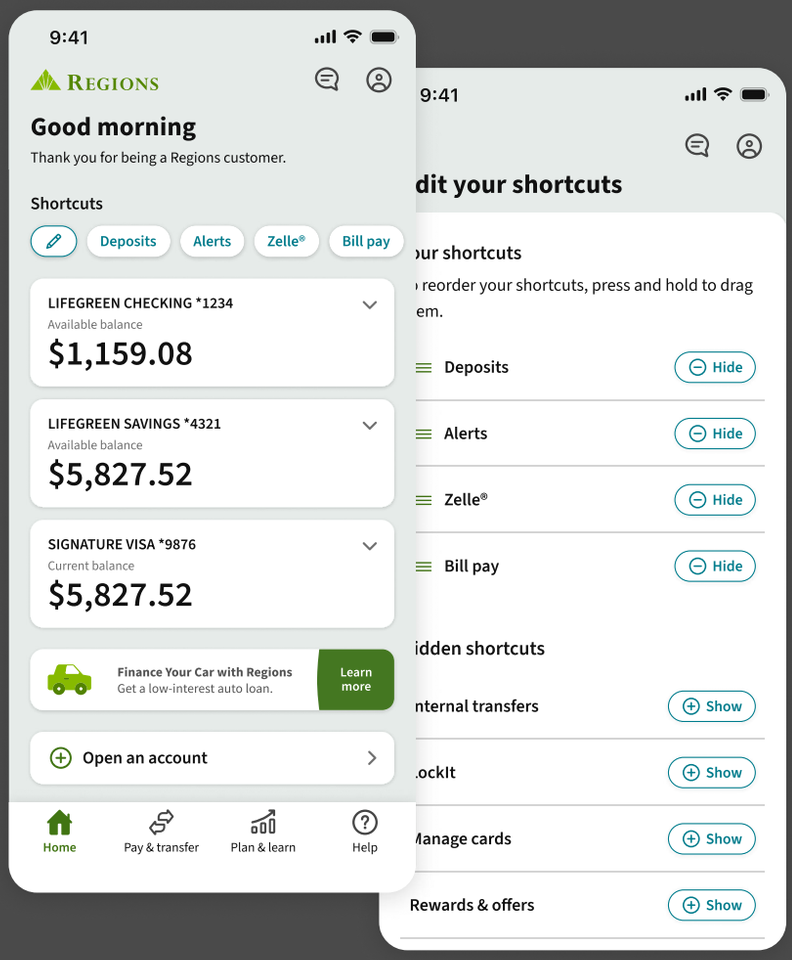
CUSTOM SHORTCUTS.

Hannah Stancliff



Problem statement

Users do not have the option to change the order of the shortcuts or customize and add new ones to their experience. Instead, the Regions app originally offers four default shortcuts on the home screen. This clutters navigation resulting in customer frustration that reduces engagement.

Goal

→ Allow customers to customize their shortcuts

Objectives

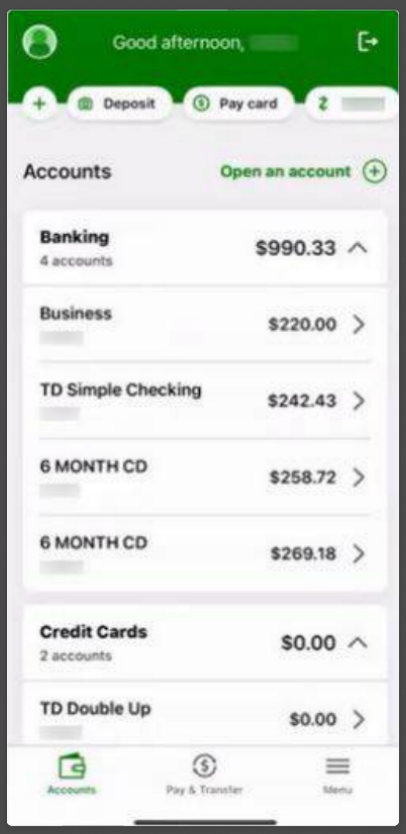
- Expand the library of shortcuts from 4 to 9, so users have more choices
- Integrate a show-hide UI, so the user can add or remove any shortcuts
- Add the ability to drag-and-drop shortcuts, so users can order their shortcuts

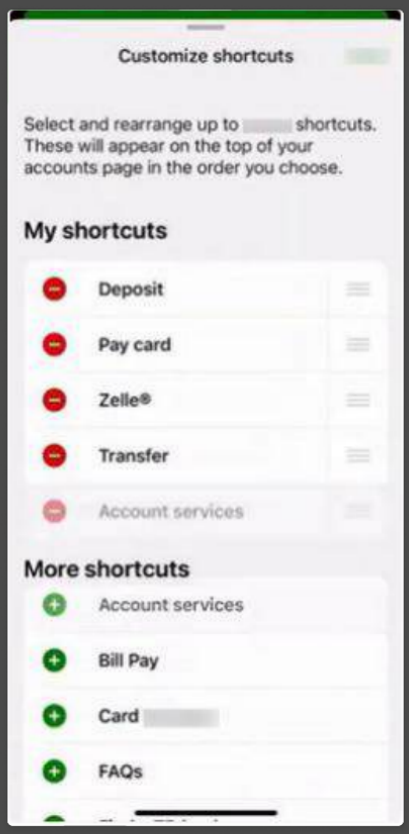
Business Requirements

- Use only native iOS and Android elements
- User must be able to hide the entire shortcuts section
- Keep compliant with ADA standards

Competitive Analysis

I partnered with Research to analyze common design patterns, feature offerings, and user experience approaches across the market. These insights helped identify opportunities for differentiation and product improvement. We looked at dozens, but I've highlighted three that represent our objectives well.



