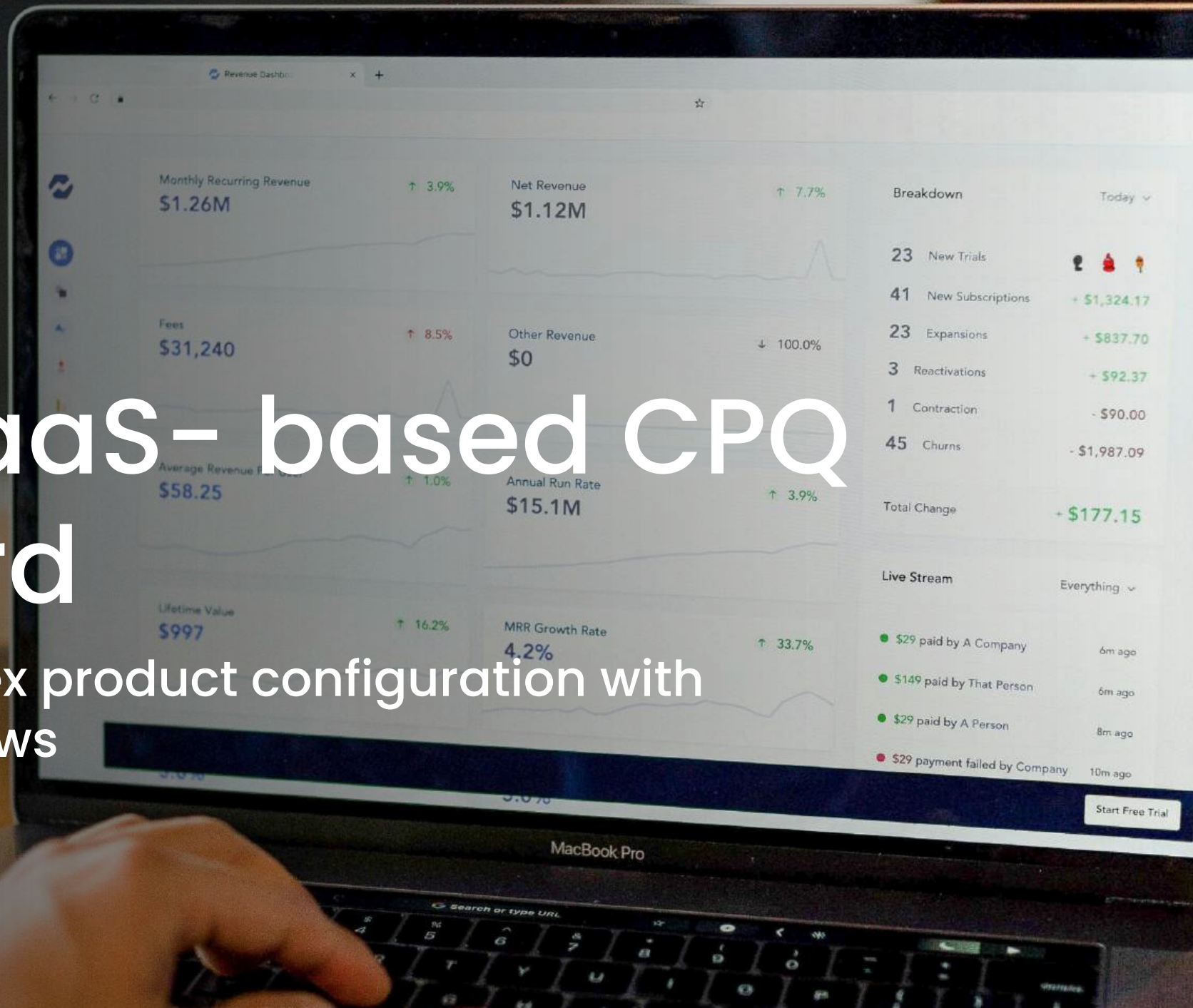# ATLAS- SaaS- based CPQ Dashboard

Streamlining complex product configuration with user-Centric workflows

Project Overview

ATLAS is a cloud based CPQ (Configure, Price, Quote) platform built for complex B2B product configurations. It enables users such as sales teams, dealers, and internal staff to easily configure customizable products, apply dynamic pricing, and generate accurate, professional quotes in minutes.

