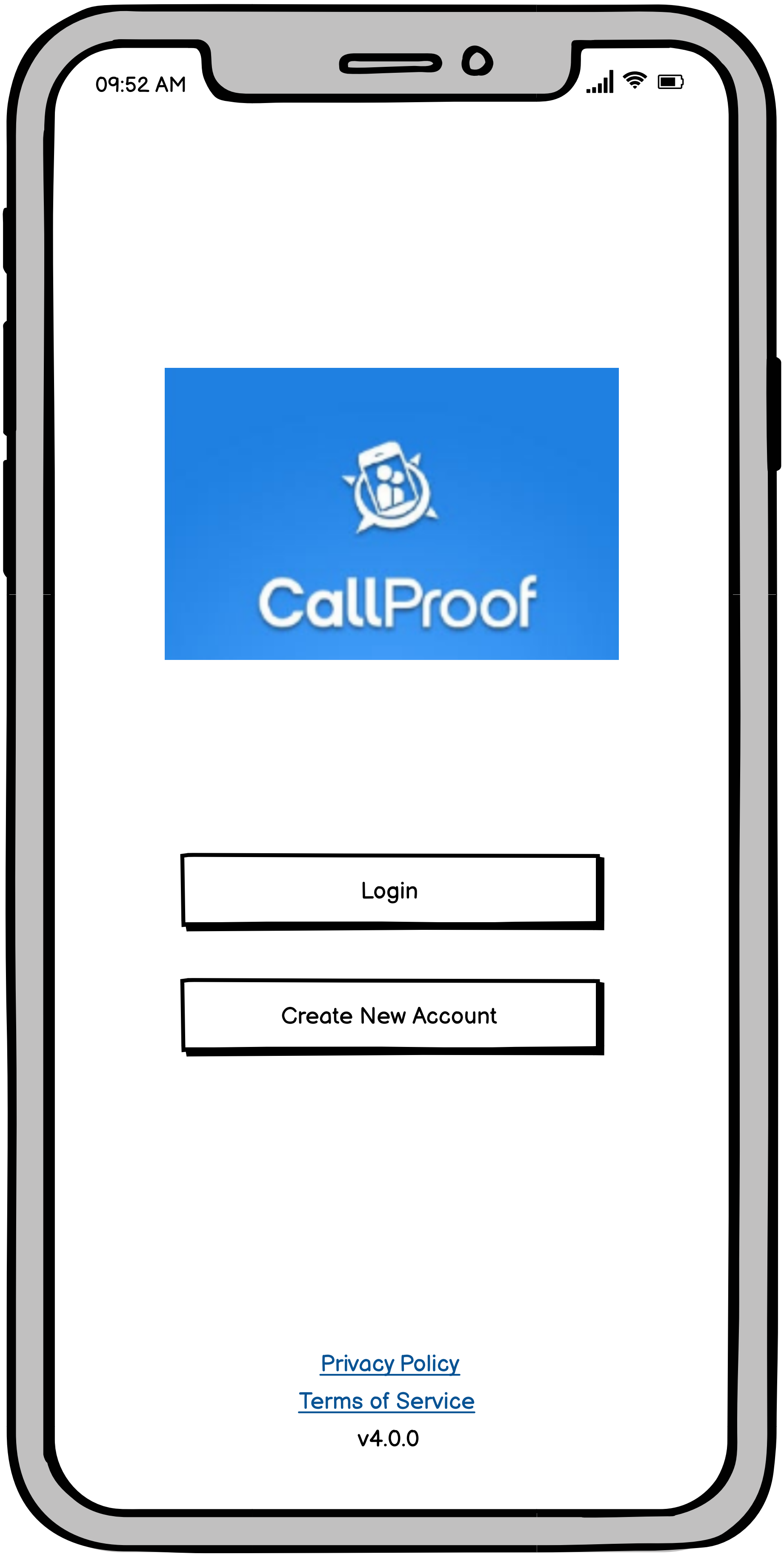
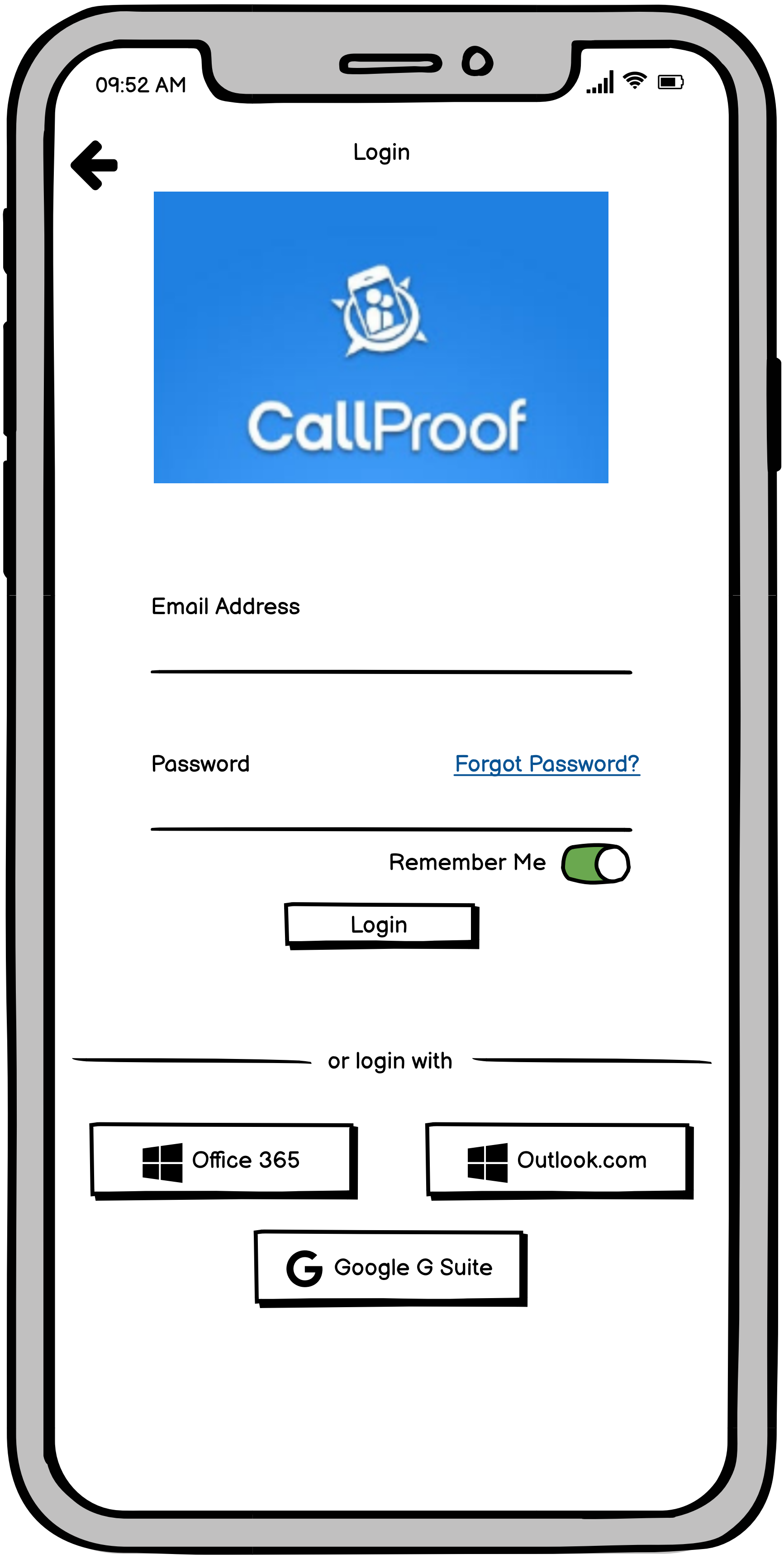


- CallProof logo needs to be reworked so it can appear properly on a variety of different background colors.
- Background should default to blue from redesign mock ups.
- Each environment will have a different default color.
- Company administrator should be able to customize this background color and that color would be applied after the user logs in.



When Forgot Password is clicked, check if email is entered. If not, tell user to enter email address. Otherwise, show a message that a link to reset password has been sent.

For Outlook.com, use the Outlook logo

Outlook

09:52 AM

My Company Currently Uses CallProof

Please contact your CallProof administrator to request an invitation to join your corporate CallProof account. You may also contact support@callproof.com if you are not sure who to ask.

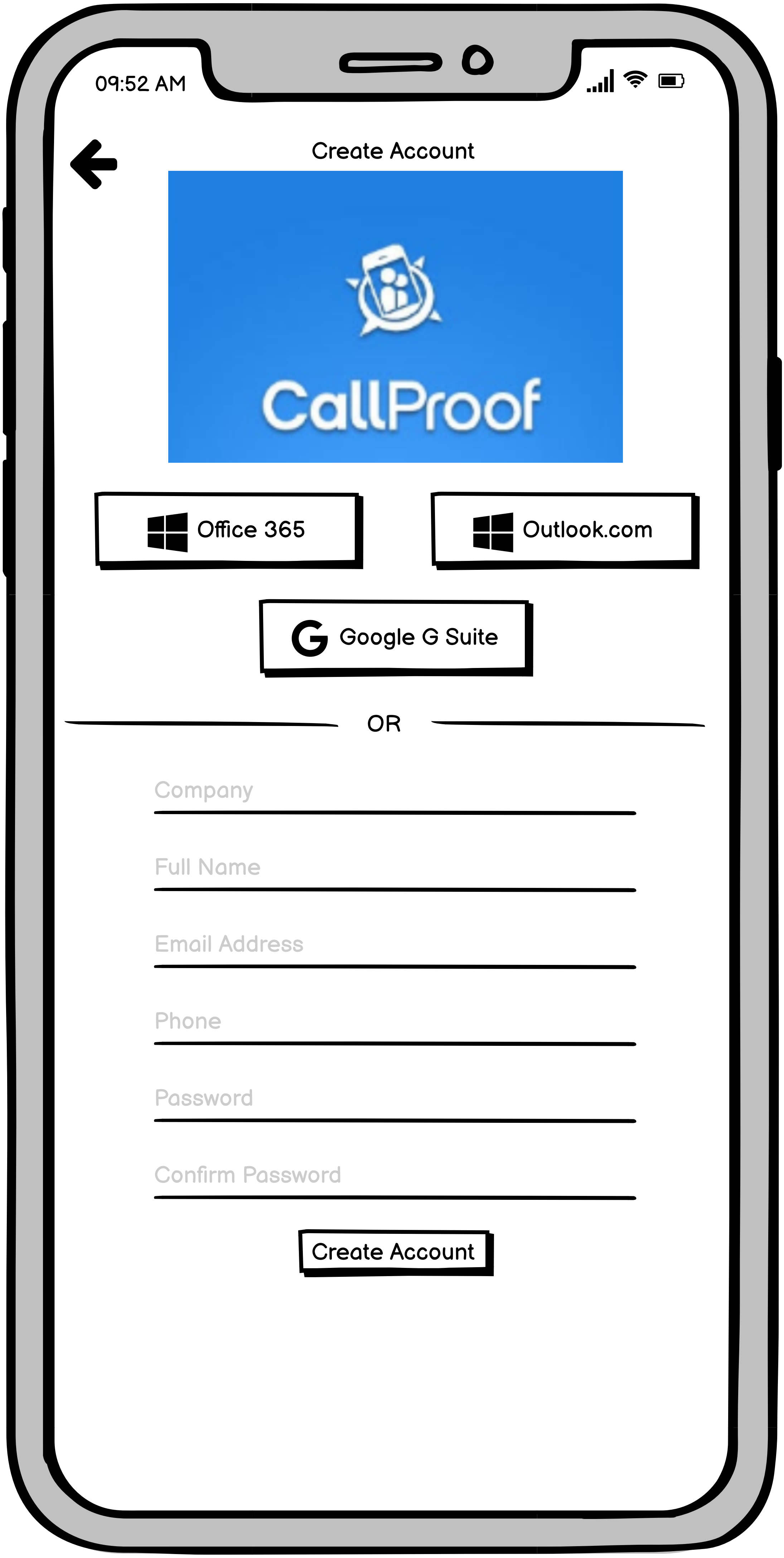
My Company Does Not Use CallProof

Create an Account for My Company

FUTURE: When a user selects this, display a screen that asks for the following information:

