



# **Customer Manager OnLine : Ideation Post Research**

**Interaction / Information Architecture**



## User Experience Goals - consistent

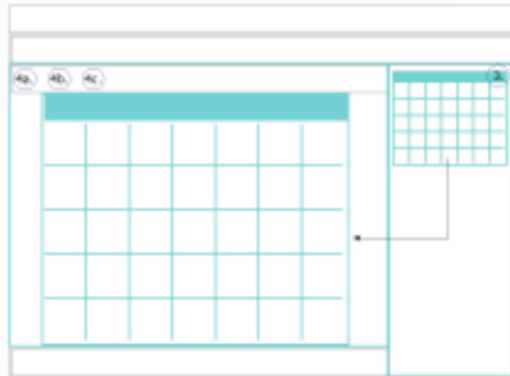
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- **Surface key actions & features**
- **Provide clear feedback**
- **Be flexible**



# Updated Information Architecture

- \* Links in the tool pane can launch views in the Primary Workspace
- \* Smaller views are summaries and act as navigation gateways to larger views
- \* Larger views allow for intensive data entry



D1. Tools in the tool pane can become full view.



D2. All summary view - as an option for a Home page



D3. Unstructured data entry into structured / categorized data



# Add Customer / Add Job

The screenshot shows a software interface for customer management. At the top, there is a search bar labeled "Search all names" and window control buttons. The main area is divided into three sections: a left sidebar, a central message history, and a right sidebar with tools.

**Recent / All**

**Inquires**

- Neil Newman
- Emily East 9am  
June 18, 2007  
B. Wells
  - Details
  - Jobs
  - \$ transactions
  - Documents
  - Notes
  - Emails
- June Bug 10:05 am  
June 18, 2007  
M. Bacigalupi
  - Details

**Message History:**

Thursday, June 19, 2007 4:35 pm  
M. Bacigalupi  
M. Bacigalupi 6/19/07

**Neil Newman**

Now has dates for event. Nov. 21, 2007. Sunday afternoon. A dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles, and a large chocolate cake. Need taste appt. Sept. 15, 10 AM.  
415-654-5567 - mobile  
**To Do:** submit taste test order of desserts

Monday, June 16, 2007 10:30 am  
B. Wells

**Neil Newman**

Currently looking for a catering service for customer appreciation event for his business. Desserts only. 415-654-5567 - mobil  
**Next Steps:** Will call back. No action required.

Results for: Nov. 21, 2007

To Dos:

Events:

Reminders:

**No customer record**

View **Financial Activity**  
Time Frame (set▼)

7 am 8 9 10 11 12 1 2 3 4 5 6 7 8 pm

**Tools**

- Calendar
- Envelope
- Document
- Pen and Paper
- Mobile Phone
- Checklist



# Add Customer

The screenshot shows a software interface for customer management. At the top, there is a search bar labeled "Search all names" and window control buttons. The main area is divided into a left sidebar, a central message history, and a right sidebar with tools.

**Recent / All**

Inquires

Neil Newman

**Tag**

- Add New Customer
- Assignments
- Note
- Address
- Resources
- To Dos
- Events
- Reminder
- Send as SMS
- Customize My Tags...
- Remove Tag

Thursday, June 19, 2007 4:35 pm

M. Bacigalupi  
M. Bacigalupi 6/19/07

**Neil Newman**

Now has dates for event. Nov. 21, 2007. Sunday afternoon. A dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles, and a large chocolate cake. Need taste appt. Sept. 15, 10 AM.  
415-654-5567 - mobile  
**To Do:** submit taste test order of desserts

Monday, June 16, 2007 3:30 am

B. Wells

**Neil Newman**

Currently looking for a catering service for customer appreciation event for his business. Desserts only. 415-654-5567 - mobil  
**Next Steps:** Will call back. No action required.

Results for: Nov. 21, 2007

To Dos:

Events:

Reminders:

No customer record

View Financial Activity

Time Frame (set)

7 8 9 10 11 12 1 2 3 4 5 6 7 8

am pm



# Add Customer – Contact Card

The screenshot displays a software interface for customer management. On the left, a sidebar shows a list of recent contacts: Neil Newman, Emily East 9am (June 18, 2007, B. Wells), and June Bug 10:05 am (June 18, 2007, M. Bacigalupi). The main area shows a contact card for Neil Newman, including a photo placeholder, name, and contact information. A pop-up window is open over the contact card, displaying a note about an event on Nov. 21, 2007. The interface also features a search bar, a 'Tools' panel with icons for calendar, envelope, document, and calculator, and a 'No customer record' message at the bottom. A time frame graph is visible at the bottom right, showing activity from 7 am to 8 pm.

