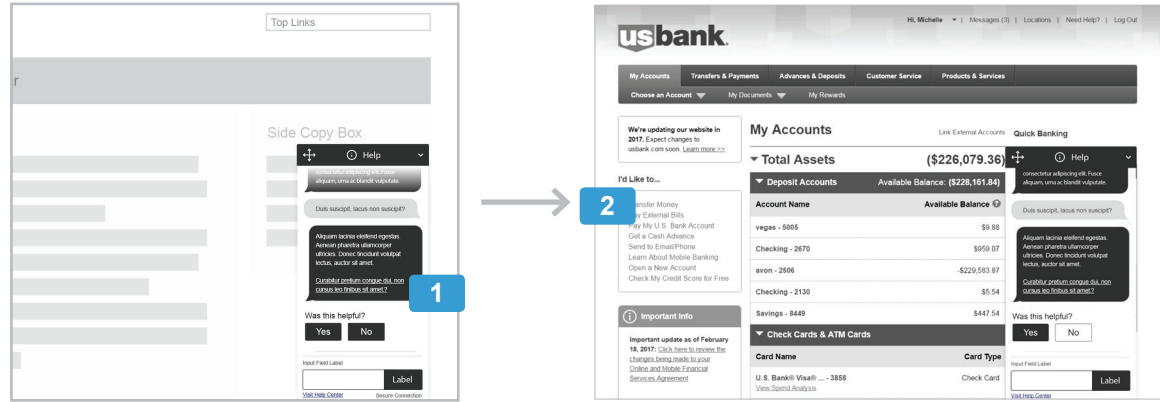
Widget Square will either display at either the upper content area [2], or in the heading area [3].

When the Widget Square button is selected, GSS will open within mobile app, below the native phone top bar [4].

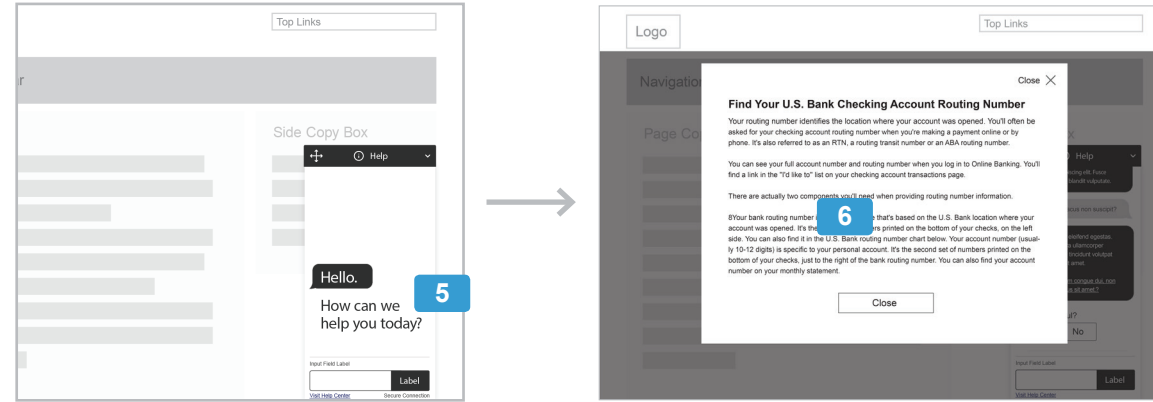
↳ Refer to Design Specs

- Widget Square** is displayed at upper content area
 - Widget Square** is displayed in heading area.
 - Native Phone Top Bar:** Area on the mobile device that displays items such as wi-fi, battery use, time and service provider. This will not be covered by the GSS Widget [5].
 - GSS Widget:** In Mobile App, the GSS Widget fills the device screen (below the Native Phone Top Bar [4]).
 - Widget Heading:** The GSS Widget Heading, at the top of the GSS Widget, allows the user to navigate to Help or to minimize the GSS Widget.
- ↳ Refer to Design Specs
- Native Keyboard:** The GSS Widget will utilize the device's native keyboard.