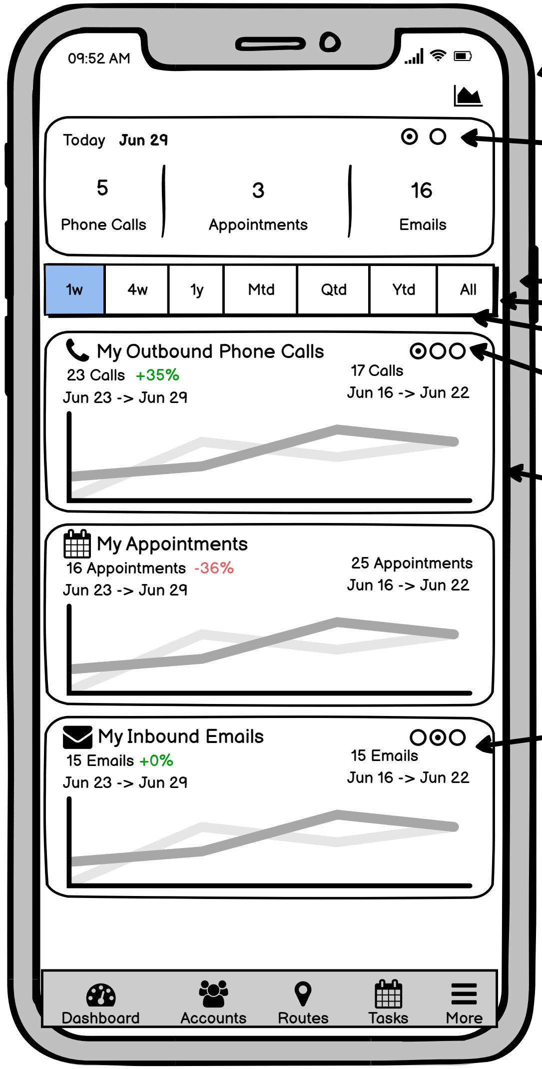
- Company Name
- Person Name (First & Last)
- Email Address
- Phone (not required)

Request Access



For Outlook.com, use the Outlook logo

Outlook



Clicking this icon will allow the user to add, remove or reorder widgets that are personalized for their own calls, appointments, emails, etc.

Managers would also have the ability to add, remove or reorder widgets showing team stats for the same.

Swipe left/right toggles between a view of Today/Yesterday. Defaults to Today.

1W -> All
Changes data in cards below.

Top section does not change. It always shows todays/yesterday (with swipe)

Each of these allows the user to toggle the timeframe for the data displayed in the widgets below this section.

Data in each widget shows a comparison of the current timeframe (on the left) to the same timeframe immediately prior to the current one(on the right). The graph shows overlapped data with a more prominent line as the current data and a lighter line consisting of the data from the previous period.

Ie: If 1w is selected, then it compares this past week to the previous week. If 4w is selected, it compares the last 4 weeks to the previous 4 weeks, etc.

Note that toggling the timeframe above will also toggle the date ranges, percent increase/decrease and numbers associated with each timeframe.

Circles = swipe action.

Options:

Inbound, Outbound, All Calls

The percentage is based on the time frame being looked at.

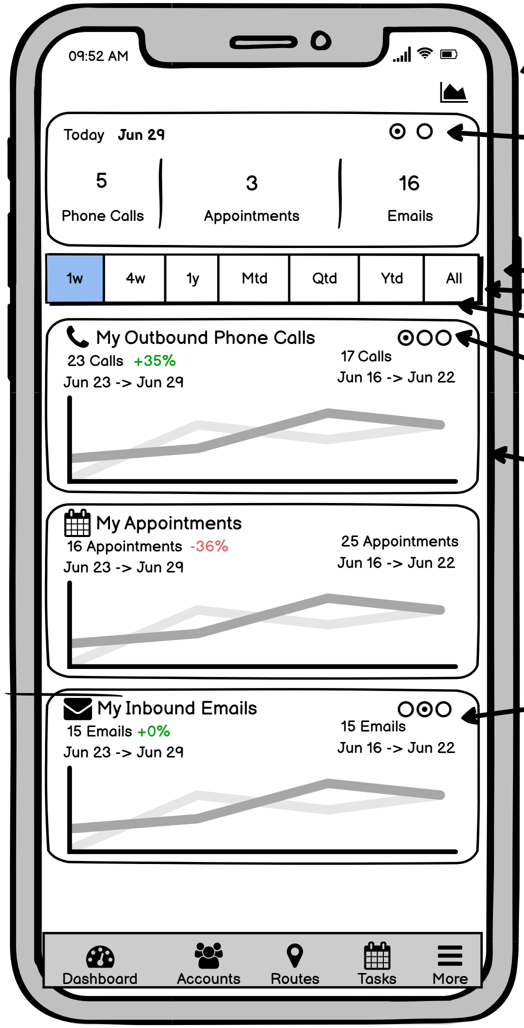
Example: We have 1 Week selected here. We see total for this week (23 Calls). The right hand side shows the previous time period (here 1 week) and shows the total for that period.

The percentage will show the difference because the previous time period and the current being shown.

Example: if 1 Y was selected, we'd see the total calls for the Current year on the left. Right hand side would show the previous year. The percentage would be the difference in Last Year compared to current year.

Differentiate between Outbound and Inbound phone calls

- Scrolling should be enabled on this page.
- Available Widgets include: Events, Calls, Webinars, Appointments and Emails



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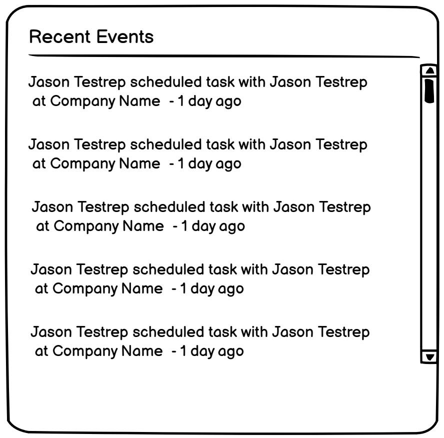
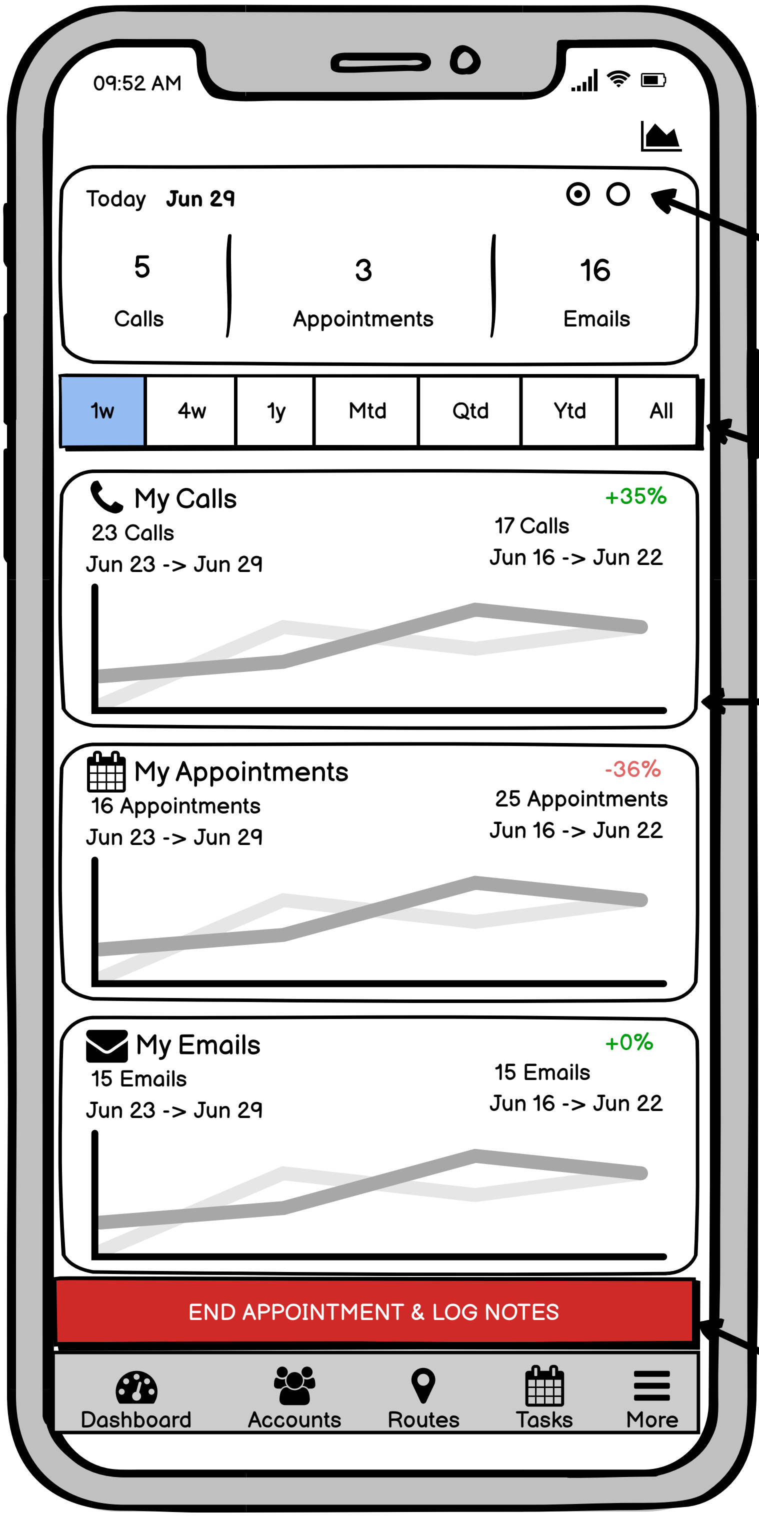


- Scrolling should be enabled on this page.
- Available Widgets include: Events, Calls, Webinars, Appointments and Emails



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Note that toggling the timeframe above will also toggle the date ranges, percent increase/decrease and numbers associated with each timeframe.

This button should be locked to the bottom of the screen, just above the navigation menu until the appointment is ended. If the user scrolls down, it should still appear on the screen and the screen content should scroll behind this button.

