


A Web Page
http://www.redspear.com




Login Screen (Sam)


A Web Page
http://www.redspear.com


Federated Insurance: CRM


Dashboard
Customer Detail
Charts
Report
Logout

Dashboard

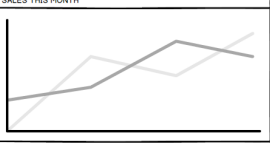
 5
Birthdays Remainder
[View Details](#)

 10
Meeting Remainder
[View Details](#)

 7
Today's Task
[View Details](#)

 5
My Calendar
[View Details](#)

SALES THIS MONTH



Notifications

Task 1

Task 1

Task 1

Task 1

Task 1

Task 1

Dashboard for MR

A Web Page
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Federated Insurance: CRM

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Dashboard > Birthday Detail

[View Upcoming Birthdays](#)

Customer Name	Phone Number	Email	DOB	Days Remaining
cFirst cLast	222-222-2525	cfirst.clast@mail.com	02/03/1987	5
cFirst cLast	222-222-2525	cfirst.clast@mail.com	02/03/1987	9
cFirst cLast	222-222-2525	cfirst.clast@mail.com	02/03/1987	12
cFirst cLast	222-222-2525	cfirst.clast@mail.com	02/03/1987	17
cFirst cLast	222-222-2525	cfirst.clast@mail.com	02/03/1987	22

Birthday Remainder Screen

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Federated Insurance: CRM

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Dashboard > Today's Meeting

[View Upcoming Meetings](#)

Meeting With	Phone Number	Email	Address	Time
cFirst cLast	222-222-2525	cfirst.clast@mail.com	21 Road road	10:00am
cFirst cLast	222-222-2525	cfirst.clast@mail.com	21 Road road	11:30 am
cFirst cLast	222-222-2525	cfirst.clast@mail.com	21 Road road	12:45 pm
cFirst cLast	222-222-2525	cfirst.clast@mail.com	21 Road road	02:15 pm
cFirst cLast	222-222-2525	cfirst.clast@mail.com	21 Road road	03:15 pm

Meeting Remainder Screen

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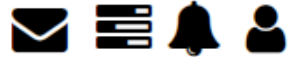
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Dashboard > Today's Task

[View Upcoming Meetings](#)

Task Detail	Due	Priority	Status
Send Birthday Card	Today	High	Completed
Lunch with Customer ABC	Today	Medium	Pending
MR weekly Meeting	Today	High	Pending

Task Remainder Screen



Dashboard

Customer Detail

Charts

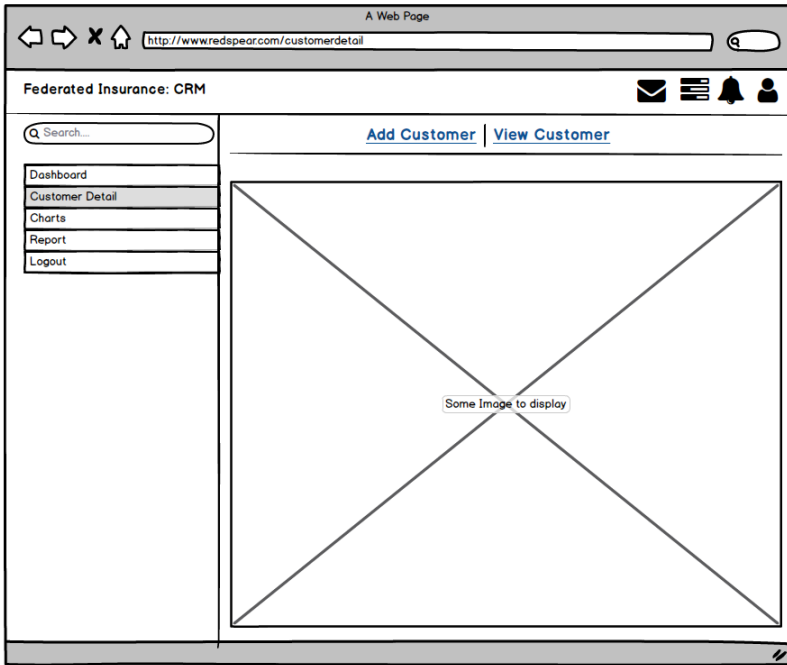
Report

Logout

[Dashboard](#) > My Calendar

View Calendar

APRIL 2018						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12



Customer Event Selection

A web browser window titled "A Web Page" with the address bar showing "http://www.redspear.com/customerdetail". The page header is "Federated Insurance: CRM" with navigation icons. The left sidebar is the same as the previous screen. The main content area has a breadcrumb "Customer Detail > Add Customer" and a form titled "Enter Customer Detail". The form contains input fields for Customer First Name, Customer Last Name, Customer Email, Customer Phone, Customer Address, Customer City, State (a dropdown menu), Zip, Customer Role, Customer Type (a dropdown menu), and Customer Date Of Birth. There is also a large text area for a "Note". At the bottom of the form are two buttons: "Add Customer" and "Reset Form".

