

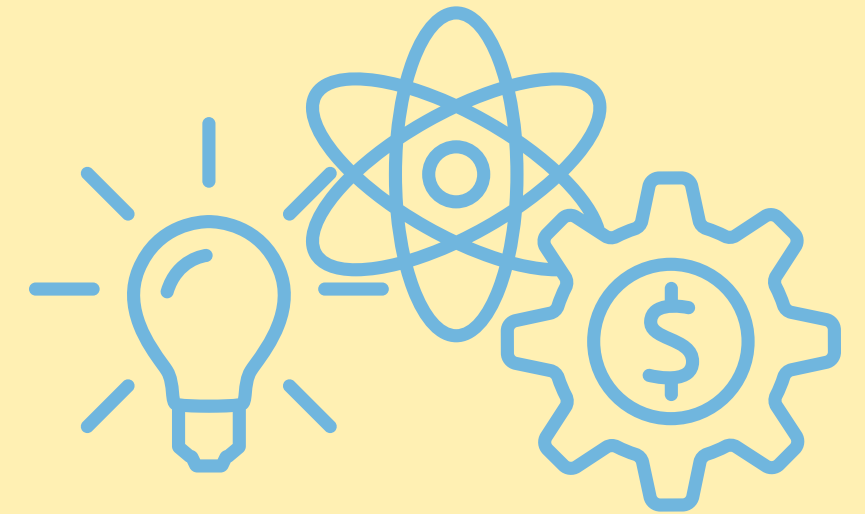


# **Stax: Case Study**

PRESENTED BY  
**NAZIA PABANI**



# Overview



## What is Stax?

Fattmerchant, now known as Stax, is a fintech company that gained recognition for its subscription-based payment processing solutions. Founded in 2014, it aimed to disrupt traditional payment processing by offering transparent pricing. The rebranding to Stax in 2021 likely signaled an expansion of services beyond payment processing, reflecting the company's evolving focus within the fintech industry.

## What roles did I hold at Stax?

In 2021, I was given the opportunity to be a Product and Tech Intern which involved me creating a program to automate data from the Operations team. In 2022, I held the role of a UX/UI Intern in which I was able to implement designs for Stax Connect (SaaS platform) and Stax Pay (for Merchants) as well as contribute to their design system.