The system handles multi-level configurations, rule-based logic, pricing tiers, and approval workflows, thereby reducing manual errors and streamlining the quote-to-order cycle.
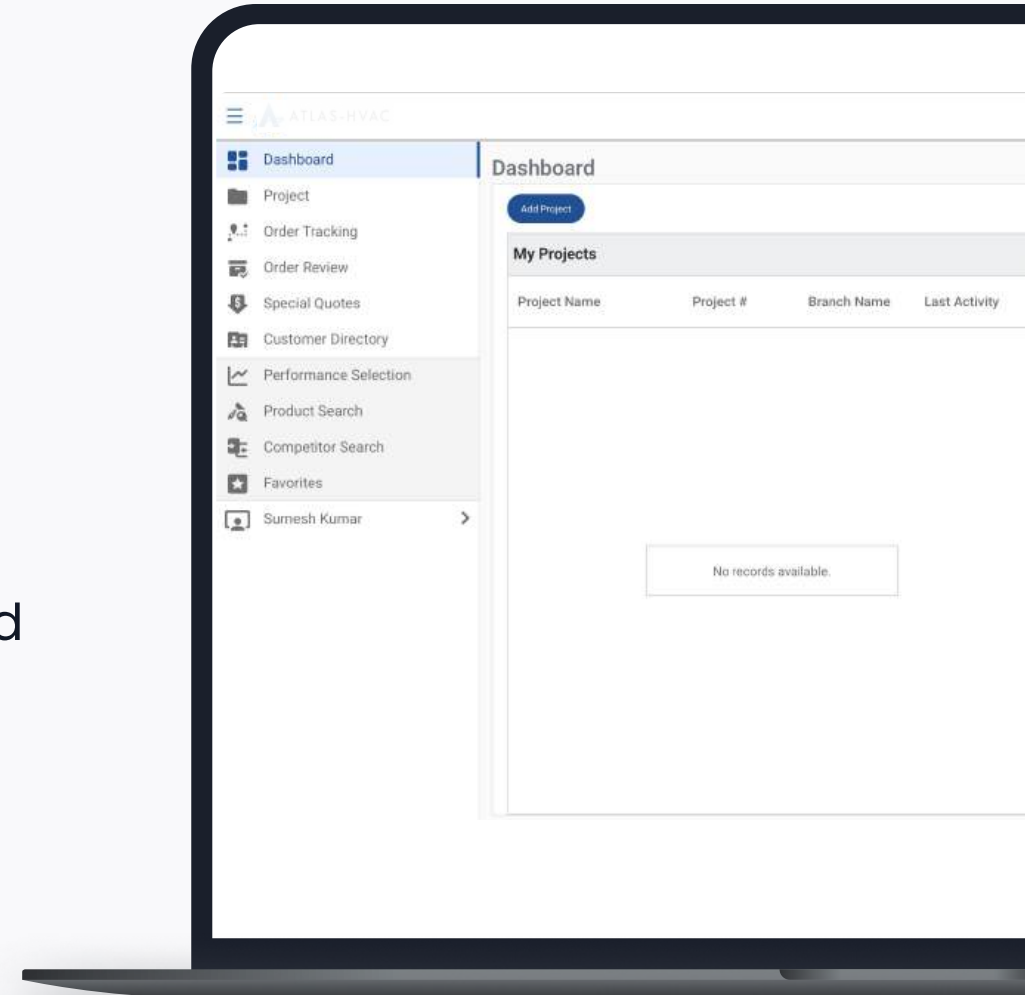
Stakeholder Discussion

The UX process began with in-depth discussions with stakeholders across Sales, Product, and Engineering. These sessions clarified business goals, identified feature gaps, and surfaced dashboard pain points. Insights from these talks aligned the redesign with KPIs like speed, accuracy, and user experience—forming the foundation for revamping the SaaS web app.
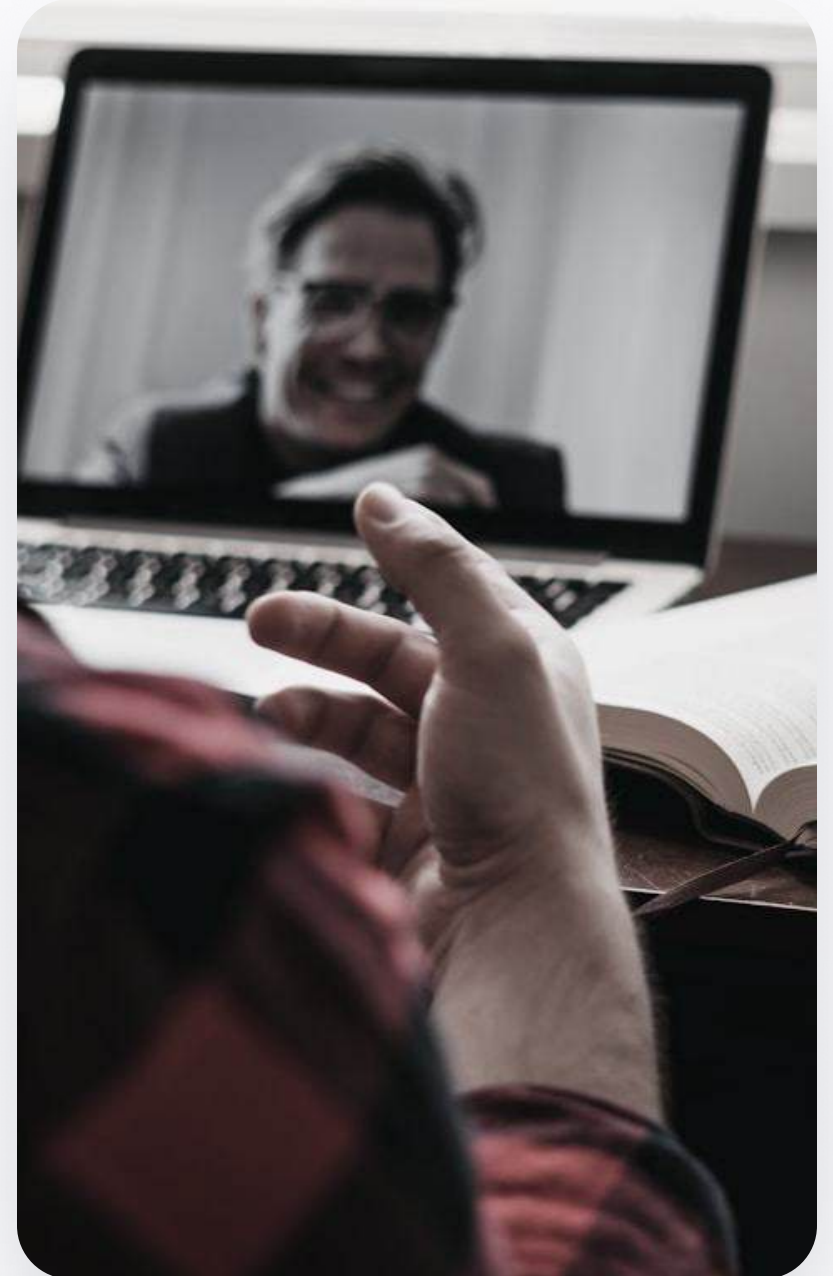
The Problem