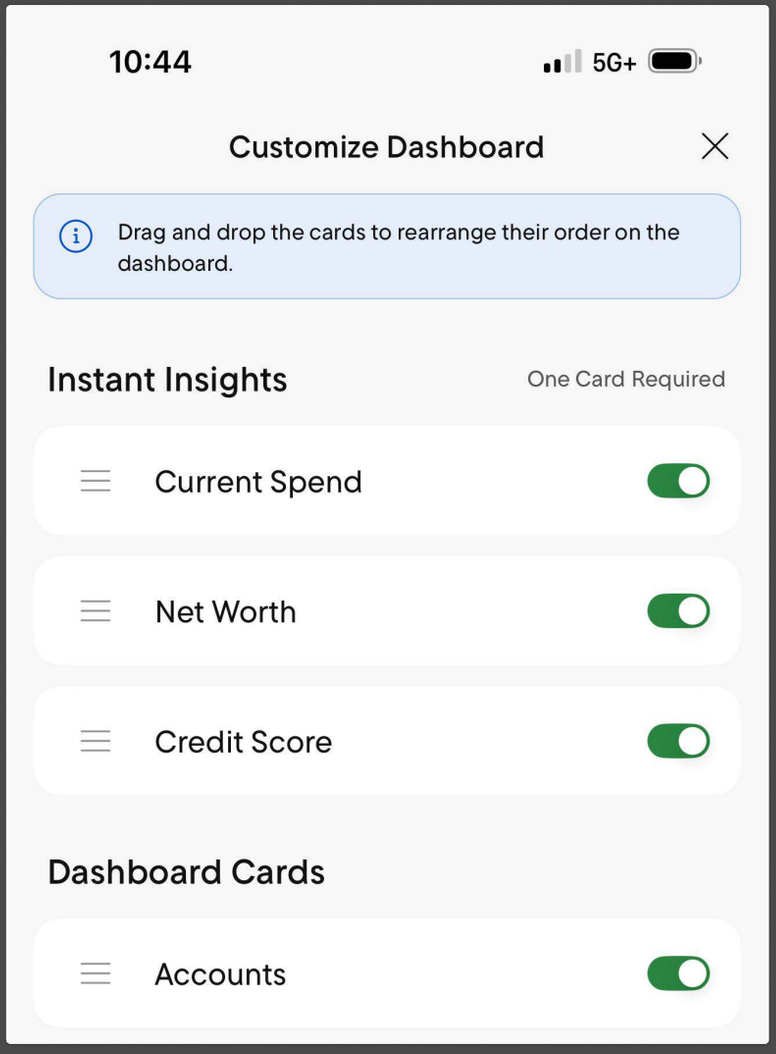


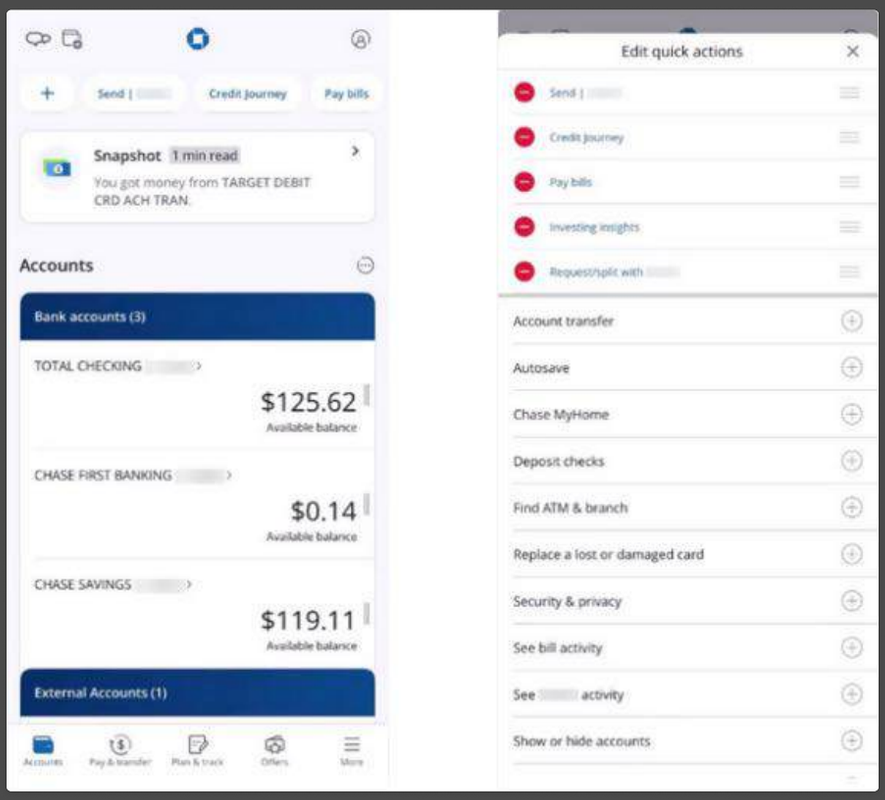
TD Bank

TD Bank separates customizable shortcuts into two categories: displayed and available. Add and remove actions are positioned on the left, while reorganization controls appear only for displayed shortcuts. During our evaluation, we also identified the need for text labels alongside the add and remove icons to improve accessibility and clarity.

Rocket Money

Rocket Money categorizes shortcuts by banking feature, creating a more structured way for users to browse and manage available options. These are based on the entire dashboard rather than a shortcuts section on page. Users can control visibility with toggles to show or hide shortcuts, while the reorder icon is positioned on the left to support customization and arrangement of displayed items.





JP Morgan Chase

Management options are presented in two distinct sections that are differentiated by a thicker divider rather than explicit labels. Unlabeled remove and add icons are used to manage shortcuts, with the remove action placed on the left and the add action on the right. Within the displayed shortcuts section, the reorder icon appears opposite the remove action on the right, supporting customization of selected shortcuts.

