



Customer Manager OnLine : Ideation Post Research V2

Interaction / Information Architecture



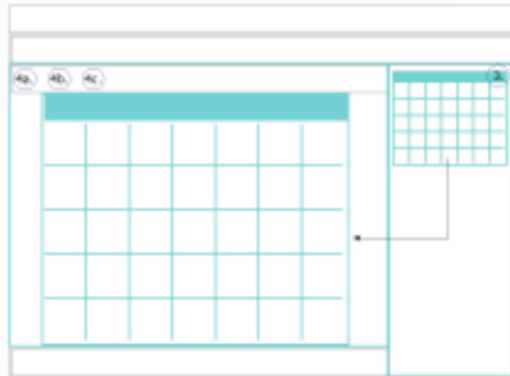
User Experience Goals - consistent

- **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



Task 1 : Add Item to Agenda

Intuit Fine Catering Inc. Welcome Amy Account Settings Logout

Search Names List Jobs List

My Tools

My Agenda Sort by Date

<input checked="" type="checkbox"/>	Subject	Due by
<input type="checkbox"/>	New Pick up brochures from..	Today
<input type="checkbox"/>	Check inventory	Today
<input type="checkbox"/>	Reorder glossy menus	Today
<input type="checkbox"/>	Drop off printer cartridges at	Today
<input type="checkbox"/>	Call Hyatt Convention Cente..	8/06/07
<input type="checkbox"/>	Reorder business cards for J	8/08/07
<input type="checkbox"/>	Call Sarah Kessler for new de.	8/17/07
<input type="checkbox"/>	Schedule new route for 2nd	8/24/07
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<input type="checkbox"/>	Go to car wash	8/15/07
<input type="checkbox"/>	Drop off dry cleaning	8/15/07
<input checked="" type="checkbox"/>	Call Adam's Printshop about	8/01/07
<input checked="" type="checkbox"/>	Email new brochure to Kim Tr	8/01/07
<input checked="" type="checkbox"/>	Email new brochure to JoAnn	7/30/07

July / August

View Date

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Meeting in 15 min: Emily's Event (4)

My Notes

Nov. 1, 2007 10:07 am
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Nov. 1, 2007 8:47 am
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Select Unstructured Data

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Drop it into Agenda List

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Create To Do

Subject: Bid for Remodel

Start Date: 8/20/07 End Date: 8/20/07

For: [select job] Assign to: Susan M.

Location: [dropdown]

Private

Meeting in 15 min: Emily's Event (4)



New Agenda Item Added

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<input type="checkbox"/> Drop off dry cleaning	8/15/07
<input checked="" type="checkbox"/> Call Adam's Printshop about..	8/01/07
<input checked="" type="checkbox"/> Email new brochure to Kim Tr	8/01/07
<input checked="" type="checkbox"/> Email new brochure to JoAnn	7/30/07
<input type="checkbox"/> Bid for Newman Remodel	12/7/08
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Task 2 - Quick Add : New Customer Record

Intuit Fine Catering Inc. Welcome Amy [Account Settings](#) [Logout](#)

Search Names List Jobs List

List Editor Detail Info

No.	Display name	Main phone	Main email address	Next appointment	Open jobs	
All Name Records (6,711)						
<input type="checkbox"/>	0182	Pace, Mark	414-988-3289	mpace@arcsystems.com	Planning Meeting, 2-3p 10/03/07	Job 0264
<input type="checkbox"/>	0019	Pacey, Sara	414-399-5183	sara@greenhouse.com	Drop off new menus, 9a 9/29/07	Job 1276
<input type="checkbox"/>	0354	Pacific Inc.	303-423-1490	ap@gmail.com	None Add New Appointment	None
<input type="checkbox"/>	0198	Pack, Janet	414-929-0329	janetpack@hotmail.com	None Add New Appointment	Job 1254
<input type="checkbox"/>	0203	Paddack, Bill	414-543-0025	bpaddack@unionco.com	Delivery, 7a 10/20/07	Job 1259
<input type="checkbox"/>	1007	Paddock, Steve	731-494-3491	stevepaddock@gmail.com	None Add New Appointment	None
<input type="checkbox"/>	0368	Padilla, Augustin	212-423-5763	padilla@padillapaint.com	None Add New Appointment	None
<input type="checkbox"/>	0799	Padol, Lisa	414-453-1168	lpadol@arlingtoninc.com	None Add New Appointment	Job 1208
<input type="checkbox"/>	0453	Padron, Jim	414-543-2096	jim_padron@yahoo.com	Initial Setup, 3-5p 10/12/07	Job 1280
<input type="checkbox"/>	0237	Page, Nick	414-988-3289	nickpage@mytime.com	Planning Meeting, 2-3p 10/03/07	Job 1264
<input type="checkbox"/>	0984	Parker, Emily	414-399-5183	e.parker@coffeebean.com	Drop off new menus, 9a 9/29/07	Job 1276
<input type="checkbox"/>	1106	Parker, John	303-423-1490	jp@gmail.com	None Add New Appointment	None
<input type="checkbox"/>	0099	Parker, Harold	414-929-0329	harold@graysoninc.com	None Add New Appointment	Job 1254
<input type="checkbox"/>	0269	Parkins, Vince	414-543-0025	vparkins@gmail.com	Delivery, 8a 10/04/07	Job 1272
<input type="checkbox"/>	0058	Pastor, Susan	731-494-3491	susan@rnjenterprises.com	None Add New Appointment	None
<input type="checkbox"/>	0272	Patts Landsc...	212-423-5763	patts72@yahoo.com	None Add New Appointment	None
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My Tools