The Existing dashboard presented a cluttered and non-intuitive interface, making it difficult for sales representatives to efficiently navigate and perform key CPQ tasks.

- Navigation was complex and time- Consuming
- Overwhelming number of options on the screen
- Task flows were fragmented and inefficient
- Lack of visual hierarchy and clear focal points
- Inconsistent design elements across the dashboard
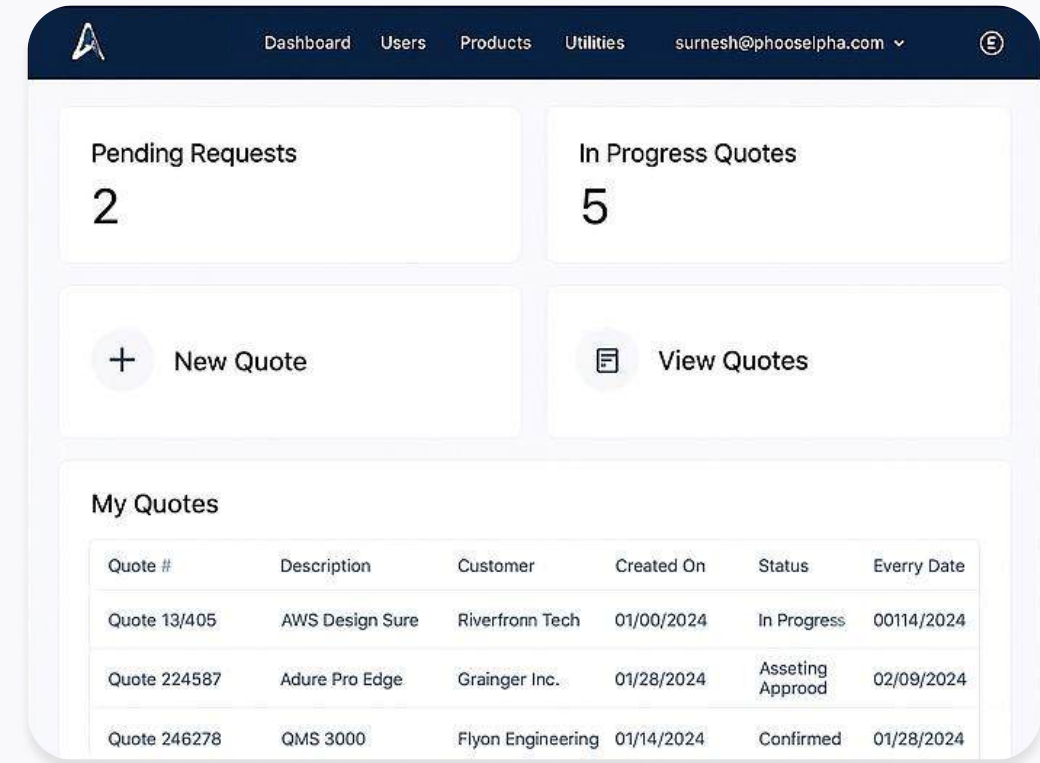
The Objective

- Redesign the dashboard with clear user flows and modular layout

- Improve visual hierarchy and accessibility

- Simplify complex CPQ operations for faster task execution

- Align UI with brand aesthetics and consistency

- Support scalability and responsiveness for tablet/desktop use

Design Process

EMPATHISE ➡ CONCEPTUALISE ➡ DESIGN

Empathise   Conceptualise   Design

- Improve visual hierarchy and accessibility

- Simplify complex CPQ operations for faster task execution

- Align UI with brand aesthetics and consistency

- Support scalability and responsiveness for tablet/ desktop use

Empathise   Conceptualise   Design

Role & Responsibilities

- Defined user journeys and task flows
- Conducted stakeholder interviews and user research
- Created visual system: Colour palette, Iconography, Typography
- Facilitated design reviews with development.

Stakeholder Strategy Sessions

- Engaged with Sales, Product, and Engineering teams
- Aligned features with business KPIs (speed, accuracy, UX)
- Identified feature gaps and dashboard friction points
- Mapped stakeholder expectations with user pain points

mindfire
BURN IGNORANCE

Empathise Conceptualise Design

Dived into an intensive 2-week research sprint.

