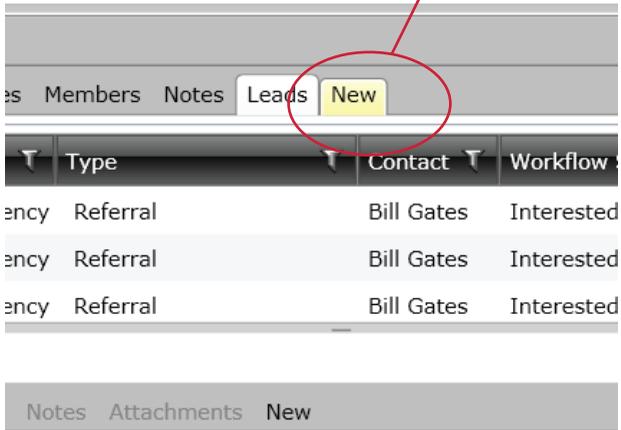
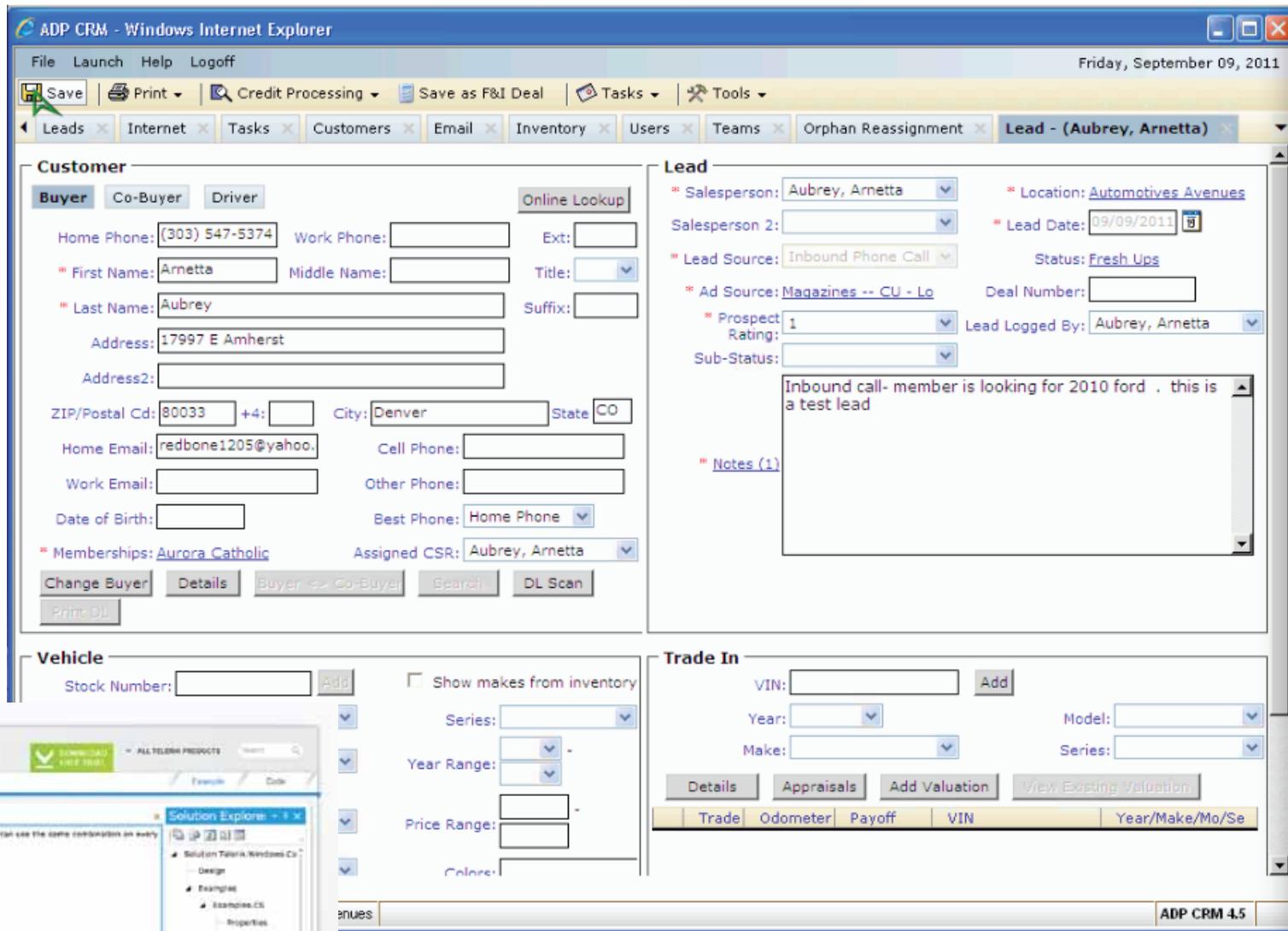