Add Customer Screen

A web browser window titled "A Web Page" with the address bar showing "http://www.redspear.com/customerdetail". The page header is "Federated Insurance: CRM" with navigation icons. The left sidebar is the same as the previous screens. The main content area has links for "Add Customer" and "View Customer". Below these links is a section titled "Customer Detail Confirmation" which contains a dialog box. The dialog box has the title "Customer Added" and the message "Your Customer Is Added To The Database. Do you want to Add another Customer?". At the bottom of the dialog box are two buttons: "Yes" and "No".

Customer Added Confirmation

A Web Page
http://www.redspear.com/customerdetail

Federated Insurance: CRM

Search...

Dashboard
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Customer Detail > View Customer

View Customer Detail

Search Customer

First Name	Last Name	Phone	Email	Role	DOB	
FirstCustomer1	LastCustomer1	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer2	LastCustomer2	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer3	LastCustomer3	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer4	LastCustomer4	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer5	LastCustomer5	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer1	LastCustomer1	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer2	LastCustomer2	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer3	LastCustomer3	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer4	LastCustomer4	222-222-2536	email@mail.com	CEO	02/25/1980	update
FirstCustomer5	LastCustomer5	222-222-2536	email@mail.com	CEO	02/25/1980	update

Search Customer Screen

A Web Page
http://www.redspear.com/customerdetail

Federated Insurance: CRM

Search...

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Customer Detail > Update Customer

Update Customer

User1

User2

user1@email.com

222-222-2525

456 road road

Mankato

MN

25264

CEO

Customer Type

05/22/1978

This note can be updated

Update Customer Detail

Cancel

Customer Update Selection

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Federated Insurance: CRM

Search...

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Add Customer | View Customer