# Stax Connect Navigation Redesign

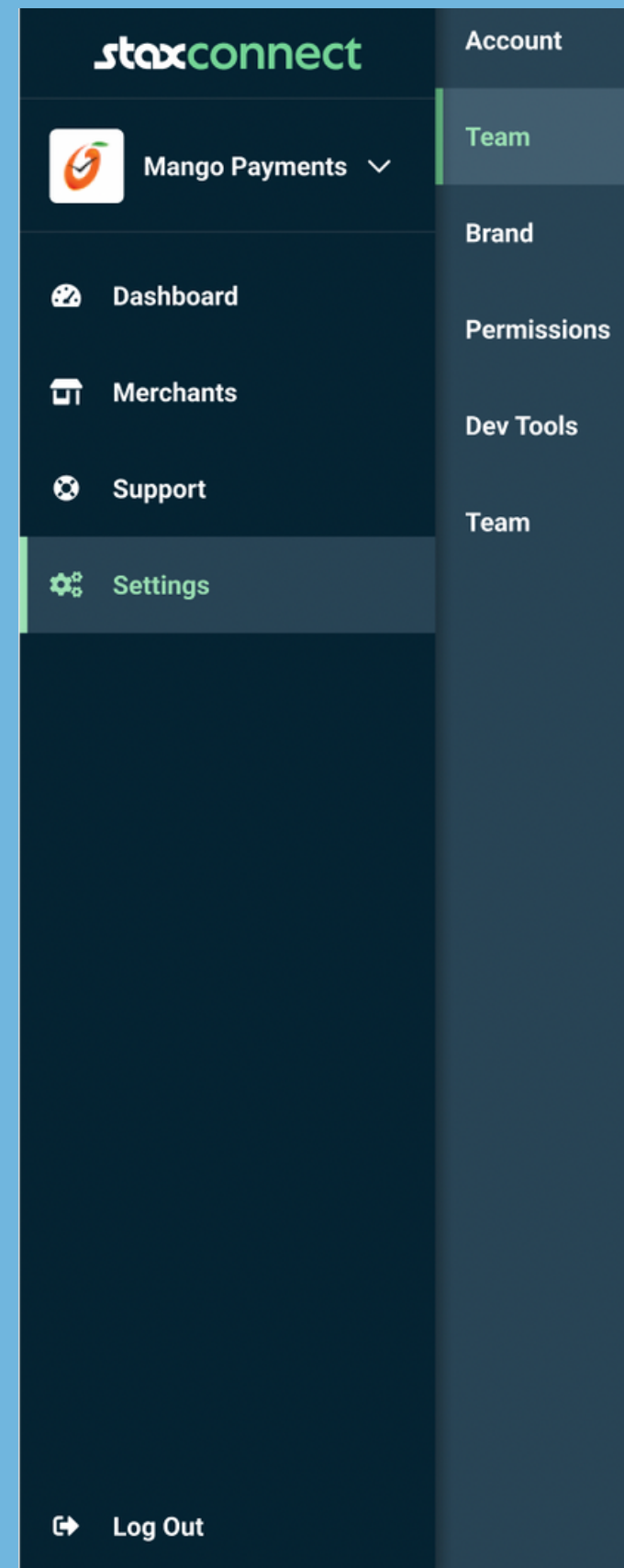
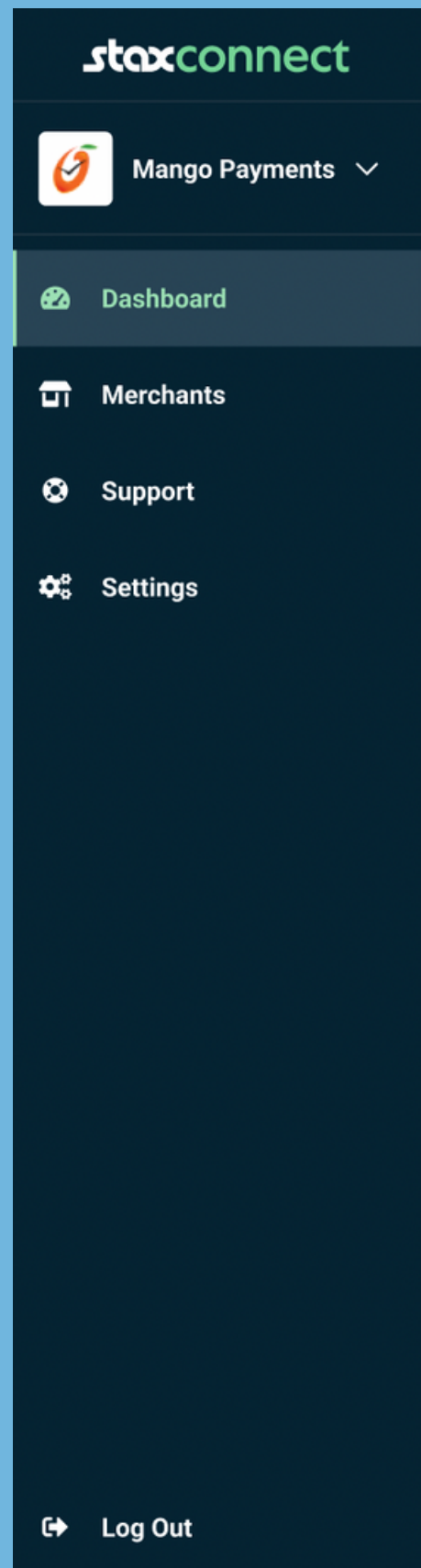
Stax Connect, a SaaS platform, serves as a pivotal tool for users in managing various aspects of their financial operations. However, the platform faced challenges due to cluttered navigation, hindering user experience and efficiency. This case study delves into the process of revamping the navigation system to enhance usability and streamline access to essential features.