I'm in Clients, looking at Leads... this is where I have a problem

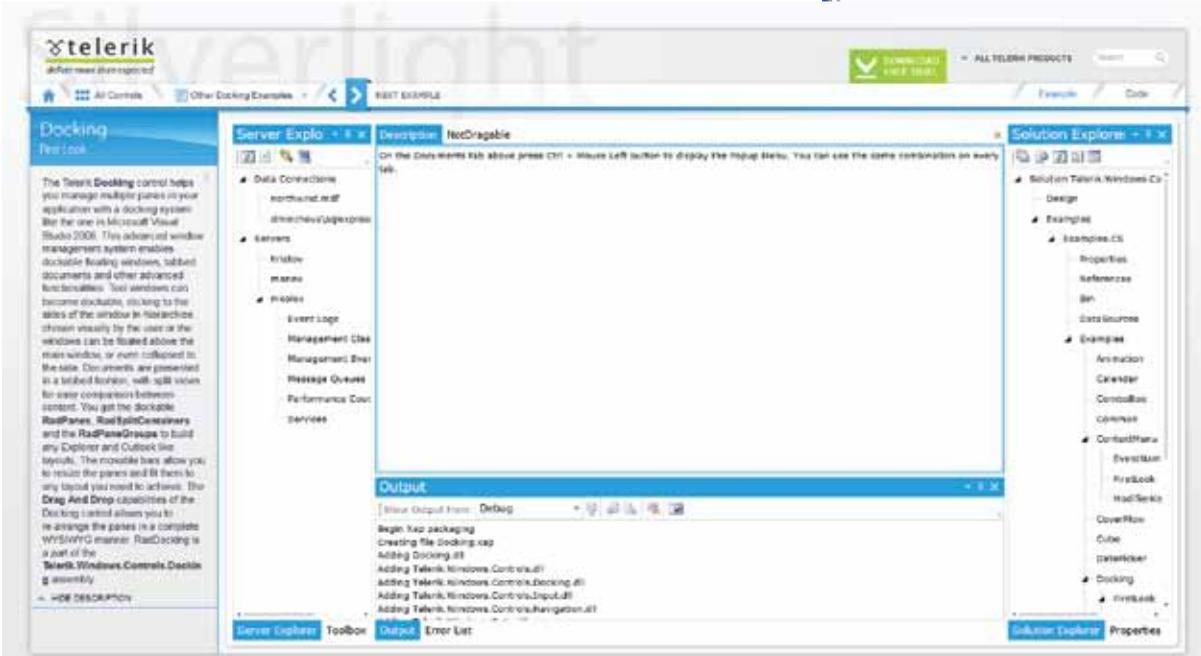
It feels like I am creating a new lead here



Existing CRM



Telerik Control to deal with multiple views



Screen Type 1: Talked about having read only information (this isn't practical)

We need to make Save/Undo the same "strength" as New, no matter where we do it.