- 09+ user interviews 4+
- Investigated forums, reddit and FB groups
- Mapped out a competitor and SWOT analysis

I hate filling out surveys weekly; it feels like busywork and gets ignored. ✅
-Senior Software Engineer

If an app could auto-detect when I'm overwhelmed, that would actually help me ask for a break. ✅
-UX Designer

We have mood check-ins, but nobody remembers to fill them out on time. ❌
-Product Manager

I'm worried any monitoring tool will read my private messages or keystrokes. ❌
-Marketing Specialist

A quick glance at the dashboard saved me
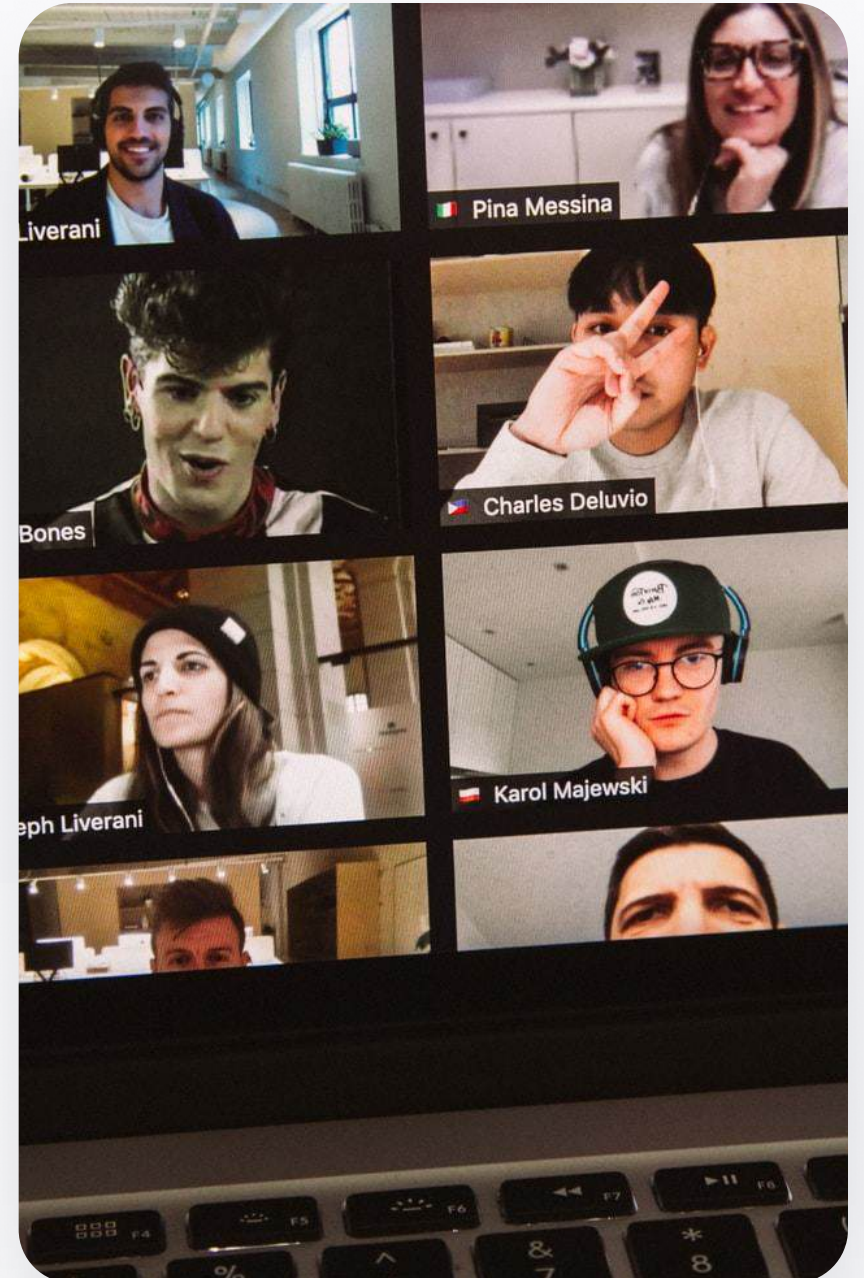
USER RESEARCH

Quantitative:

- Avg. task completion time: 2.5x expected
- 60% users skipped feature modules due to confusion

USER RESEARCH

Qualitative:

- "Too many options at once."
- "I can't find what I need without trial and error."
- "Tablet use is frustrating."

Empathise   Conceptualise   Design

USER PERSONAS

Amit (Sales Executive)

- Needs quick access to quote builder
- Works on-site and uses a tablet
- Frustrated by load times and nested menus

Nisha (Product Manager)

- Oversees pricing models and analytics
- Desktop-first, data-heavy tasks
- Needs clarity in reporting and editing

EMPATHY MAPPING

FEELS

"I hope I don't mess up the quote again."

SAYS

Frustrated, rushed

DOES

"Where's the last version I saved?"

Amit

THINKS

Switches between tabs to complete tasks
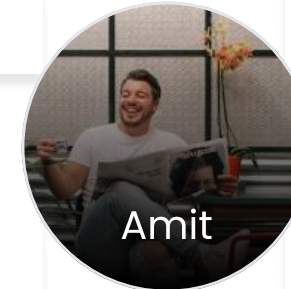
FEELS

"Cluttered interface too much time taking

SAYS

Confused, impatient
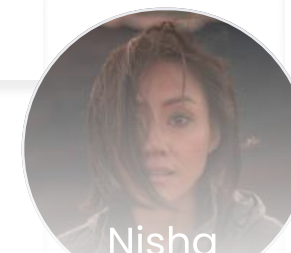
DOES   Nisha   THINKS

Empathise **Conceptualise** Design

Overwhelmed with insights, we needed to start prioritizing to form a strategy.

