

Thomas Proctor

Content Strategy, Design, and Technical Writing

Portfolio Samples from PayPal, PayPal Credit, Xoom, Symantec, Autodesk, Connectix and others

These examples illustrate examples and thinking behind enterprise UI and app design projects, and technical writing deliverables such as user manuals and instructional content I created in my career.

The content and examples are real, and are used with permission for the purpose of work sample discussions. For all of these items, I was the primary content owner.

Tom Proctor

June 18, 2025



PayPal Credit Website Redesign

In a 6 billion dollar deal, PayPal sold its PayPal Credit portfolio to Synchrony Bank. As part of the deal, our Credit team worked with the Synchrony design and legal teams to complete the redesign that was already underway. We improved the information architecture and as a team redesigned navigation and improved key workflows prior to handoff on a tight deadline. The redesign was very successful and was delivered on-time with happy stakeholders from both companies. The redesigned site is currently live today with very few changes since then.

In this cross-company collaboration, we simplified several key areas of the UX to address known issues and improve navigation and usability. We also had to make key changes for legal purposes. I received 2 PayPal Spot Awards of \$3K each from senior management for my role.

"— you were the best writer at PayPal, hands down, seriously."

Beth Wells – Director of User Experience, PayPal



Transactions

Goals achieved

Created a simple "at-a-glance" transactions reporting page.

Reviewed and tested various layouts, labels and touchpoints.

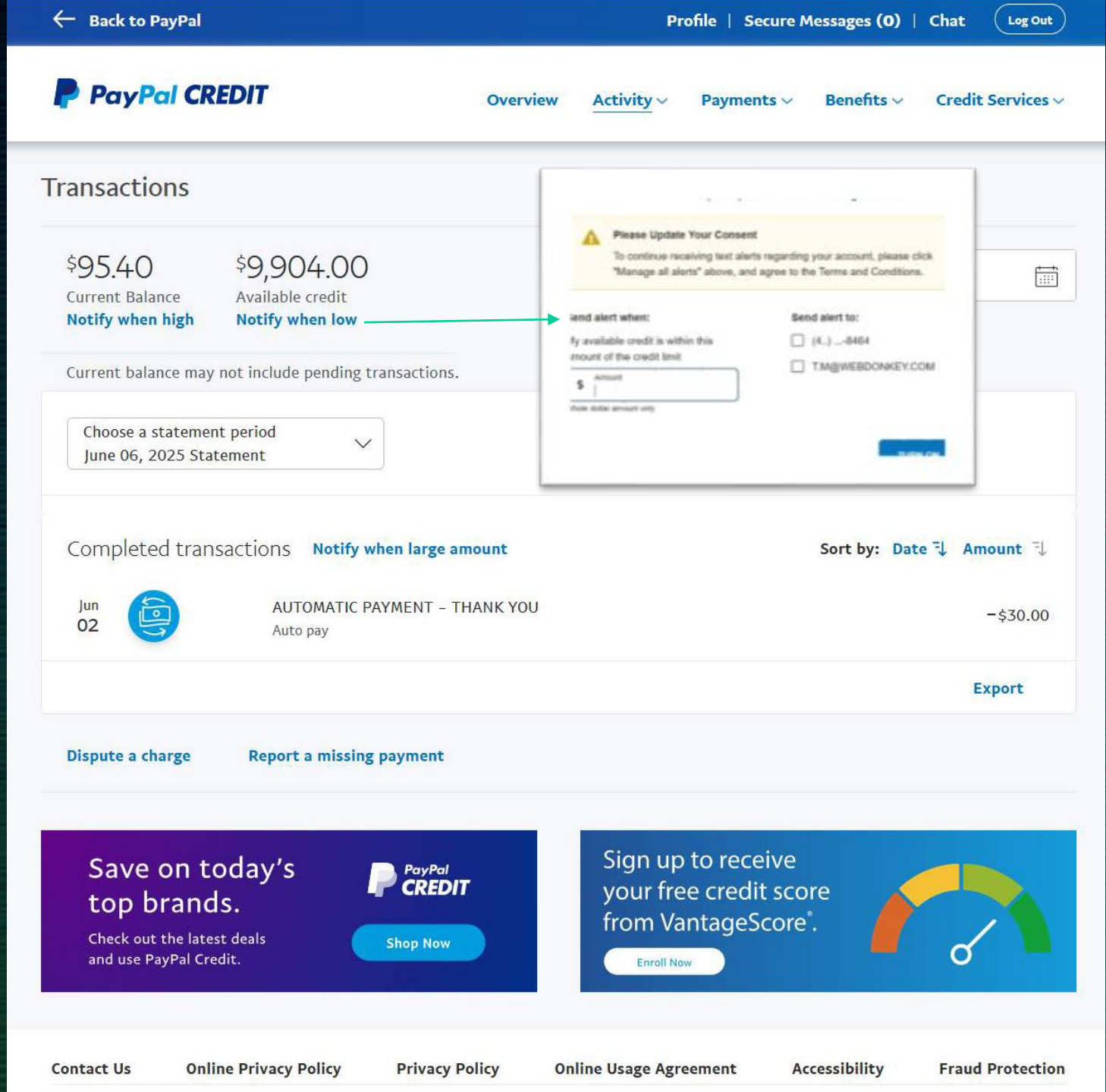
Aligned navigation with PayPal and Synchrony Bank.

Provided uncrowded and balanced layout with room for banner elements.

Added notifications framework with alert options based on user feedback.

Allowed for whitespace elegance without clutter.

The result was happier users, reduced call volume and a page design that was well received by customers and support.