Primary Entities

If there's input on current screen then Alert: Do you want to Save?
Type 1. Needs Data Tree with Basic Filtering (Clients, Contacts)
Type 2. Needs Advanced Search
Type 3. Dashboard

Only applicable to create new Primary Entity (in this case clients)

Saves everything that has been changed on page: Only three kinds of entities can change (without leaving the current page)
• Details
• Calendar
• Notes
The rest are "read only"

Primary Entities "one place removed" (they colorize when active)
They bring up windows within the Primary View

Add Members and Notes to icons in this instance
Notes and Attachments repeats always (I think)

Moves up here

Screen Type 1

This is acting like a "mini-dashboard" For Client (Primary Entity - Type 1)
Uses Telerik Docking Control (telerik - http://demos.telerik.com/silverlight/#Docking/FirstLook)

Highest Level in Tree View Brings up This screen (in Default layout last used for Clients (Primary Entity - type 1))

These can drill down as far as needed Whatever user selects becomes the highest tab level in Screen Type 2 (more immediate and don't have to drill down all of the time)

Can you select Multiple clients in Tree View? I think this is too much.

The screenshot shows the Automotive Avenues application interface. At the top, there's a header with the logo and 'Welcome Dave Nespoli'. Below that is a navigation bar with tabs for 'Dashboard', 'Clients', 'Leads', and 'Contacts'. The 'Clients' tab is active. On the left, there's a tree view showing a hierarchy of clients, with 'Mexican Space Program' selected. Below the tree view are options for 'Only My Accounts' and 'Include Inactive', and a 'Create' dropdown menu. The main area displays the details for 'Mexican Space Program', including fields for 'Client Name', 'Identifier', 'Active', and 'Primary Address'. There are also tabs for 'Details' and 'Contacts'. A 'Leads' window is open, showing a table of leads with columns for 'Workflow', 'Type', 'Contact', and 'Reference'. A contextual menu is open over one row, showing options like 'Walk-In', 'Internet', 'Phone Call', 'Change Contact', 'Replace This Contact', 'Loan Process', 'Researching', 'Pending', and 'Lead Terminated'. At the bottom, there's a 'Pending Tasks' section with a 'Calendar View' and an 'Attachments' section.

Admin | **FAQS (Help)** | Logout

FILE VIEW SHARE

Icons: +, folder, folder with lock, refresh, undo, redo, trash, home, people, calendar, paperclip, checkmark, printer, envelope

Dialogue box with checkboxes for what to print/email

In dropdown option to expand Creates screen type 2

Double Click for Details Screen Type 2-B (Details is ALWAYS in screen type 2-B)

"Specific Action" Contextual Menus do not require Save or Undo (for quick mass changes)

selection is ≥ 1 - contextual menu icon This situation applied to all items where multiple selection Shows Actions available for those entities (Items are greyed out here because they cannot be applied to ALL items selected)

Is active in toolbar, but not "forward" in tabs

Switch kind of filtering is an option for Primary Entities that can benefit from both Advanced Search and Data Tree Views (Screen Type 2)

Below is Worst Case User Scenario For Saving (they are high in the hierarchy for top tab)

These now apply to all changes made for these leads

Screen Type 2
Grid View within
Primary Entity

The screenshot shows the Automotive Avenues CRM interface. At the top, there's a header with the logo, a welcome message for 'Dave Nespoli', and navigation links for 'Admin', 'FAQS (Help)', and 'Logout'. Below the header is a navigation bar with tabs for 'Dashboard', 'Clients', 'Leads', and 'Contacts'. The 'Clients' tab is active. Underneath, there's a toolbar with icons for file operations (New, Save, Copy, Paste, Undo, Redo, Delete, Home, Add User, Add Group, Add Contact, Add Note, Add Attachment) and share options (Print, Email). A 'Mexican Space Program - Leads' tab is open, showing a grid of leads. A 'New' dropdown menu is open, listing options: Lead, Vehicle, Note, and Attachment. A 'Deselect All' button is visible at the bottom of the grid. A 'Vehicles' tab is also visible. At the bottom, there's a pagination bar showing '1 of 3' items.

Contact	Reference ID	Last Modified
Linus van Pelt	10234	10/19/11 1:01:25 PM
Bought Car Walk-in Linus van Pelt	14892	10/19/11 1:01:25 PM
Lead Terminated Walk-in Linus van Pelt	23479	10/19/11 1:01:25 PM
Bought Car Walk-in Linus van Pelt	2349	10/19/11 1:01:25 PM
Bought Car Walk-in Linus van Pelt	14987	10/19/11 1:01:25 PM
Lead Terminated Walk-in Linus van Pelt	345364	10/19/11 1:01:25 PM

Alert: Do you want to Save?