Features & Functionalities

Labeled add and remove buttons

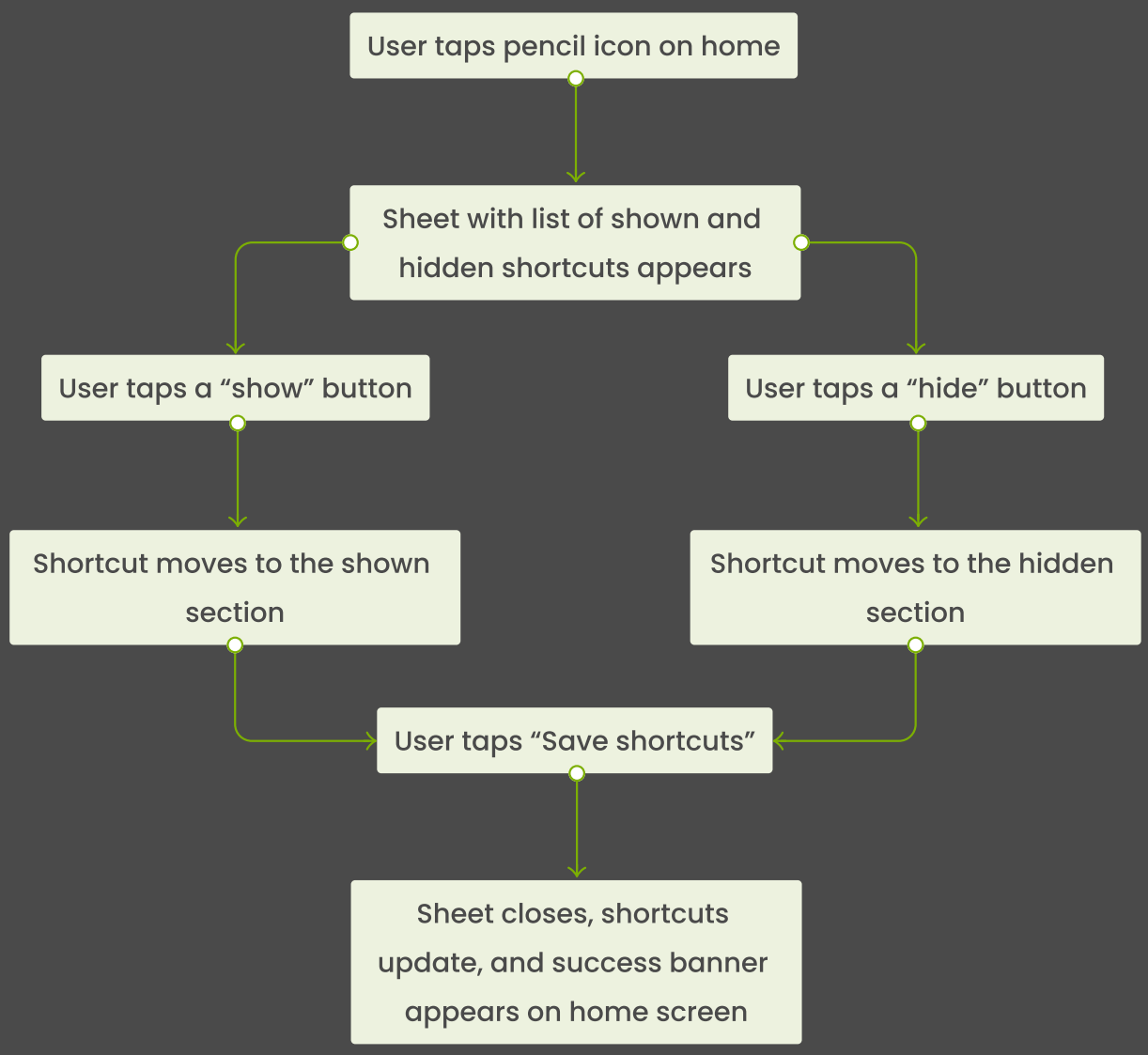
Native drag and drop icons and functionality

Separate lists for active and hidden shortcuts

Taskflows

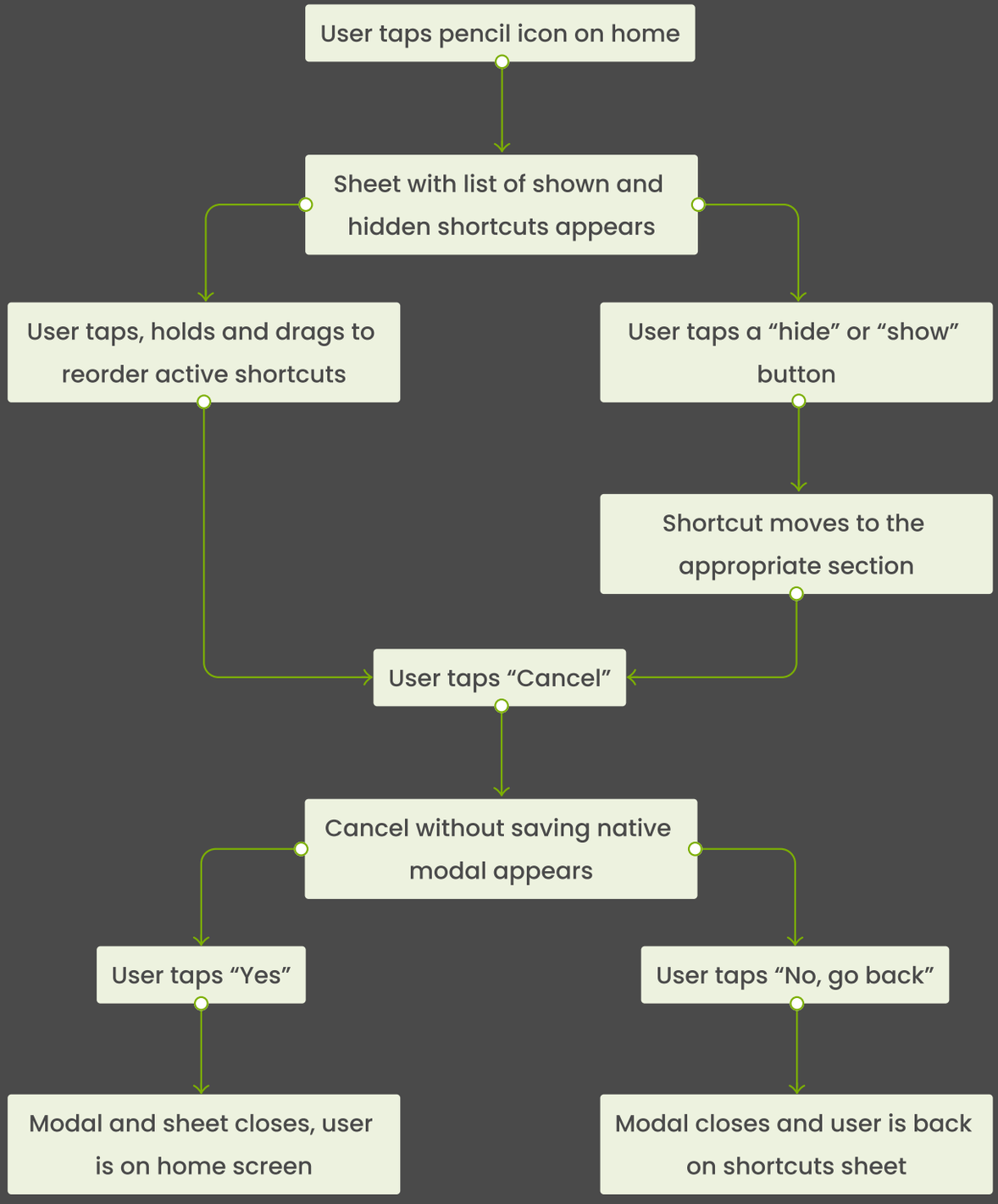
Scenario 1 : Show & hide schortcuts

How users show and hide shortcuts on their home screen.