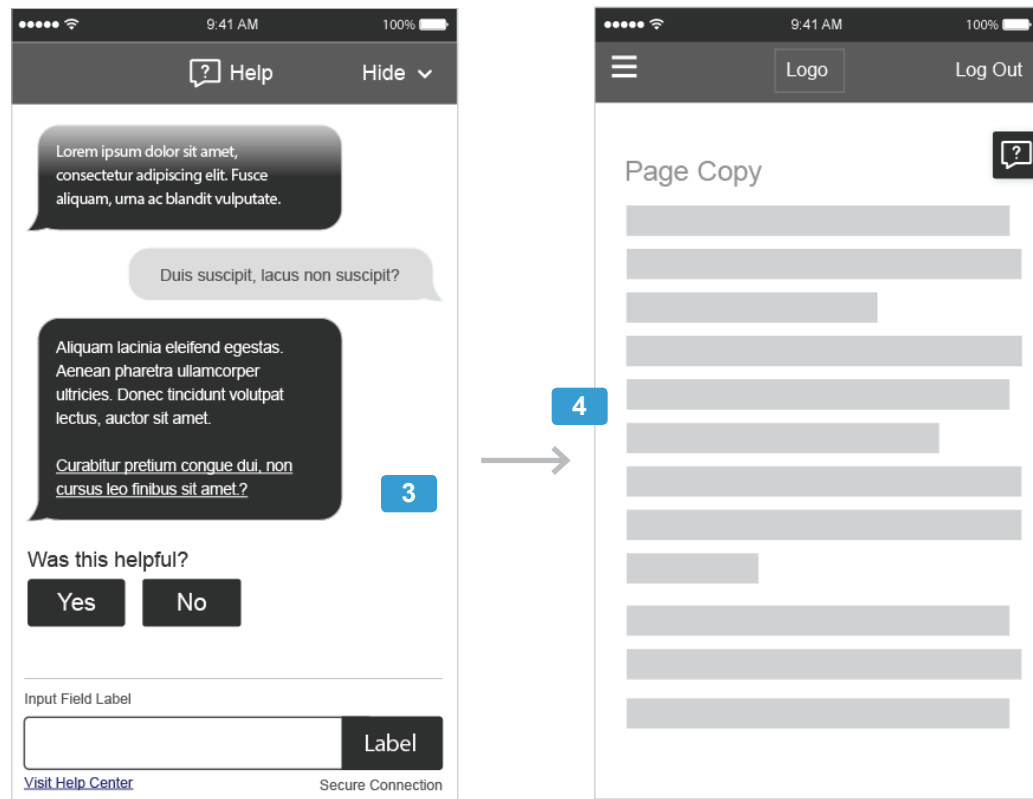
OLB Links: Desktop and Tablet Landscape



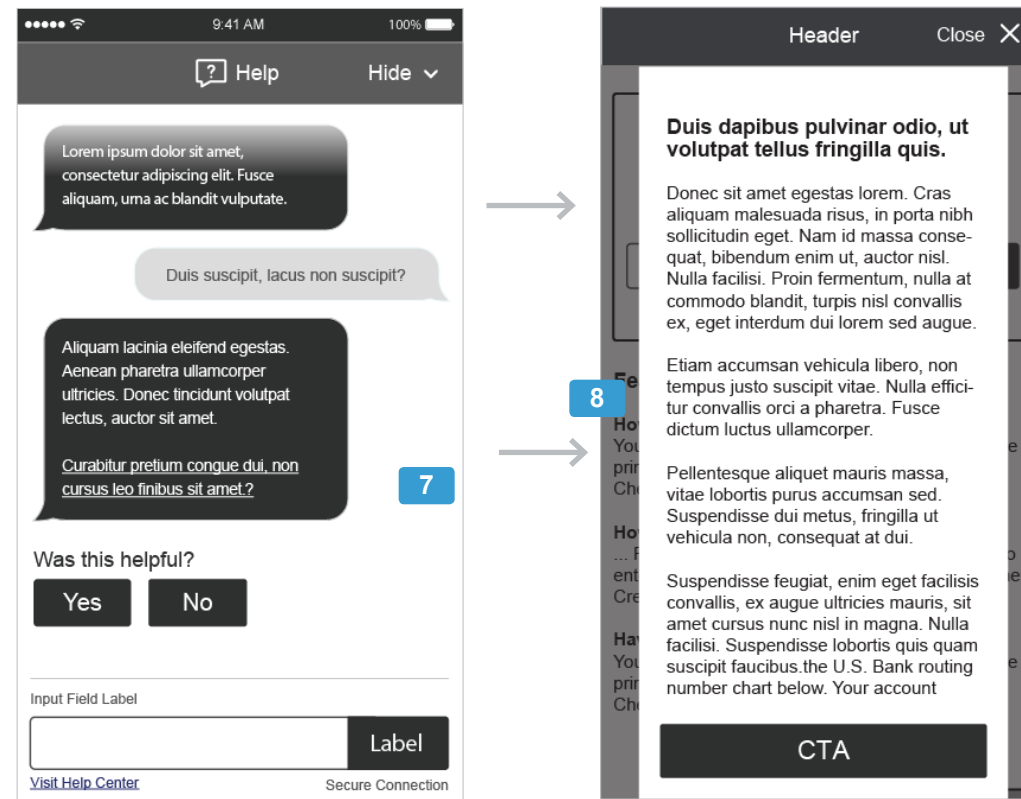
KMI Links: Desktop and Tablet Landscape



OLB Links: Mobile Web + Mobile App



KMI Links: Mobile Web + Mobile App



1. **OLB Link (Desktop):** GSS sends user a link to article on OLB.
2. **Link:** When user clicks on link to OLB, screen opens behind Widget. Current session remains in Widget.

When user links outside of OLB, link appears in a new browser tab. Widget stays on original browser tab.

3. **OLB Link (Mobile Web):** GSS sends user a link to article on OLB.
4. **Link:** When user clicks on link, Widget minimizes to original position.

Current session remains in Widget and will display when user expands Widget and resumes discussion.

