



Customer Manager OnLine : Early Wireframes

Interaction / Information Architecture



User Experience Goals

- **Surface key actions & features**
- **Provide clear feedback**
- **Be flexible**



Early Information Architecture

Overarching Framework Smart Blog Framing

Windowing

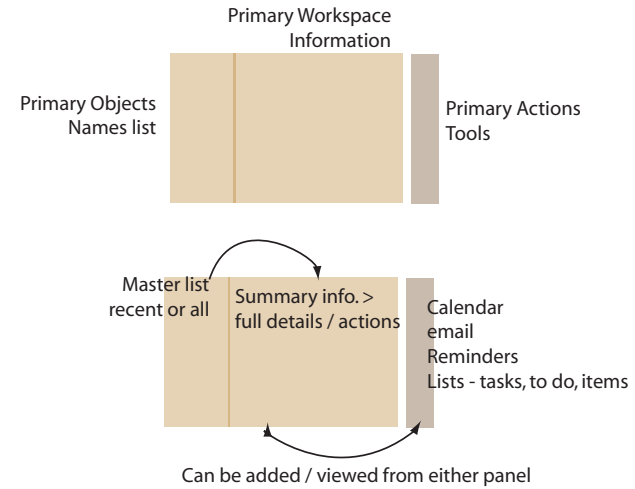
- Clear categorization of types of information / actions
- Flexible / adaptable to the way people run their business
- Lightweight actionable 'card' paradigm

Navigation

- Master / Detail
- Summary views to full details
- In context actions - smart tags

Presentation

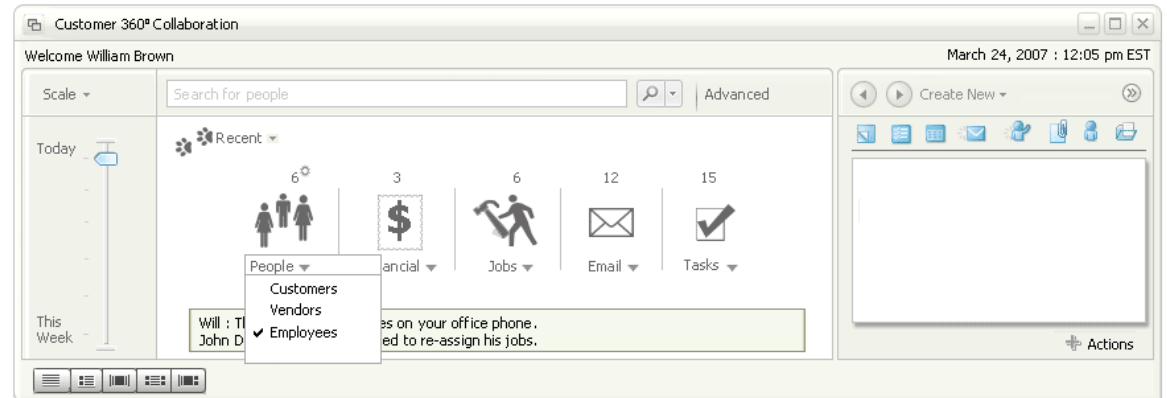
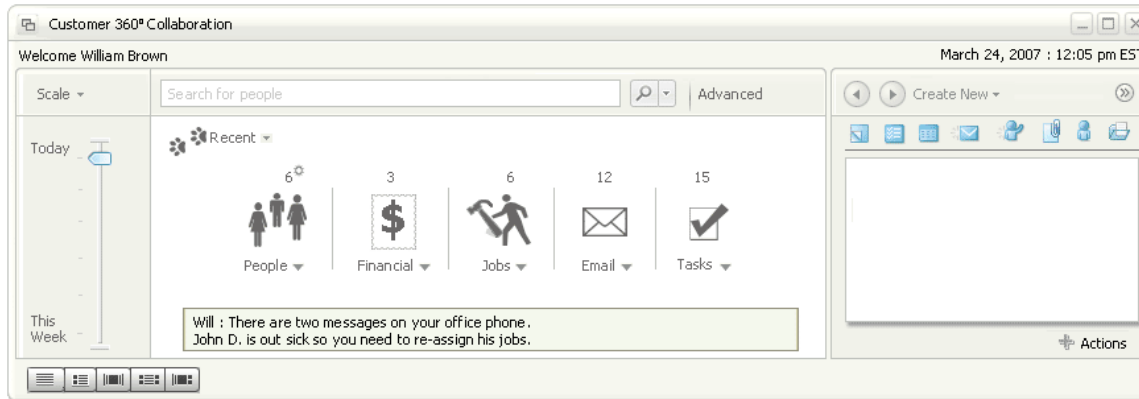
- Dynamic transition of view - card rotate, panels slide, tool panel floats over workspace
- Hover over to view prior to 'pinning'
- Tool panel can be 'detached'



