



Photo Attachments in QBO Mobile App

Customer Confusion and Pain

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Agenda

- Backstory
- Current Setup & Results
- Customer Pain
- Proposed Changes
- Goals

Backstory

I got a call from Jared at Quality Construction (Case # 537964271)

He wants to switch to QBO for doing estimates and invoices but he cannot figure out how to attach a photo on the mobile app when he's out in the field.

This is causing him frustration because he can attach photos on the web interface easily but cannot figure out how to do the same on the mobile app.

Current Setup & Results

Once you have an estimate or invoice created, you need to scroll to the bottom and tap "add note or attachments"

Verizon 8:31 AM 36%



Anakin Skywalker
\$21.69

Send Estimate >

24" Heavy Blade	19.95
1.00 x 19.95 each Taxable	
24" Heavy Blade	
<hr/>	
Subtotal	19.95
SD (4.50%)	1.74
Total	\$21.69

X Get signature

NOTES & ATTACHMENTS

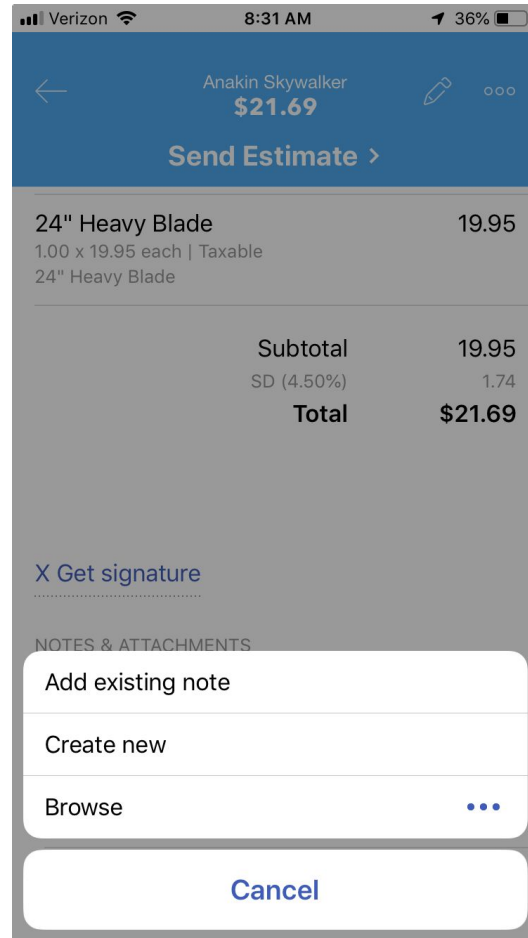
 Add notes or attachments 

ACTIVITY ▾

Current Setup & Results

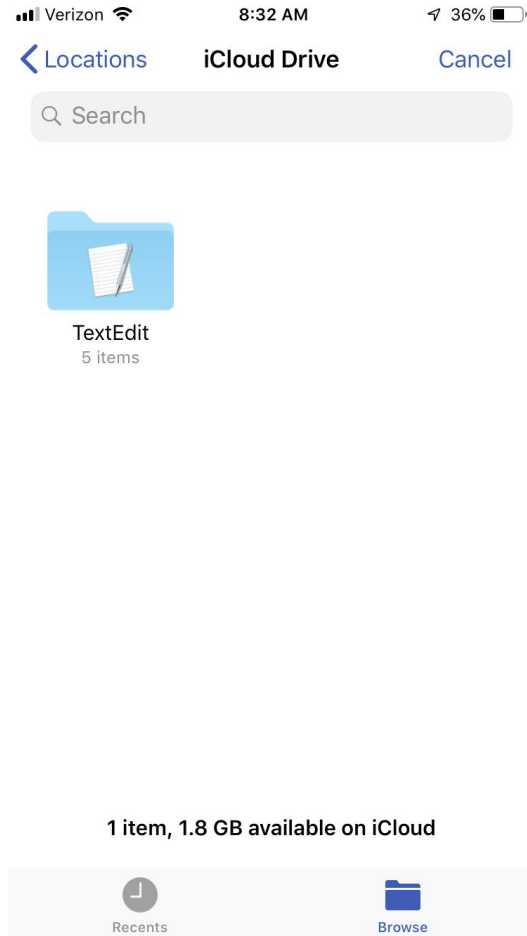
You're presented with a menu where you can add an existing note, create a new, or browse.

Because this option is labeled "add notes or attachments", you would think the browse button will lead you to your photos you have saved on your phone.