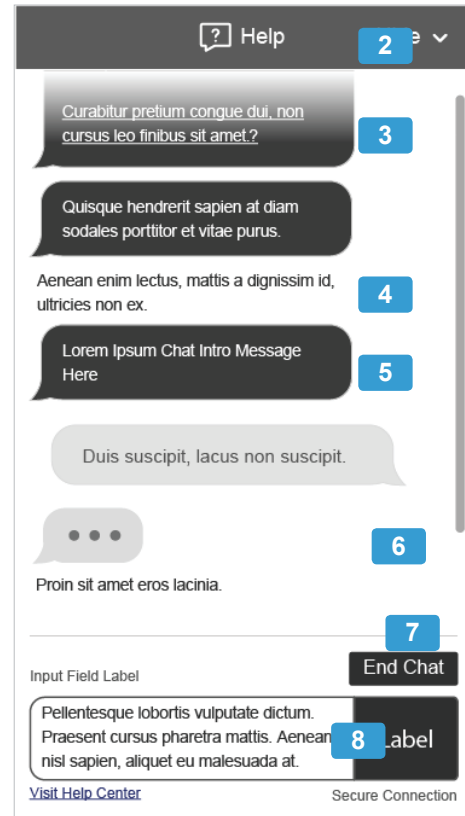
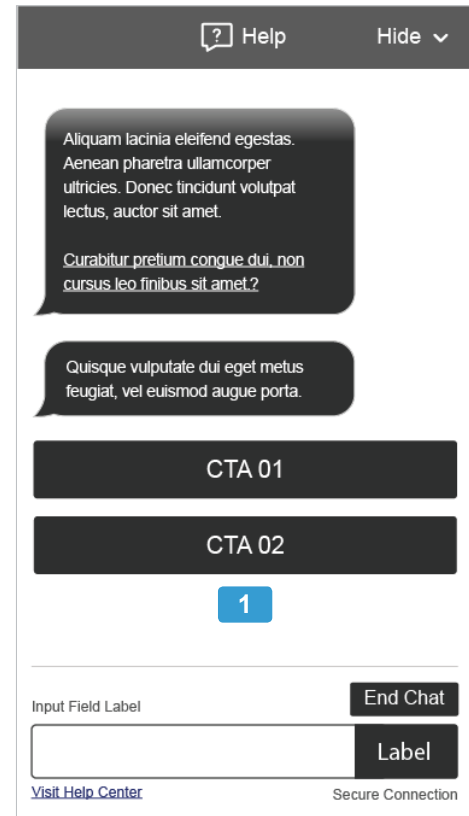
5. **KMI Link (Desktop):** GSS sends user a link to KMI Article (dependent on KMI).

6. **Link:** When user clicks on link, KMI screen opens in modal window over Widget and page. Current session remains in Widget.

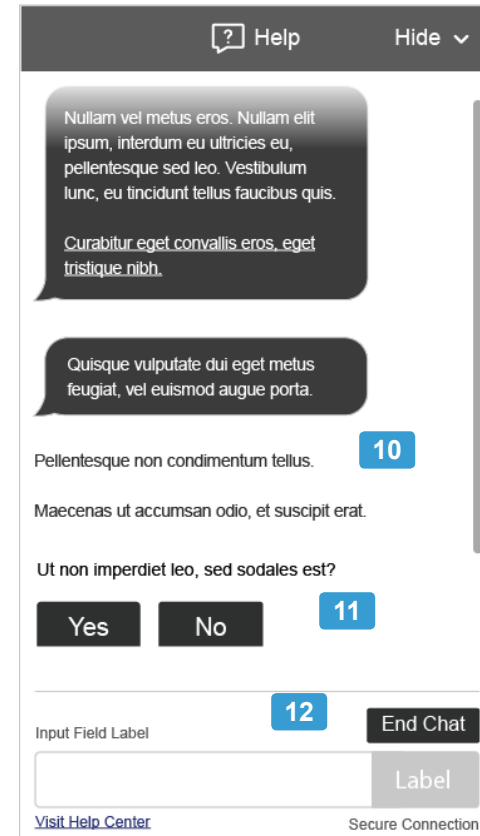
7. **KMI Link (Mobile Web):** GSS sends user a link to KMI article.

8. **Link:** When user clicks on link, KMI screen opens in modal window over Widget and page. Current session remains in Widget.

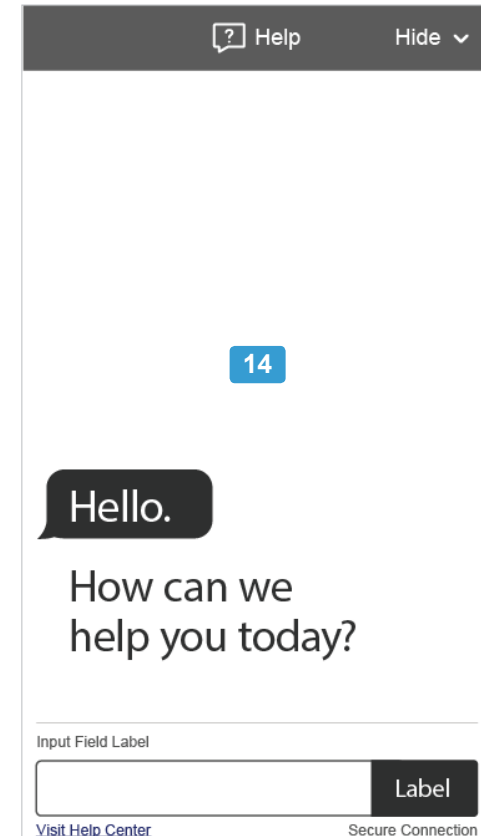
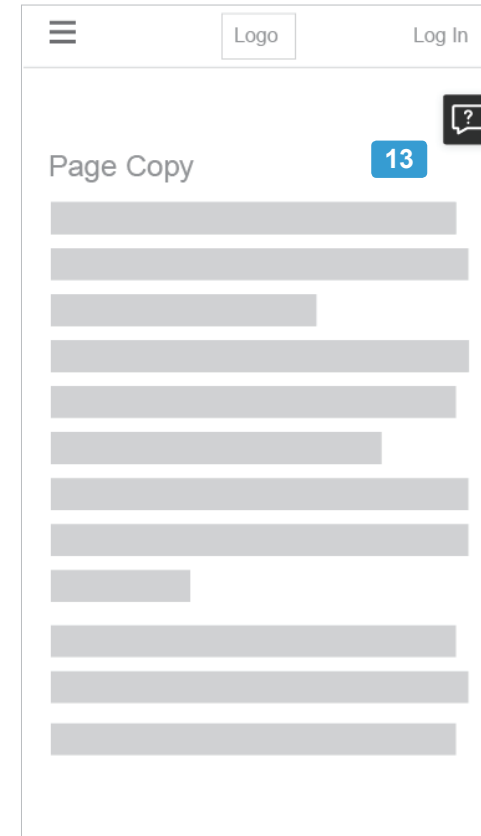
GSS to Banker Chat Transition: All Devices



User Ends Chat: All Devices



End Chat: All Devices



1. **Chat with a Banker Button:** When the user engages the "Chat with a Banker" button (by click / tap / enter), Widget will then transition into the Banker Chat. Handoff will refresh in the original window.
2. **Minimize Arrow Button:** Arrow is clickable and used to minimize Widget. When Widget is minimized, conversation is retained until the session ends.