## Problem Statement:

The original navigation layout within Stax Connect exhibited severe clutter, with a myriad of options spanning from top to bottom. Users struggled to navigate efficiently, leading to frustration and reduced productivity. The challenge was to declutter the sidebar while retaining all necessary functionalities.

## Research and Discovery:

Recognizing the need for a solution, an in-depth analysis of user feedback and navigation patterns was conducted. It was evident that a significant overhaul was required to reduce navigation complexities. Market research and exploration of UI/UX best practices highlighted the potential benefits of a dual-tier navigation approach.



## Design Process:

A collaborative brainstorming session involving designers was held to explore viable solutions. After deliberation, the dual-tier sidebar emerged as the most promising approach. Wireframes and prototypes were iteratively developed and refined to ensure seamless integration with the existing interface.

## Solution:

The proposed solution entailed the implementation of a dual-tier navigation system, aimed at enhancing clarity and accessibility. Upon opening designated sections, such as settings, a secondary sidebar would dynamically appear, housing pertinent options. This approach not only reduced clutter but also improved visibility, thereby optimizing the user experience.



## **Results:**

Following the implementation of the redesigned navigation system, user feedback indicated a marked improvement in usability and navigation efficiency. The dual-tier approach successfully mitigated clutter, allowing users to locate and access features with greater ease. Enhanced user satisfaction and productivity were observed, reflecting the efficacy of the revamped navigation design.

## **Challenges/Lessons Learned:**

Throughout the design process, several challenges were encountered, including ensuring seamless integration of the dual-tier navigation without disrupting existing functionalities. Iterative testing and feedback proved instrumental in addressing these challenges and refining the solution. Additionally, the importance of user-centric design principles and collaboration emerged as critical factors in achieving optimal outcomes.

## **Conclusion:**

The redesign of Stax Connect's navigation system represented a significant milestone in improving user experience and usability. By adopting a dual-tier approach, clutter was effectively mitigated, facilitating smoother navigation and heightened accessibility to essential features. Moving forward, continued user engagement and iterative refinement will remain integral to further enhancing the platform's usability and overall user satisfaction.



# Brand Settings:



In the dynamic landscape of SaaS platforms, efficient management of user permissions is paramount to ensure smooth operations and security. Stax Connect, a comprehensive SaaS tool, faced challenges in managing user permissions, leading to inefficiencies and time-consuming manual interventions. This case study delves into the process of reimagining the user permissions system to empower administrators with greater flexibility and control.

## Problem Statement:

The existing user permissions management system within Stax Connect relied on predefined roles, necessitating manual adjustments by supervisors based on limited role options. This process was laborious and time-intensive, particularly with the continuous influx of new users. The challenge was to devise a solution that enabled customizable roles and streamlined permissions management.

## Research and Discovery:

To address the complexities of user permissions management, stakeholders were interviewed to gather insights into their specific requirements and pain points. Analysis revealed a consensus on the need for a more flexible and granular approach to permissions management. Extensive research into industry best practices and user-centric design principles informed the development of a solution tailored to address these needs.



## **Design Process:**

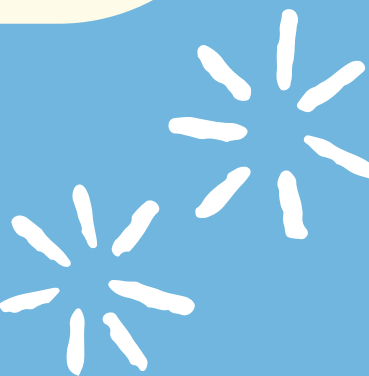
A collaborative effort involving stakeholders, designers, and developers was undertaken to conceptualize and refine the solution. Wireframing and prototyping were employed to visualize the proposed user permissions interface, allowing for iterative refinement based on stakeholder feedback. The design process prioritized simplicity, intuitiveness, and scalability to accommodate evolving user needs.