- Understand key pain points, wants and needs
- Classify all insights gathered
- Present our synthesis to stakeholders
- Created affinity maps
- Prioritized customer pain points, wants and needs
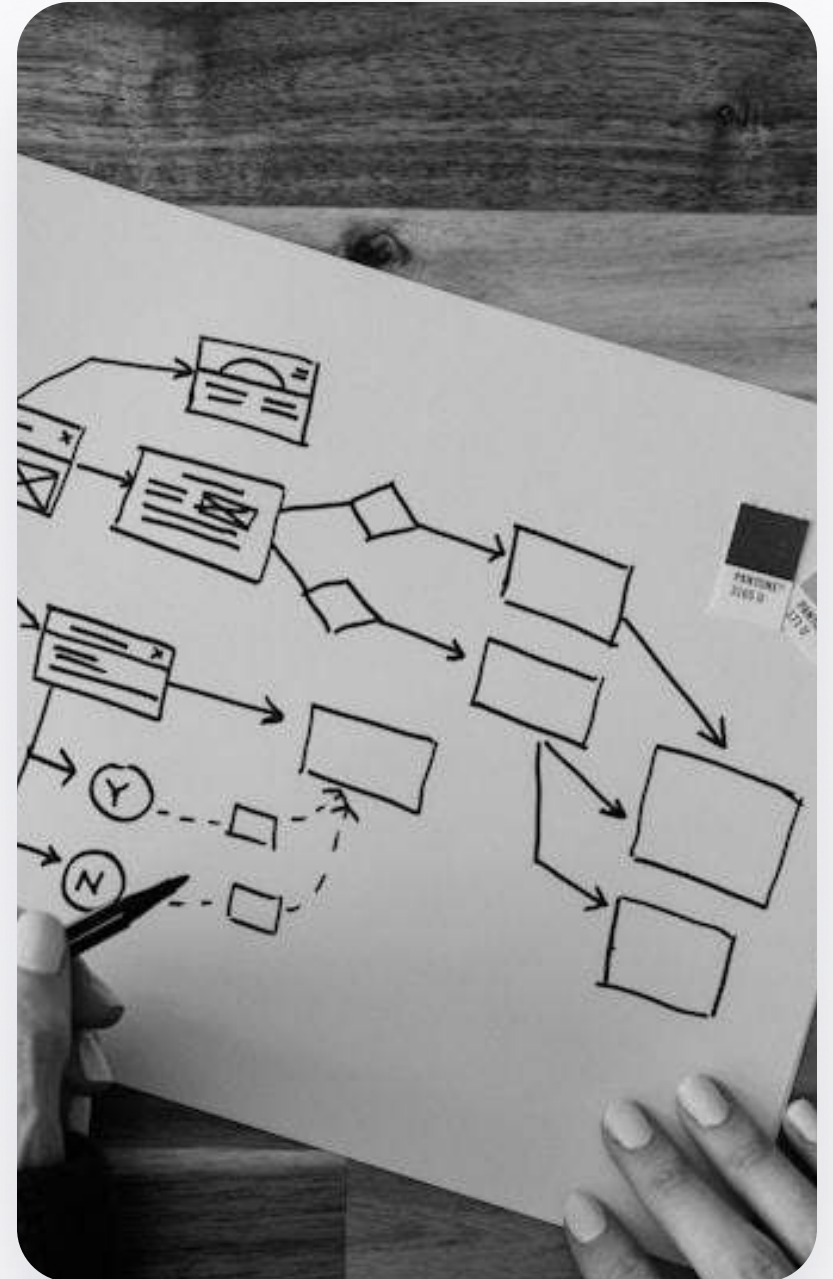
User

Login
→ Lands on dashboard

Select Customer
→ Search Existing Customer
→ Create New Cust. Profile

Initiate Quote
→ Click "New Quote"

Configure Products
→ Select Product Category
→ Choose Products
→ Configure Options
  (E.G., Colour, Size)
→ Validate Configuration Rules

USER FLOW

Price The Quote
→ System Applies Price List & Discounts
→ Option To Override With Discount
  (Triggers Approval If Needed)

Submit Quote To Customer
→ Generate Quote PDF
→ Email To Customer

INFORMATION ARCHITECTURE

Landing Page

Log In

Sing UP

Dashboard

KPIS & Metrics

RECENT ACTIVITIES

ALERTS & NOTIFICATIONS

QUOTES

CREATE NEW QUOTE

MY QUOTES

QUOTE TEMPLATES

No

DRAFTS

SENT

APPROVED

PRODUCTS & CATALOG

BROWSE PRODUCTS

ACCOUNT DETAILS

Entrar

E-mail

E-mail

Senha

Senha

Entrar

Entrar como Trader

E-mail

Você está conectado!

Agora basta você acessar sua conta na Bet365 e começar a operar.

Acessar conta

Trader

Entrar

LOGO   Dashboard

Usuário   Saldo R$0,00   Apostas R$0,00

Dashboard   Lucro R$0,00

Ganhas Perdidas Anuladas Pendentes
0   0   0   0

Configurações   Últimas entradas

Histórico

Sair

LOGO   Dashboard

Período

Usuário   Saldo R$0,00   Apostas R$0,00   Tips R$0,00

Dashboard   Lucro R$0,00

Ganhas Perdidas Anuladas Pendentes   Ganhas Perdidas Anuladas Pendentes
0   0   0   0   0   0   0   0

Configurações   Últimas entradas

Histórico   Seja bem-vindo!