If Chat ends for any reason while user has session minimized, it will reopen as per the rules for new GSS window.
3. **After Screen Refresh:** The previous GSS conversation advances above the dialogue area.
4. **System Message:** Messaging indicates to the user that the Chat session has started.
↳ **Refer to Content Document**
5. **Banker Enters Chat:** Message appears indicating that a live human banker has entered the chat.
↳ **Refer to Content Document**
6. **Typing Awareness Indicator + System Message:** Three dots in a chat bubble and system message indicate to users that an agent is typing.
↳ **Refer to Content Document**
7. **End Chat:** Button is added to the footer allowing the user to end the chat.
8. **Expanding Text Entry Field:** As the user enters their concern in the Input Field, the field will expand to accommodate the text. Text will be limited to **3** lines.
Note: Send Button will also expand vertically
9. **Secure Connection Indicator:** Message will appear indicating to the user that the Banker Chat Session is secure.
↳ **Refer to Content Document**
10. **End Chat Message:** Message indicates to users that they have requested to end the chat.
↳ **Refer to Content Document / Design Specs**
11. **Survey:** Message will appear asking the user if they would like to participate in a brief survey.

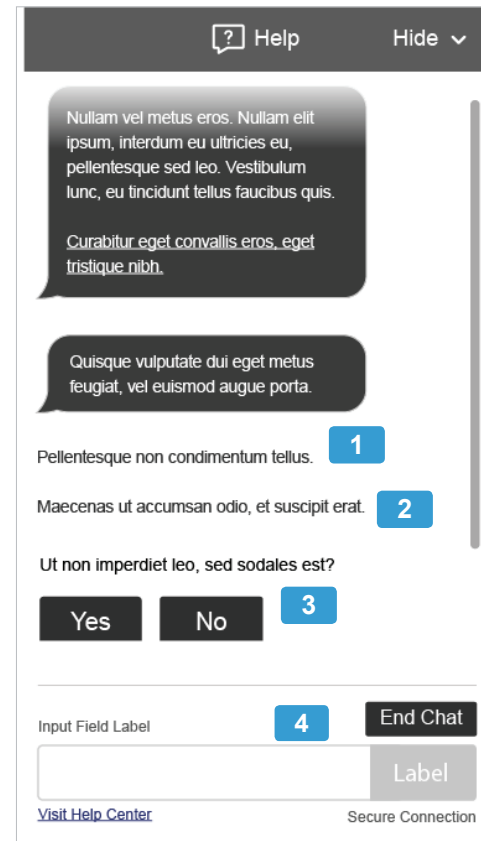
If YES, the survey will populate chat widget.
If NO, the Widget will close upon timeout.
↳ **Refer to Content Document / Design Specs**
12. **Input Field:** Input Field de-activates.

Note: Image is grayed out on wireframe to indicate that field is de-activated.
13. **Chat End:** When the chat ends, Widget minimizes and snaps to original position on the viewport.
14. **New Chat:** When the user expands the Widget again, the dialogue will reset to a new session (previous conversation will no longer be in the window).

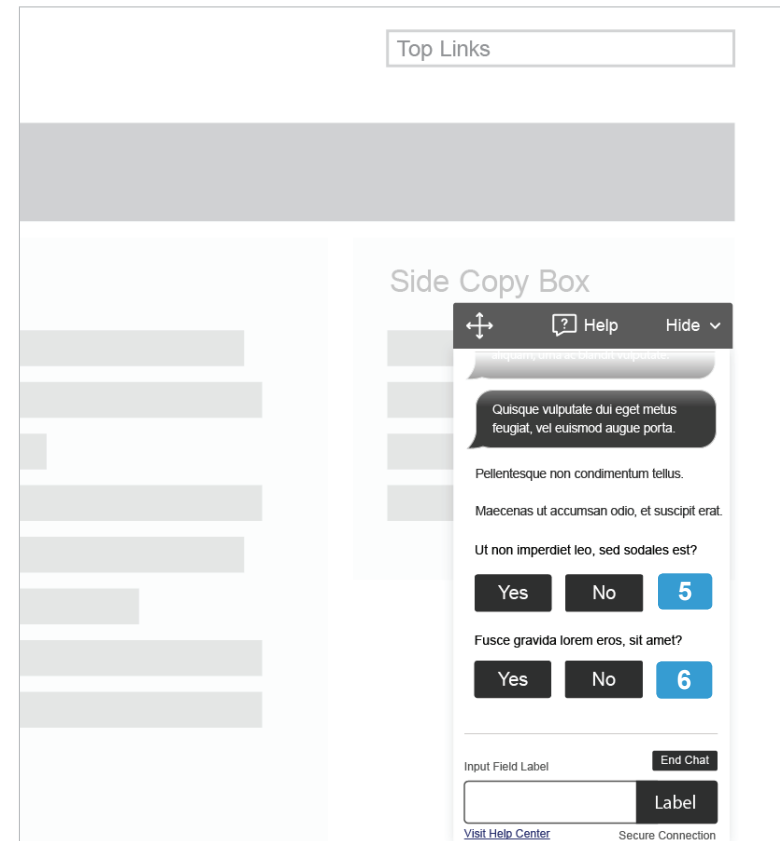
Note: Banker Chat will display different colors in the chat bubbles and background to visually signify to the user that they are Banker Chat instead of GSS.