## **Solution:**

The solution entailed the creation of a dedicated user permissions management screen within Stax Connect, empowering administrators with granular control over user roles and permissions. Users were afforded the flexibility to create custom roles, defining specific permissions tailored to their organizational requirements. This streamlined approach facilitated efficient permissions assignment and minimized the need for manual interventions.

## **Results:**

Following the implementation of the redesigned user permissions system, stakeholders reported significant improvements in user management efficiency and flexibility. The ability to create custom roles and assign permissions dynamically streamlined administrative tasks, reducing the burden on supervisors and enhancing overall productivity. User feedback indicated a high degree of satisfaction with the new permissions management interface, reflecting its efficacy in addressing longstanding pain points.



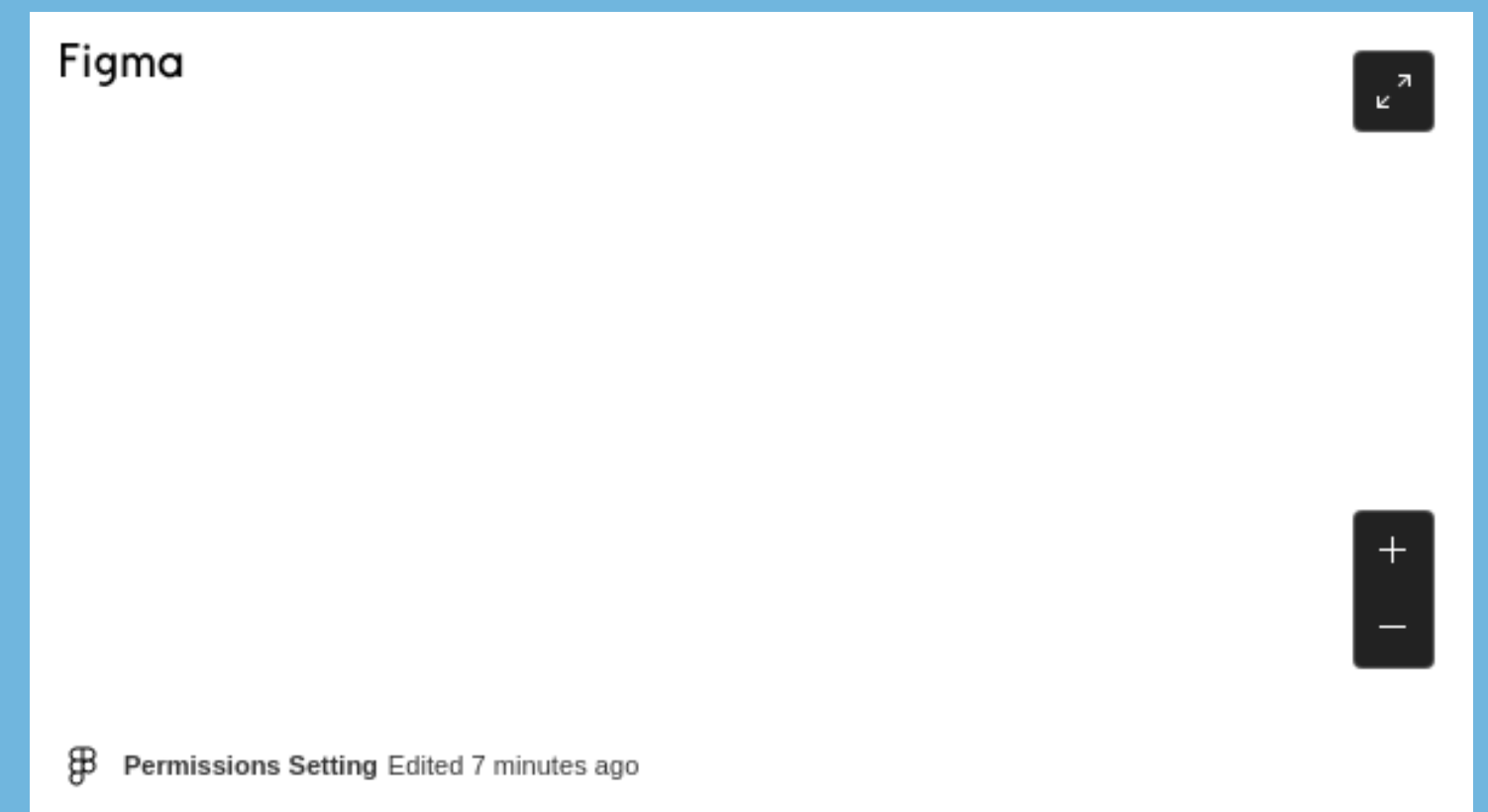
## Lessons Learned/Challenges:

The project presented several challenges, including the need to balance flexibility with simplicity in the design of the permissions management interface. Iterative testing and stakeholder engagement played a pivotal role in refining the solution to meet diverse user needs effectively. Additionally, clear communication and collaboration across interdisciplinary teams were essential to ensure seamless integration and user adoption.



## Conclusion:

The transformation of user permissions management within Stax Connect represented a significant milestone in enhancing administrative efficiency and user experience. By introducing customizable roles and permissions, the platform empowered administrators with greater control and flexibility, thereby reducing manual interventions and streamlining operations. Moving forward, continued iteration and user-centric design principles will remain central to further enhancing the platform's capabilities and user satisfaction.

## Prototype:







# Contribution to Design System


In the realm of design systems, effective communication between designers and developers is crucial for ensuring alignment and consistency. Stax, leveraging its proprietary design system, Truffle, recognized the need to streamline the annotation process to bridge the gap between design intent and implementation. This case study explores the initiative to enhance collaboration by enriching design annotations with direct links to component specifications within the Truffle design system.

## Problem Statement:

Despite the presence of Truffle as a comprehensive design system, designers and developers encountered challenges in maintaining alignment between design specifications and implementation. This resulted in inefficiencies and misinterpretations, leading to discrepancies in the final product. The challenge was to devise a solution that facilitated seamless communication and reference to design system components during the annotation process.

## Research and Discovery:

To address the communication gap between designers and developers, an analysis of existing workflows and pain points was conducted. Interviews with stakeholders revealed a consensus on the need for a more integrated approach to design annotation, allowing for direct reference to component specifications within the Truffle design system.



## Cancel

The cancel button should only appear when the save button is present.

Clicking Cancel will discard all changes

Save

[Button Specs](#)

## Colors

When hovering over the info icon it should display a tooltip with an explanation of the Colors section

Set the colors for your sub merchants platform

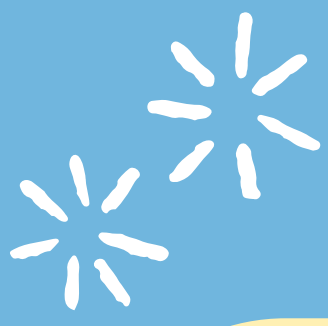
[Tooltip Specs](#)

## Design Process:

A collaborative effort involving designers, developers, and stakeholders was undertaken to conceptualize and implement the solution. Iterative testing and refinement ensured usability and seamless integration with existing workflows.

## Solution:

The solution involved enriching design annotations with direct links to component specifications within the Truffle design system. By integrating a dropdown menu within the annotation component, designers could easily select the relevant component when annotating designs. Subsequently, a hyperlink to the corresponding component specifications was dynamically generated and appended to the annotation. This streamlined approach facilitated clearer communication and reference to design system components, enhancing collaboration between designers and developers.



## **Results:**

Following the implementation of the enhanced annotation system, stakeholders reported significant improvements in collaboration and efficiency throughout the design and development process. Designers could seamlessly reference component specifications within Truffle, reducing ambiguity and ensuring alignment with design intent. Developers, equipped with direct access to component specifications, could more effectively translate designs into code.