Special Financing

Goals achieved

Presented minimalist simplified redesign of special purchase amounts, terms, expiration dates, and reminders.


Cleared up confusion from previous label "Deals and Offers". Users didn't identify with this, so we tested new terms extensively with customers and "Special Financing" was a term customers liked.

This page was a product of our team insisting that customers needed to have a good way to know when their offers expire to avoid fees and interest. We got a lot of feedback from customers that this set us apart from banks and lenders because we are looking out for them, not ripping them off like most banks and cards do.

← Back to PayPal Profile | Secure Messages (0) | Chat Log Out

PayPal CREDIT Overview Activity Payments Benefits Credit Services

Special Financing Purchases

>	 NEWSHOSTING No Interest if paid in full by October 02, 2025	\$95.40 Remaining balance	\$8.13 Current accrued interest ?	Oct 02, 2025 Expiration date Set reminder
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[Glossary of terms](#)

Set up reminders for your PayPal Credit account

Receive email and text alerts about your balance, due date and account activity.

[Set Up Alerts](#)

A typical special finance purchase is a credit deal with no interest or fees if fully paid within 6 months. The gotcha is if you don't pay in that time, the customer takes a big hit on interest. This page was designed to engender brand loyalty and was successful based on feedback.



Credit Increase

Goals achieved

Created a standalone Request Credit Increase page showing credit account balances in line with Synchrony standards.

Provide easy to understand labels and help item for users to determine amounts to enter in 2 fields, a point of confusion in past UI.

Insert legally required disclaimer without destroying the look and feel of the page.

This page tested well and has been implemented without changes since 2022.

[← Back to PayPal](#)[Profile](#) | [Secure Messages \(0\)](#) | [Chat](#) [Log Out](#)

[Overview](#) [Activity](#) [Payments](#) [Benefits](#) [Credit Services](#)

Request Credit Increase

\$10,000.00
Current Credit Line

\$95.40
Current Balance

\$9,904.00
Available Credit

Request an increase to your current credit line by providing your requested credit line amount and your annual income after taxes.

New Credit Line: \$

The total credit line amount you are requesting.

You may be asked to provide your annual income after taxes if we do not have your recent information on file. Income is used to determine eligibility for a credit line increase. Subject to credit approval.

Annual Income after Taxes: \$

208,000

How to calculate your annual income ?

WI Residents only: If this is an individual account, please also include your spouse's income.

Request Credit Line Increase

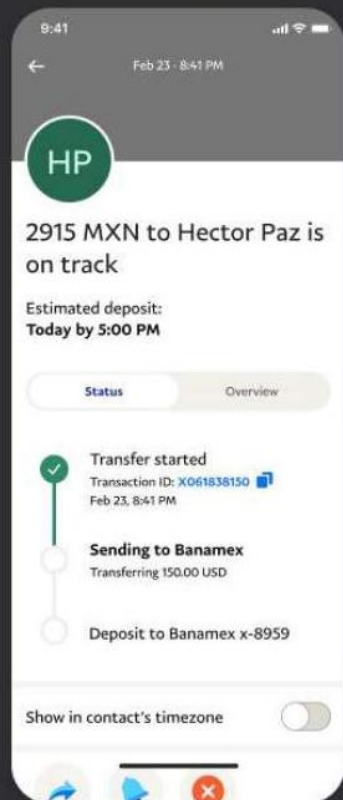
[Contact Us](#) [Online Privacy Policy](#) [Privacy Policy](#) [Online Usage Agreement](#) [Accessibility](#) [Fraud Protection](#)

Transaction Tracking

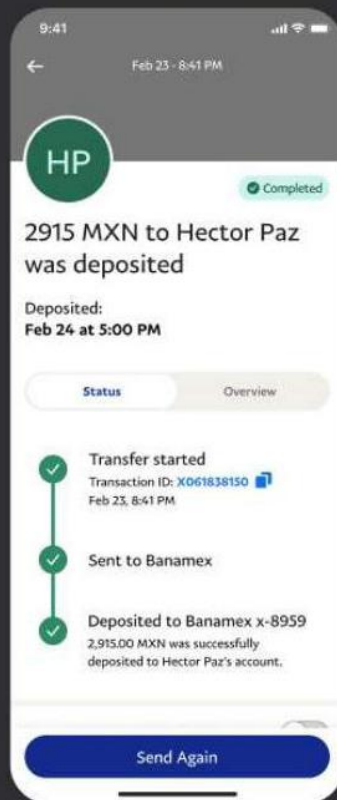
The ability to track transaction progress in real-time was an important milestone for Xoom and its customers.

Money tracking was missing at Xoom and a competitive disadvantage, so we developed a framework to handle all events related to money transfer in the mobile UI. This involved mapping hundreds of possible cases with engineers and providing relevant messaging to empower customers to know the status of their transfers, and enable them when they need to take action.