Mordecai SBD XD

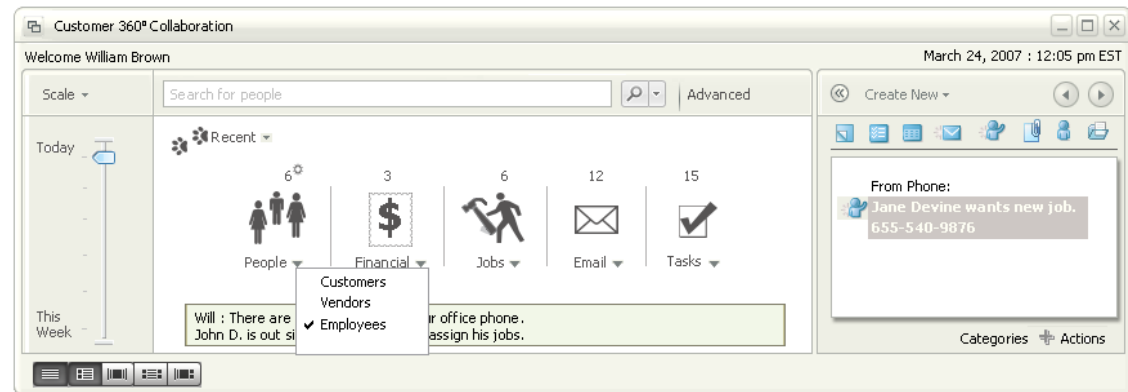
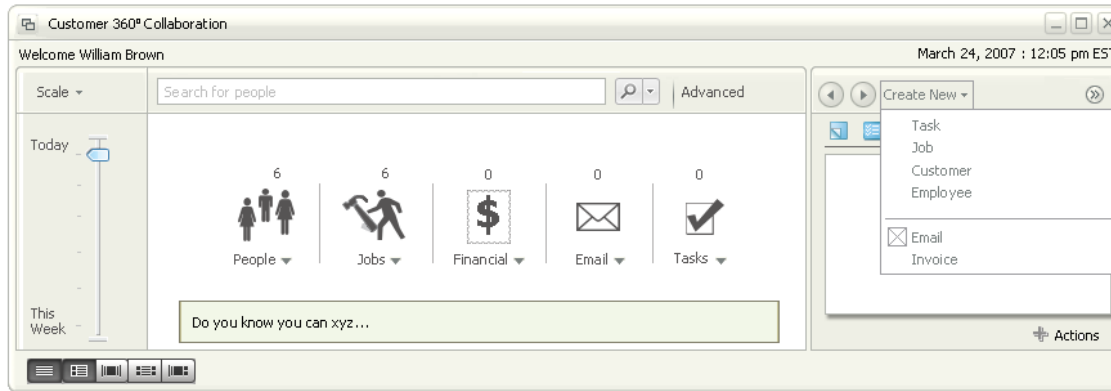