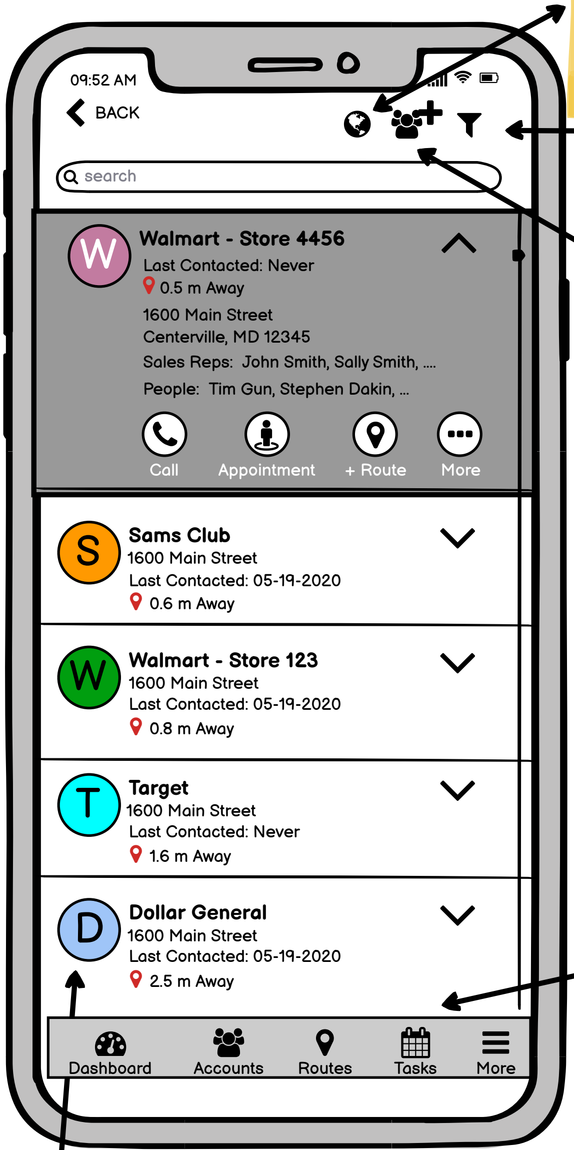
- Scrolling should be enabled on this page.
- Available Widgets include: Events, Calls, Webinars, Appointments and Emails

PLACES button

Filters from existing app (custom fields, just my contacts, etc)

contact type needs to be considered as well

Sort options



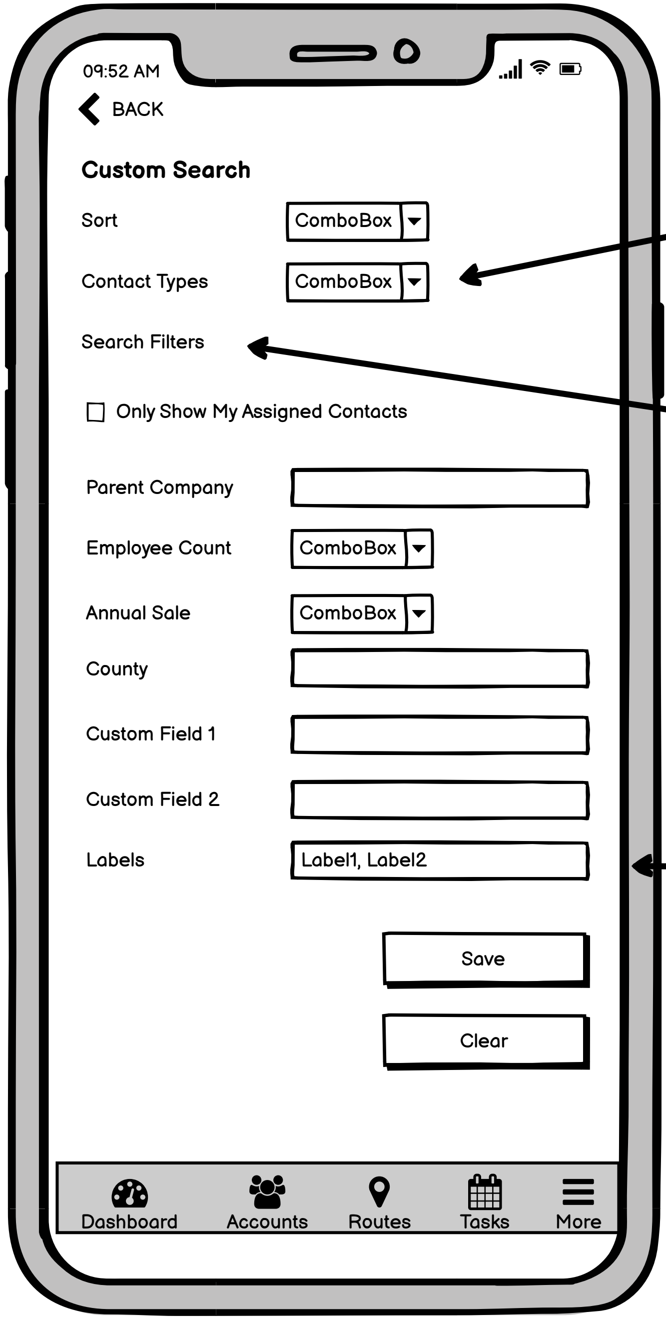
New Account screen

Clicking "+ Route" should use an overlay to display a list of the Routes, allowing the user to select where to add this Account to a Route.

Only load the first 25 results at a time. When the user scrolls to the bottom, there should be a "Load More" button at the bottom of the scroll-bar. Clicking that should load the next 25 results in the UI, based on the search or the order that the original query had loaded.

The background colors and letter colors for the icon that displays the first initial of the company name were randomly chosen for the UI mockups. The specific colors used as the backgrounds should be consistent, based on the first letter of the company name. ie: Companies starting with the same letter should all use the same color. A simple way of doing this would be to select 27 colors (A-Z plus company names starting with numbers) and assign the colors based on the first letter.
Example:
https://www.rapidtables.com/web/color/RGB_Color.html
A=990000, B=FF0000, C=FF6666 (3 variations of the red column, skipping 1 row between each)
D=994C00, E=FF8000, F=FFB266 (3 variations of the orange column, skipping 1 row between each)
etc...

Example2: Every company that starts with W would have the same W avatar.



multi-select box. ALL selected by default

WORKING ON THIS

To Be Determined. Will update before Oct 7 -Jeff

This screen is similar to the current filters screen.

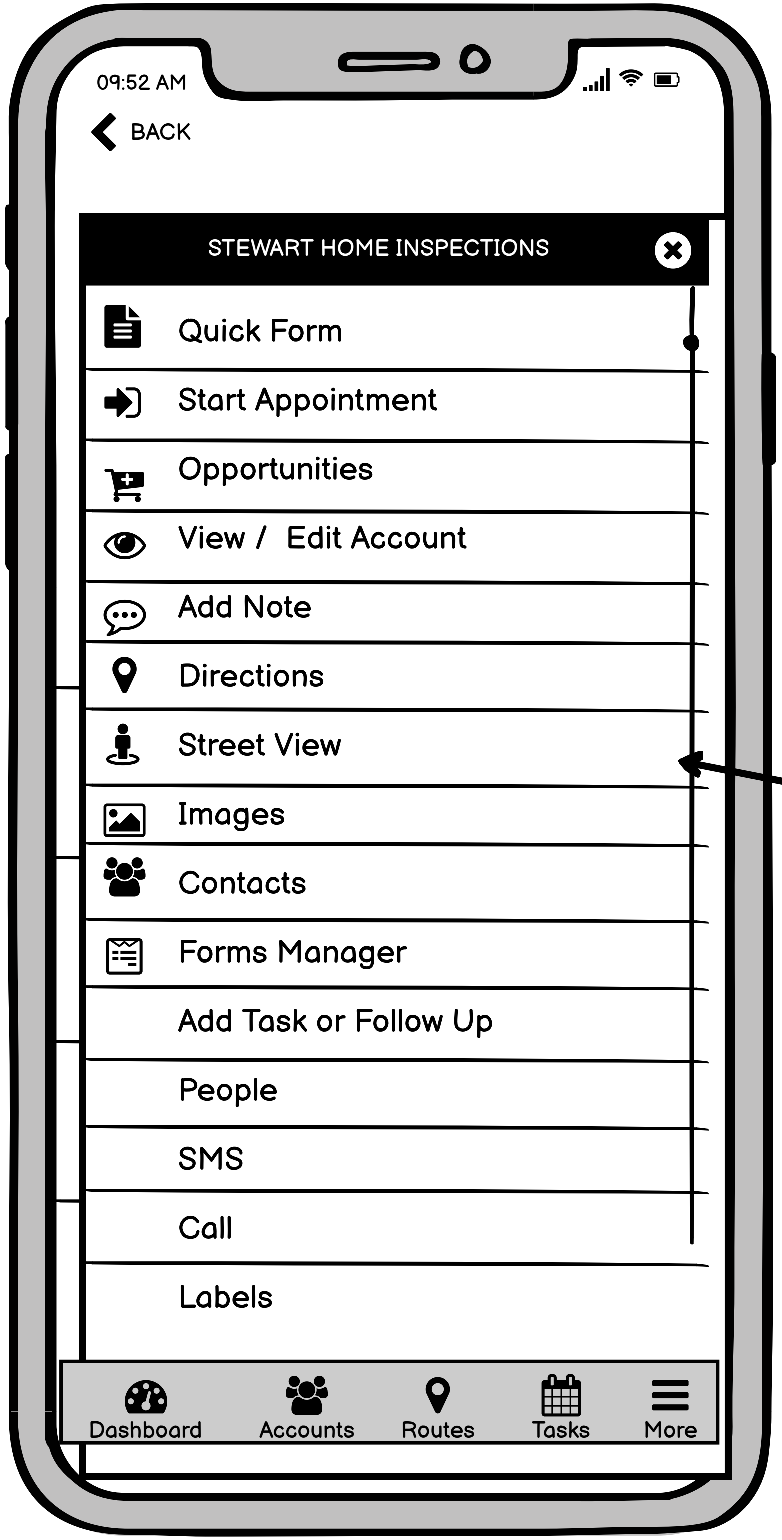
Assigned, Parent Company, Employees, Sales, County are all listed.

Then, custom fields are shown.

This stick around until they clear them.

Clear will also return Contact Types back to ALL and Sort to Closest

Labels would be a multi-select field.



Idea - New screen instead of a pop-up for menu options?