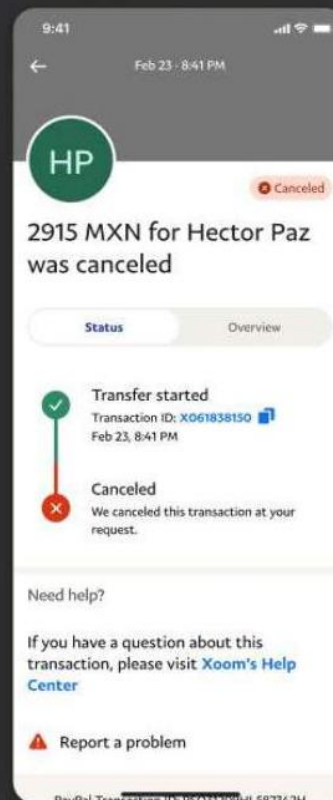
On Track



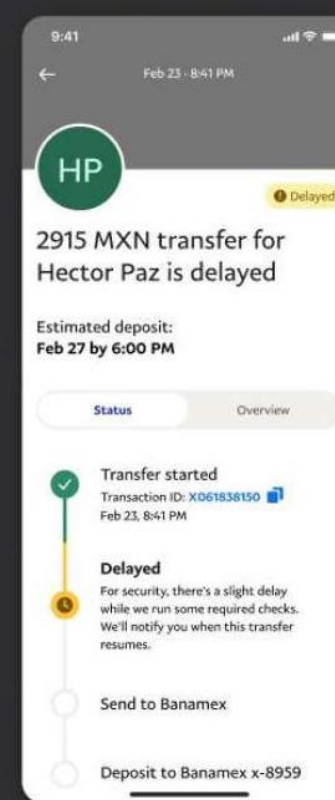
Completed



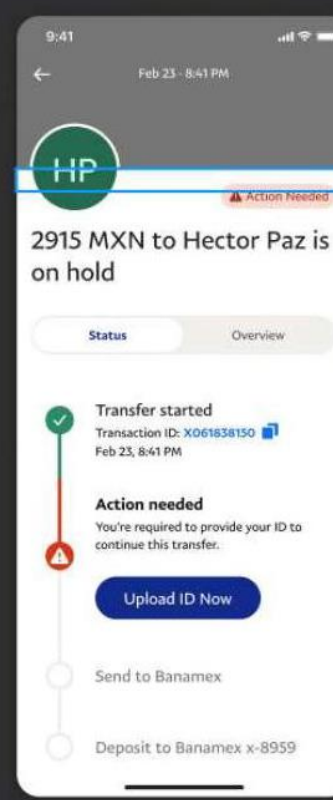
Canceled



Delayed



On Hold



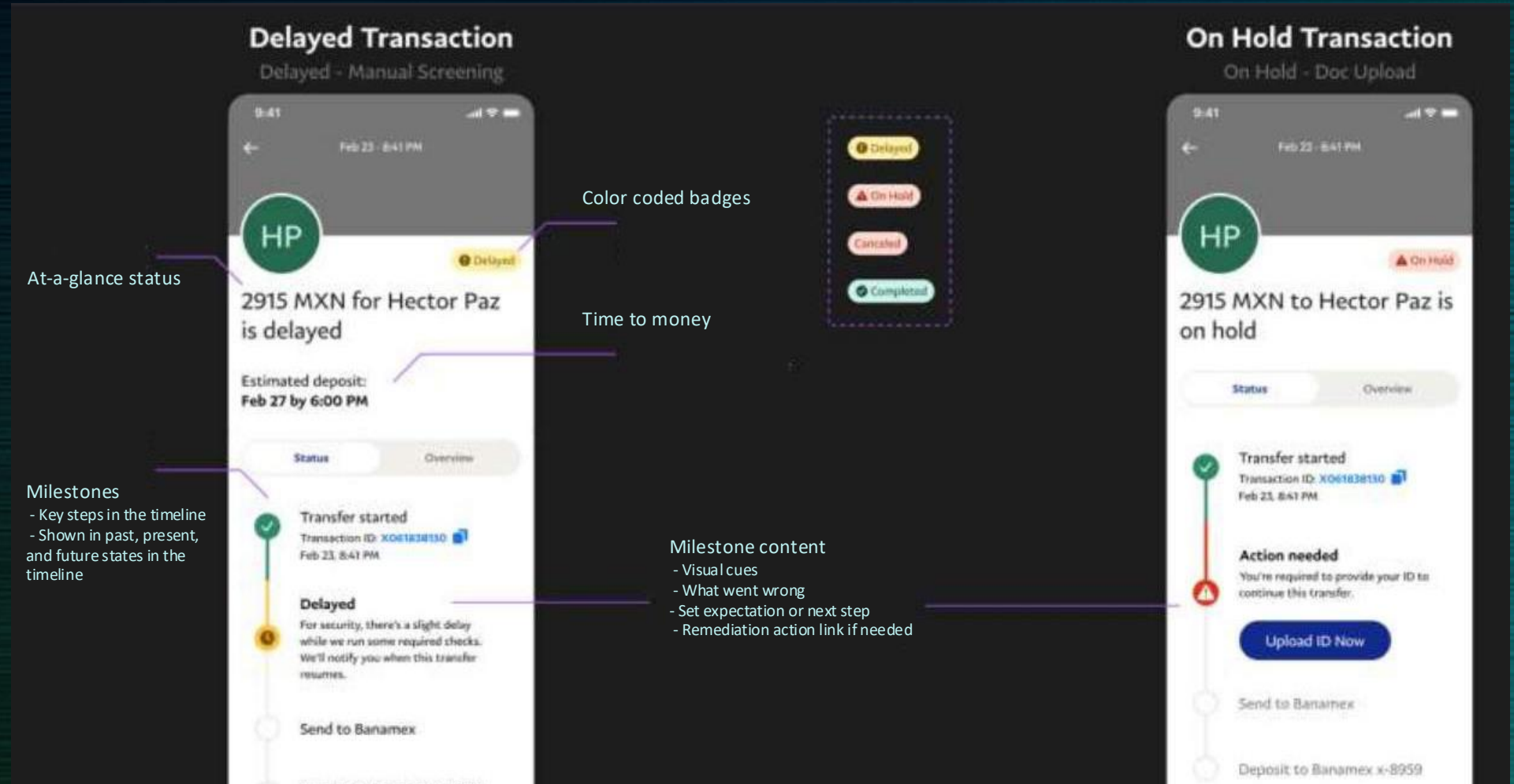
Transaction Tracking

The framework accounts for all types of scenarios, providing colorful visual cues that allows customers to quickly see if their money is moving or if there's an issue. Where possible, users see links that help them complete their transfers.