## **Challenges/Lessons Learned:**

The project presented several challenges, including the need to balance usability with functionality within the annotation component. Iterative testing and feedback from users proved instrumental in refining the solution to meet diverse needs effectively. Additionally, clear communication and collaboration across interdisciplinary teams were essential to ensure successful implementation and adoption.

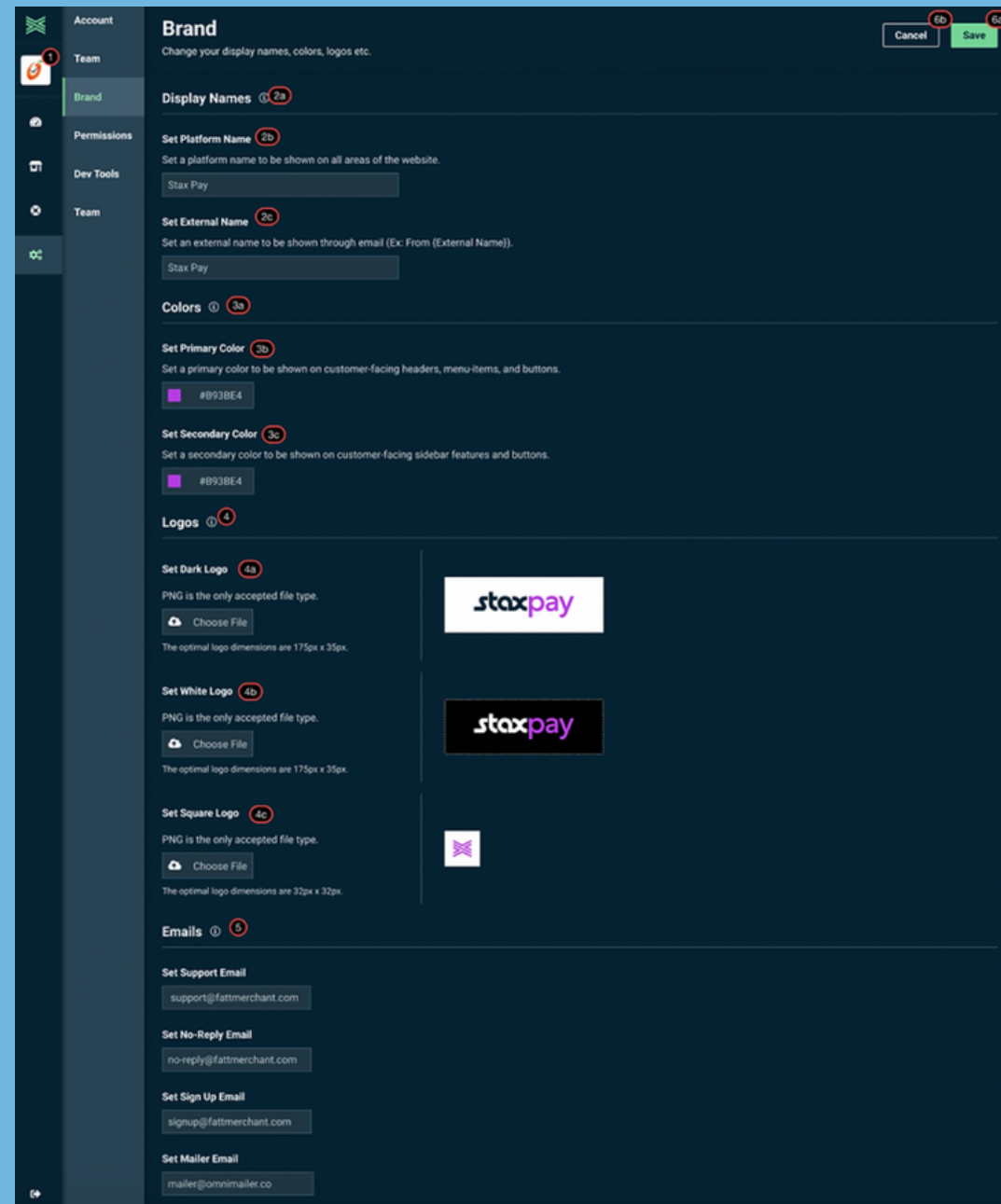
## **Conclusion:**

The initiative to enrich design annotations with direct links to component specifications within the Truffle design system represented a step towards enhancing collaboration and alignment within Stax's design and development workflows. By providing designers and developers with seamless access to design system components, the annotation system facilitated clearer communication and reduced discrepancies throughout the product development lifecycle.