Calendar ▼

August 2007

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In Context Menu

Intuit Fine Catering Inc. Welcome Amy [Account Settings](#) [Logout](#)

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In Context Menu:

- Create New Customer Record
- Create New Contact
- Create New Referral
- Send Email



Quick Create Menu Selected

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Search **Names List** **Jobs List**

List Editor **Detail Info**

No. Display name Main phone Main email address Next appointment Open jobs

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Nov. 1, 2007 8:47 am
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Task 3 – Quick Add Appointment

Intuit Fine Catering Inc. Welcome Amy Account Settings Logout

Search Names List Jobs List

My Tools

My Agenda Sort by Date

Subject	Due by
<input type="checkbox"/> New Pick up brochures from...	Today
<input type="checkbox"/> Check inventory	Today
<input type="checkbox"/> Reorder glossy menus	Today
<input type="checkbox"/> Drop off printer cartridges al...	Today
<input type="checkbox"/> Call Hyatt Convention Cente...	8/06/07
<input type="checkbox"/> Reorder business cards for J...	8/08/07
<input type="checkbox"/> Call Sarah Kessler for new de...	8/17/07
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Meeting in 15 min: Emily's Event (4)

My Notes

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QuickText for Nov. 1, 2007 10am x

Identified Text (8) Nov. 15, 9am Next >>

Assign As Appointment

Schedule Appointment x

Subject Walk through for remodel

Start Date 9/15/07 Start Time 9 am

End Date 9/15/07 End Time 11 am

With Neil Newman For [select job]

Location Assign to Susan M.

Private

Save Cancel



Task 4 - Categorizing Unstructured Data

Intuit Fine Catering Inc. Welcome Amy [Account Settings](#) [Logout](#)

Search Names List Jobs List

List Editor Detail Info

No.	Display name	Main phone	Main email address	Next appointment	Open jobs
All Name Records (6,711)					
<input type="checkbox"/>	0189 Newman, Neil	925-665-0989	NN@Network.com	Nov. 15th, 9 am	Pending
<input type="checkbox"/>	0019 Pacey, Sara	414-399-5183	sara@greenhouse.com	Drop off new menus, 9a 9/29/07	Job 1276
<input type="checkbox"/>	0354 Pacific Inc.	303-423-1490	ap@gmail.com	None Add New Appointment	None
<input type="checkbox"/>	0198 Pack, Janet	414-929-0329	janetpack@hotmail.com	None Add New Appointment	Job 1254
<input type="checkbox"/>	0203 Paddack, Bill	414-543-0025	bpaddack@unionco.com	Delivery, 7a 10/20/07	Job 1259
<input type="checkbox"/>	1007 Paddock, Steve	731-494-3491	stevepaddock@gmail.com	None Add New Appointment	None
<input type="checkbox"/>	0368 Padilla, Augustin	212-423-5763	padilla@padillapaint.com	None Add New Appointment	None
<input type="checkbox"/>	0799 Padol, Lisa	414-453-1168	lpadol@arlingtoninc.com	None Add New Appointment	Job 1208
<input type="checkbox"/>	0453 Padron, Jim	414-543-2096	jim_padron@yahoo.com	Initial Setup, 3-5p 10/12/07	Job 1280
<input type="checkbox"/>	0237 Page, Nick	414-988-3289	nickpage@mytime.com	Planning Meeting, 2-3p 10/03/07	Job 1264
<input type="checkbox"/>	0984 Parker, Emily	414-399-5183	e.parker@coffeebean.com	Drop off new menus, 9a 9/29/07	Job 1276
<input type="checkbox"/>	1106 Parker, John	303-423-1490	jp@gmail.com	None Add New Appointment	None
<input type="checkbox"/>	0099 Parker, Harold	414-929-0329	harold@graysoninc.com	None Add New Appointment	Job 1254
<input type="checkbox"/>	0269 Parkins, Vince	414-543-0025	vparkins@gmail.com	Delivery, 8a 10/04/07	Job 1272
<input type="checkbox"/>	0058 Pastor, Susan	731-494-3491	susan@rnjenterprises.com	None Add New Appointment	None
<input type="checkbox"/>	0272 Patts Landsc...	212-423-5763	patts72@yahoo.com	None Add New Appointment	None

My Tools

Calendar ▼

August 2007

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Meeting in 15 min: Emily's Event (4)

My Agenda (4)

Notes

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New Customer Record Added – noted with star

Intuit Fine Catering Inc. Welcome Amy Account Settings Logout

Search Names List Jobs List

My Tools

My Agenda Sort by Date

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QuickText for Nov. 1, 2007 10am x

Identified Text (8) Phone: 925-665-0989 Next >>

Add To Customer Record

Create Customer Record x

Name < select >

Phone 925-665-0989

Address

City State

Zip Email

Assign to Susan M.

Private

Save Cancel

Meeting in 15 min: Emily's Event (4)



New Customer Record Added – noted with star

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July / August View Date

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Add To Customer Record

Create Customer Record x

Name < select >
Phone 925-665-0989
Address Location: 345 Splenda St., Pleasantville
City State
Zip Email
Assign to Susan M.
 Private
Save Cancel

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Identified Text (8) Phone: 925-665-0989 Next >>

Add To Customer Record

Create Customer Record x

Name

Phone

Address

City State

Zip Email

Assign to Susan M. v

Private

Save Cancel

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Name Neil Newman

Phone 925-665-0989

Address 345 Splenda St

City Pleasantville State < select >

Zip Email

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Phone 925-665-0989

Address 345 Splenda St

City Pleasantville State < select >

Zip Email NN@Network.com

Assign to Susan M.

Private

Save Cancel

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