Please refer to Design Specs for colors and more information.

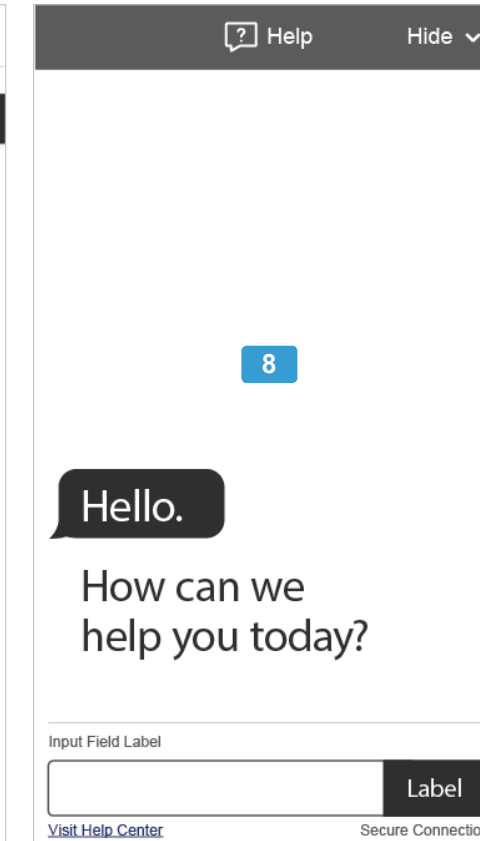
Banker Leaves: All Devices



Save Banker Chat: Desktop Only



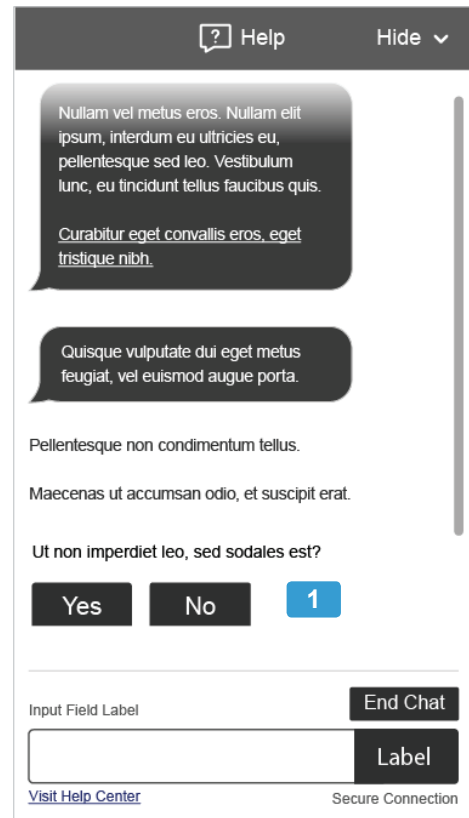
End Chat: All Devices



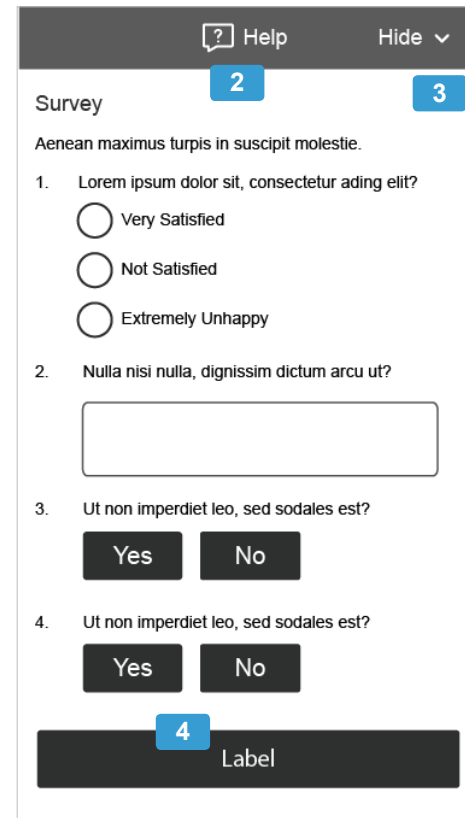
Save Chat is Desktop Only

1. **Banker Leaves Chat:** Message will appear indicating the end of the conversation, and user will be asked to participate in Survey.
2. **Goodbye.** Message appears thanking the user for their chat.
 - ↳ **Refer to Content Document**
3. **Survey:** Message will appear asking the user if they would like to participate in a brief survey.
 - If **YES**, the survey will populate chat widget.
 - If **NO**, the Widget will close upon timeout.
4. **Input Field:** Input Field de-activates.
 - Note:** Image is grayed out on wireframe to indicate that field is de-activated.
5. **Save Chat (DESKTOP ONLY):** Message will appear asking the user if they would like to save the chat transcript.
 - If **YES**, the chat transcript will be saved to an HTML or TXT file on the user's computer. The user will next be asked whether they would like to participate in **Survey [6]**.
 - If **NO**, Message appears asking user whether they would like to participate in **Survey [6]**.
 - Note:** After the user responds either Yes or No to Save Chat, the buttons will deactivate when the Survey question next appears.
6. **Survey:** Message will appear asking the user if they would like to participate in a brief survey.
 - If **YES**, the survey will populate chat widget.
 - If **NO**, the Widget will close upon timeout.
 - ↳ **Refer to Content Document / Design Specs**
7. **Chat End:** When the chat ends, Widget minimizes and snaps to original position on the viewport.
8. **New Chat:** When the user expands the Widget again, the dialogue will reset to a new session (previous conversation will no longer be in the window).