Money tracking is a game-changer and a big win for customers and the support team.

Call volume related to money transfer issues with banks and general delays was significantly reduced and customer feedback extremely positive.

This project was a huge cross-team effort that paid off for the business and helps Xoom compete with Western Union and Remitly.





Regulatory Change Management (RCM)

I managed the content and legal review process for global PayPal product legal updates, ensuring compliance with evolving regulatory requirements.

I worked closely with legal partners to drive alignment, secure signoff, and complete high-impact content changes under tight deadlines.

As the sole advocate for accessibility, clarity, and brand voice, I collaborated with legal and UX teams to simplify legal language and improve user experience across all PayPal products.

I owned the legal approval workflows, managing meetings and JIRA tracking in one of PayPal's most demanding content roles, consistently delivering under intense time pressure.





Tackling the TOP support issue for Symantec Trust Services

- SSL certificates, essential for web security, were very technical and difficult for average users to install and manage. Customers would often try to install them anyway to save money.
- SSL certificate and intermediate certificate installation was the #1 support issue for Symantec, who acquired the Verisign brand and thus had a huge customer base.
- 40% of support calls with customers were related to problems with certificate delivery and installation.



SSL Certificate Installs

Upgrading the tools and user experience

Goals

- Fully understand user tasks and workflows, and where and why users get stuck. Ensure steps are explained clearly in docs and help.
- Improve designs and flows while minimizing impact on development and engineering teams.
- Visibly improve the user experience for customers with better layouts, instructions, and less jargon.
- Provide clear paths for the various levels of user preparedness.
- Evaluate and understand our customer personas and provide a design that works equally well for the full range of users.
- Educate users that need information and help at key pain points in the journey, while not impeding users that know what to do and don't need explanation.
- Reduce support call volume. Enlist support team feedback to fine-tune designs to cover all use-cases.

Upgrading the tools and user experience

The Issues

The UX team collaborated with user research, support, and product management to identify the customer issues and see how to make it easier to install and maintain SSL certificates. Fixing the issues was a high priority and key business goal.

Key Issue #1 - Certificate delivery to the customer

The existing method of delivering certificates to customers was inadequate and problematic for many users, mostly due to using attachments in the delivery email – an outdated method for file delivery.

Key Issue #2 – Generating a CSR for the certificate

The requirement for customers to generate a CSR on their server is a big technical hurdle. The existing workflow had a lot of “gotchas” and show-stoppers that users found difficult to remedy, short of calling support.



Upgrading the tools and user experience

Discovery

- User Personas – Through user research for a similar project, we reviewed and agreed on two general personas of users.
 - Non-admin users – This user is familiar with basic concepts and terms, but not adept at working with servers, may not understand server jargon. This persona needs help and information along the way, step by step.
 - Admin or technical users – This user is familiar with SSL concepts and only needs basic steps to complete the job. This user understands server administration and jargon.