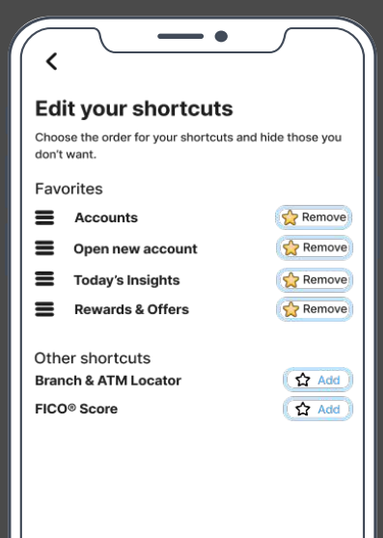


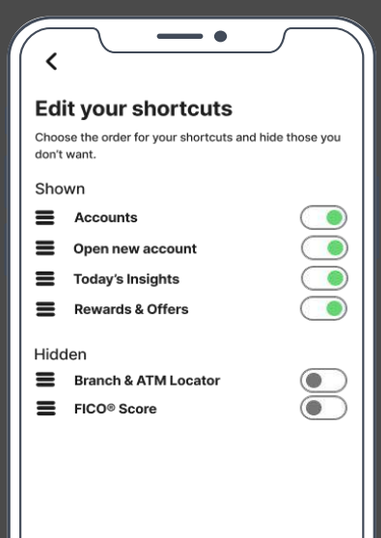
Scenario 2 : Reorder & edit shortcuts

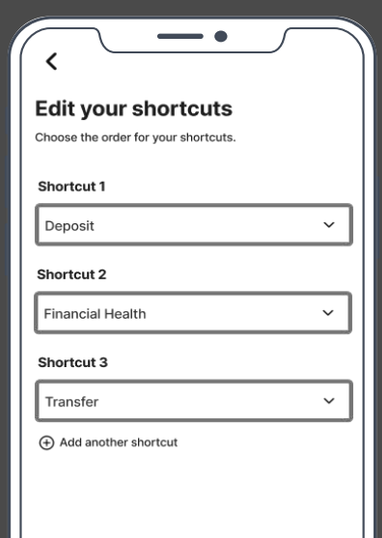
How users reorder, edit and cancel show-hide tasks.

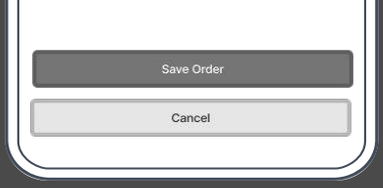

User taps pencil icon on home
Sheet with list of shown and hidden shortcuts appears
User taps, holds and drags to reorder active shortcuts
User taps a “hide” or “show” button
Shortcut moves to the appropriate section
User taps “Cancel”
Cancel without saving native modal appears
User taps “Yes”
User taps “No, go back”
Modal and sheet closes, user is on home screen
Modal closes and user is back on shortcuts sheet

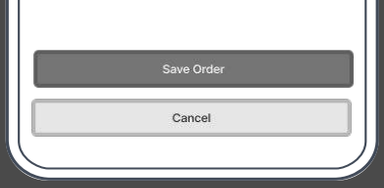
Sketches

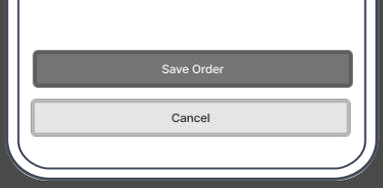

Edit your shortcuts
Choose the order for your shortcuts and hide those you don't want.
Favorites
Accounts
Remove
Open new account
Remove
Today's Insights
Remove
Rewards & Offers
Remove
Other shortcuts
Branch & ATM Locator
Add
FICO® Score
Add

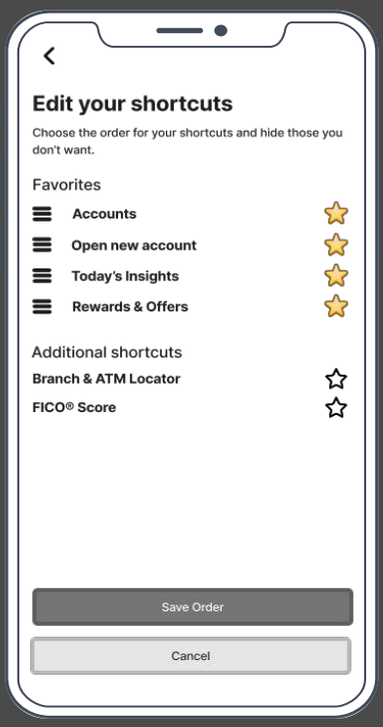

Edit your shortcuts
Choose the order for your shortcuts and hide those you don't want.
Shown
Accounts
Open new account
Today's Insights
Rewards & Offers
Hidden
Branch & ATM Locator
FICO® Score

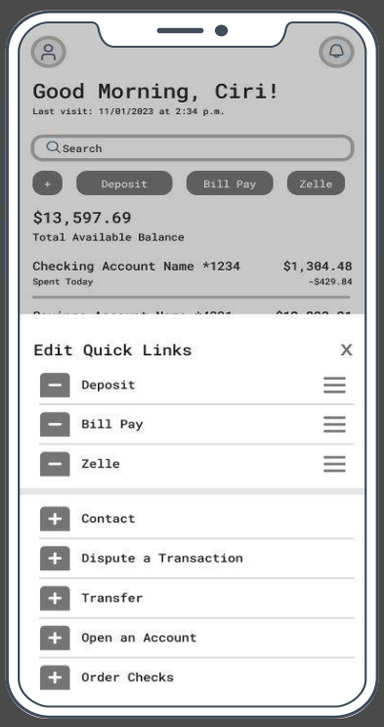

Edit your shortcuts
Choose the order for your shortcuts.
Shortcut 1
Deposit
Shortcut 2
Financial Health
Shortcut 3
Transfer
Add another shortcut