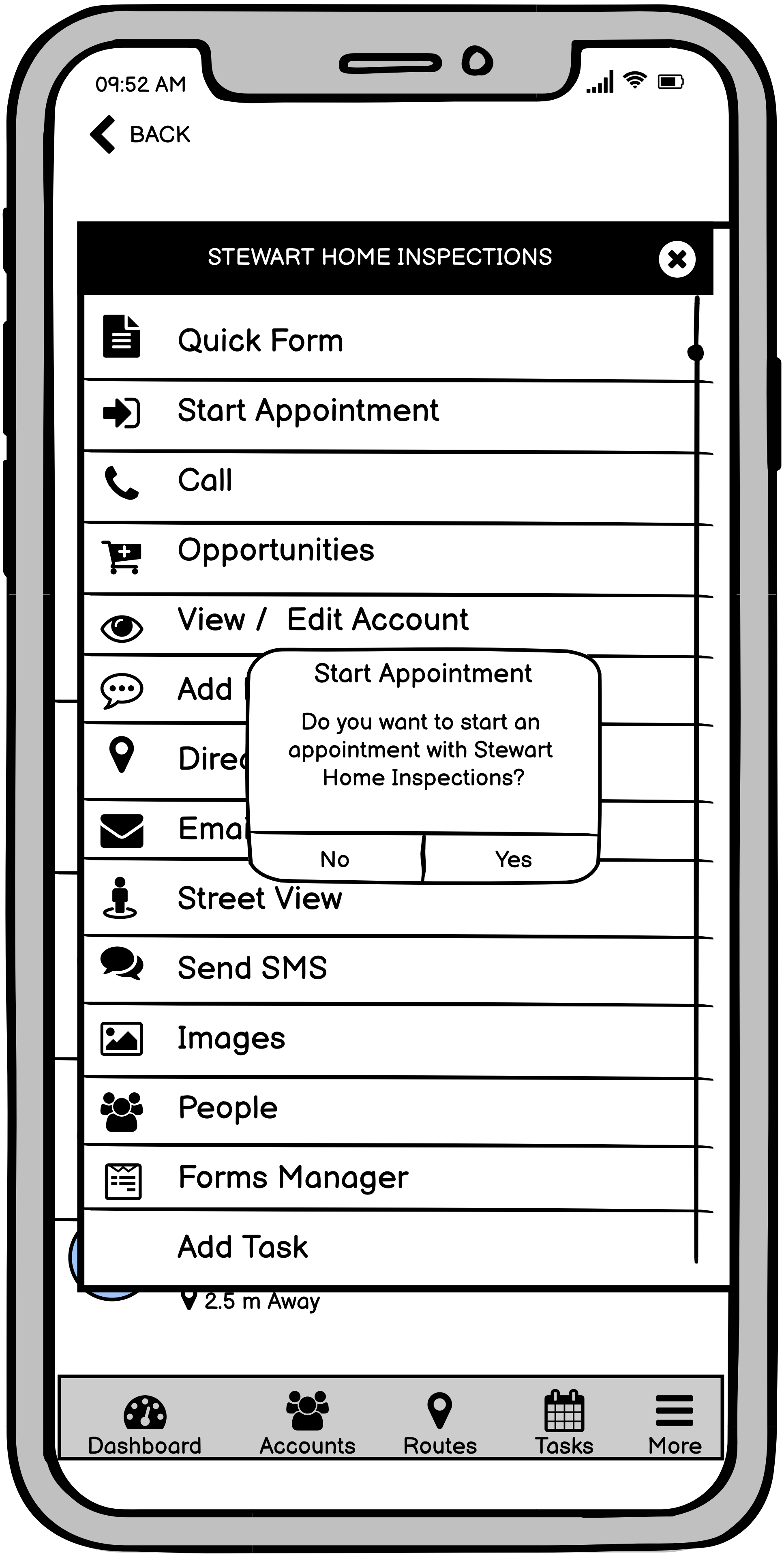
Don't hold up anything here. Just an idea.

If we haven't done this menu yet, we may want to make it a seperate screen instead of a popup.

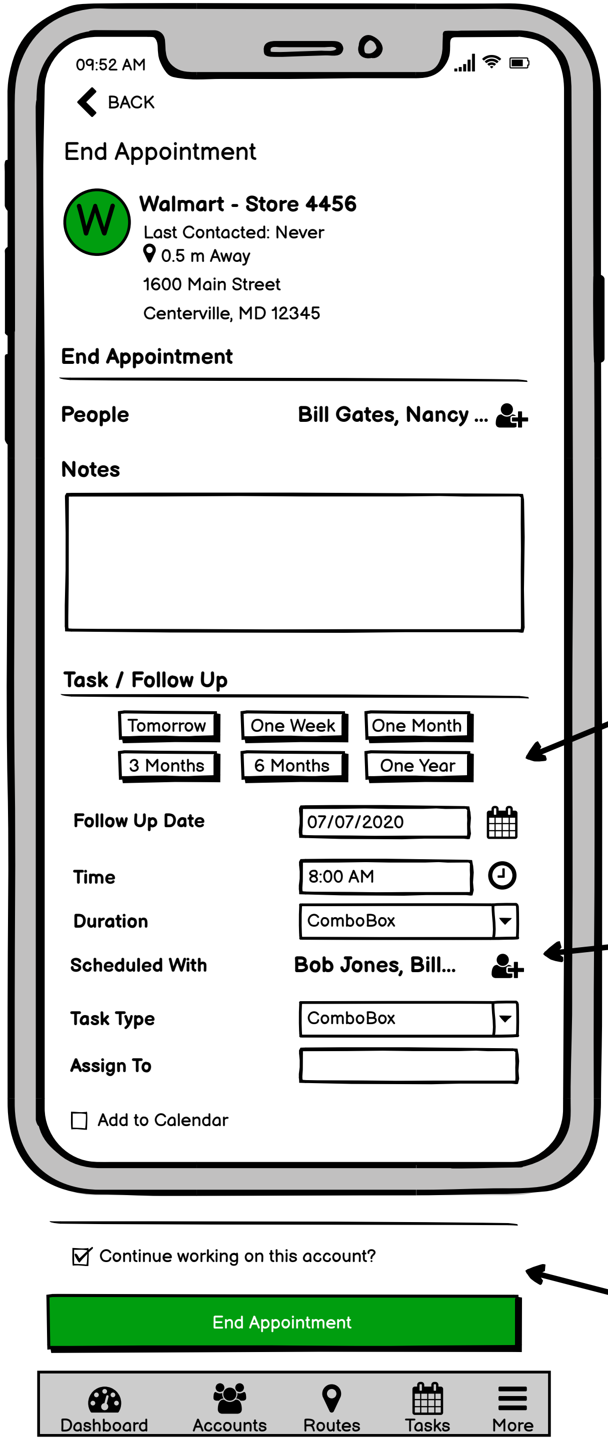
Thoughts, Mani / Anil?

Street View can link to Google like CallProof Classic does today.

09:52 AM
BACK
Labels for XXXXXX
Current Labels
Current Label1
Current Label2
Current Label3
Add Label
Add Label
Dashboard
Accounts
Routes
Tasks
More
This would be predictive text based on labels in the system.
Or, use can create a new label if what they typed is in the system.



Update the menu options here from the previous page



Task / Follow Up section appears on Default End Appointment Screen.

Task / Follow Up section will appear when Event Forms are being used as appointments if the Event Form option is set to show task.

Add People from the top section to the Task section when they select them. This will avoid having the user select people twice.

So, it someone is picked on th top, they are automatically added to "Scheduled With" in Task / Follow Up at the same time.

It can further be editted in tasks to change it. These changes would not effect the top box.

Continue Working on this account?

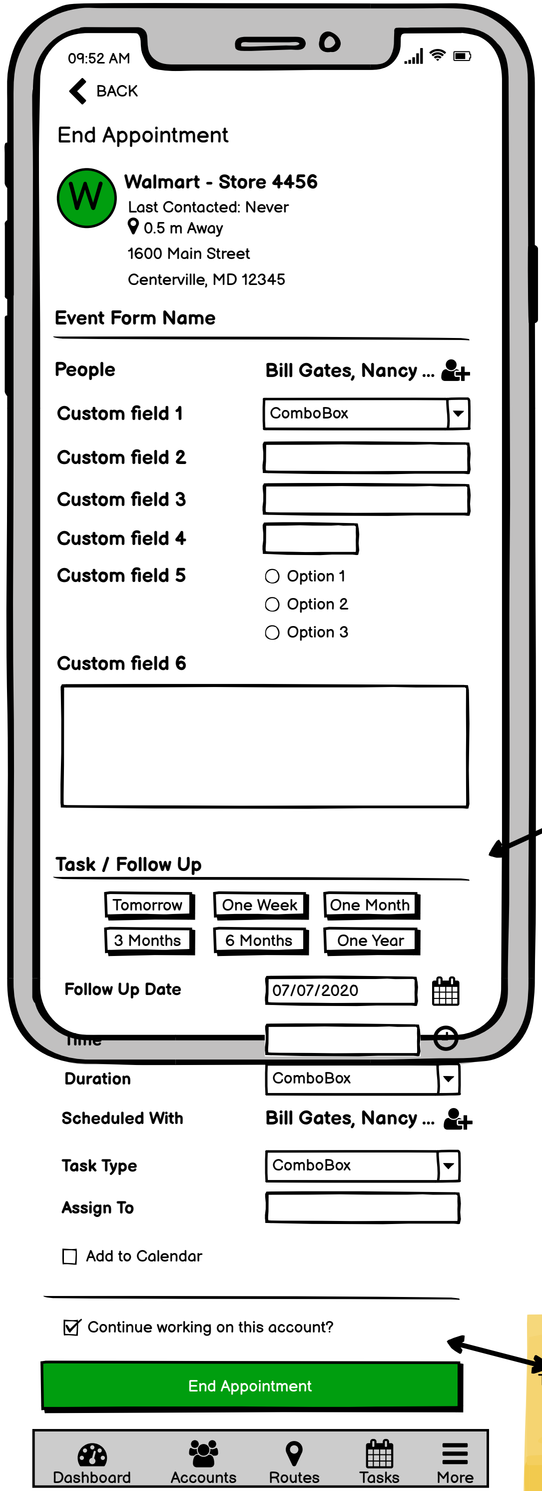
This would remember the user's last option. If they checked it off, it remains checked off. If they check it, the next appointment they end will also have it checked off.

When checked, the user will return to the Contacts screen with the menu already open for this Account.

Follow up info here

Could remember what they use here
Could have a user profile that enables it by defult

If the user clicks to "Continue working" They will move a screen for adding Event Forms / Opportunites / etc



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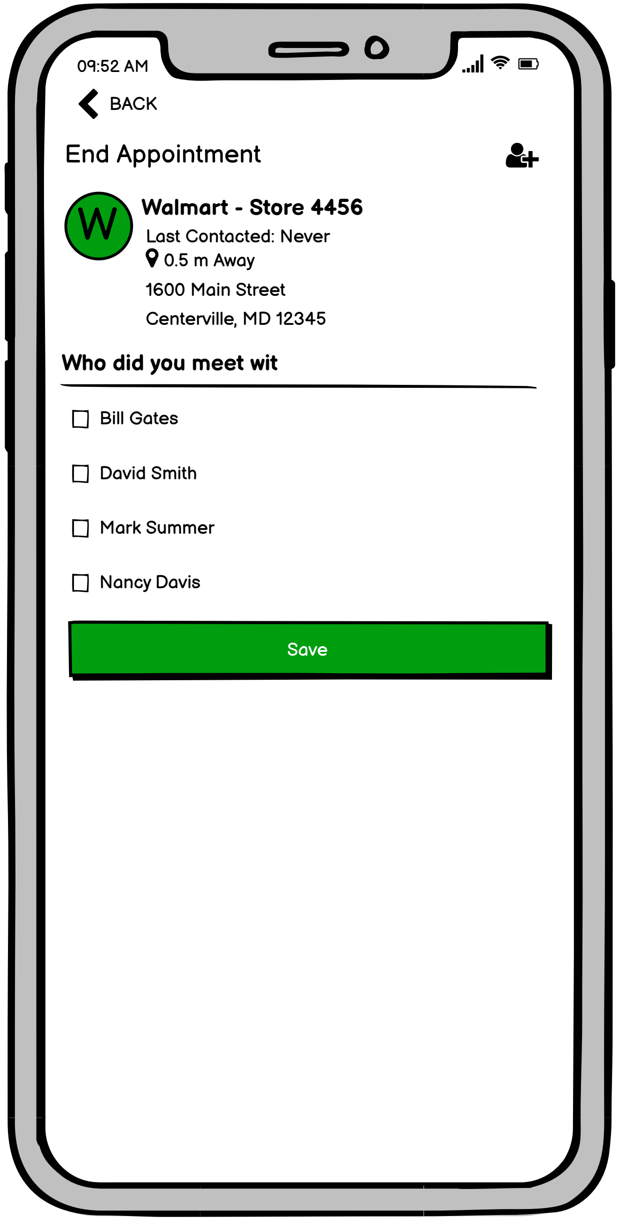