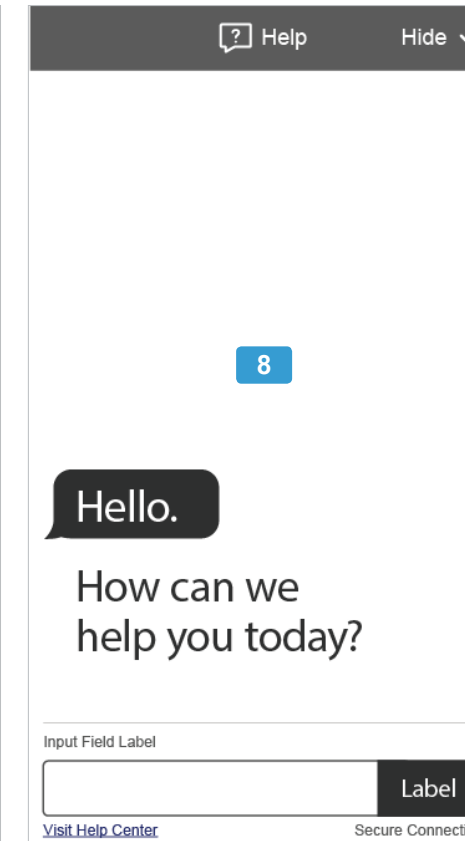
Survey Launch: All Devices



Survey: All Devices

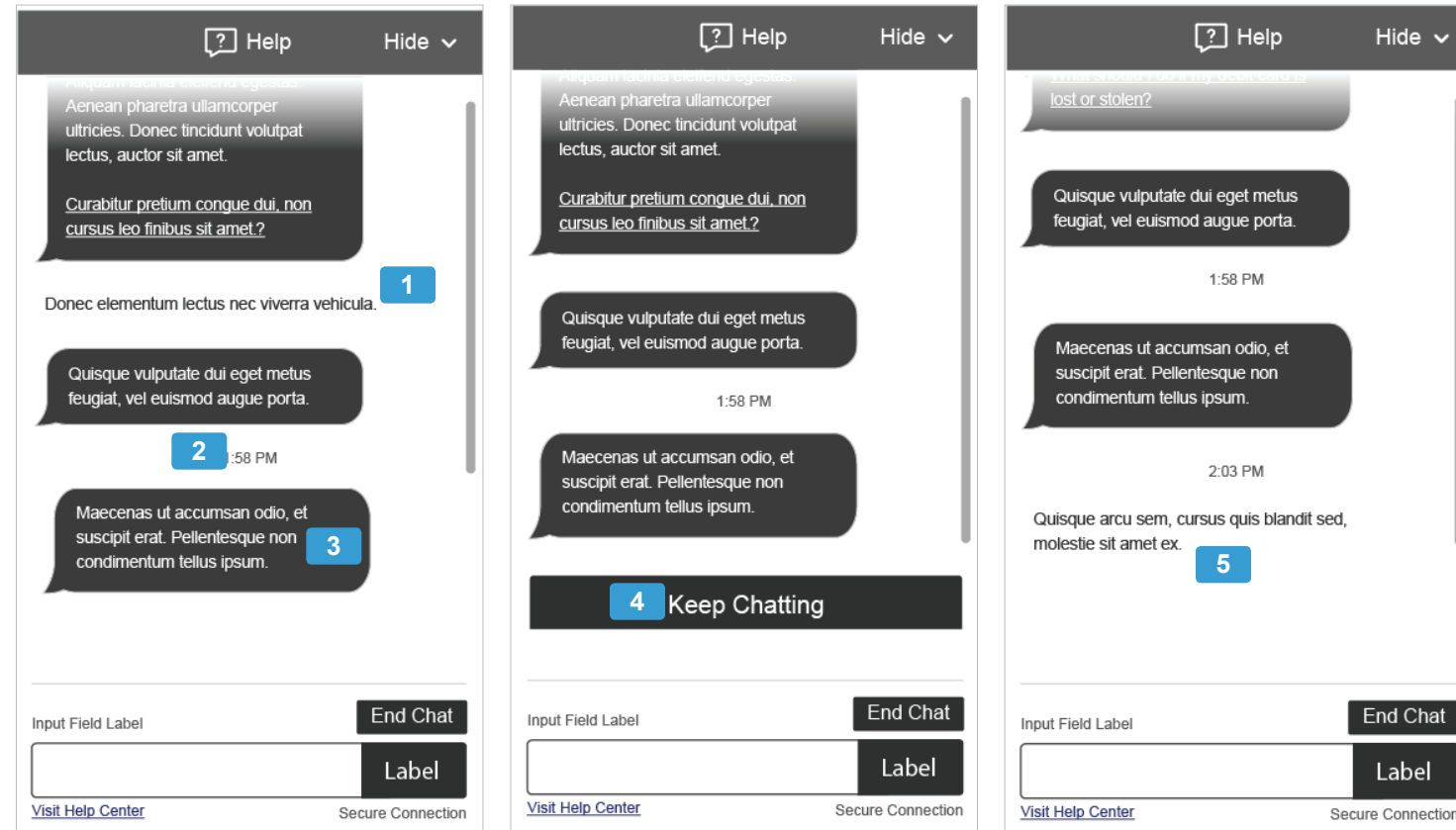


End Chat: All Devices

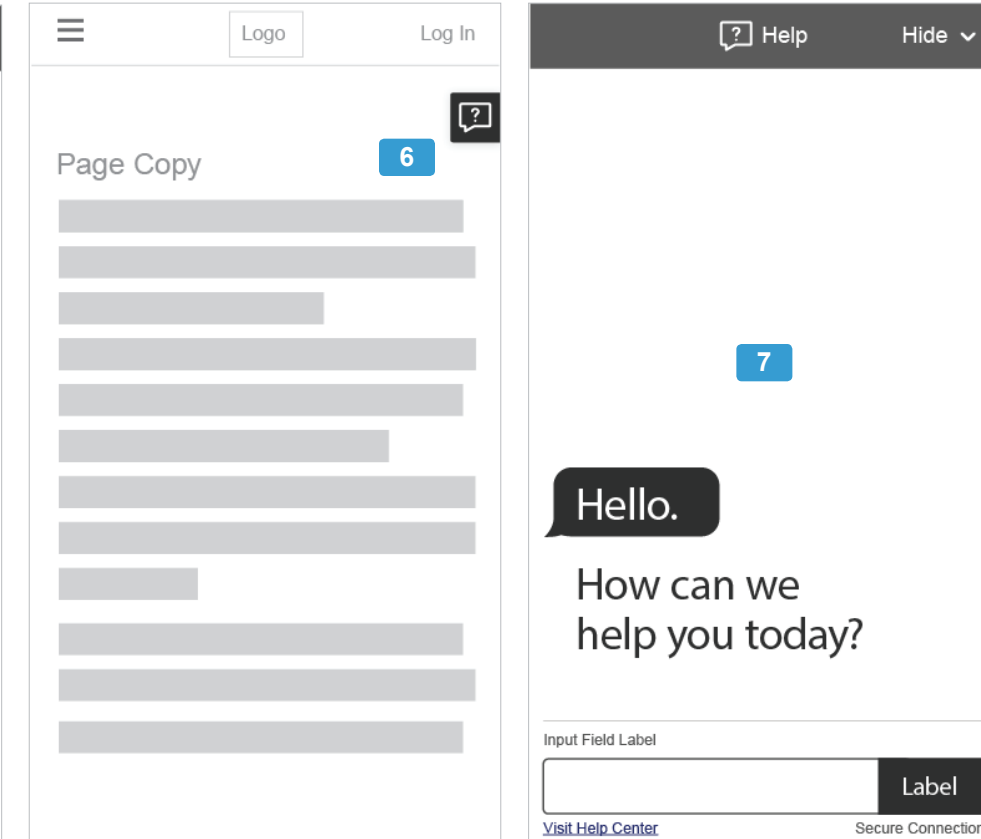


1. **Survey Launch:** When the Chat ends -- whether by Banker ending Chat or User ending Chat -- Message will appear indicating the end of the conversation, and user will be pushed to Survey.
 - ↳ Refer to Design Specs and Content Document
2. **Survey:** Survey (provided by Salesforce) will open in Widget, allowing user to give feedback on their recent Banker Chat experience.
 - ↳ Refer to Content Document and Survey Specification Document (provided by 24 Hr Banking)
3. **Survey Close:** If user chooses NO (does not want to answer the survey), the Widget will minimize to original position in the viewport.
 - Note:** When the user re-opens the Widget, they will start a new session.
4. **Survey Send:** Button to Send Survey, leads user to the Survey Thank You screen [4].
5. **Survey Thank You:** This screen displays Thank You copy for the user.
 - ↳ Refer to Content Document
6. **Survey Close:** Button closes the Widget, which would then reset to original position on the viewport.
 - ↳ Refer to Content Document
7. **Chat End:** When the chat ends, Widget minimizes and snaps to original position on the viewport.
8. **New Chat:** When the user expands the Widget again, the dialogue will reset to a new session (previous conversation will no longer be in the window).

Chat Timeout: All Devices



End Chat: All Devices



1. **Agent Response Query:** Message indicating that agent is waiting for response, prompting user to respond prior to Timeout warnings.
 - ↳ Refer to Content Document
2. **Timestamp:** Appears above chat warning / prompt, alerting users of the timeout.
3. **Banker Timeout Prompt:** After XX minutes (example: 2 - 3 minutes) of user inactivity, Banker asks the user whether they are still engaged with the chat, and warns the user that the chat will end if no response is received.
 - ↳ Refer to Content Document
4. **Keep Chatting Button:** CTA appears after the warning prompt, allowing user to avoid timing out and keep chatting with a banker.
 - ↳ Refer to Content Document
5. **System Timeout Message:** System message appears after the user has not been active on the chat for XX minutes.