Early Wireframes – High Level Summary





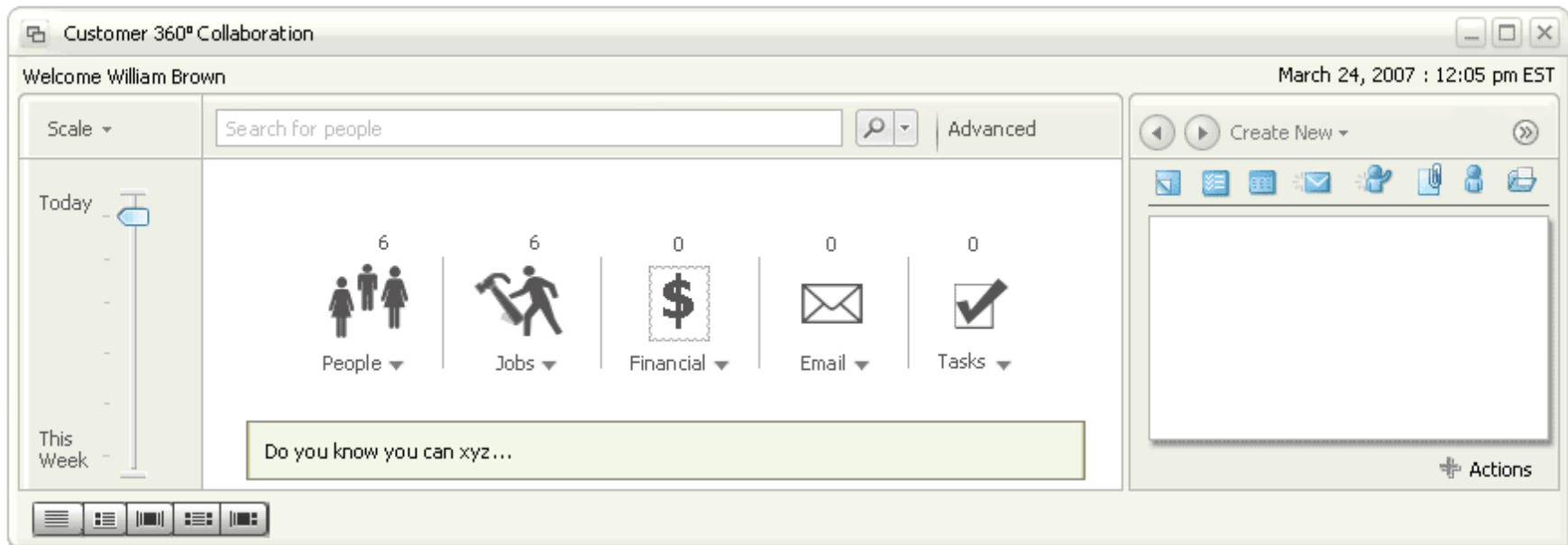
Early Wireframes – High Level Summary





New User Flow

- **Assume**
 - Import of small data file during installation





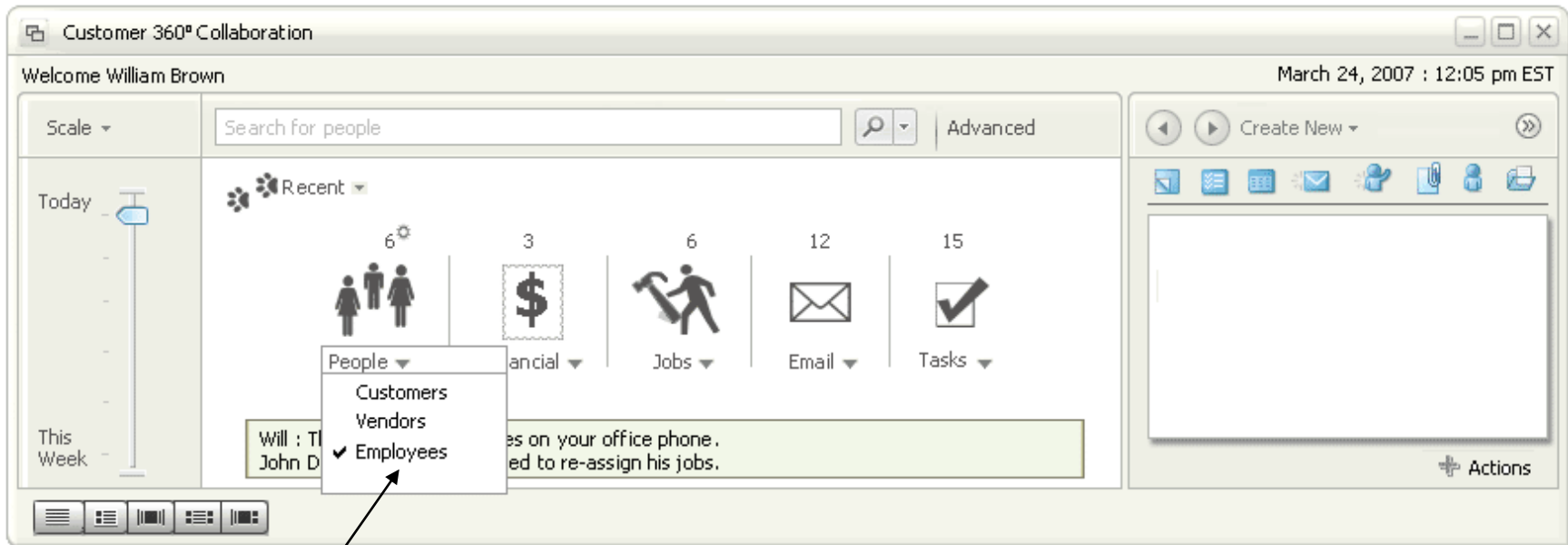
Reassign Job

The screenshot shows the 'Customer 360 Collaboration' application window. The title bar includes the application name and window controls. The main content area is titled 'Welcome William Brown' and shows the date 'March 24, 2007 : 12:05 pm EST'. A search bar is present with the text 'Search for people' and a magnifying glass icon. Below the search bar, there are five categories with icons and counts: 'People' (6), 'Financial' (3), 'Jobs' (6), 'Email' (12), and 'Tasks' (15). A notification box at the bottom of the main area contains the text: 'Will : There are two messages on your office phone. John D. is out sick so you need to re-assign his jobs.' An arrow points from this notification to the text 'Message left for co-worker' below the screenshot. On the right side, there is a 'Create New' button and a toolbar with various icons. At the bottom left, there are several small icons for navigation and settings.

Message left for co-worker