Aqui você poderá gerenciar todas as suas apostas esportivas na Bet365, basta apenas configurar sua conta.

Configurar conta

LOGO   Configurações

Usuário   Valores

Valor da stake

Dashboard   R$ 0,00 /dia

Meta diária

Configurações   R$ 0,00 /dia

Stop loss

Histórico   R$ 0,00 /dia

Sair

Receber Alertas

Apostas   Lucro   Perda

Seja bem-vindo!

Aqui você poderá gerenciar todas as suas apostas esportivas na Bet365, basta apenas configurar sua conta.

Configurar conta

LOGO   Dashboard

Usuário   Saldo R$0,00   Apostas R$0,00

Dashboard   Lucro R$0,00

Ganhas Perdidas Anuladas Pendentes
0   0   0   0

Configurações   Últimas entradas

Histórico

Sair

WIREFRAMING

mindfire
BURN IGNORANCE

Empathise   Conceptualise   Design

We were on a very tight deadline and developers needed to start building soon.

- Should we design web App responsive design first?

- Did we need a design system now ?

- What was our visual design language?

mindfire
BURN IGNORANCE

Empathise   Conceptualise   Design

Once we answered the burning questions, we commenced design right away.

- Built a design system as a priority

- Moved forward with a Web app-first approach with responsive design

- Focus on homepage and funnel first

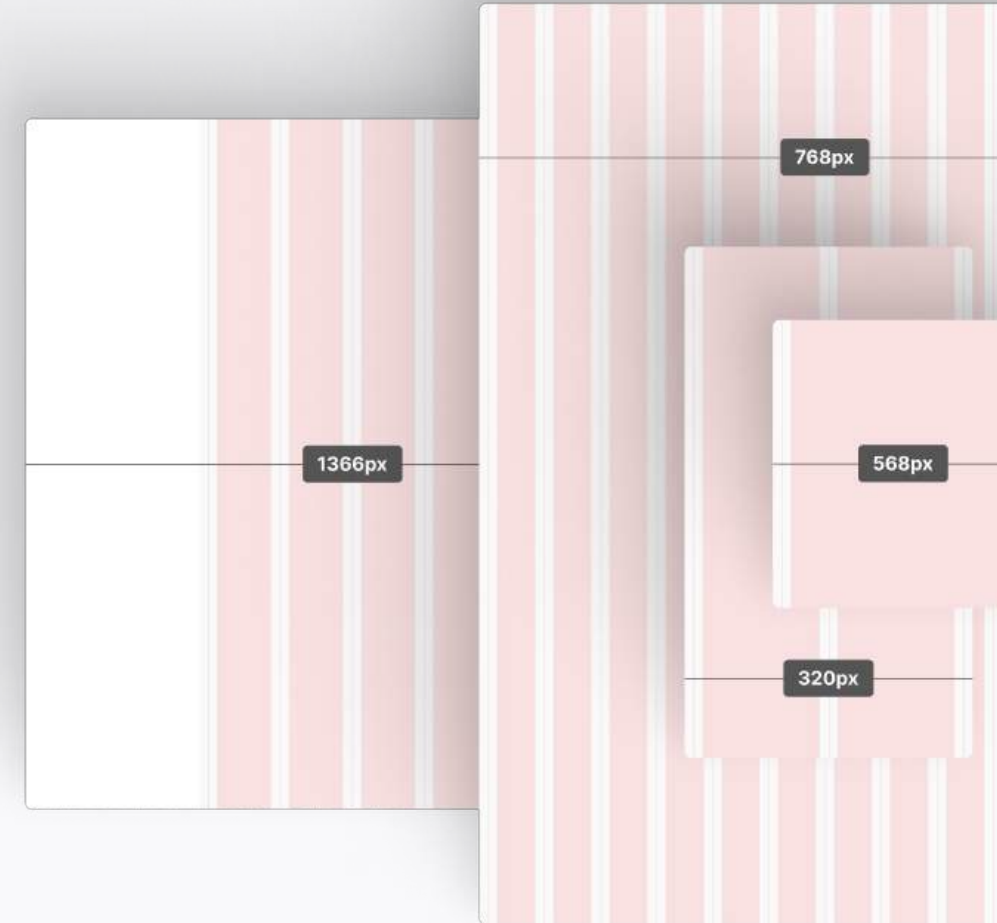Empathise   Conceptualise   Design

GRIDS

A classic combination of 12-Column and 4- Colums grids is used,and on desktop the sidebar aligns to a separate grid.
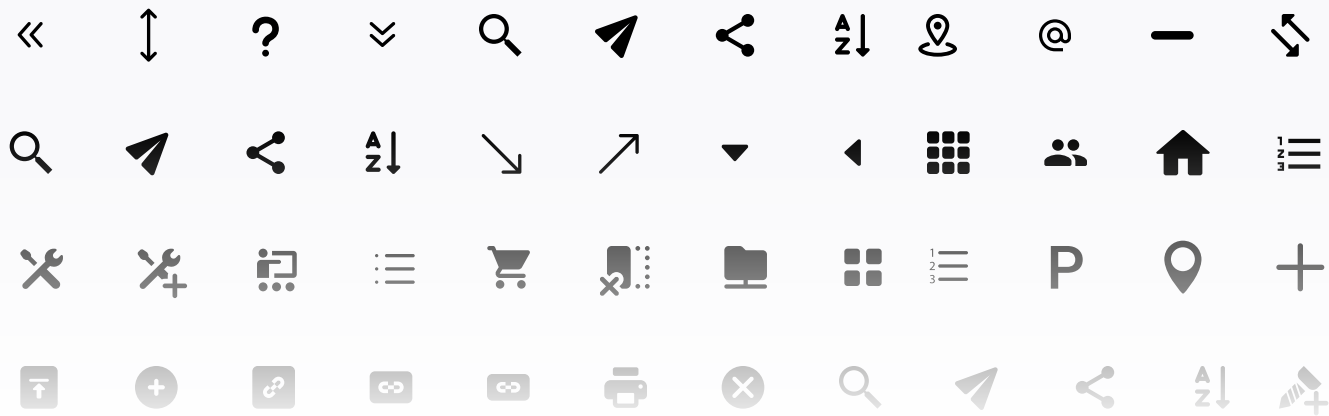
(1280X832)