SSL Certificate Installs

Upgrading the tools and user experience

Discovery

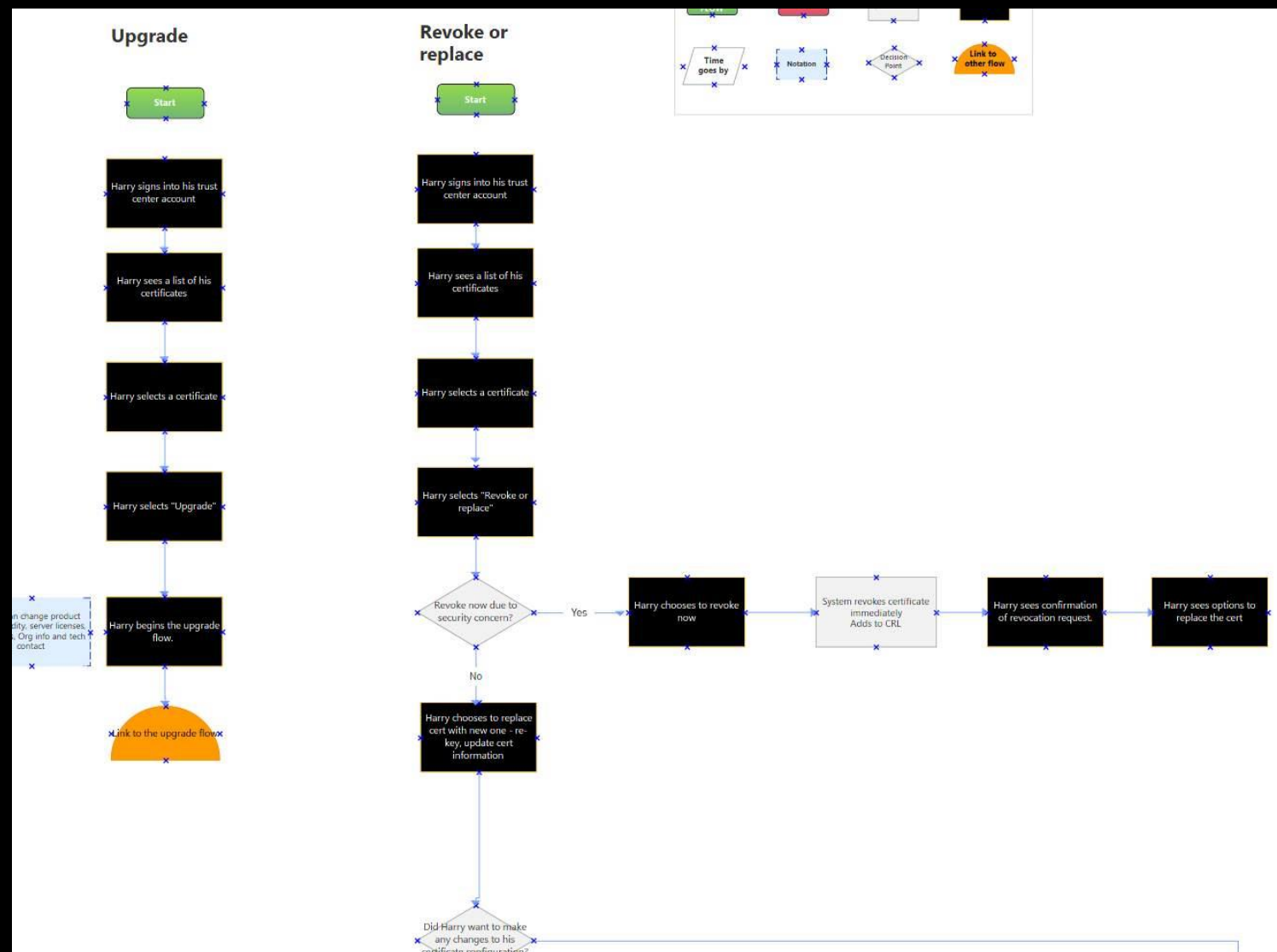
Task flow diagrams

UX created detailed steps of the user's task flows.

UX and content storyboarded the flows with a fresh look at key decision points on a task-specific basis.

Revisiting the task flows ensures that our UI steps are in line with the actual customer needs.

See a [larger user story diagram](#)




Upgrading the tools and user experience

Problems Identified

- The installation process and steps were not clear
- A lack of examples, help, or supporting media
- Incomplete information provided
- Not enough information collected from the user to tailor the experience
- Content not focused on the user's tasks
- Use of unsupported or unfamiliar jargon and terminology
- A complex email full of content not applicable to most users.

```
keytool -genkey -alias star_domain_com_2015Nov2 -keyalg RSA
-keysize 2048 -keystore star_domain_com_2015Nov2.jks -dname
"CN=*.domain.com, OU=OName, O=OrgName, L=Santa Clara,
ST=California, C=US" && keytool -certreq -alias
star_domain_com_2015Nov2 -file star_domain_com_2015Nov2.csr
-keystore star_domain_com_2015Nov2.jks
```

United States | English | 144QATESTFIRST 144QATESTLAST | [Help & Support](#) | [Feedback](#) | [Sign Out](#)

 Symantec. Trust Center

You must submit your CSR to continue.
Before we can issue your certificate, you must generate and submit a certificate signing request (CSR). You can submit your CSR now or come back later by signing in to your account.

1 Select your server


☒ Apache
☐ Microsoft IIS server
☐ Other server / I don't know


2 Generate your CSR

Automated CSR generation
Run the SSL Assistant tool on your server to generate your CSR.

Manual CSR generation
Use the manual instructions to generate your CSR.

OR

 **Apache on Red Hat**
[Instructions for Red Hat](#)

 **Manual instructions**

3 Submit your CSR

- RSA: Use a 2048-bit key to generate your CSR.
- DSA: Use a 2048-bit key and SHA-256 to generate your CSR.
- Do not include passwords or challenge phrases.
- We issue your certificate using the domain and organization submitted with your order, not your CSR.

Paste CSR here

How will I know when my certificate is ready?
Before we can issue the certificate, your organization contact needs to approve your order. We will email or call them for approval.
Meanwhile, we will verify your organization information.
When complete, you will receive an email with instructions to download and install your certificate.

[Go to the Trust Center](#)

CHAT WITH US
A representative is standing by

NEED ASSISTANCE?

CALL US
1-866-893-6565 or 1-520-477-3111

ORDER DETAILS

ORDER NUMBER
622049469

WEBSITE
qatestout162-11.qatestout1.com

YOUR RECEIPT
We will send you an email when your order is approved. You can also use the printer icon to print your receipt.

SSL Certificate Installs

Upgrading the tools and user experience

Generating a CSR

Original Page

Visual analysis

As part of the process, I evaluated the existing page and created tags indicating known issues to explore ways to improve.

It became apparent after this how much needed to be changed and improved. This diagram proved useful in discussions with interaction designers and stakeholders for discussing improvements.

United States | English | 144QATESTFIRST 144QATESTLAST | [Help & Support](#) | [Feedback](#) | [Sign Out](#)

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[Go to the Trust Center](#)

Annotations:

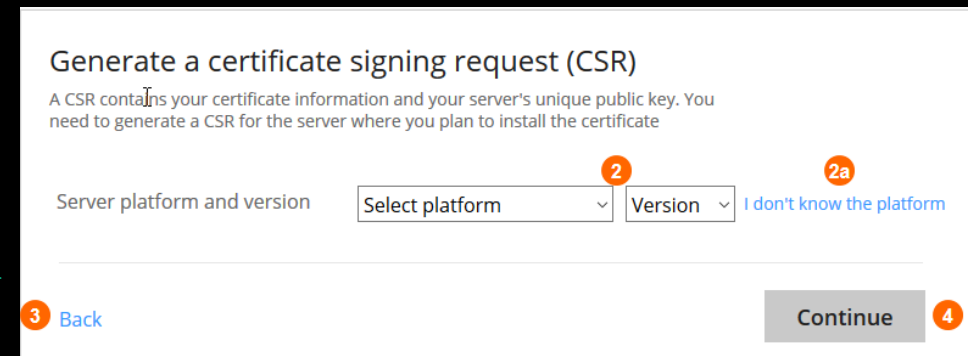
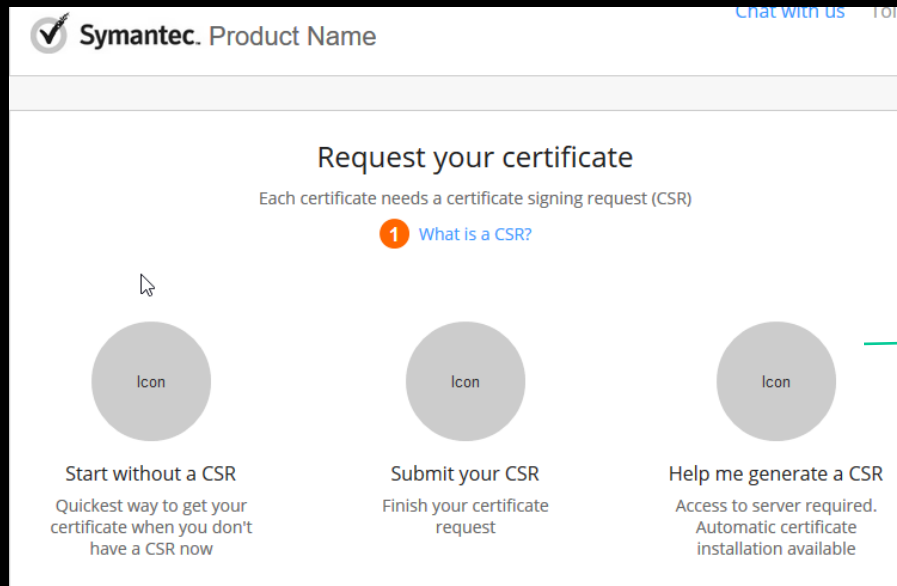
- Many users were stuck here - didn't know what a CSR is or how to submit one. No help was available.
- A representative is standing by
- NEED ASSISTANCE?**
- CALL US**
1-866-893-6565 or 1-520-477-3111
- ORDER DETAILS**
- ORDER NUMBER**
622049469
- WEBSITE**
qatestout162-1 testout1.com
- YOUR RECEIPT**
We will send you a receipt when your order is approved. You can also use the printer icon to print receipt.
- Redundant text. Not clear how to "come back later"
- Inadequate options for server definition
- A reference to a tool most users have never seen or do not know how to get
- Complex criteria is a jargon filled mess
- Complex instructions, very generalized
- With no examples or help. Users would call support.
- Most references to "we" are not user focused and the information is more relevant to the company, not the user.
- The user's expectation and goal is the last thing mentioned in tiny print

Solution 1

Change the order of information collected to better focus the user down one of three different paths at the outset.

Result

- User expectations are better understood at the outset.
- Users follow a path most appropriate to their needs and situation.



Solution 2

- **Refocus content and messages** onto user tasks and education. Vet new and proposed content ideas rigorously through testing and peer review.
- Re-draft What is a CSR? ([See KB article](#))
- Make sure improved content and contextual help is prominent, visible, and thoughtfully placed.

Result

- Users get only the info they need and feel more comfortable when messaging is directed to their tasks, and when they can quickly find the info they need in the context of the UI and help links.

Solution 3

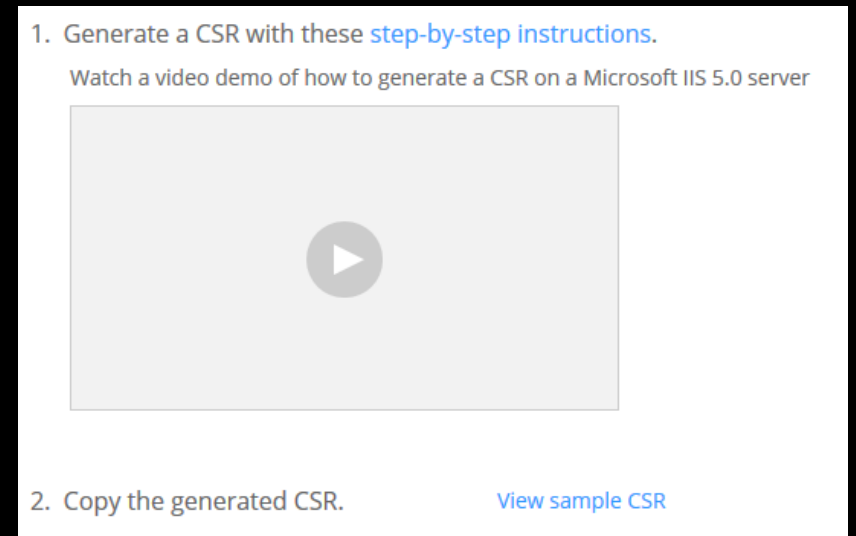
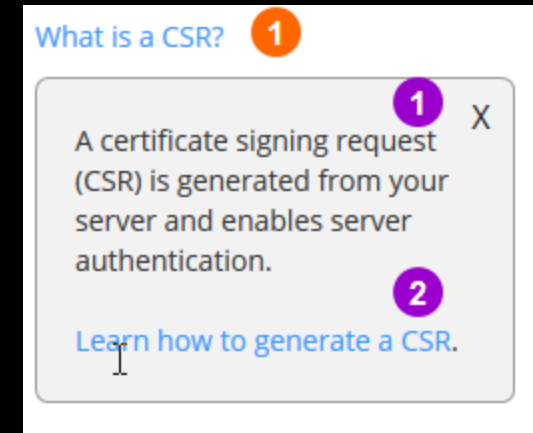
Provide user education at appropriate places using tool tips, code samples, CSR samples, videos, and help links.