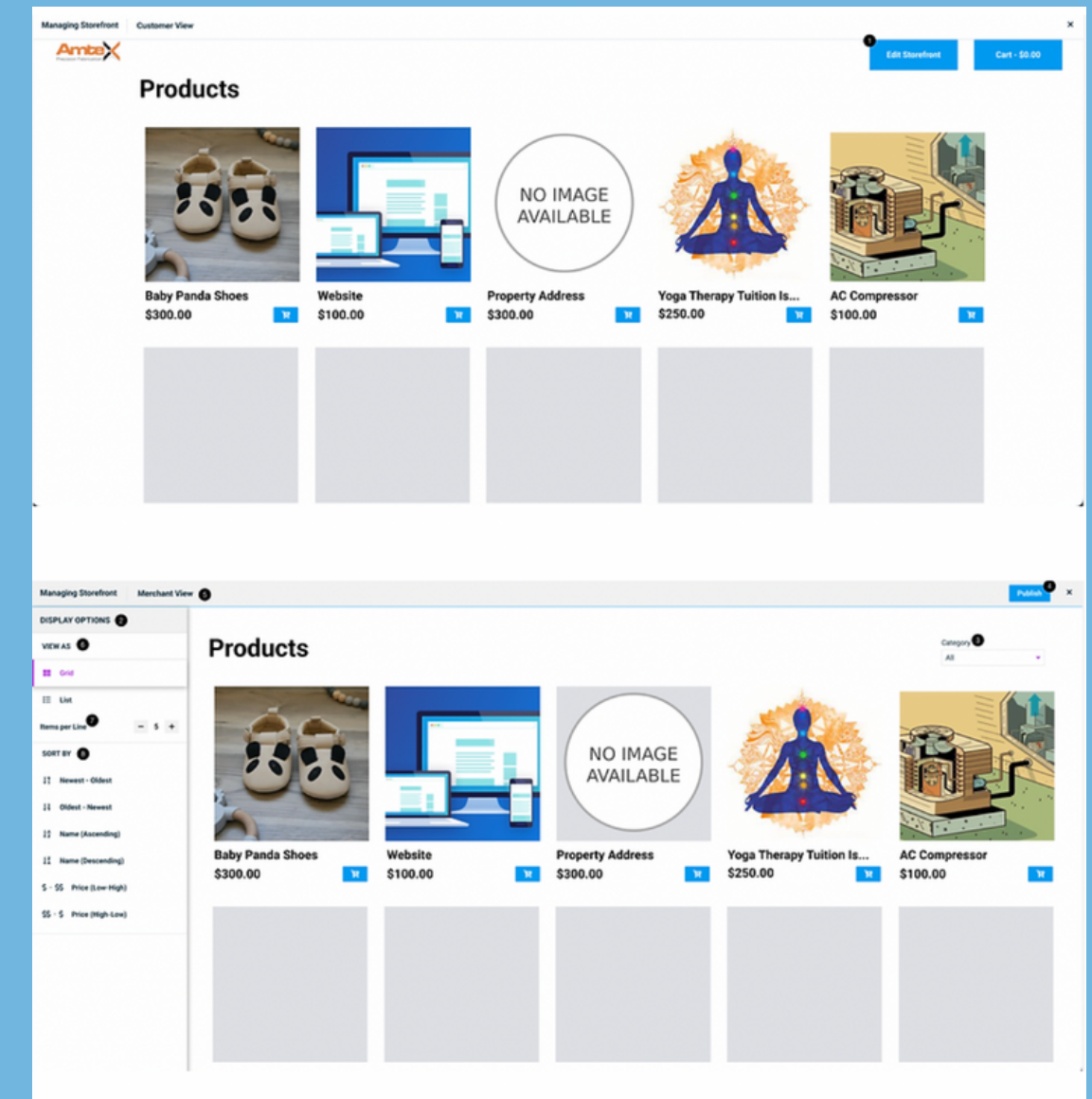




# Other Stax Works



Creation of Brand Settings



Ability to Sort Storefront + Redesign



# Other Stax Works

+

?

💬

👤

Print

Export

Take a Payment

NDS

FAILED ATTEMPTS

Search by customer email, name, total, and more...

🔍

Filter (1)

Type	Customer	Payment Method	Source	Total	
Charge	Aaron Amyson	VISA 1111	📺	\$99.97	
Charge	Aaron Amyson	VISA 1111	📺	\$4,275.99	
Charge	Credit Card Sale Customer	VISA 5712	📺	\$2,182.75	
Dispute Hold	Tomas Braun	VISA 3421	📺	\$8,888.88	
Charge	Credit Card Sale Customer	AMEX 8633	📺	\$2,072.51	
Charge	Ralph Leonard	MAST 9441	📺	\$793.73	
				Total Sales:	\$47,664.10

Show 20

<<

<

1

2

>

>>

Manage Columns

Date

Type

Customer

Payment Method

Source

Total

User

Total Paid

Surcharge

Save

## Ability to Control Visibility of Columns

ASSUMING  
Ops Brew Happiness

+?

49

1

BOARD

RTS

TATION

ENTS

CES

ODULES

OMERS

LOG

INGS

IRALS

ECT LITE

pay

Settings / Invoice Settings