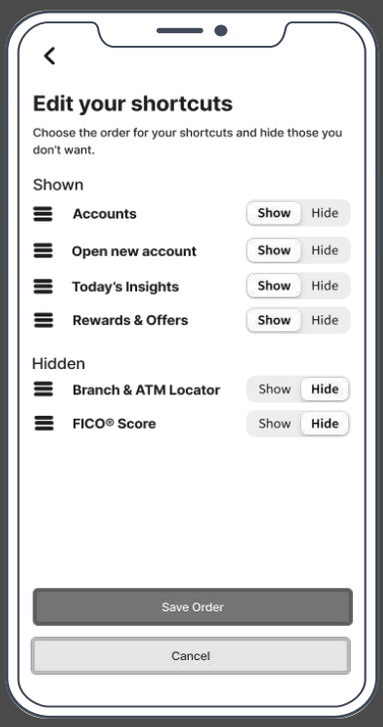




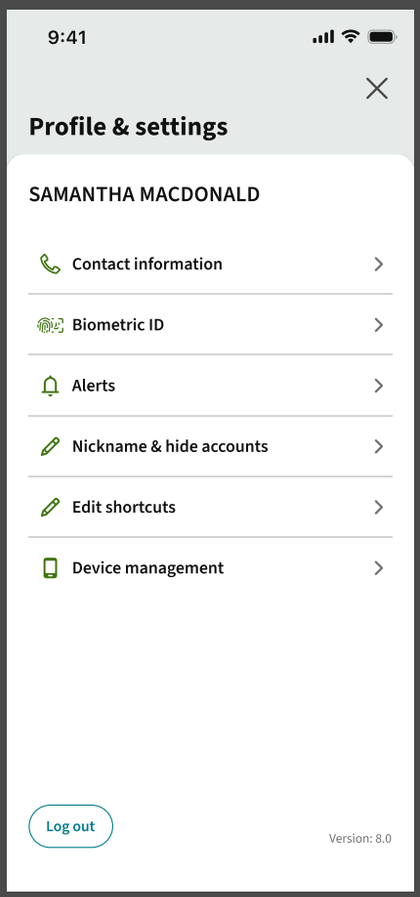




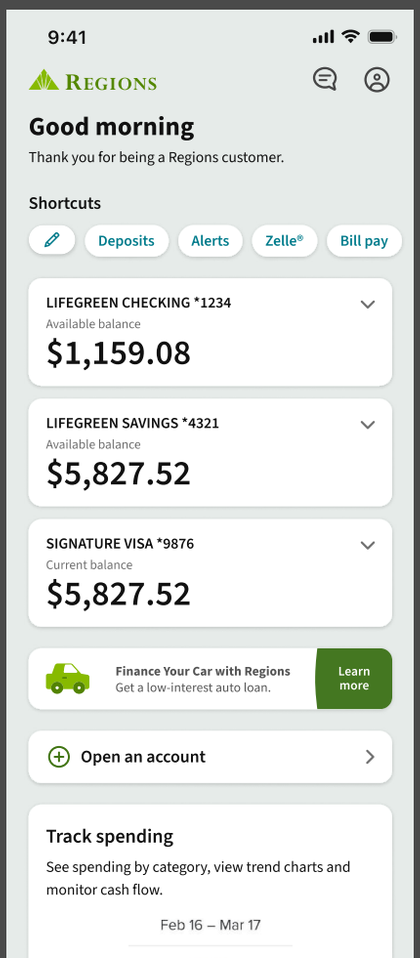


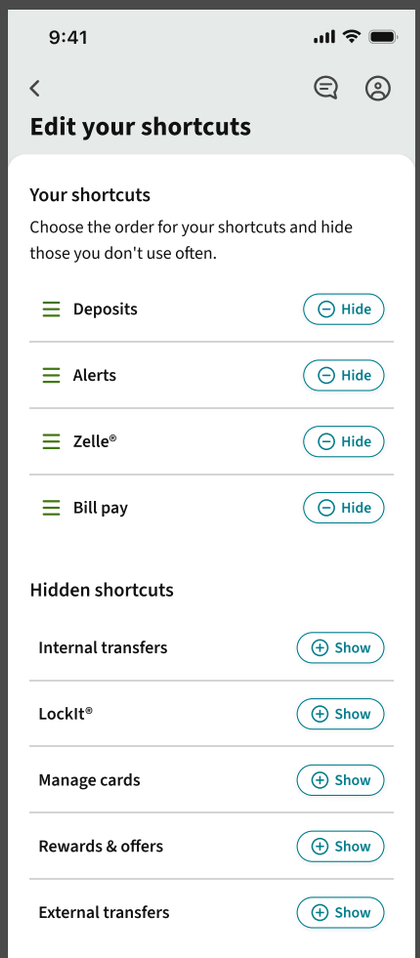


Prototype testing

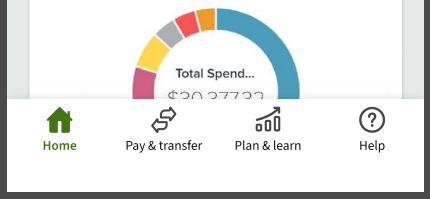


Profile and Settings



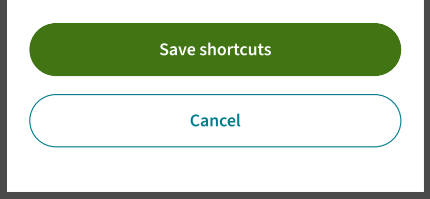


Provides a new entry point to manage and edit shortcuts.



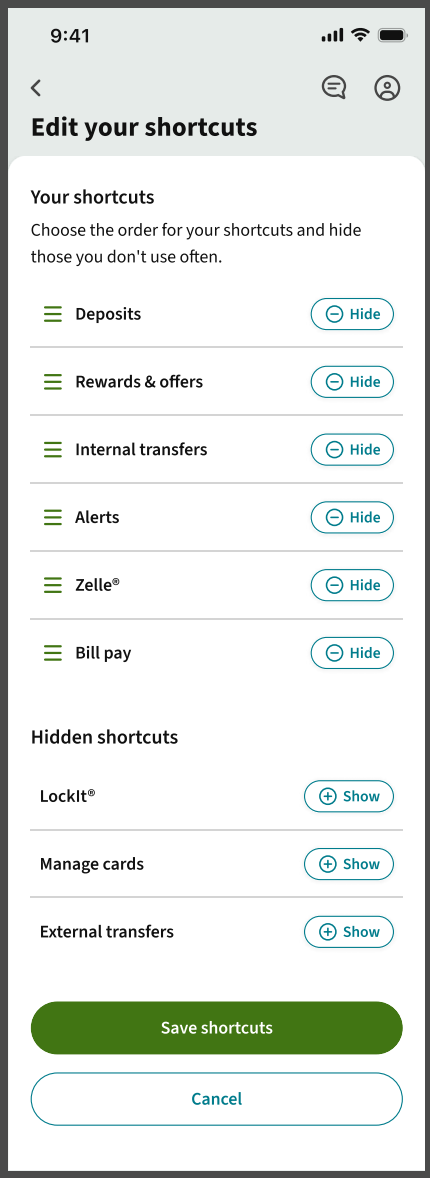
Home

Includes default shortcuts and a dedicated edit action.



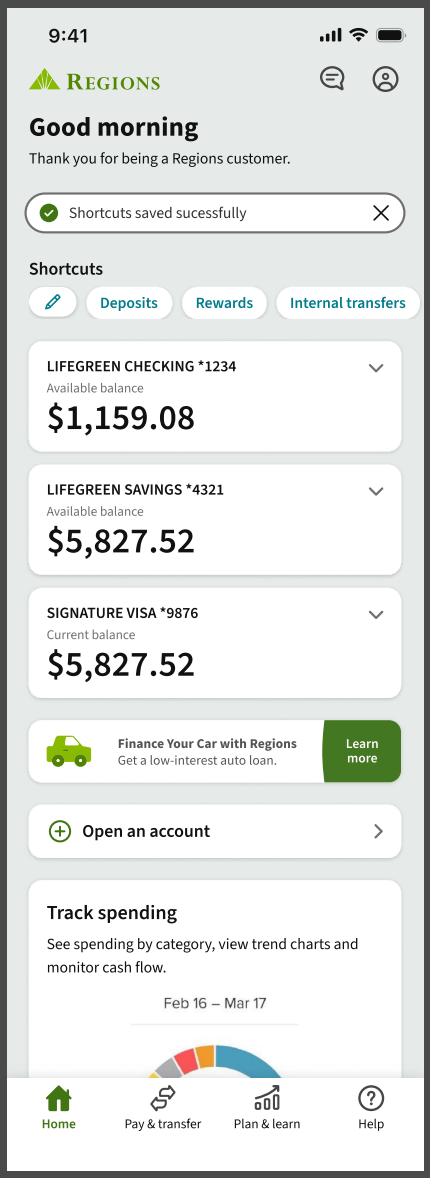
Edit your shortcuts

Displays four default actions followed by five additional options.