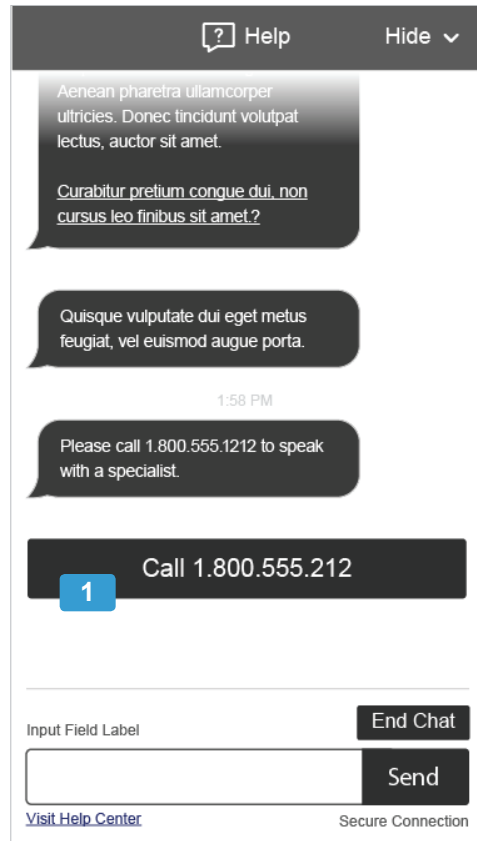
This message contains a **COUNTDOWN TIMER**; the number will count down from the current remaining minutes to indicate to the user that the chat will timeout.

If there is no response from the customer within the specified amount of time, the session will end.

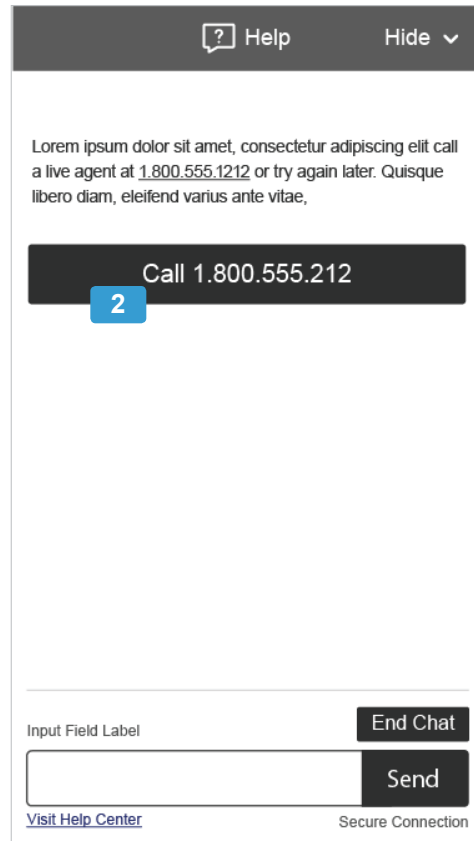
 - ↳ Refer to Content Document
6. **Chat End:** When the **COUNTDOWN TIMER** times out (i.e. when the number hits zero), the Chat Widget will automatically close by minimizing and snapping to the original position on the viewport.
7. **New Chat:** When the user expands the Widget again, the dialogue will reset to a new session (previous conversation will no longer be in the window).

Note: Timeout userflow will be consistent across all device versions, although Mobile is displayed for this scenario

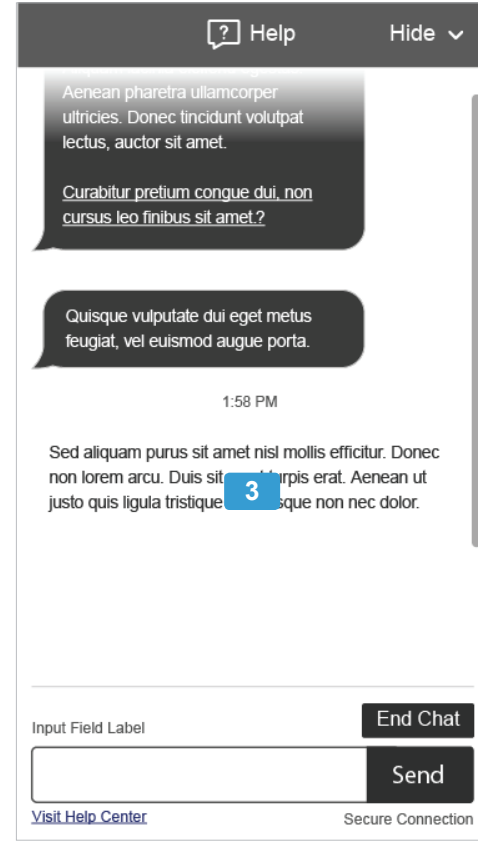
Display Phone Number



Error w/Phone#: All Devices



Error, Text Only: All Devices



1. **Display Phone Number:** Button dynamically displays the phone number advised by Banker. On Mobile devices, the user may tap this button to initiate call on their phone.
 - ↳ Refer to Content Document
2. **Error Phone:** Error message may direct user to a live phone agent. Button dynamically displays the phone number, and on Mobile devices, the user may tap this button to initiate call on their phone.
 - ↳ Refer to Content Document and Design Specs
3. **Error Message:** This screen displays a possible scenario for an Error Message.
 - ↳ Refer to Content Document and Design Specs

Revision History

Date	Ver	Screen ID	Change Description	Author
04/27/2017	1	All	Initial draft new format and Presentation	Kari B
05/04/2017	2		Version 2 Wireframe	Kari B
05/08/2017	2.1		Version 2 Wireframe (post meeting edits)	Kari B
05/11/2017	2.2		Version 2 Wireframe Edits	Kari B
05/12/2017	2.2		Version 2 GSS Edits	Kari B
05/18/2017	2.9		Final GSS	Kari B
05/24/2017	3.0		Version 3.0 Initial Banker Chat	Kari B
05/31/2017	3.1		Version 3.1 Banker Chat Edits	Kari B
06/01/2017	3.2		Version 3.1 Banker Chat Edits	Kari B
06/05/2017	3.3		Final Banker Chat	Kari B