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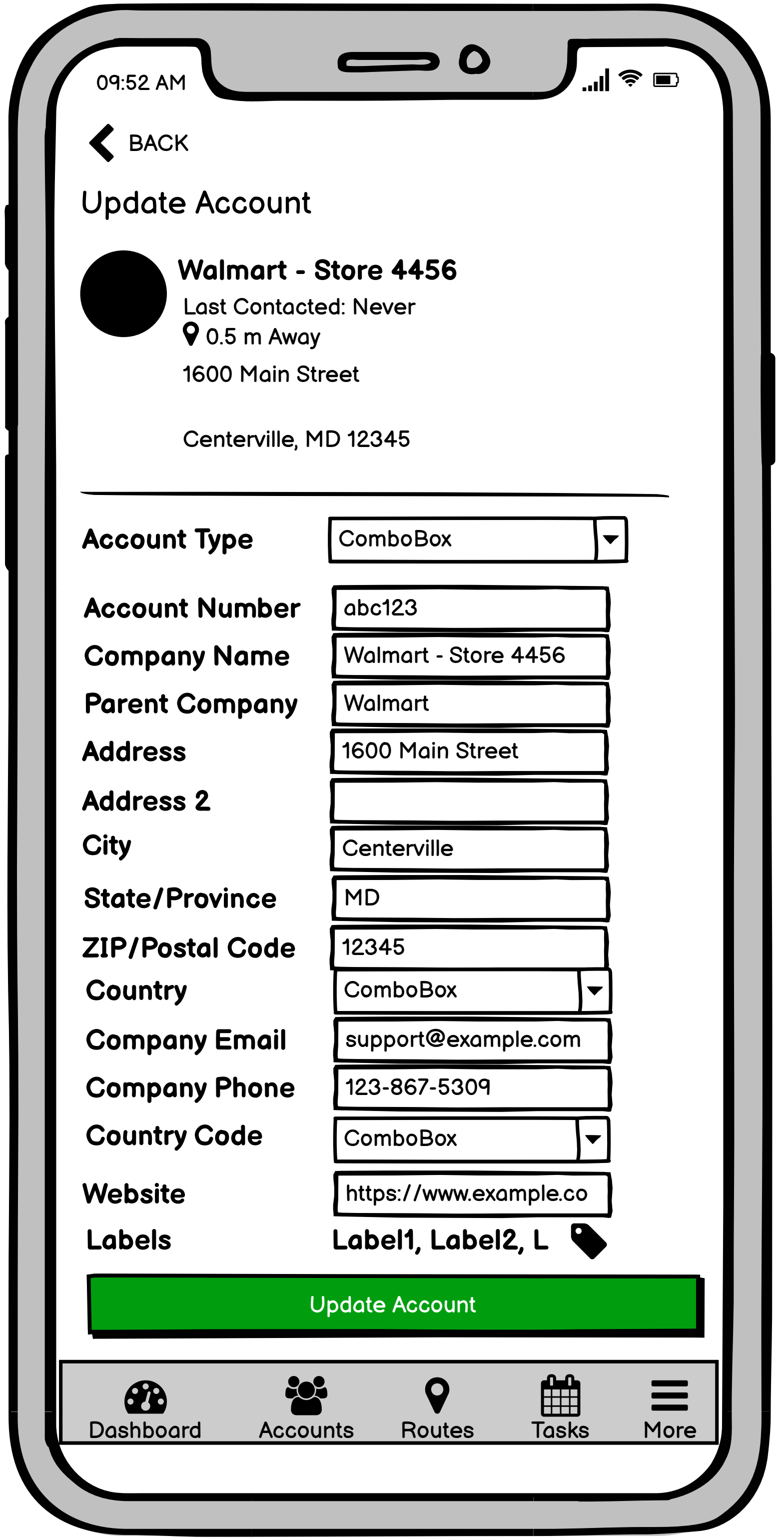
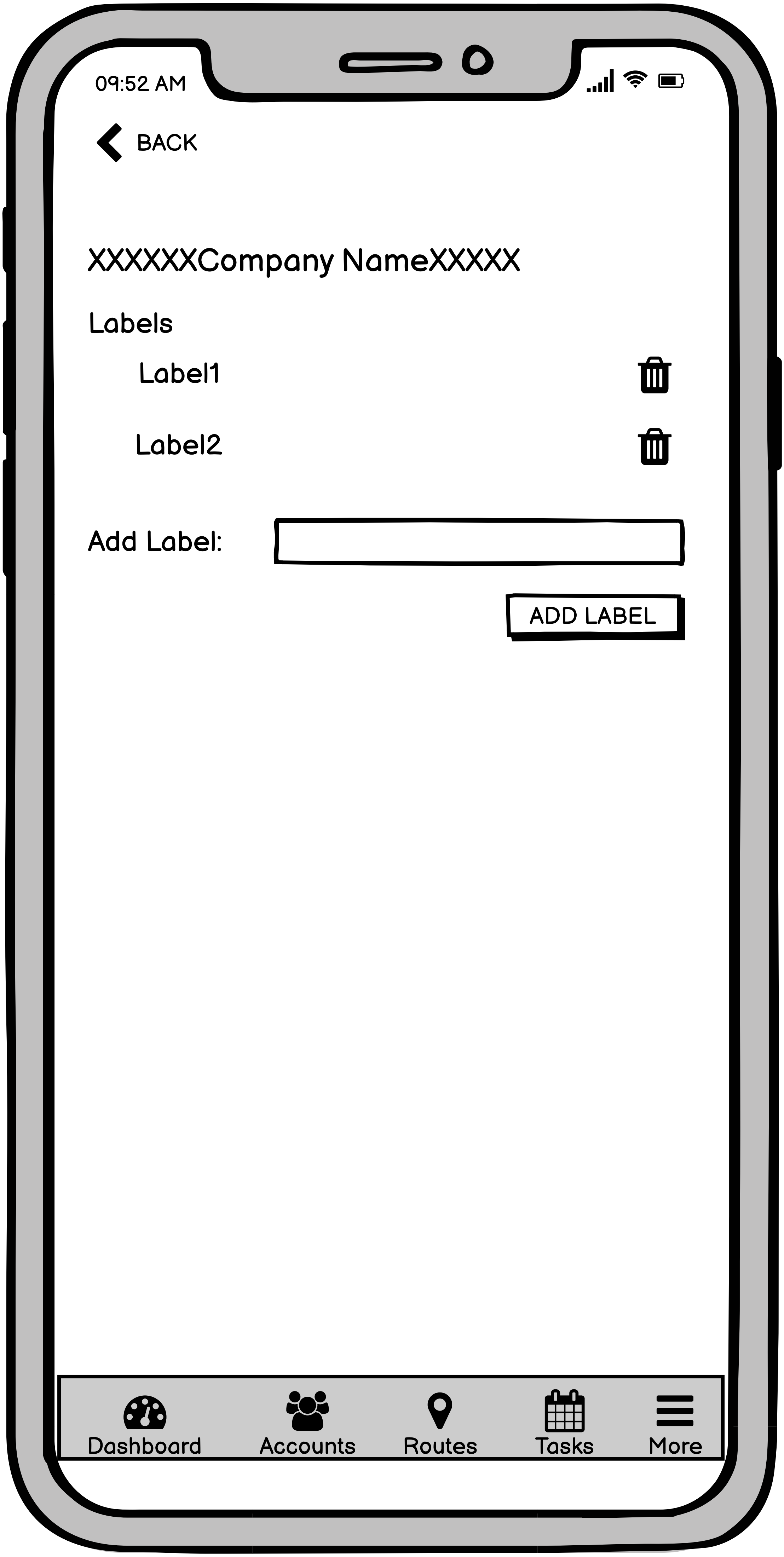
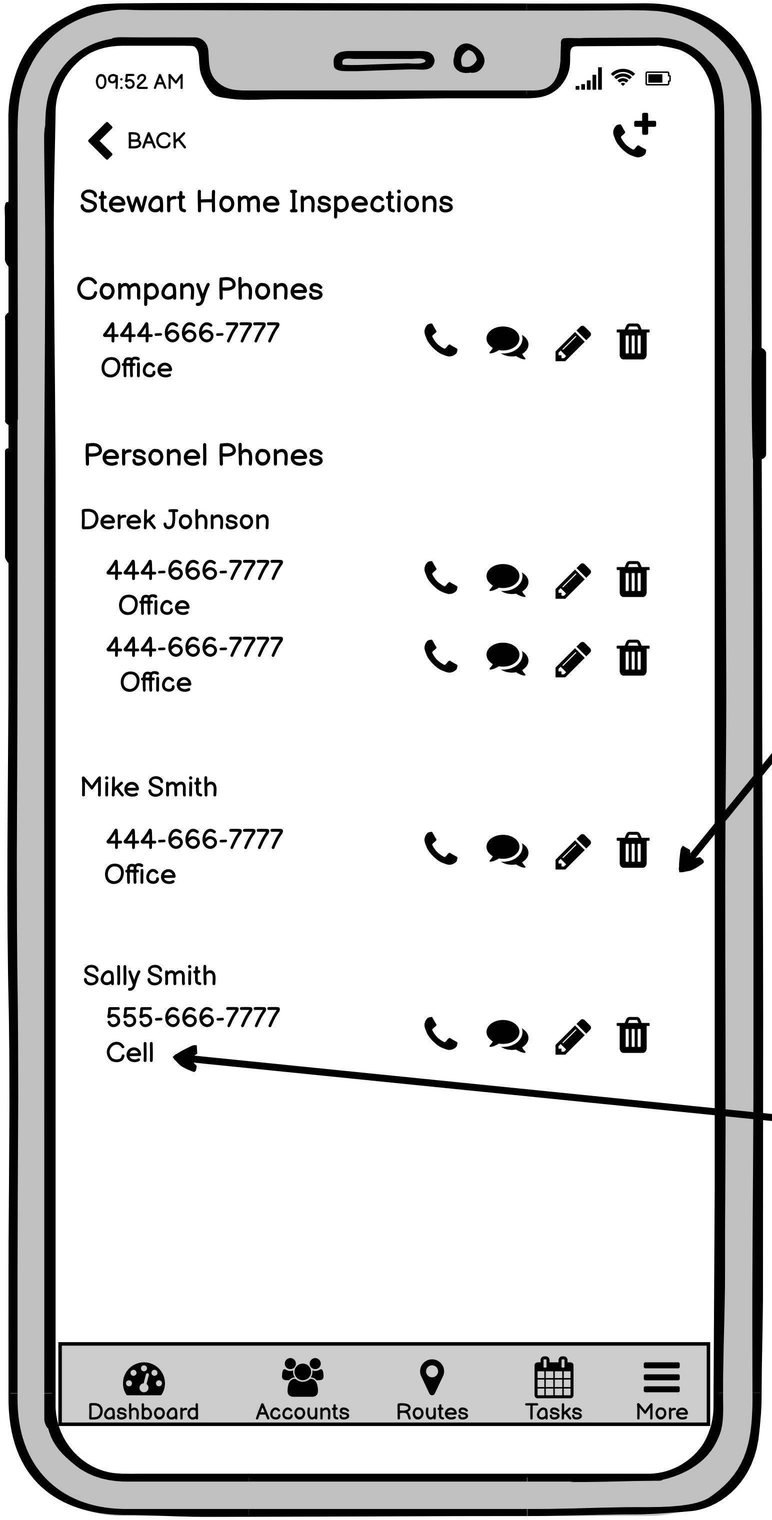