Selects Employees



View of Employees to see who is available



Employee quickly found

Customer 360° Collaboration

Scale ▾

Search for... ▾ Advanced

Today

This Week

Employees : Summary

Name	Date	Number	Status
Dee, John	01/22/07	414-292-8691	Ill
Martin, Bubber	02/30/07	423-980-8796	Full Schedule
Signal, Harry	04/23/06	414-568-8750	Available

Create New ▾

jot down notes or sketch an idea...

⊕ Actions

Switch View - Select of a name



Selects to view jobs

Customer 360° Collaboration

Scale ▾ Search for... [Magnifying Glass] ▾ Advanced

Today [Slider]

This Week

Employees : Summary

Name	Date	Number	Status
Dee, John	01/22/07	414-292-8691	Ill
Martin, Bubber	02/30/07	423-980-8796	Full Schedule
Signal, Harry	04/23/06	414-568-8750	Available

Create New ▾ [Icons]

jot down notes or sketch an idea...

Actions

[Navigation Icons]

Select to view details for that name



Brings up information – and take action

Customer 360° Collaboration

Scale ▾ Search for... Advanced

Today [Timeline]

Employees : Summary

Name	Date	Number	Status
Dee, John	01/22/07	414-292-8691	Ill
Martin, Bubber	02/30/07	423-980-8796	Full Schedule
Signal, Harry	04/23/06	414-568-8750	Available

jot down notes or sketch an idea...