Result

Users have more information and details about concepts or terms they don't understand without calling support or needing other guidance.

Examples

- "What is CSR?" tool tip (on right)
- "Learn how to generate a CSR" help topic
- "I don't know the platform" help topic
- "View sample CSR" example text of a real CSR
- "Generate a CSR" video tutorial



Solution 3

Example

- Better steps that are more clear.
- Links to instructions and more info in places where users get stuck.

Generate your CSR

- 16** 1. Run this command on the server where you plan to install the certificate:

```
openssl req -new -newkey rsa:2048 -nodes -out  
www_ruthsboutique_com.csr -keyout www_ruthsboutique_com.key -subj "/  
C=US/ST=California/L=Mountain View/O=Ruths Boutique Inc./  
CN=www.ruthsboutique.com"
```

2. Select and copy the generated CSR.

[View sample CSR](#)

16a

The Certificate Signing Request (CSR) begins with the line

-----BEGIN CERTIFICATE REQUEST-----

and ends with the line

-----END CERTIFICATE REQUEST-----

3. Return to this page and click Submit CSR.

4. On the CSR page, paste the CSR in the appropriate field.

Refer to these instructions for more information:

- 16** [Step by step instructions for Apache](#)

18

Solution 4

- **Create the server selection wizard** to simplify server criteria selection. Users can also now select server type and version. The wizard achieves the following:

Result

- Enabled use of smart defaults based on their selections.
- Allowed delivery of better, more specific information about the user's installation (rather than making users have to dig for it).

The screenshot shows a web form titled "Generate a certificate signing request (CSR)". Below the title is a descriptive paragraph: "A CSR contains your certificate information and your server's unique public key. You need to generate a CSR for the server where you plan to install the certificate". The form includes a section labeled "Server platform and version" with two dropdown menus: "Select platform" and "Version". To the right of these dropdowns is a link that says "I don't know the platform". At the bottom left of the form is a "Back" button, and at the bottom right is a "Continue" button. Red circular callouts with numbers are placed over the form: "2" is over the "Select platform" dropdown, "2a" is over the "Version" dropdown, "3" is over the "Back" button, and "4" is over the "Continue" button.

Generate a certificate signing request (CSR)

A CSR contains your certificate information and your server's unique public key. You need to generate a CSR for the server where you plan to install the certificate

Server platform and version

Select platform Version I don't know the platform

Back Continue

Solution 5

Provide additional UI for special use-cases (server type).

Result

- The user experience is now more robust and complete for many variable setups and environments that previously required the help of the support team. This accommodates a much wider array of users and simplifies the process for all users.

Figure A-1.2: Supported server type (for KLEE), Select org, Common name, SANs,

Generate a certificate signing request (CSR)

A CSR contains your certificate information and your server's unique public key. You need to generate a CSR for the server where you plan to install the certificate

Server platform and version [I don't know the platform](#)

Organization [Change organization](#)

A CSR requires information about the organization that requests the certificate

Headquarters
Mountain view, California
United States

Solution 6

UX to enlist support team member's input for direct feedback during design and content iteration.

Result

- The support team's in depth knowledge of user issues helped UX fine tune our designs to cover all the bases for users, further reducing future support calls and pleasing customers!

Summary

Successful implementation of the project goals yielded immediate positive feedback from our support team and some of our customers.

We were delighted to hear about how the upgrades directly helped reduce calls and make customers that were used to the old process much happier.

Real-world evidence and the test of time validates many of the assumptions we made.

This project was a huge win and an important set of improvements for the main product behind the number one recognized brand on the Internet at the time, the Verisign check mark.

The process outlined illustrates key areas of teamwork, strategy, and planning that goes into content and app design and development in a corporate setting.

Certificate Intelligence Center



Principal Information Developer

I led content strategy and development for a \$50M enterprise software project designed to help large organizations manage SSL certificate installations at scale. The tool identified certificates across complex networks—such as those at major banks—and reported on their status and expiration. The highly technical nature of the discovery and reporting mechanisms added significant development challenges, requiring close collaboration with engineering teams to ensure accurate, user-friendly documentation.

In addition to UI content, I wrote the [CIC Installation Guide](#) and the [Technical Manual for CIC](#), in addition to a [Quick Reference Guide](#) and release notes for the earliest versions of this software.

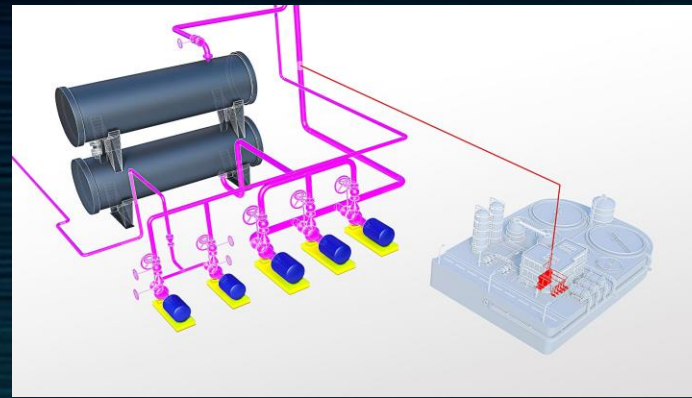
 Symantec. Certificate Intelligence Center for Mobile