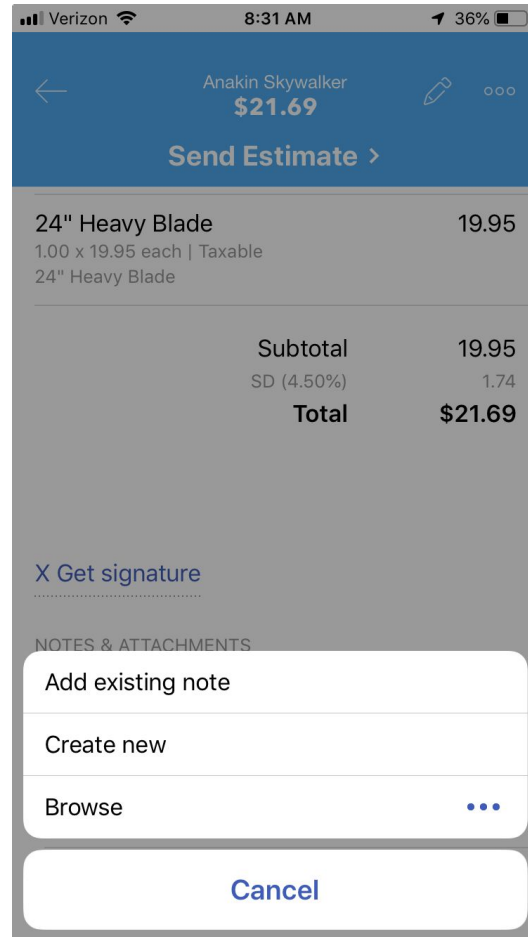
Current Setup & Results

Instead of your photos, the browse button brings you to locations for saved notes only. No photos or access to your devices camera are visible.



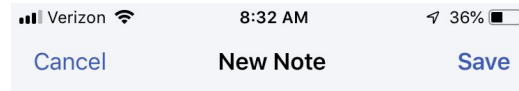
Current Setup & Results

In order to add a photo, whether it's a new photo or existing you need to tap create new



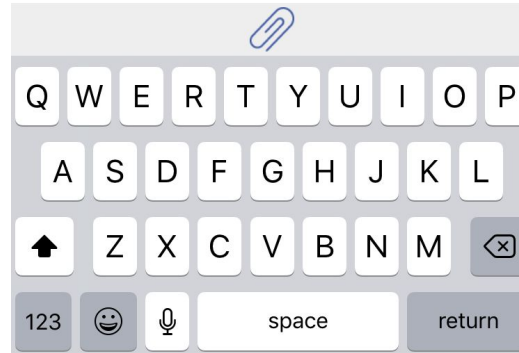
Current Setup & Results

Once in the new attachment screen, it's still mis-leading on how to browse for an existing picture or attach a new one as there is no indication of a camera or photo icon. You need to tap the paperclip.



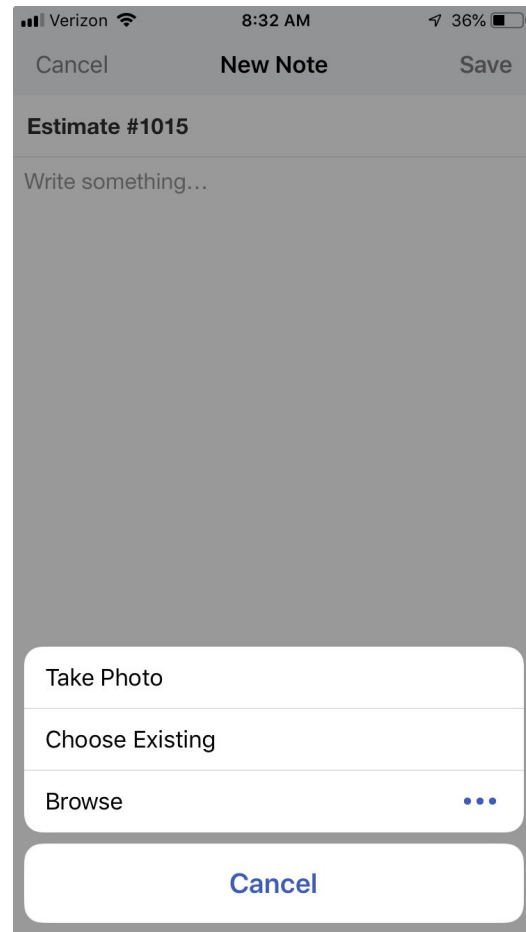
Estimate #1015

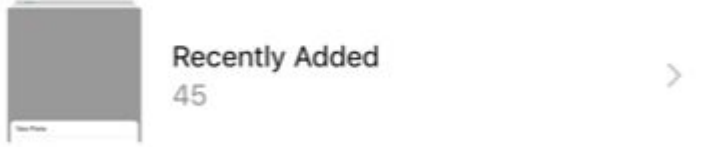
Write something...