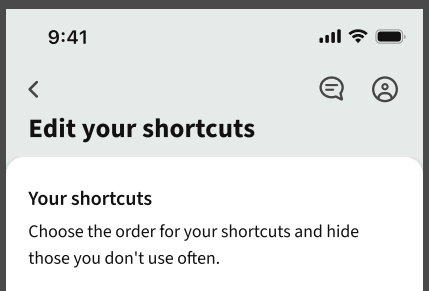
Edit your shortcuts

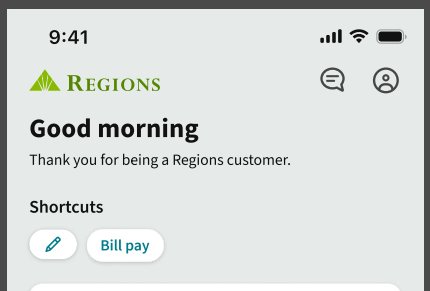
Adds two additional shortcuts and rearranges their order.

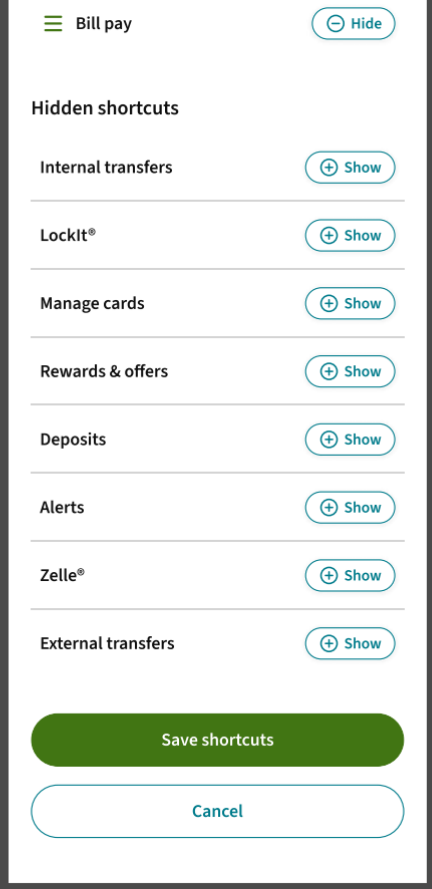


Home

Displays a success banner with the updated shortcuts menu.

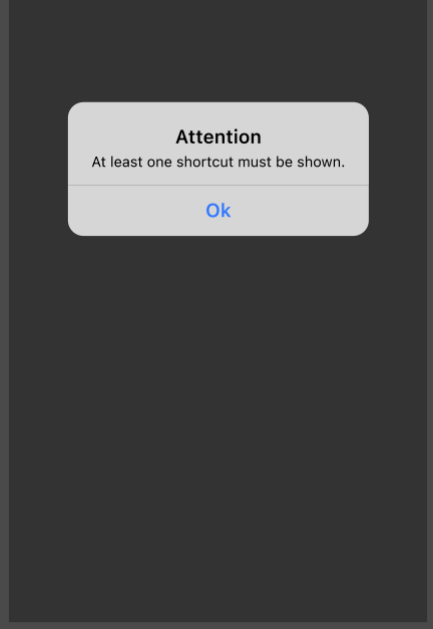






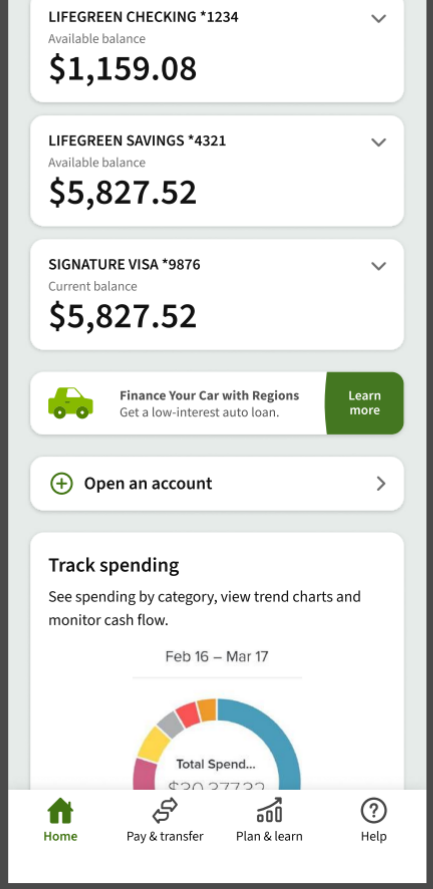
Edit your shortcuts

Shows all but one shortcut removed from the menu.



Alert modal

Prevents removal of the final shortcut with an alert message.



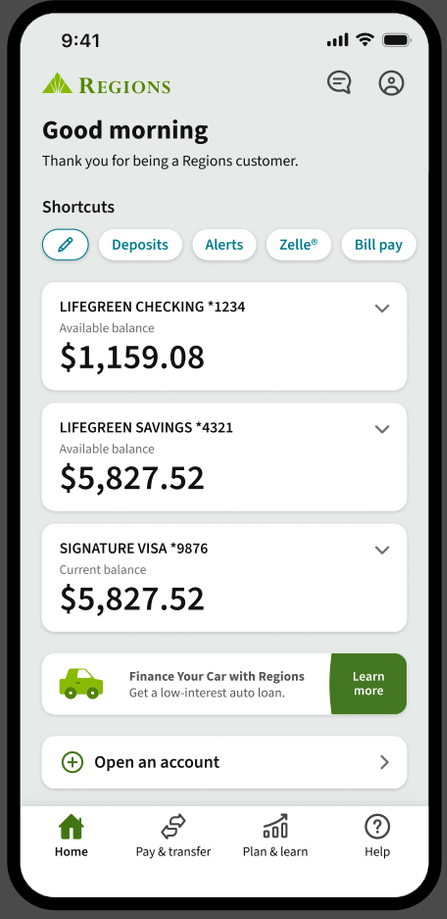
Home

Shows all but one shortcut removed from the menu.