COUNT	12
MARGIN	32
GUTTER	44

mindfire
BURN IGNORANCE

Empathise   Conceptualise   Design

ICONS

The icon styel is both angular and soft, designed to complement the overall aesthetic of the website

Size XS	12X12	🔍
Size S	16X16	🔍
Size M	20X20	🔍
Size L	24X24	🔍

mindfire
BURN IGNORANCE

Empathise **Conceptualise** **Design**

Visual Design System

Typography & Colour Palette

xs	Almost before we knew it, we had left the ground.
sm	Almost before we knew it, we had left the ground.
base	Almost before we knew it, we had left the ground.
lg	Almost before we knew it, we had left the ground.
xl	Almost before we knew it, we had left the ground.
2xl	Almost before we knew it, we had left the ground.
3xl	Almost before we knew it, we had left the ground.
4xl	Almost before we knew it, we had left the ground.
5xl	Almost before we knew it, we had left the ground.
6xl	Almost before we knew it, we had left the ground.
7xl	Almost before we knew it, we had left the ground.
8xl	Almost before we knew it, we had left the ground.
9xl	Almost before we knew it, we had left the ground.

/MAIN FONT

AaB

WEIGHT

Regular
Medium
Semibold

#00070E
#00152A
#002445
#003261
#004F98
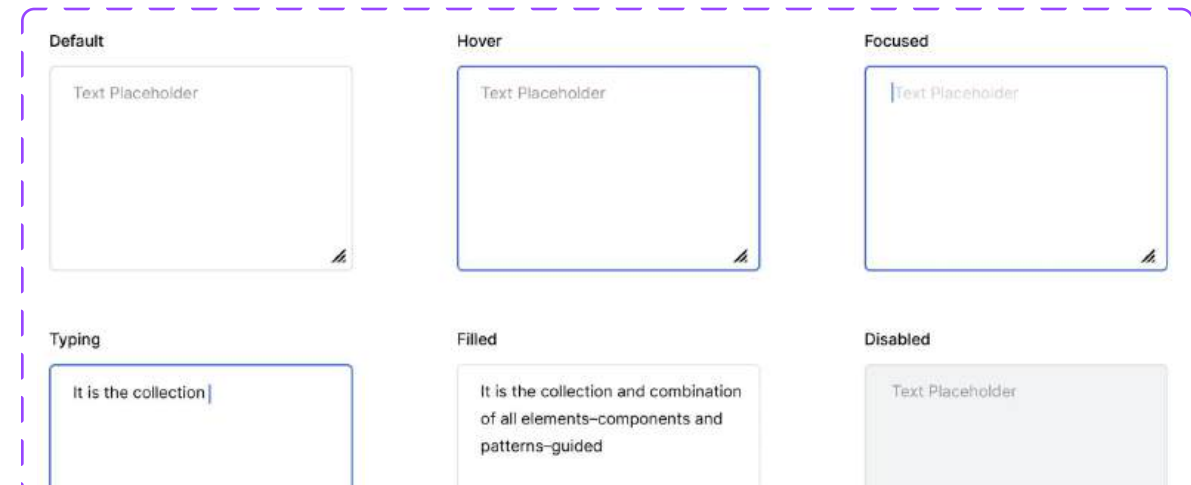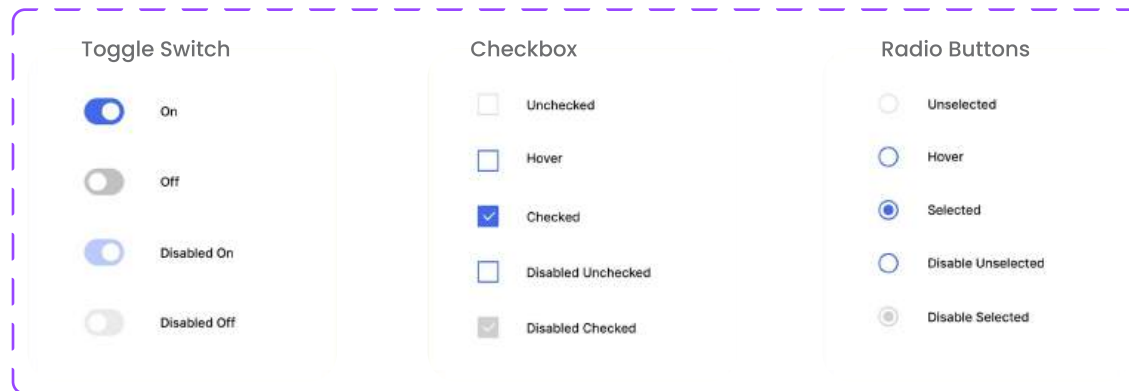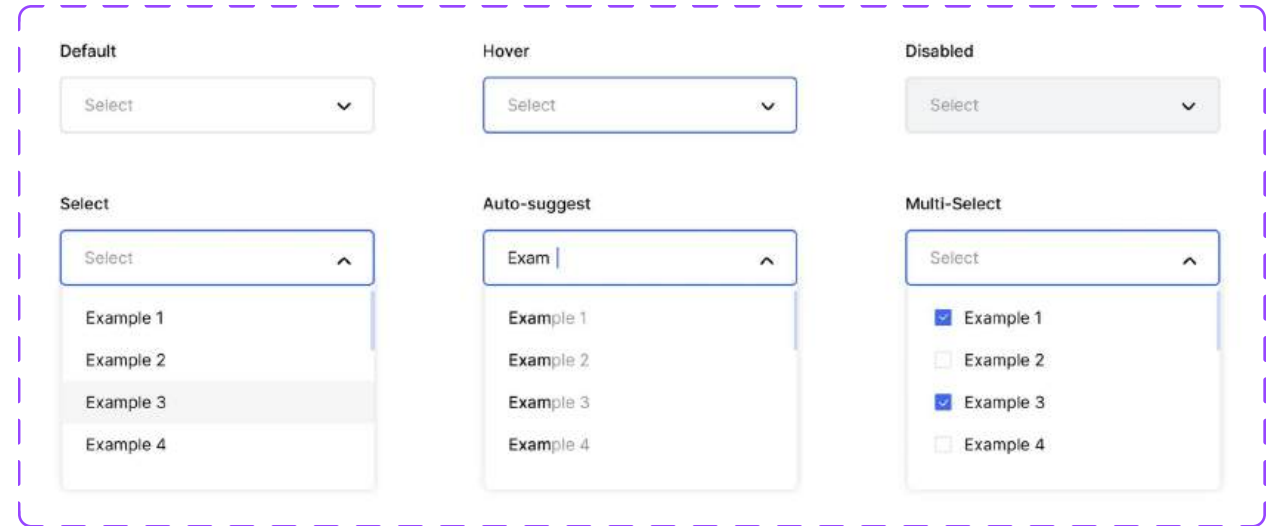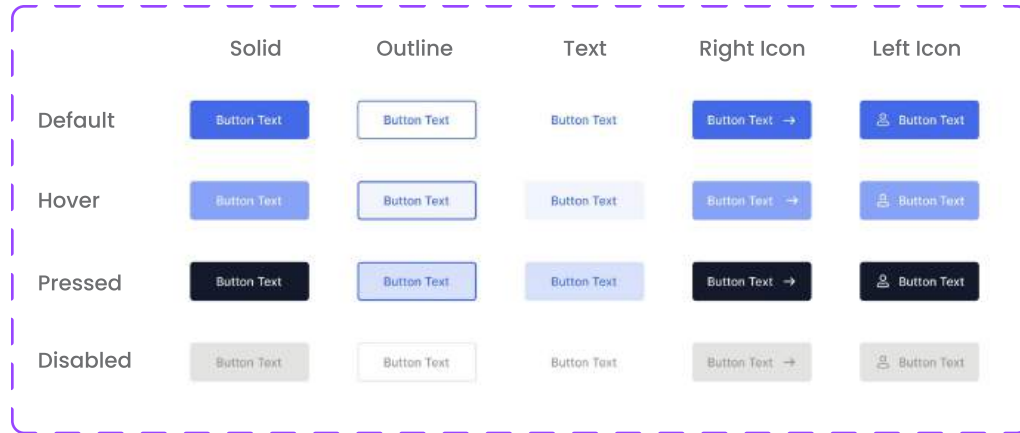#0065C3