Current Setup & Results

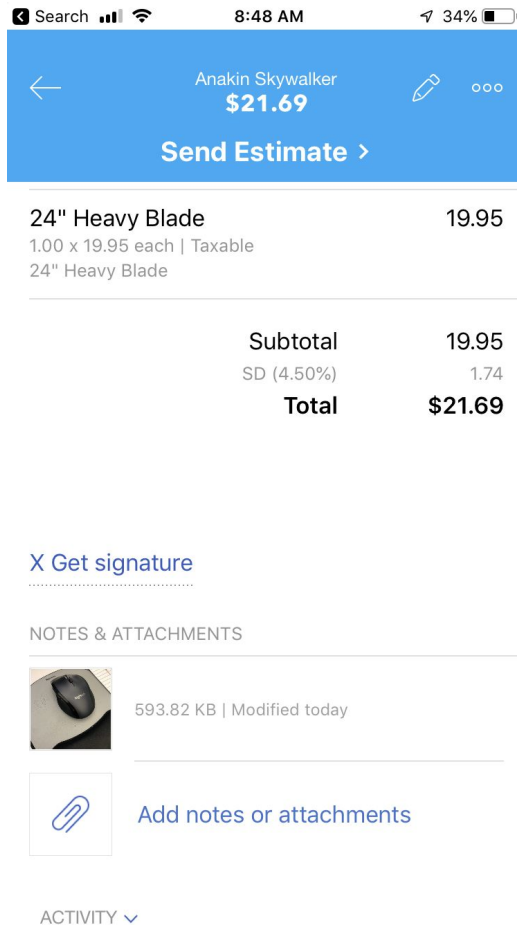
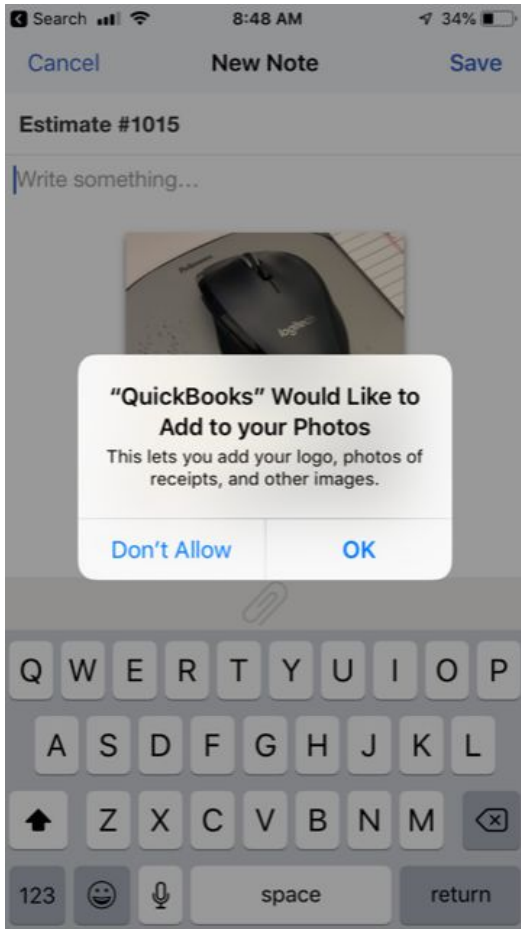
After tapping the paperclip you're presented with options for taking a new photo or attaching an existing photo from your device.





Or





The QBO App will then attach the existing or new photo to the estimate/invoice.

Customer Pain

- When a customer selects the first screen for attachments, they don't see any icon referencing attaching or taking a photo, This could lead a customer to believe they cannot attach a photo on the app.
- You have to go through 3 misleading taps to finally find the option to take a new picture or attach an existing one.
- You have to create and save the estimate/invoice before you can attach a picture. This could cause frustration as you're saving the invoice before it's complete.

Proposed Changes

A combination of the following should accomplish easing customer pain and confusion.

- **Allow attachments when creating estimates and invoices and not just editing existing ones.**
- **Make the option to attach and take new picture more apparent and obvious on the first attachment screen.**

Goals

By implementing some of these updates to the mobile app it will not only cut down on support calls but also provide a more pleasurable and effective experience when using the app.



**Thank you for your time
and consideration.**