Actions

Dee, John Search for... Advanced

Jobs : Summary

Job Title	Start Date	End Date	Status

Create New ▾ Actions ▾

- ✓ Assign
- Send Email
- ...

Create a new assignment



Integration and repurpose data

The screenshot shows the 'Customer 360 Collaboration' interface. At the top, it says 'Welcome William Brown' and 'March 24, 2007 : 12:05 pm EST'. The main area has a search bar and a 'Recent' section with five categories: People (6), Financial (3), Jobs (6), Email (12), and Tasks (15). A notification box at the bottom says: 'Will : There are two messages on your office phone. John D. is out sick so you need to re-assign his jobs.' On the right, a 'From Phone:' notification says: 'Jane Devine wants new job. 655-540-9876'. Two arrows originate from the text 'Create a new job for a customer' below the screenshot: one points to the 'Jobs' category icon, and the other points to the 'From Phone:' notification.

Create a new job for a customer



Can direct create or create detail

Customer 360° Collaboration

Scale ▾ Search for... [Magnifying Glass] Advanced

Today [Slider]

This Week [Slider]

Customers : Summary

Devine, Jane	01/22/07	414-292-8691

From Phone:
Jane Devine wants new job.
655-540-9876

Actions

Devine, Jane Search for... [Magnifying Glass] Advanced

Jobs : Summary

Create New ▾ Job

There are no current jobs for this customer



View of details and actions

Customer 360° Collaboration

Welcome William Brown

March 24, 2007 : 12:05 pm EST

Scale ▾ Search for people [Magnifying Glass] ▾ Advanced

Partial [Slider]

Suzanne Ecker [Dropdown] [Left Arrow] [Right Arrow]

Name Profile	
Name	Suzanne Ecker
Show As	Ecker, Suzanne ▾
Groups	Customer
Settings	Favorite, Show, Public
Company	Ecker Design
Job Title	▾
Phone: Work	415-555-6729
Fax: Work	415-555-6729
E-mail: Main	suzanne@eckerdesigninc.com

Address: Bill To 109 N. Elm Street
Middlefield, WY 37862 [Map]

Address: Home

Attended show

Customer since

New field... [Add a new custom field]

Actions

Full [Slider]

Ecker, Suzanne Search for people [Magnifying Glass] ▾ Advanced

Invoice: Details Create New ▾ Actions ▾ View ▾

[Customer: Job] ▾ Estimate Active Class ▾ Quote

Name / Address	Rep	Date	Quote
	▾	12/15/2007 [Calendar]	71010

Item	Description	Qty	Class	Total	Tax

Jobs : Summary Create New ▾ Actions ▾

Save Cancel



Search

The screenshot shows the 'Customer 360 Collaboration' application window. The title bar reads 'Customer 360 Collaboration' and the system tray shows 'March 24, 2007 : 12:05 pm EST'. The main content area is titled 'Welcome William Brown'. On the left, there is a vertical navigation bar with 'Today' and 'This Week' sections. The central search area has a search bar containing 'Search for people' and an 'Advanced' button. Below the search bar, there are two category filters: 'People' with a count of 6 and 'Financial' with a count of 3. A dropdown menu is open over the search bar, listing 'People (default)', 'Financial', 'Jobs', 'Email', 'Tasks', and 'custom categories...'. To the right of the search area, there is a 'Create New' button and a '15' indicator. Below the search area, there is a notification box that says 'Will : There are two messages on your office phone. John D. is out sick so you need to re-assign his jobs.' On the far right, there is a 'jot down notes or sketch an idea...' text area and an 'Actions' button. The bottom of the window features a toolbar with various icons.