[Admin](#) | [FAQS \(Help\)](#) | [Logout](#)

Double Click Row or
Click "Details" icon after selection
To get to Screen 2-B

New Dropdown
if multiple levels
Screen Type 2-A

The contextual menu is titled 'Type' and contains the following options: Walk-In, Internet, Phone Call. Under the 'Contact' section, there are options: Change Contact, Replace This Contact. Under the 'Workflow' section, there are options: Loan Process, Researching, Pending, and Lead Terminated (which is highlighted).

selection is ≥ 1 - contextual menu icon
This situation applied to all items
where multiple selection

Additional Info Can Go Here

Multiple Selection
Only some of these secondary
tabs can support
multiple selection
(in this instance only
Vehicles makes sense)
Thus The tabs are greyed
out in this instance

Multiple Selection
Next and Back
Highlights (Grey) active item in grid
((If beyond scroll, will have to
"move back up" to it))

Tabs can continue to nest...

1 of 3

These now apply to the current lead
that is being added

Alert: Do you want to Save?

Dashboard

Clients

Leads

Contacts

FILE

VIEW

SHARE



Mexican Space Program - Add Lead

Screen Type 2-A = "ADD..."
Screen Type 2-B = "EDIT..."

Details Form Goes Here

Screen Type 2-B would say "Edit Lead"

Lorem Ipsum	<input type="text"/>	Lorem Ipsum	<input type="text"/>	Lorem Ipsum	<input type="text"/>
Dolar	<input type="text"/>	Dolar	<input type="text"/>	Dolar	<input type="text"/>
Lorem	<input type="checkbox"/>	Lorem	<input type="checkbox"/>	Lorem	<input type="checkbox"/>

Lorem Ipsum	<input type="text"/>	Lorem Ipsum	<input type="text"/>	Lorem Ipsum	<input type="text"/>
	<input type="text"/>		<input type="text"/>		<input type="text"/>
Dolar	<input type="text"/>	Dolar	<input type="text"/>	Dolar	<input type="text"/>
Lorem	<input type="text"/>	Lorem	<input type="text"/>	Lorem	<input type="text"/>
Ipsium	<input type="checkbox"/>	Ipsium	<input type="checkbox"/>	Ipsium	<input type="checkbox"/>

Ipsium	<input type="text"/>	Ipsium	<input type="text"/>	Ipsium	<input type="text"/>
	<input type="text"/>		<input type="text"/>		<input type="text"/>

Screen Type 1
But with advanced search

The screenshot shows the Automotive Avenues CRM interface. At the top, the logo and 'Welcome Dave Nespoli' are visible, along with navigation links for Admin, FAQs (Help), and Logout. Below this is a navigation bar with tabs for Dashboard, Clients, Leads (highlighted in orange), and Contacts. A secondary toolbar contains icons for File, View, and Share. The main content area displays search results for 'John Doe', including a 'Details' tab (highlighted in orange) and a 'Vehicles' tab. A large orange-bordered box highlights the 'Details Form Goes Here' area. Below this is a 'Pending Tasks (only for Mexican Space Program)' section with a 'Calendar View - not worked out yet (some telerik thing)' note. At the bottom, there are 'Pending Tasks' and 'Attachments' buttons. A red circle highlights the 'Home' icon in the View toolbar, and a red arrow points to the 'Attachments' button with the text 'Is active in toolbar, but not "forward" in tabs'. Another red arrow points to the 'Leads' tab with the text 'view menu will reflect whatever is in "docking tabs below" as it does in Screen Type 1 For Clients'.

Customer Name
Phone Number
Date of Birth
Email Address
Notes
Customer Number
VIN Number
Deal Number
RO Number
Car Make
Car Model]

Leads belong to Clients
Leads belong to Contacts
Contacts MAY belong to Clients (but don't have to)

There's a lot of things that belong to Leads
That's why it has the search window to narrow it down.