Labels can go to new page for adding / removing / creating labels


09:52 AM
BACK
XXXXXXCompany NameXXXXX
Labels
Label1
Label2
Add Label:
ADD LABEL
Dashboard
Accounts
Routes
Tasks
More



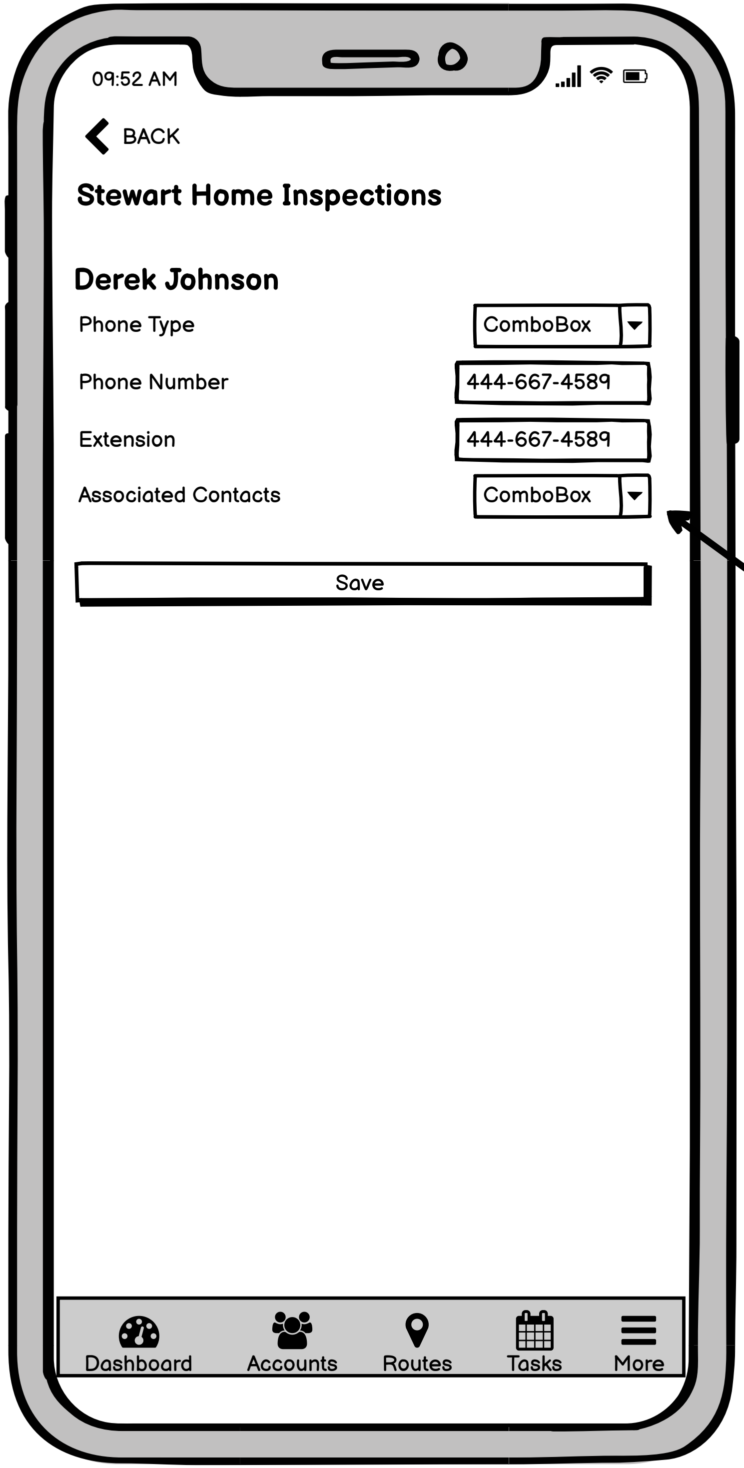
People can have the same number.

If no people in company, this screen would be blank. New person icon top right would allow them to add another person to the company and populate their phone(s).

Only users with delete permissions (Can Delete and Can delete Personel) would see the delete icons where applicable. Otherwise, the other icons would be right justified.

Use an alert to confirm when delete is pressed.

Phone type can be under or to the right of the name. Either is fine.



SMS Screen and
Make a Call Screen

may be able to be combined into a single screen and used.

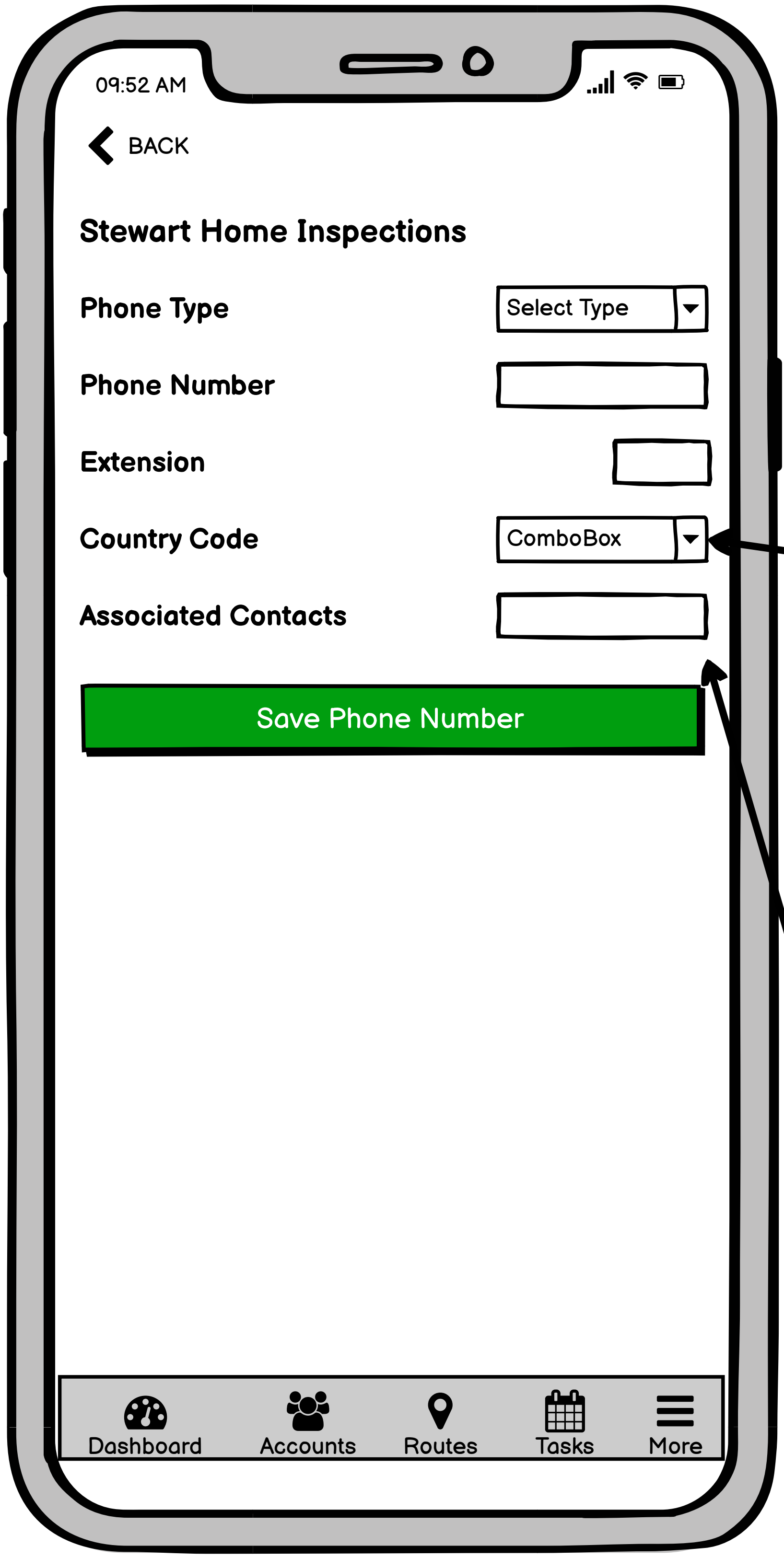
Will re-evaluate later today.

People can have the same number.

If no people in company, this screen would be blank. New person icon top right would allow them to add another person to the company and populate their phone(s).

Multi-select box allowing the number to be attached to any people or as a company number

Company Number
Rep 1
Rep 2
Rep 3



Phone Type = Cell, Home, Office (Default), Fax

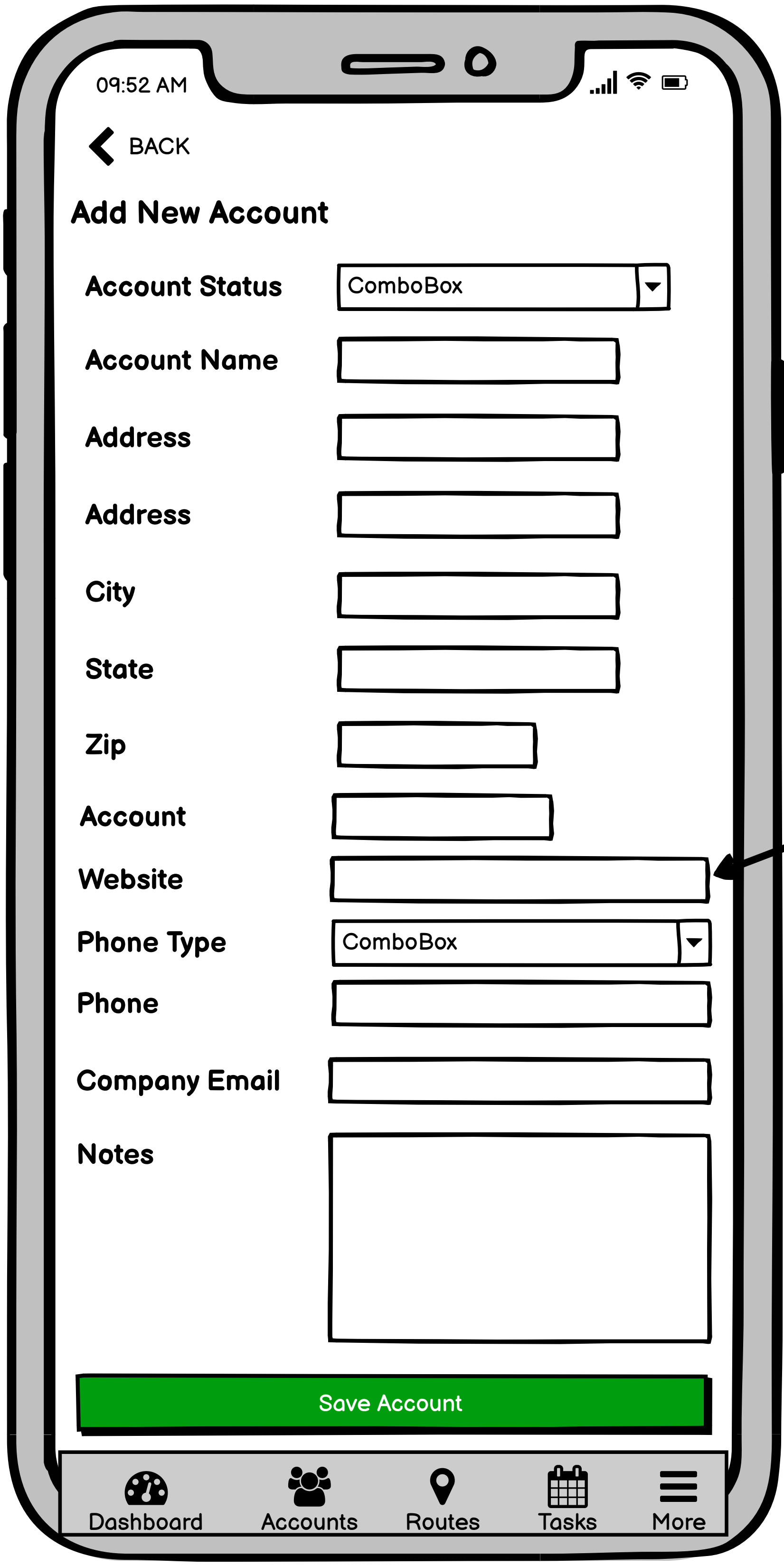
Associated Contacts allows the user to assign the number to PEOPLE within this contact

Once submitted and returned to the Call Screen, a pop up should be seen verifying the phone was added.