Get an executive view for all of your SSL certificates





AutoCAD Plant 3D AutoCAD P&ID



Senior Technical Writer at Autodesk

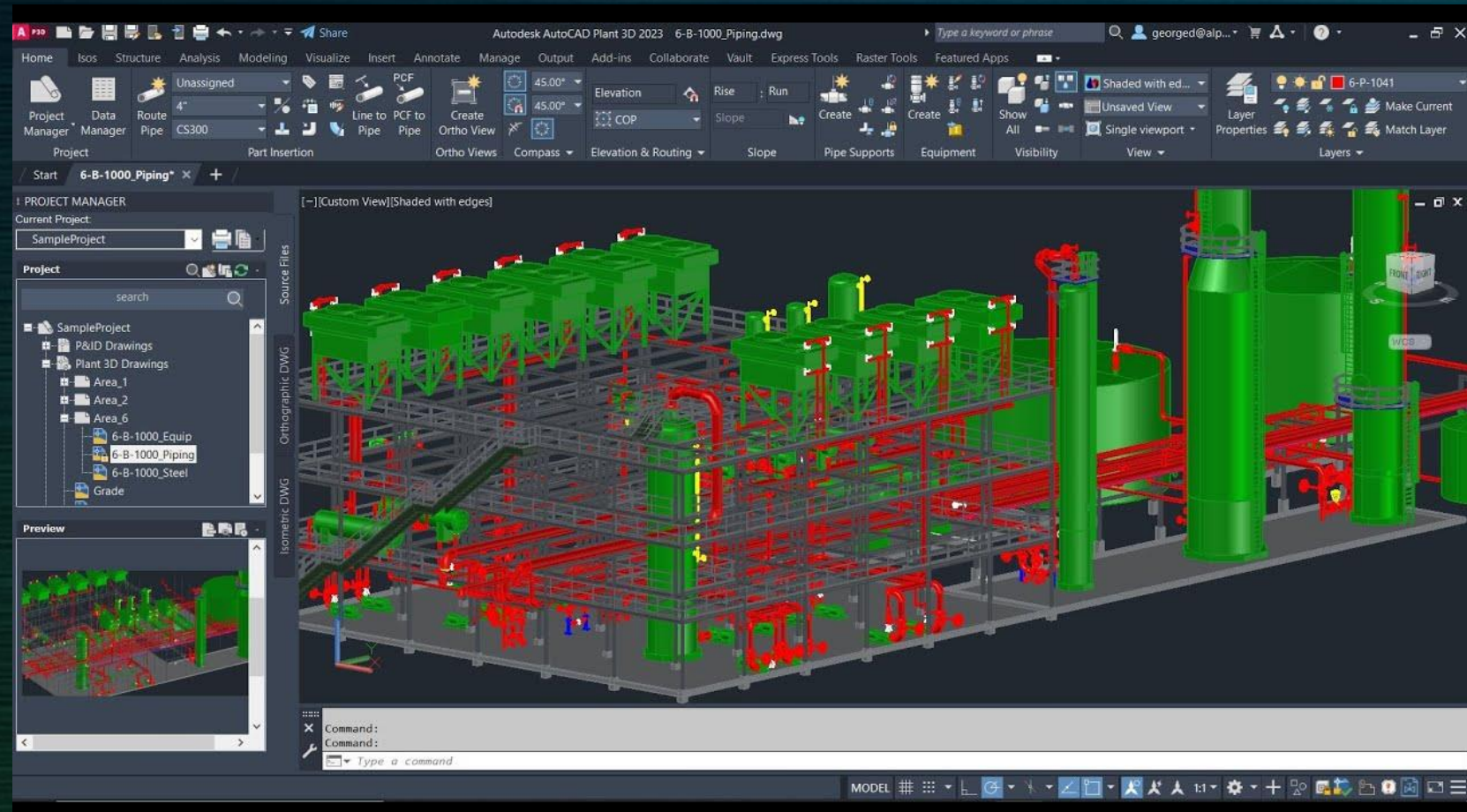
I developed technical content for AutoCAD P&ID and AutoCAD Plant 3D, a next-generation 3D CAD tool built for designing large-scale infrastructure like power plants and refineries. The tool enabled engineers to model complex piping networks using a library of real-world components. I authored the manual for the [Specs and Catalogs Editor](#), a companion tool for managing parts data.

My work focused on creating clear labels, tooltips, and procedural content for a highly specialized, dense PC interface—writing step-by-step procedures tailored for engineers. Content development required close collaboration with global SMEs, including late-night meetings with piping engineers and intensive reviews with local product owners to ensure technical accuracy and localization friendliness.



AutoCAD Plant 3D

I wrote content for labels, tooltips and help items for this extremely dense user interface. The content was localized into 19 languages, and we were trained to write consistently with as many reusable phrases as possible to conserve translation costs.



SpringCM Document Management

I was **Senior Technical Writer at SpringCM**, an innovative document management firm that provided software as a service long before Dropbox was a name. I worked directly with the CEO to develop their website and key documentation such as the [SpringCM User Guide](#).

Connectix

I was **Senior Technical Writer at Connectix** where I created the [Virtual Server 1.0 Getting Started Guide](#) and all support documentation for the revolutionary virtual machine software Virtual PC and Virtual Server. Virtual Server could run up to 64 separate virtual machines on a single hardware box! Because Virtual Server threatened so many of Microsoft's business models, Connectix was quickly purchased by Microsoft after its release. Subsequently they sacrificed the product to save their legacy, leading to the rise of VMWare.