Prototype results

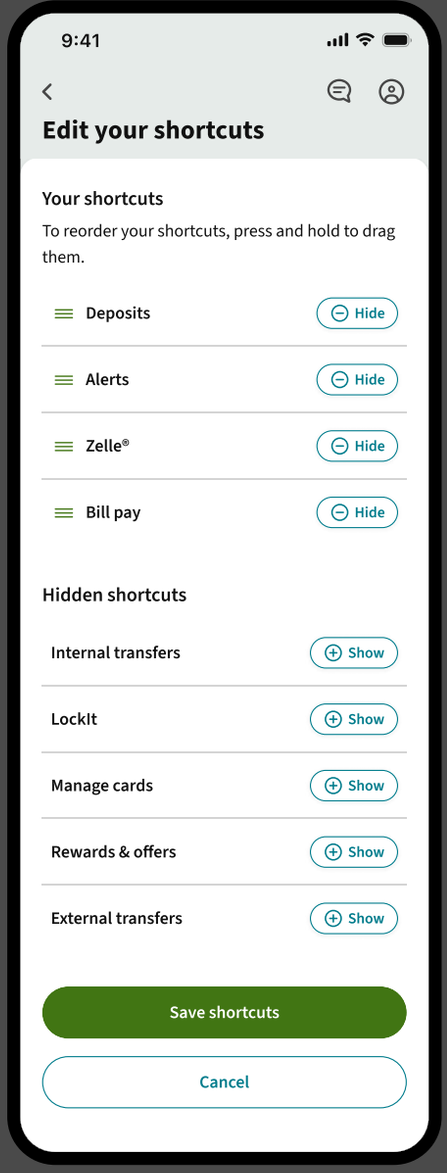
Testing identified opportunities to improve discoverability, simplify reordering interactions, and clarify shortcut visibility rules. Enhancing the edit entry point, strengthening drag-and-drop guidance, and providing clearer messaging when only one shortcut remains would help create a more intuitive user experience.

Final Screens (HiFi)



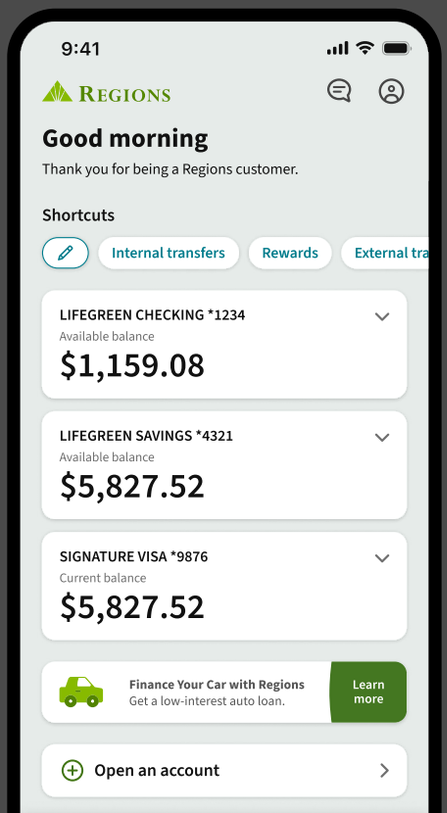
Home

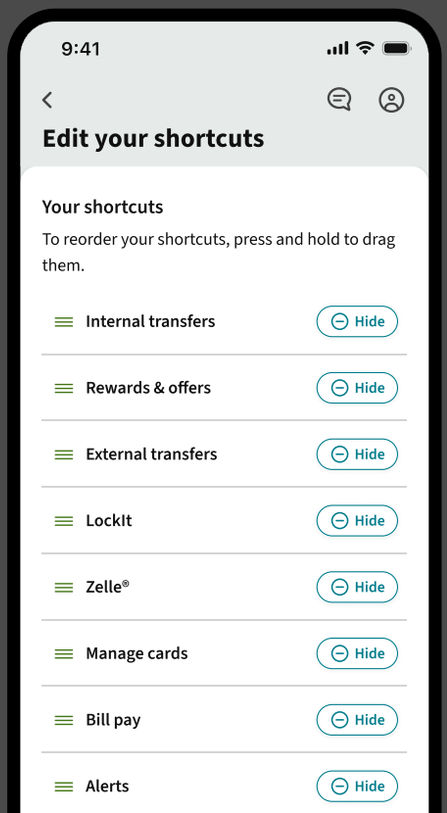
Includes default shortcuts and an outlined edit button for added affordance.

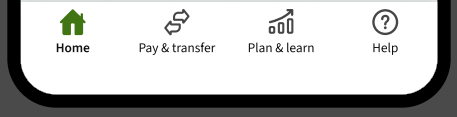


Edit your shortcuts

Displays default actions followed by additional options, utilizing native iOS and Android drag handles for reordering.

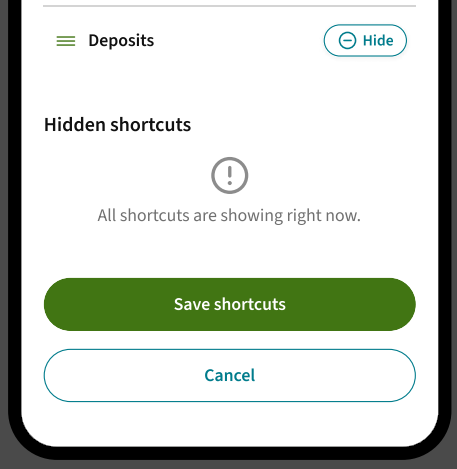






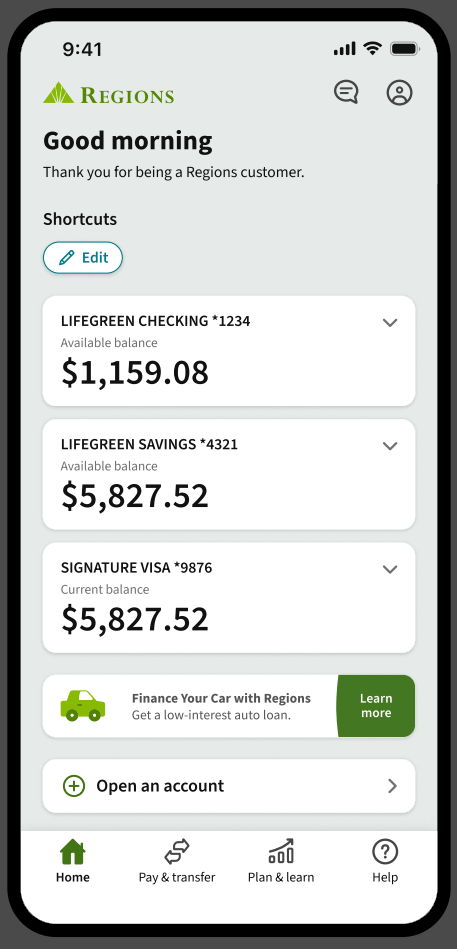
Home

Adds all shortcuts and rearranges their order.