#0070D8
#1D92FF
#349DFF
#77BEFF
#A5D3FF
#D2E9FF
#E8F4FF

Empathise   Conceptualise   Design

Components

	Solid	Outline	Text	Right Icon	Left Icon
Default	Button Text	Button Text	Button Text	Button Text →	Button Text
Hover	Button Text	Button Text	Button Text	Button Text →	Button Text
Pressed	Button Text	Button Text	Button Text	Button Text →	Button Text
Disabled	Button Text	Button Text	Button Text	Button Text →	Button Text

Default
Select ⌄

Hover
Select ⌄

Disabled
Select ⌄

Select
Select ⌃
Example 1
Example 2
Example 3
Example 4

Auto-suggest
Exam | ⌃
Example 1
Example 2
Example 3
Example 4

Multi-Select
Select ⌃
☑ Example 1
☐ Example 2
☑ Example 3
☐ Example 4

Toggle Switch
🔵 On
⚪ Off
🔵 Disabled On
⚪ Disabled Off

Checkbox
☐ Unchecked
☐ Hover
☑ Checked
☐ Disabled Unchecked
☑ Disabled Checked

Radio Buttons
◯ Unselected
◯ Hover
◉ Selected
◯ Disable Unselected
◉ Disable Selected

Default
Text Placeholder

Hover
Text Placeholder

Focused
Text Placeholder

Typing
It is the collection|

Filled
It is the collection and combination of all elements–components and patterns–guided

Disabled
Text Placeholder

mindfire
BURN IGNORANCE

UI LAYOUT

Tablet Responsive