ACCOUNTTEAM SETTINGSBRANDINGINVOICE SETTINGSPAYMENT SETTINGSNOTIFICATIONS SALES TAXWEBHOOKSREPUTATION

Receipts

Send Payment Receipts From:

User (whoever made sale) ▾

Allowed Payment Methods

Star's default behavior is to allow customers to use both Bank Accounts and Credit Cards as payment methods when paying an invoice.

☒ Bank

☒ Credit Card

Default When Taking a Payment

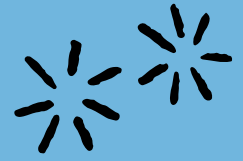
Star's default behavior is to use a new Credit Card as the default payment method when taking a payment. By choosing one of the options below, you can set a different method as the default.

☐ Credit Card

☐ Bank

☒ Send to Terminal

## Ability to Set Default when Taking a Payment



# Other Design Works

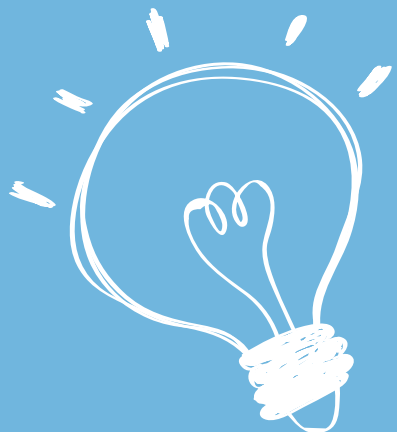


**GET A-HEAD**

**AGA KHAN  
FOUNDATION  
ISLEWORTH GOLF  
TOURNAMENT**

**UNITED STATES  
ISMAILI ARTS  
FESTIVAL -  
FLORIDA**

**CAMP MOSAIC -  
MENTAL HEALTH**





# Thank You

PRESENTED BY  
● **NAZIA PABANI** ●