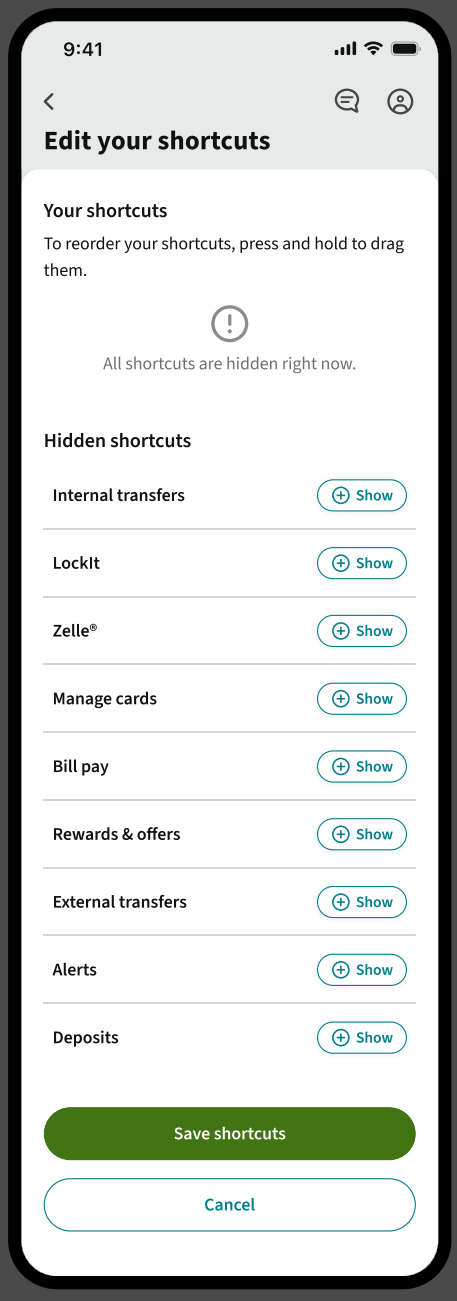
Edit your shortcuts

Displays all shortcuts and introduces a null state when no shortcuts are hidden.



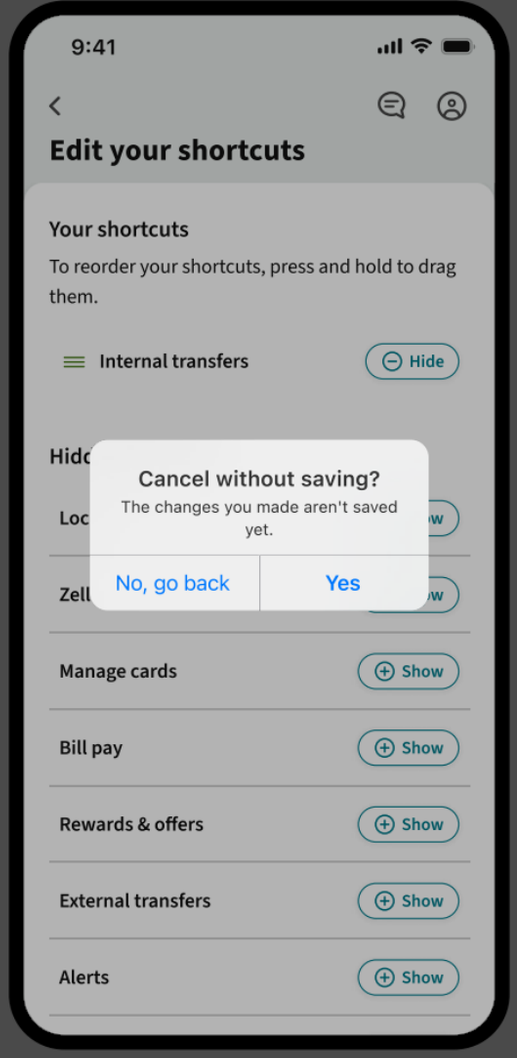
Home

Shows a shortcuts-free state with a labeled edit button for improved clarity.



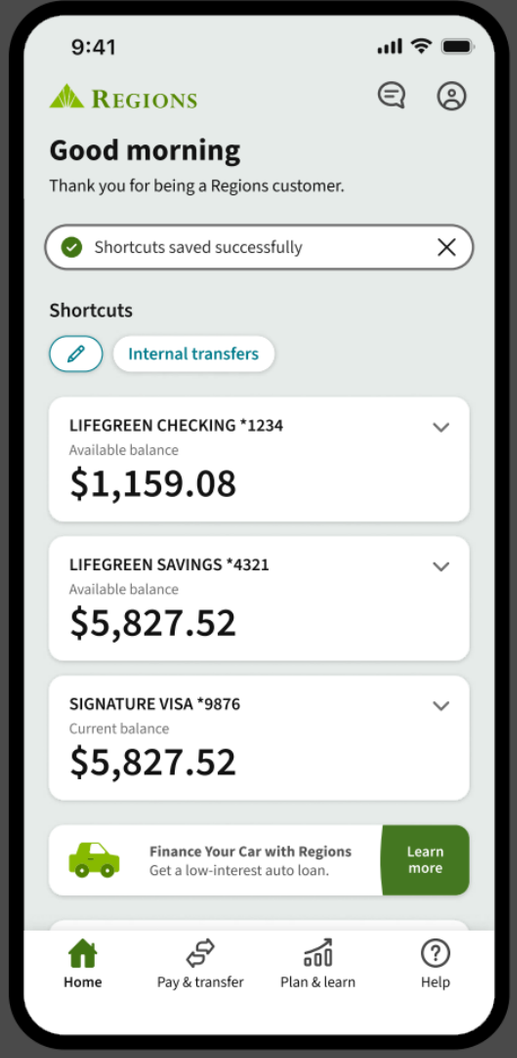
Edit your shortcuts

Removes all shortcuts and introduces a null state when no shortcuts are shown.



Alert modal

Presents a confirmation modal after the user selects cancel with unsaved changes.



Home

Displays a success banner with the updated shortcuts menu.

Conclusion

This project transformed the shortcuts experience from a static set of four default actions into a flexible, customizable feature that gives customers greater control over their home screen. By expanding the shortcut library, enabling users to add, remove, hide, and reorder shortcuts, and leveraging native iOS and Android patterns, the design solution delivers a more personalized, accessible, and user-centered experience.