UBS Neo
Visual Designs Meerkat - Controls stacking

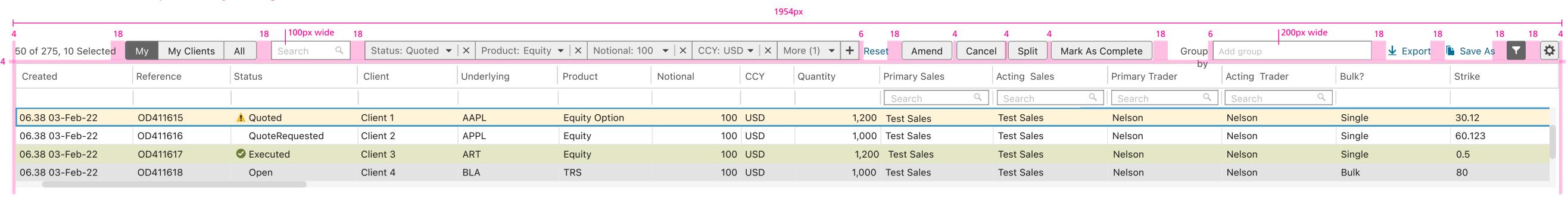Created by: Tarek Quereshi
Updated: July 2022

This is a working document and is subject to change

Meerkat - Controls stacking

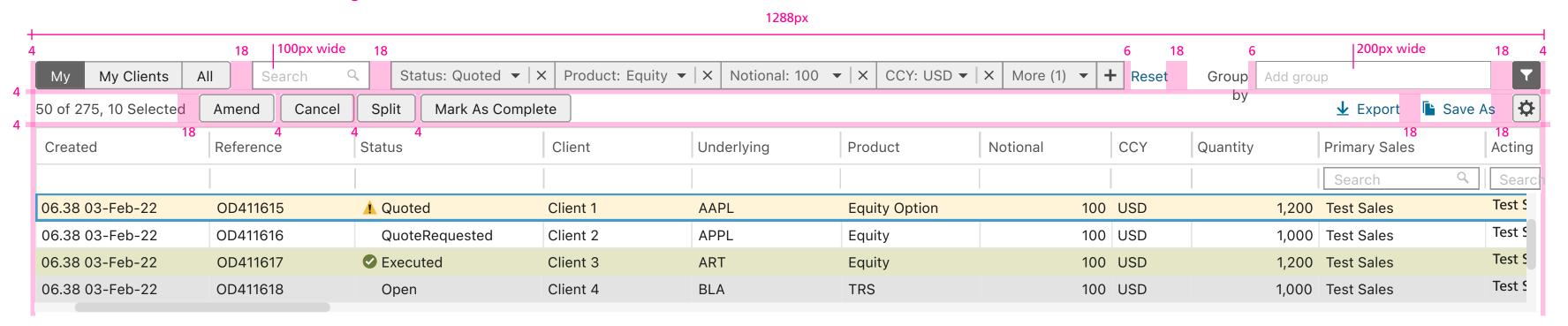Initial visual design

Control section with all components fully showing

1954px

| | My | My Clients | All | Search | Status: Quoted ✕ | Product: Equity ✕ | Notional: 100 ✕ | CCY: USD ✕ | More (1) + | Reset | Amend | Cancel | Split | Mark As Complete | Group by | Add group | ↓ Export | 📋 Save As | ▼ | ⚙ |

50 of 275, 10 Selected

100px wide — 200px wide

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales	Primary Trader	Acting Trader	Bulk?	Strike
									Search	Search	Search	Search		
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single	30.12
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales	Nelson	Nelson	Single	60.123
06.38 03-Feb-22	OD411617	✔ Executed	Client 3	ART	Equity	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single	0.5
06.38 03-Feb-22	OD411618	Open	Client 4	BLA	TRS	100	USD	1,000	Test Sales	Test Sales	Nelson	Nelson	Bulk	80

Control section with action buttons falling into the second row

1288px

| My | My Clients | All | Search | Status: Quoted ✕ | Product: Equity ✕ | Notional: 100 ✕ | CCY: USD ✕ | More (1) + | Reset | Group by | Add group | ▼ |

50 of 275, 10 Selected | Amend | Cancel | Split | Mark As Complete | ↓ Export | 📋 Save As | ⚙

100px wide

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting
									Search	Searc
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test S
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test S
06.38 03-Feb-22	OD411617	✔ Executed	Client 3	ART	Equity	100	USD	1,200	Test Sales	Test S
06.38 03-Feb-22	OD411618	Open	Client 4	BLA	TRS	100	USD	1,000	Test Sales	Test S