Dropdown
United States (default)
Canada
Mexico
Costa Rica
Israel

<All other countries in alphabetical order>

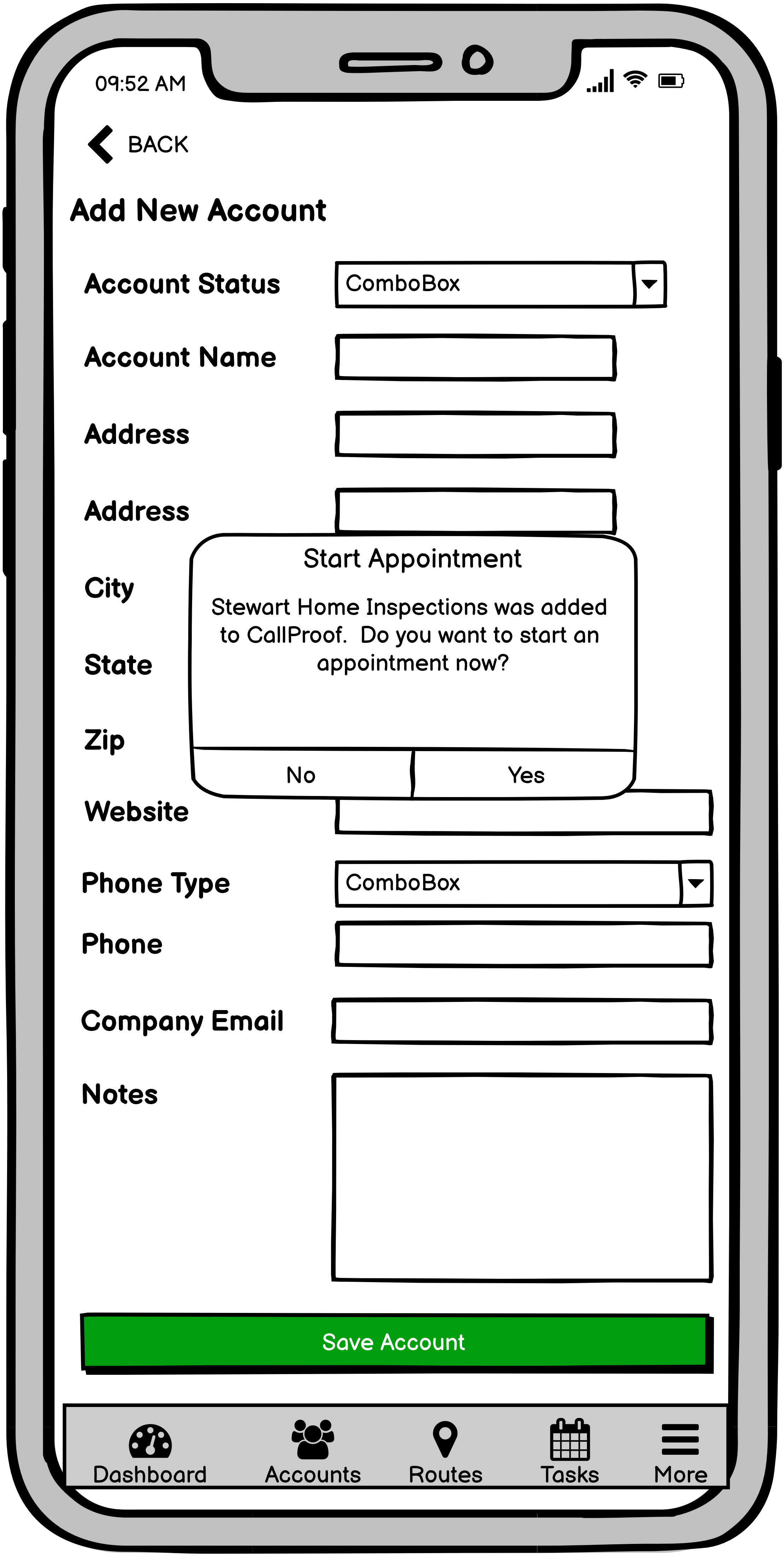
Use a multi-select dropdown.

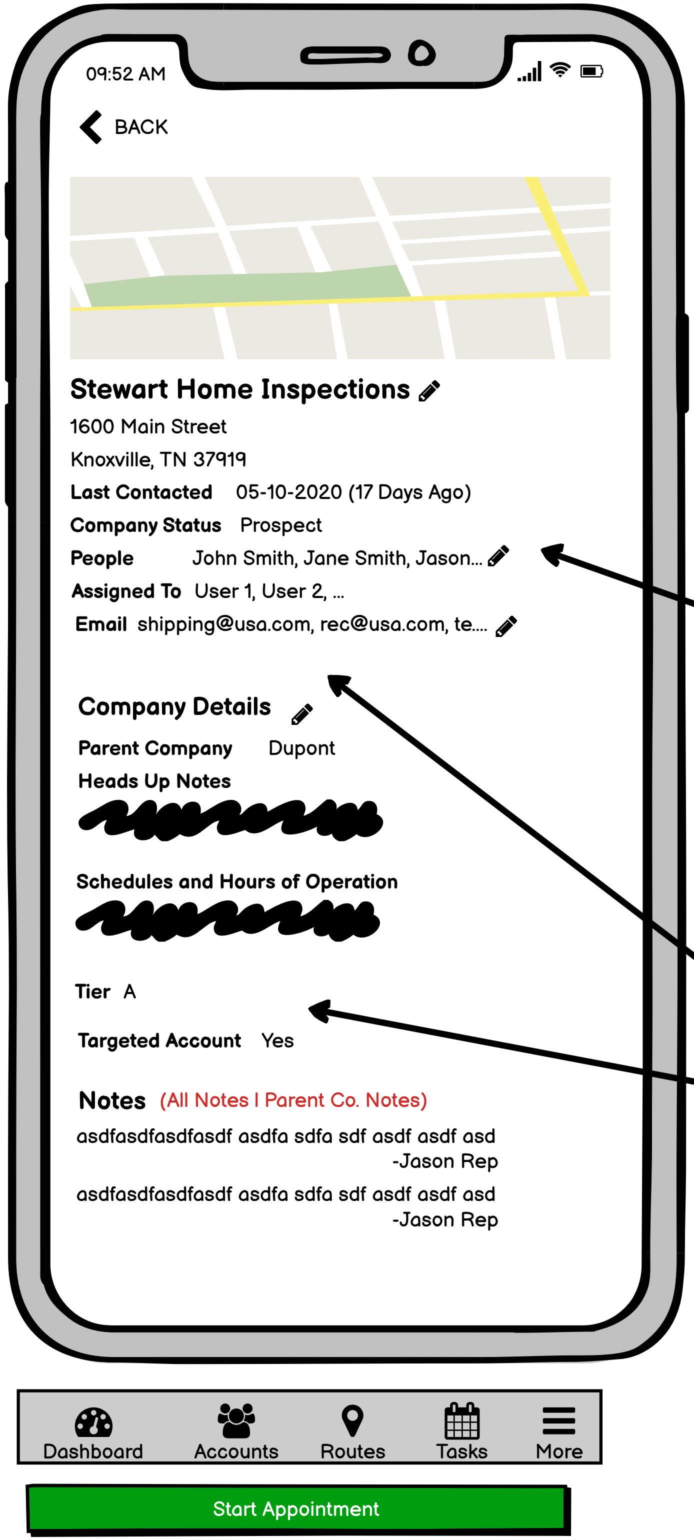


Text field needed for the "Account Number"

Phone Type = Cell, Home, Office(Default), Fax

Layout for this could be better.


09:52 AM
BACK
Add New Account
Account Status
ComboBox
Account Name
Address
Address
City
State
Zip
Website
Start Appointment
Stewart Home Inspections was added to CallProof. Do you want to start an appointment now?
No
Yes
Phone Type
ComboBox
Phone
Company Email
Notes
Save Account
Dashboard
Accounts
Routes
Tasks
More



Multiple sections
- Info
- Details (Custom Fields)
- Notes
- Contacts

Notes section may need to include additional notes from the "parent company"

This layout is correct.

We want to remove the tabs and just list this info on one single screen.

Order of the data

Info (Company name, Last Contacted, Status/Type, Reps, Emails)

Company Details
(List all custom fields here)

Notes
(Show last 5 notes by default. If user clicks "All Notes", then all notes from the account should be shown. If Parent Co. Notes is selected, all Parent Company Notes will be shown. Users should be able to switch easily between these with the links next to Notes.)

Contacts are handled in the INFO section and can be editted with the pencil/edit button.