Recent / All

Inquires

Neil Newman

Emily East 9am  
June 18, 2007  
B. Wells  
Details  
Jobs  
\$ transactions  
Documents  
Notes  
Emails

June Bug 10:05 am  
June 18, 2007  
M. Bacigalupi  
Details

Search all names

Thursday, June 19, 2007  
4:35 pm

M. Bacigalupi  
M. Bacigalupi 6/19/07

Neil Newman

Now has dates for event. Nov. 21, 2007. Sunday afternoon. A dessert and  
ts cookies, eclairs, truffles, and a  
ept. 15, 10 AM.

Click to enter notes

Neil Newman

Contact information Edit contact

Mobil: 415-654-5567  
Address:  
Event: Nov. 21st, 2007  
Appt.: Sept. 15, 10 AM

Contact updates: Automatic

Enter phone number  
Enter new field  
Enter referral

No customer record

View Financial Activity

Time Frame (set)

7 8 9 10 11 12 1 2 3 4 5 6 7 8 am pm



# In Context Add Job

**Intuit Customer 360®**

Recent / All Search all contact information Welcome B. Wells, Nov. 2, 2007 9 am

Name	Main Phone
Abbitt, Watkins	702-555-0819
Abernathy, Claude A	804-555-1956
Abidor, Robert	732-555-0197
Ackerman, Katherine	414-444-1234
Ackerman, Mary	303-555-8122
Ackerson, James	414-423-6893
Adaia, Floyd D.	414-322-7869
Adams, Mark	303-988-5638
Adams, Philip	414-908-3289
Adams, Victoria	414-423-5782
Adcock, Robert L.	414-309-5183
Adkins, David	414-322-1490
Afton, Dave	303-980-4598
Agee, Michael D.	414-908-6751
Ahrens, John L.	414-908-7289
Akerman, Bill	303-988-1982
Alan, Dale	414-322-7890
Albaugh, David	414-423-1785
Aldrich, Jim	414-908-7283
Aldrich, Ken	414-892-3459
Aldrich, Leigh	303-292-3846
Alexander, Douglas	414-908-2094
Alexander, Mitchell	303-989-2641
Alice, Shyu	414-908-7294
Allen, Gerald	414-908-2839
Allen, Ed	414-322-4955
Allen, Marianne E.	303-988-7393
Allen, Neal	732-988-2549
Allinger, Matthew L.	414-892-3846
Allison, Kenneth	414-309-8471
Almquist, Roger S.	414-892-3794
Althouse, Benjamin	303-988-2888
Alumbaugh, Claude	414-292-8691
Bat, Ray	414-309-7171
Beat, Bill	414-892-3779

Thursday, June 19, 2007 4:35 pm M. Bacigalupi

**Victoria Adams**

Now has dates for event: Dec. 20, 07 Sunday afternoon. A dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles, and a large chocolate cake. Need taste appt. Nov. 15, 10 AM.  
 415-654-5567 - mobile  
**To Do:** submit taste test order of desserts

Monday, June 16, 2007 10:30 am

**Victoria Adams**

Currently looking for a catering service for customer for his business. Desserts only. 415-654-5567 - mobile  
**Next Steps:** Will call back. No action required.

Work Orders and Assignments

Current as of 11, 2007

Job: Holiday Event  
 Details: 200 people, 4 pm - 12 am  
 Items: eclairs, chocolate cake for 100...  
 Date: Dec. 20, 2007

Team Members:  
 Lead: Janet  
 Support: Bill, Mark,  
 Delivery: Susan

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<< December 2007 >>

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29	30	31	1	2	3	4
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Details for December 20th:  
**Event:** 9:00 am - Emily easton  
**To Do:** Prepare for holiday party

Tarwater, Jason

Send SMS messages

Log Message



# Add Appointment Details

Intuit Customer 360®

Recent / All

Search all contact information

Welcome B. Wells, Nov. 2, 2007 9 am

Name	Main Phone
Abbitt, Watkins	702-555-0819
Abernathy, Claude A	804-555-1956
Abidor, Robert	732-555-0197
Ackerman, Katherine	414-444-1234
Ackerman, Mary	303-555-8122
Ackerson, James	414-423-6893
Adaia, Floyd D.	414-322-7869
Adams, Mark	303-988-5638
Adams, Philip	414-908-3289
Adams, Victoria	414-423-5782
Adcock, Robert L.	414-309-5183
Adkins, David	414-322-1490
Afton, Dave	303-980-4598
Agee, Michael D.	414-908-6751
Ahrens, John L.	414-908-7289
Akerman, Bill	303-988-1982
Alan, Dale	414-322-7890
Albaugh, David	414-423-1785
Aldrich, Jim	414-908-7283
Aldrich, Ken	414-892-3459
Aldrich, Leigh	303-292-3846
Alexander, Douglas	414-908-2094
Alexander, Mitchell	303-989-2641
Alice, Shyu	414-908-7294
Allen, Gerald	414-908-2839
Allen, Ed	414-322-4955
Allen, Marianne E.	303-988-7393
Allen, Neal	732-988-2549
Allinger, Matthew L.	414-892-3846
Allison, Kenneth	414-309-8471
Almquist, Roger S.	414-892-3794
Althouse, Benjamin	303-988-2888
Alumbaugh, Claude	414-292-8691
Bat, Ray	414-309-7171
Beat, Bill	414-892-3779