Search Results

Customer 360° Collaboration

Welcome William Brown

March 24, 2007 : 12:05 pm EST

Scale ▾ Search for people [] Advanced

Today []

This Week []

	Name	Modified	Main Phone	More fie
[Add a new record]				
0182	Abbitt, Watkins	10/21/06	702-555-0819	
0019	Abernathy, Claude A.	10/21/06	804-555-1956	
0354	Abidor, Robert	10/21/06	732-555-0197	
0191	Ackerman, Katherine	10/21/06	414-444-1234	
0201	Ackerman, Mary	10/21/06	303-555-8122	
0357	Ackerson, James	10/21/06	414-423-6893	
0346	Adaia, Floyd D.	10/21/06	414-322-7869	
1290	Adams, Mark	01/27/07	303-988-5638	
0893	Adams, Philip	02/20/07	414-908-3289	
0562	Adams, Victoria	10/21/06	414-423-5782	
1242	Alan, Dale	02/28/07	414-322-7890	
0934	Albaugh, David	10/21/06	414-423-1785	
0396	Aldrich, Jim	10/21/06	414-908-7283	
0799	Aldrich, Ken	03/14/07	414-892-3459	
0002	Aldrich, Leigh	10/21/06	303-292-3846	
0021	Alexander, Douglas	10/21/06	414-908-2094	
0874	Alexander, Mitchell	01/31/07	303-989-2641	
1203	Alice, Shyu	10/21/06	414-908-7294	
0017	Allem, Gerald	10/21/06	414-908-2839	
0569	Allen, Ed	10/21/06	414-322-4955	
0833	Alumbaugh, Claude	01/22/07	414-292	

Create New ▾

jot down notes or sketch an idea...

Actions



Early Wireframes - Summary

Customer 360° Collaboration

Scale ▾ Search for... Advanced Create New ▾

Today ▾

Employees : Summary

Name	Date	Number	Status
Dee, John	01/22/07	414-292-8691	Ill
Martin, Bubber	02/30/07	423-980-8796	Full Schedule
Signal, Harry	04/23/06	414-568-8750	Available

This Week ▾

Dee, John Search for...

Jobs : Summary

QuickBooks CRM

File Edit View Help

All Names ▾ All Projects ▾ Search: Enter any keyword

Name Profile

Name	Suzanne Ecker
Show As	Ecker, Suzanne
Groups	Customer
Settings	Favorite, Show, Public
Company	Ecker Design
Title	
Phone: Work	415-555 6729
Fax: Work	1752 276 17
Phone: Home	
E-mail: Main	suzanne@eckerdesigninc.com
Address: Bill To	109 N. Elm Street Middlefield, WY 37862
Address: Home	
Attended show	<input type="checkbox"/>
Customer since	
New field...	[Add a new custom field]

To Do

Subject	Due
[Add a new To Do item]	
<input type="checkbox"/> Finish updating project plan from m...	
<input type="checkbox"/> Remind Joan to call Alan back about...	

Appointments: One Month ▾

[Add a new appointment]

Fri, 3/16
2:00 P Review blueprints

Wed, 3/28
9:00 A Installation day

Fri, 3/30
Electrical Inspection

+ Add as a note

Add to

Adams, Victoria ▾ No Project Selected ▾

Tag as

Urgent Call Private

Notify

Notify people of this note:

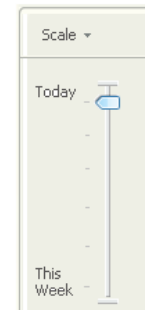
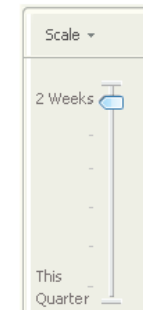
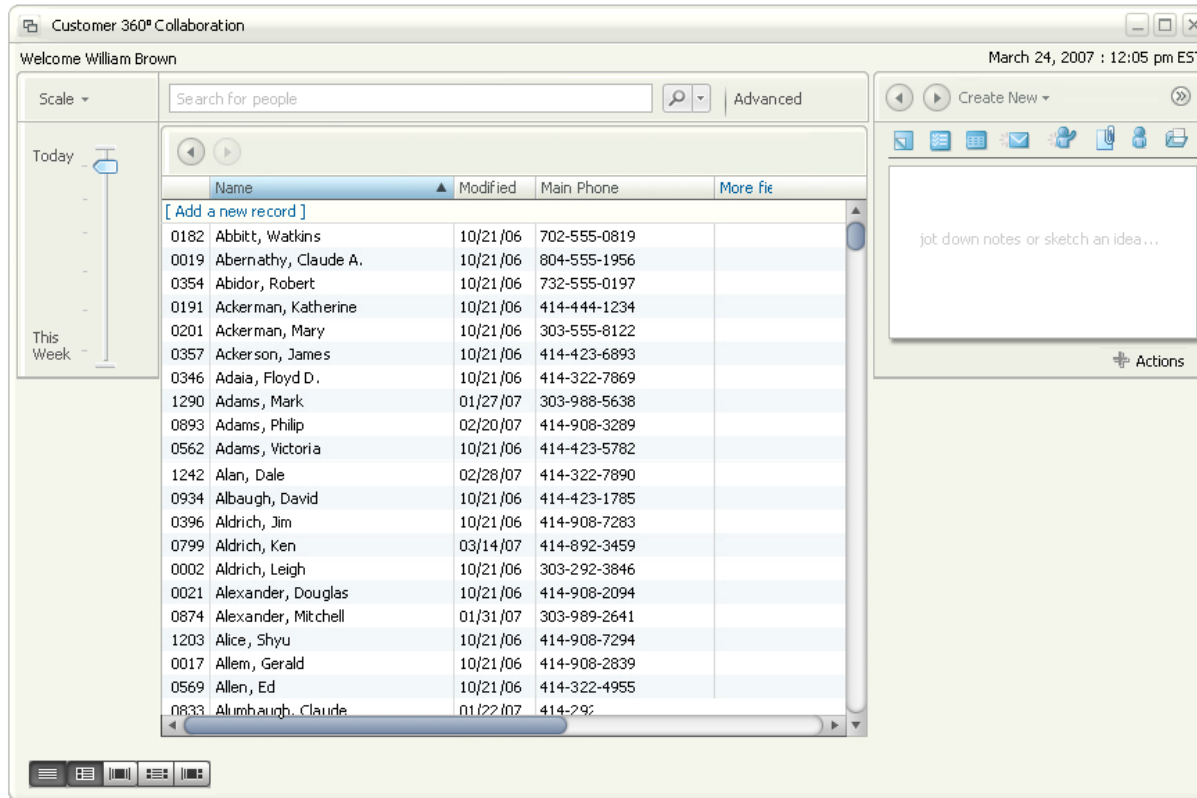
All staff Project team

[Select people to notify]

Name	Modified	Main Phone	More fields...
[Add a new record]			
0182 Abbitt, Watkins	10/21/06	702-555-0819	
0019 Abernathy, Claude A.	10/21/06	804-555-1956	
0354 Abidor, Robert	10/21/06	732-555-0197	
0191 Ackerman, Katherine	10/21/06	414-444-1234	
0201 Ackerman, Mary	10/21/06	303-555-8122	
0357 Ackerson, James	10/21/06	414-423-6893	
0346 Adaia, Floyd D.	10/21/06	414-322-7869	
1290 Adams, Mark	01/27/07	303-988-5638	
0893 Adams, Philip	02/20/07	414-908-3289	
0562 Adams, Victoria	10/21/06	414-423-5782	
0437 Adcock, Robert L.	10/21/06	414-309-5183	
1109 Adkins, David	03/14/07	414-322-1490	
0237 Afton, Dave	10/21/06	303-980-4598	
0405 Anee, Michael D.	10/21/06	414-908-6751	



Early Wireframes – ideation on widgets





User Object Model – QuickBooks and CMO