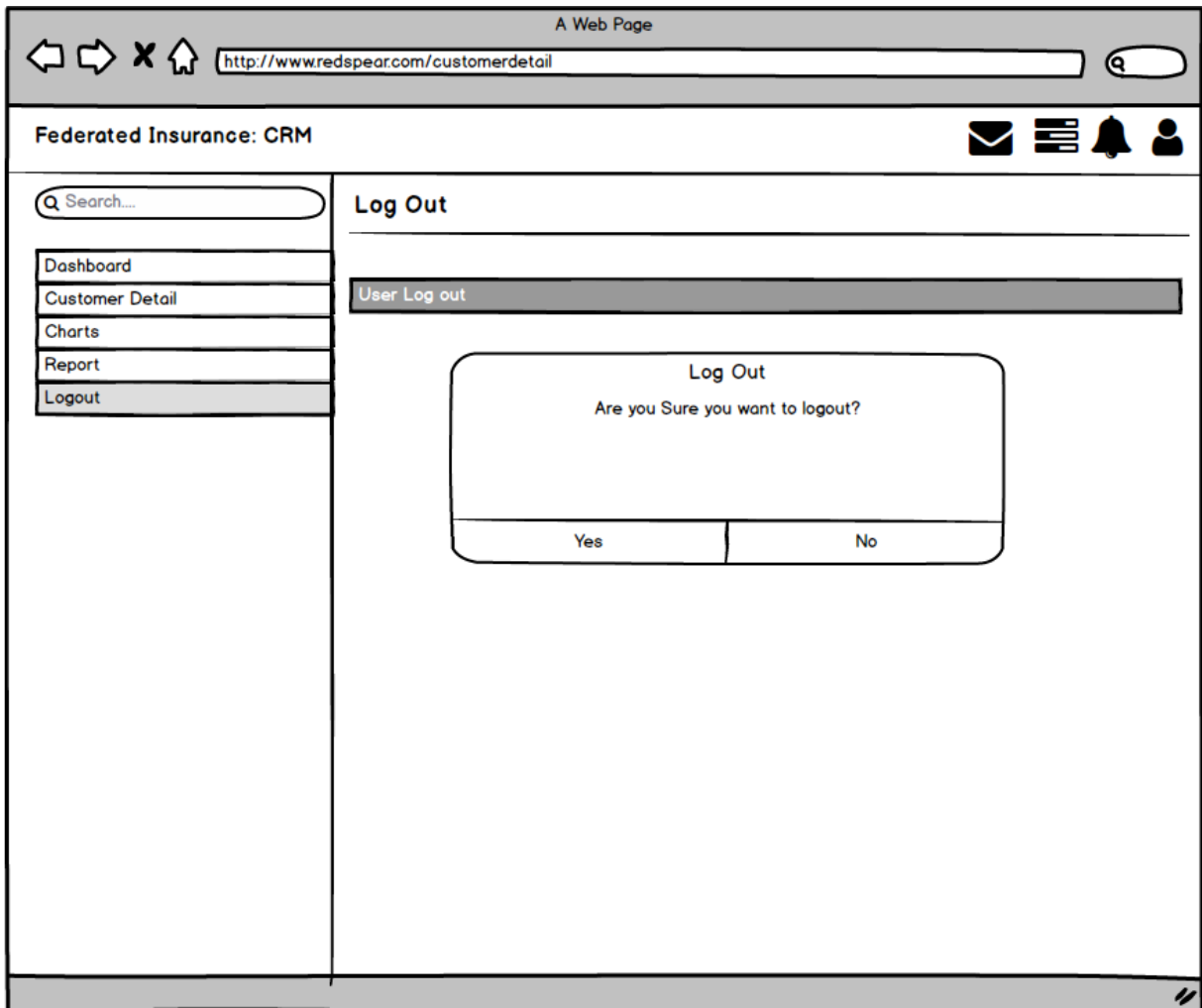
Customer Update Confirmation

Customer Updated

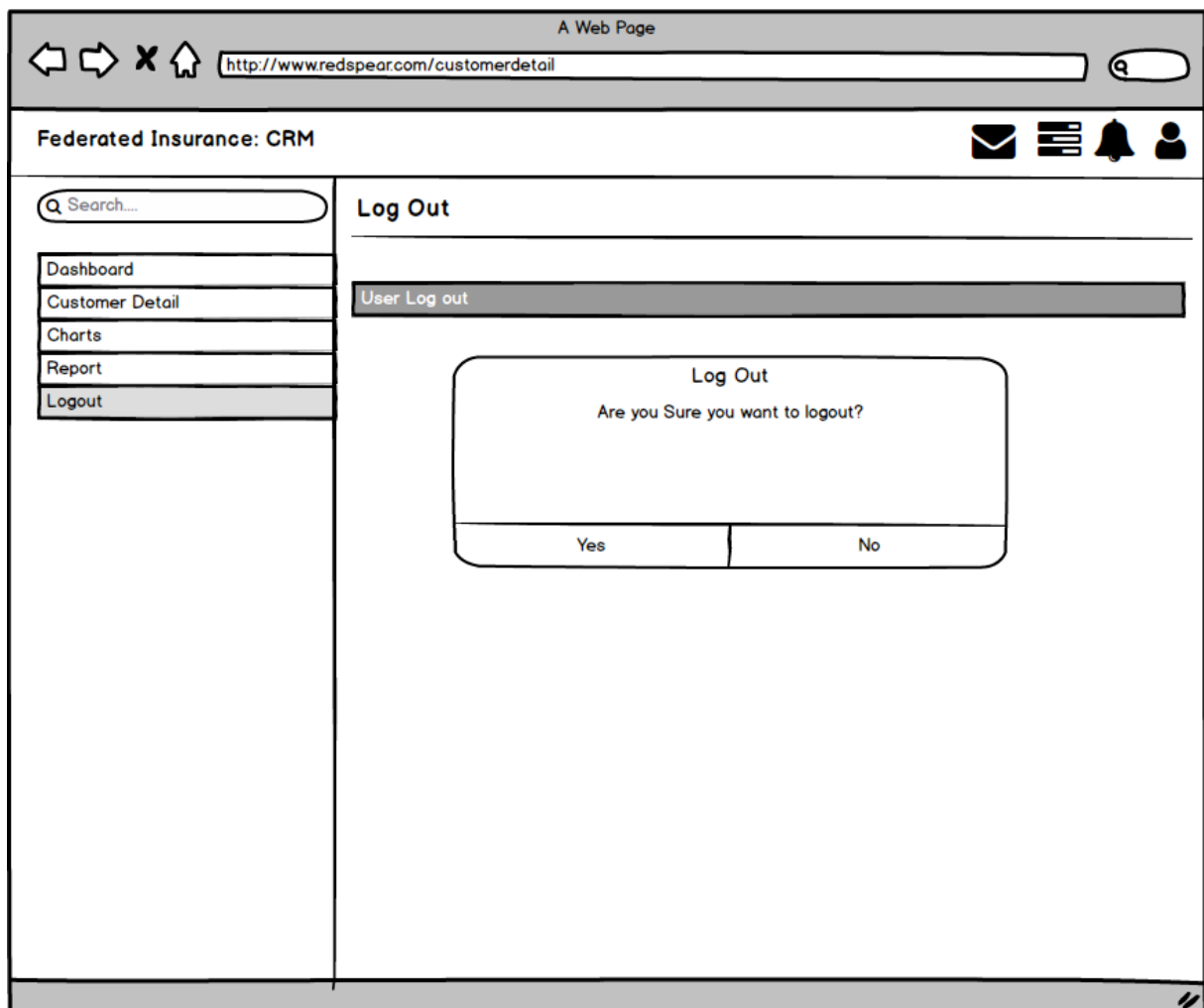
Your Customer detail has been updated.

Ok

Customer Update Confirmation



User Log out Screen



User Log out Screen