Thursday, June 19, 2007 4:35 pm M. Bacigalupi

**Victoria Adams**

Now has dates for event: Dec. 20, 07 Sunday afternoon. A dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles, and a large chocolate cake. Need taste appt. Nov. 15, 10 AM.  
415-654-5567 - mobile  
**To Do:** submit taste test order of desserts

Monday, June 16, 2007 10:30 am

**Victoria Adams**

Currently looking for a catering service for customer appreciation for his business. Desserts only. 415-654-5567 - mobile  
**Next Steps:** Will call back. No action required.

Work Orders and Assignments

Current as of 11, 2007

**Job: Holiday Event**

**Details:**  
200 people  
4 pm - 12 am

**Items:**  
eclairs, chocolate cake for 100...

**Date:** Dec. 20, 2007

**Team Members:**  
Lead: Janet  
Support: Bill, Mark,  
Delivery: Susan

Past work orders: (3) (6) (4) (9) (10)

Supplie list:

Schedule Appointment

Sunday afternoon dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles and a large chocolate cake.

Subject: Taste test for Dec. 20, 07 event

Date: Nov. 15, 2007 Time: 10 am

Location: (Select)

Participants: delimited list (Select)

Private (OK) (Cancel)

Create Assignment  
Add To Do  
Add Event

Send SMS messages

Log Message

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29	30	1	2	3	4	5
6	7	8	9	10	11	12

for 20th:  
family easton  
holiday party

Jason





# In Context Add Assignment

Intuit Customer 360®

Recent / All

Search all contact information

Welcome B. Wells, Nov. 2, 2007 9 am

Name	Main Phone
Abbitt, Watkins	702-555-0819
Abernathy, Claude A	804-555-1956
Abidor, Robert	732-555-0197
Ackerman, Katherine	414-444-1234
Ackerman, Mary	303-555-8122
Ackerson, James	414-423-6893
Adaia, Floyd D.	414-322-7869
Adams, Mark	303-988-5638
Adams, Philip	414-908-3289
Adams, Victoria	414-423-5782
Adcock, Robert L.	414-309-5183
Adkins, David	414-322-1490
Afton, Dave	303-980-4598
Agee, Michael D.	414-908-6751
Ahrens, John L.	414-908-7289
Akerman, Bill	303-988-1982
Alan, Dale	414-322-7890
Albaugh, David	414-423-1785
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Allen, Neal	732-988-2549
Allinger, Matthew L.	414-892-3846
Allison, Kenneth	414-309-8471
Almquist, Roger S.	414-892-3794
Althouse, Benjamin	303-988-2888
Alumbaugh, Claude	414-292-8691
Bat, Ray	414-309-7171
Beat, Bill	414-892-3779

Thursday, June 19, 2007 4:35 pm

M. Bacigalupi

**Victoria Adams**

Now has dates for event: Dec. 20, 07 Sunday afternoon. A dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles, and a large chocolate cake. Need taste appt. Nov. 15, 10 AM.  
415-654-5567 - mobile  
**To Do:** submit taste test order of desserts

Monday, June 16, 2007 10:30 am

**Victoria Adams**

Currently looking for a catering service for customer appt for his business. Desserts only. 415-654-5567 - mobile  
**Next Steps:** Will call back. No action required.

Work Orders and Assignments

Current as of 11, 2007

**Job: Holiday Event**

**Details:**  
200 people  
4 pm - 12 am

**Items:**  
eclairs, chocolate cake for 100...

**Date:** Dec. 20, 2007

**Team Members:**  
Lead: Janet  
Support: Bill, Mark,  
Delivery: Susan

Send SMS messages

Log Message

December 2007

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December 20th:  
10 am - Emily easton  
prepare for holiday party

arwater, Jason

Create Assignments

Sunday afternoon dessert and coffee/tea gathering of 300 peopoe. Wants cookies, eclairs, truffles and a large chocolate cake.