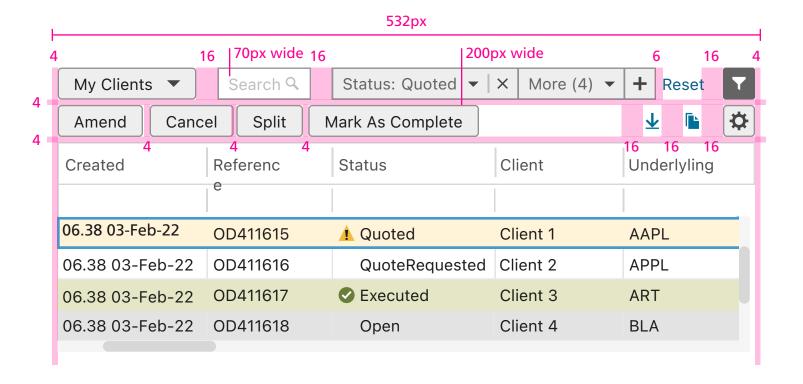## Control section in three rows with collapsable options

Version 1: collapsable segment control and action buttons

532px

70px wide — 200px wide

| My Clients ▾ | Search | Status: Quoted ▾ ✕ | More (4) ▾ | + | Reset | ▼ |

50 of 275, 10 Selected ✎ | Add group | ↓ | 📋 | ⚙

Created	Reference	Status	Client	Underlying
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL
06.38 03-Feb-22	OD411617	✔ Executed	Client 3	ART
06.38 03-Feb-22	OD411618	Open	Client 4	BLA

Version 2: removeable of row selected and add group

532px

70px wide — 200px wide

| My Clients ▾ | Search | Status: Quoted ▾ ✕ | More (4) ▾ | + | Reset | ▼ |

| Amend | Cancel | Split | Mark As Complete | ↓ | 📋 | ⚙ |

Created	Reference	Status	Client	Underlying
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL
06.38 03-Feb-22	OD411617	✔ Executed	Client 3	ART
06.38 03-Feb-22	OD411618	Open	Client 4	BLA

Collapsable buttons

Segment control

My Clients ▾
My
My Clients
All

104px

Action buttons

✎
Amend
Cancel
Split
Mark As Complete

122px

Settings

⚙
Edit column
??
??

104px

Meerkat - Controls stacking

Initial visual design

Hide and show control components

With all controls components showing

50 of 275, 10 Selected | My | My Clients | All | Search | Status: Quoted ▾ ✕ | Product: Equity ▾ ✕ | Notional: 100 ▾ ✕ | CCY: USD ▾ ✕ | More (1) ▾ + Reset | Amend | Cancel | Split | Mark As Complete | Group by | Add group | ⬇ Export | 🔖 Save As | ⏚ | ⚙

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales	Primary Trader	Acting Trader	Bulk?	Strike
									Search	Search	Search	Search		
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06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales	Nelson	Nelson	Single	60.123
06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single	0.5
			Client 4	BLA	TPS									

Menu option showing the toggle on/off of indiviual control components with segment control turned off

50 of 275, 10 Selected | Search | Status: Quoted ▾ ✕ | Product: Equity ✕ | Notional: 100 ▾ ✕ | CCY: USD ▾ ✕ | More (1) ▾ + Reset | Amend | Cancel | Split | Mark As Complete | Group by | Add group | ⬇ Exp

		Selected row	ON
		Segment control	OFF
		Search	ON
		Filter	ON
		Action buttons	ON
		Add group	ON

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales	Primary Trader	Acting Trader	Bulk?
									Search	Search	Search	Search	
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single
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06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single
			Client 4	BLA	TPS								

Hide and show control section

With all controls showing

50 of 275, 10 Selected | My | My Clients | All | Search | Status: Quoted ▾ ✕ | Product: Equity ▾ ✕ | Notional: 100 ▾ ✕ | CCY: USD ▾ ✕ | More (1) ▾ + Reset | Amend | Cancel | Split | Mark As Complete | Group by | Add group | ⬇ Export | 🔖 Save As | ⏚ | ⚙

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06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single	0.5
			Client 4	BLA	TPS									

With the control section hidden

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06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	100	USD	1,200	Test Sales	Test Sales	Nelson	Nelson	Single	0.5
			Client 4	BLA	TPS									