Subject  
Taste test for Dec. 20, 07 event

Date Nov. 15, 2007 Time 10 am

Location Local office

Assignments	Name	Role
<input type="checkbox"/>	Jane	
<input type="checkbox"/>	Jerry	

(OK) (Cancel)

Send SMS  
Add To Do  
Add Event



# Multi-Select : Quick Add

Intuit Customer 360°

Recent / All

Search all contact information

All Abbreviated <

Name	Modified	Main Phone	More fields...
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 Agee, Michael D.	10/21/06	414-908-6751	
0238 Ahrens, John L.	10/21/06	414-908-7289	
0907 Akerman, Bill	01/09/07	303-988-1982	
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	
0093 Allen, Marianne E.	10/21/06	303-988-7393	
0657 Allen, Neal	11/18/06	732-988-2549	
1007 Allinger, Matthew L.	10/21/06	414-892-3846	
0551 Allison, Kenneth	10/21/06	414-309-8471	
1089 Almquist, Roger S.	10/21/06	414-892-3794	
0098 Althouse, Benjamin	10/21/06	303-988-2888	
0833 Alumbaugh, Claude	01/22/07	414-292-8691	
0099 Bat, Ray	10/28/06	414-309-7171	
0883 Beat, Bill	01/22/07	414-892-3779	

Tag

- Add New Customer
- Assignments
- Note
- Address
- Resources
- To Dos
- Events
- Reminder
- Customize My Tags...
- Remove Tag

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Details for December 20th:  
**Event:** 9:00 am - Emily easton  
**To Do:** Prepare for holiday party

Send SMS messages



# Examples of Documentation

Mordecai Customer Manager

Interaction Models

Framework

**Intuit Customer 360**

Recent / All

Name	Main Phone
Abbitt, Watkins	702-555-0819
Abernathy, Claude A	804-555-1956
Abidor, Robert	732-555-0197
Ackerman, Katherine	414-444-1234
Ackerman, Mary	303-555-8122
Ackerson, James	414-423-6893
Adaja, Floyd D.	414-322-7869
Adams, Mark	303-988-5638
Adams, Philip	414-908-3289
<b>Adams, Victoria</b>	<b>414-423-5762</b>
Adcock, Robert L.	414-309-5183
Adkins, David	414-322-1490
Afton, Dave	303-980-4598
Agee, Michael D.	414-908-6751
Ahrens, John L.	414-908-7289
Akerman, Bill	303-988-1982
Alan, Dale	414-322-7890
Albaugh, David	414-423-1785
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Alexander, Mitchell	303-989-2641
Alice, Shyu	414-908-7294
Allen, Gerald	414-908-2839
Allen, Ed	414-322-4955
Allen, Marianne E.	303-988-7393
Allen, Neal	732-988-2549
Allinger, Matthew L.	414-892-3846
Allison, Kenneth	414-309-8471
Almquist, Roger S.	414-892-3794
Althouse, Benjamin	303-988-2888
Alumbaugh, Claude	414-292-8691
Bat, Ray	414-309-7171
Beat, Bill	414-892-3779

Search all contact information

Thursday, June 19, 2007 4:35 pm M. Bacigalupi

**Victoria Adams**

Now has dates for event: Dec. 20, 07 Sunday afternoon. A dessert and coffee/tea gathering of 300 people. Wants cookies, eclairs, truffles, and a large chocolate cake. Need taste appt. Nov. 15, 10 AM.  
[415-654-5567 - mobile](#)  
**To Do:** submit taste test order of desserts

Monday, June 16, 2007 10:30 am B. Wells

**Victoria Adams**

Currently looking for a catering service for customer appreciation event for his business. Desserts only. [415-654-5567 - mobile](#)  
**Next Steps:** Will call back. No action required.

Financial Transactions	Jobs & Assignments event. Nov. 21, 2007.	Appointments taste appt. Sept. 15, 10 AM.
Actions for this card	Actions for this card	Actions for this card
Tasks / To Dos event. Nov. 21, 2007.	Attachments event. Nov. 21, 2007.	Emails
Actions for this card	Actions for this card	Actions for this card

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22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Details for December 20th:  
**Event:** 9:00 am - Emily easton  
**To Do:** Prepare for holiday party

Tarwater, Jason

Send SMS messages

Log Message



Mordecai SBD XD



# View Details Overlay

Mordecai Customer Manager

Interaction Models

# Framework

The screenshot displays the Intuit Customer 360° interface. On the left is a contact list with columns for Name and Main Phone. The contact 'Adams, Victoria' is selected. The main area shows a detailed view for Victoria Adams, including a calendar for December 2007 with the 20th highlighted. A 'To Do' item is listed: 'submit taste test order of desserts'. Below this, there are sections for 'Financial Transactions', 'Tasks / To Dos', and 'Work Orders and Assignments'. The 'Work Orders and Assignments' section shows details for a 'Holiday Event' on Dec 20, 2007, with 200 people and a 4 pm - 12 am time slot. It also lists team members: Lead: Janet, Support: Bill, Mark, Delivery: Susan. A calendar overlay on the right shows the month of December 2007, with the 20th highlighted. Below the calendar, it says 'Details for December 20th: Event: 9:00 am - Emily easton holiday party'.



Mordecai SBD XD