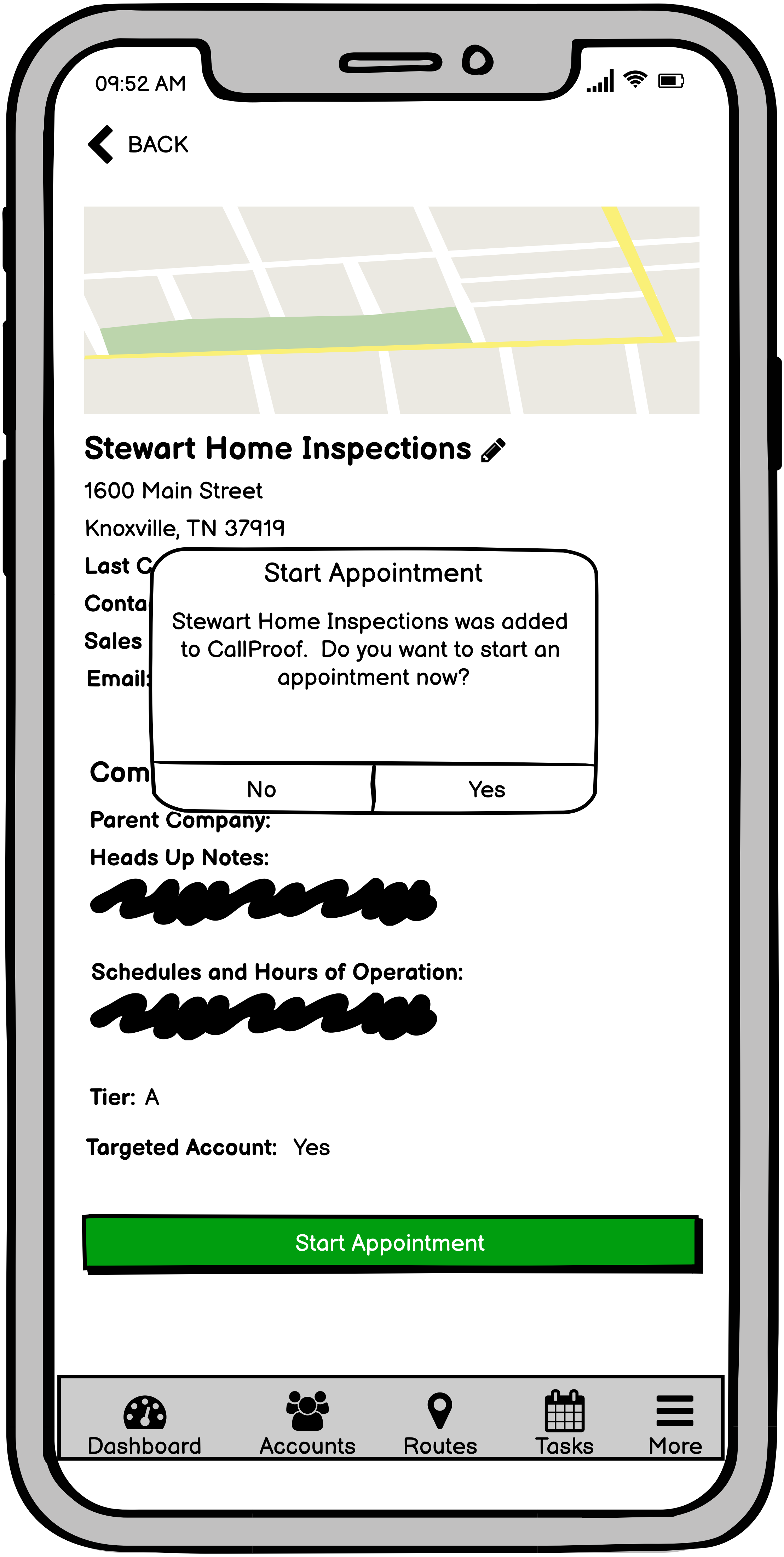
Under Company Details, the Custom Fields need to be displayed.

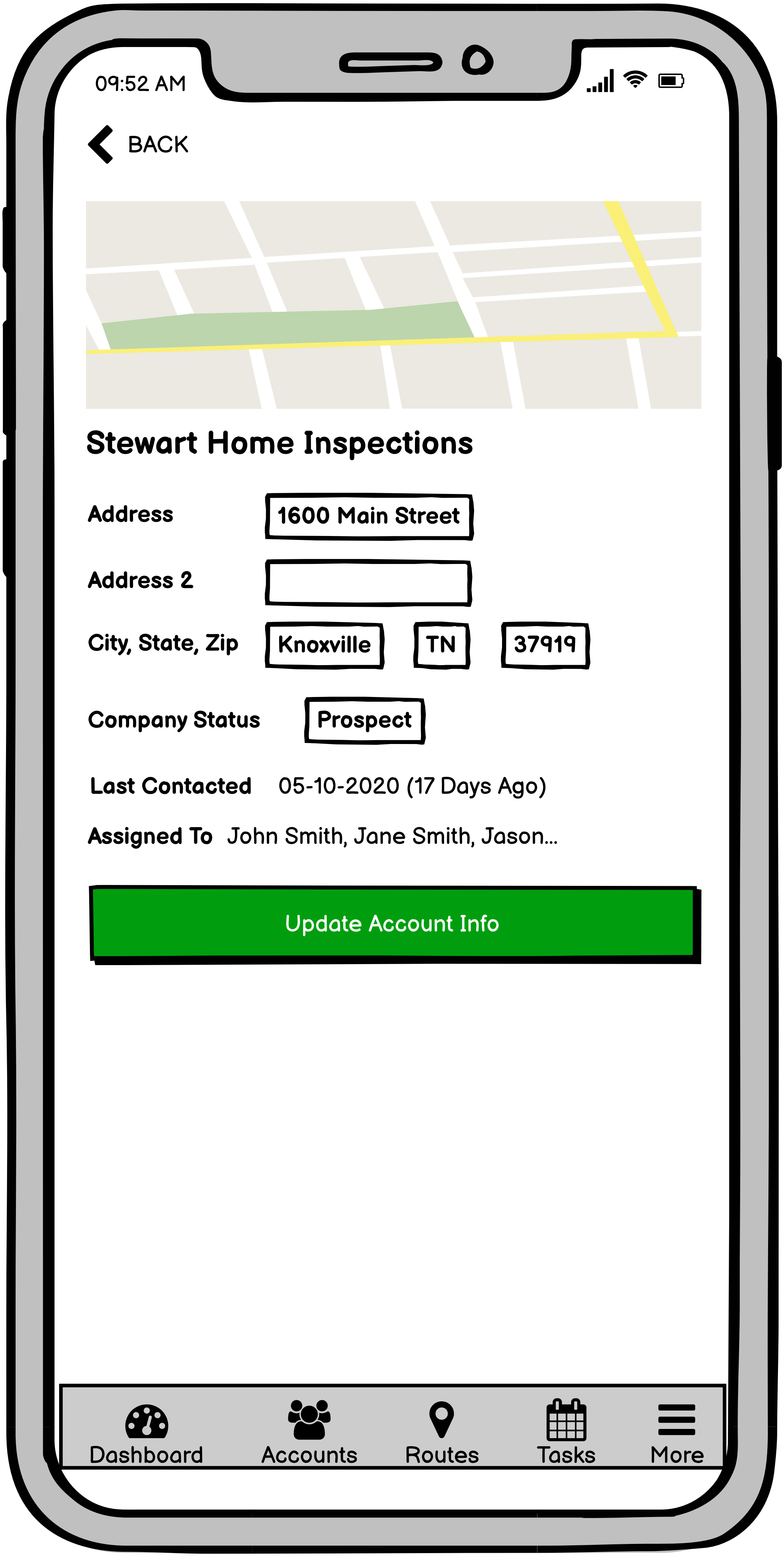
This section goes to the PEOPLE manager page. They can add/edit people within the account.

No selection of people is done here. That is done at other times.

This section is Custom Fields.

Pencil Icon allows users to edit this info here


09:52 AM
BACK
Stewart Home Inspections
1600 Main Street
Knoxville, TN 37919
Last C
Conta
Sales
Email:
Com
Start Appointment
Stewart Home Inspections was added to CallProof. Do you want to start an appointment now?
No
Yes
Parent Company:
Heads Up Notes:
Schedules and Hours of Operation:
Tier: A
Targeted Account: Yes
Start Appointment
Dashboard
Accounts
Routes
Tasks
More


09:52 AM
BACK
Stewart Home Inspections
Address
1600 Main Street
Address 2
City, State, Zip
Knoxville
TN
37919
Company Status
Prospect
Last Contacted
05-10-2020 (17 Days Ago)
Assigned To
John Smith, Jane Smith, Jason...
Update Account Info
Dashboard
Accounts
Routes
Tasks
More

09:52 AM

BACK

Stewart Home Inspections

1600 Main Street

Knoxville, TN 37919

Last Contacted 05-10-2020 (17 Days Ago)

Account Status Prospect

Assigned To John Smith, Jane Smith, Jason...

Email shipping@usa.com, rec@usa.com, te....

Account Details

Parent Company: Dupont

Heads Up Notes

asdfasd fasdf asdf asdf asdf asdf asdf asdf sadf asdf asdf asdf asdf asdf asdf asdfa sdf

Schedules and Hours of Operation

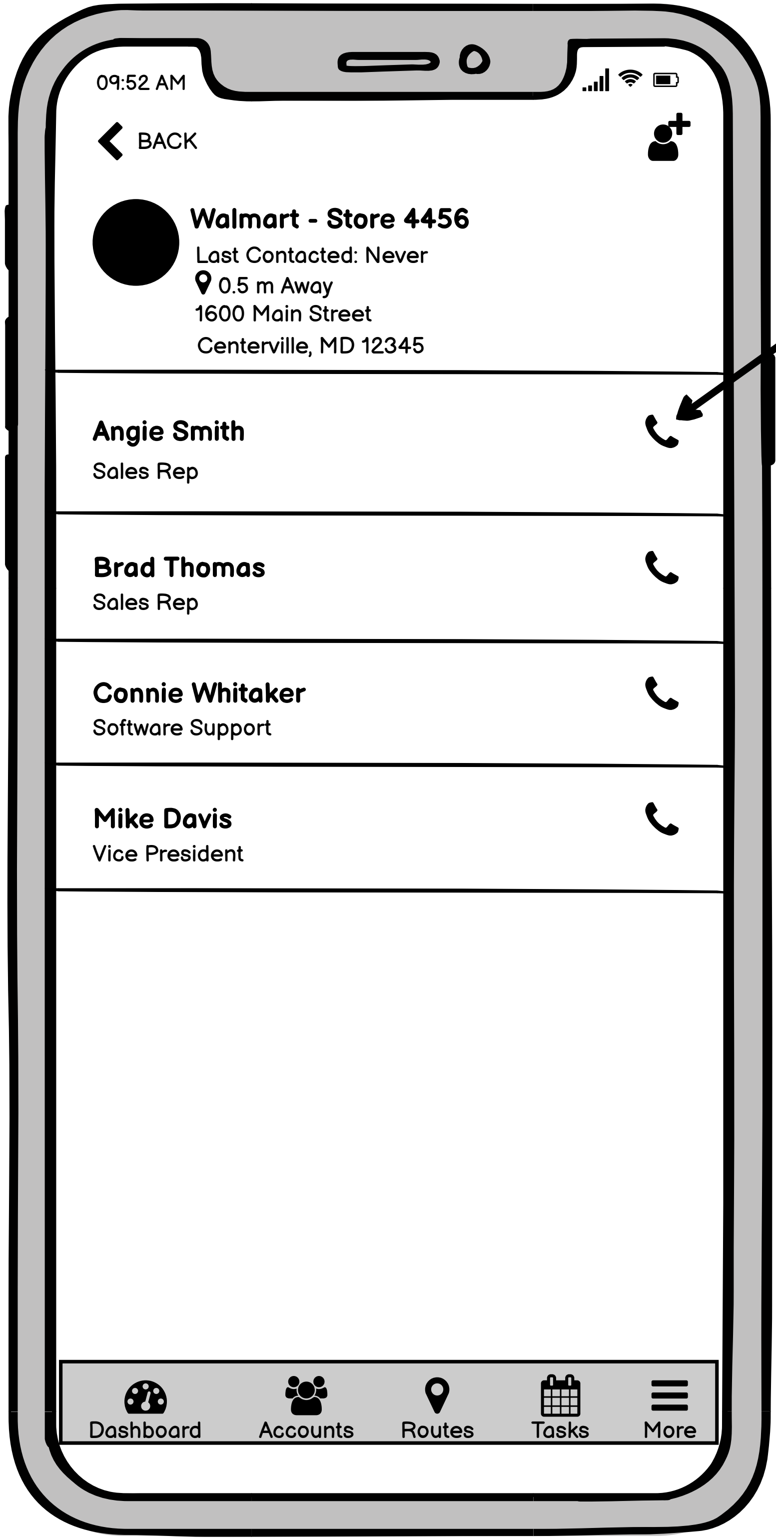
asdfasd fasdf asdf asdf asdf asdf asdf asdf sadf asdf asdf asdf asdf asdf asdf asdfa sdf

Tier: A

Targeted Account ☐

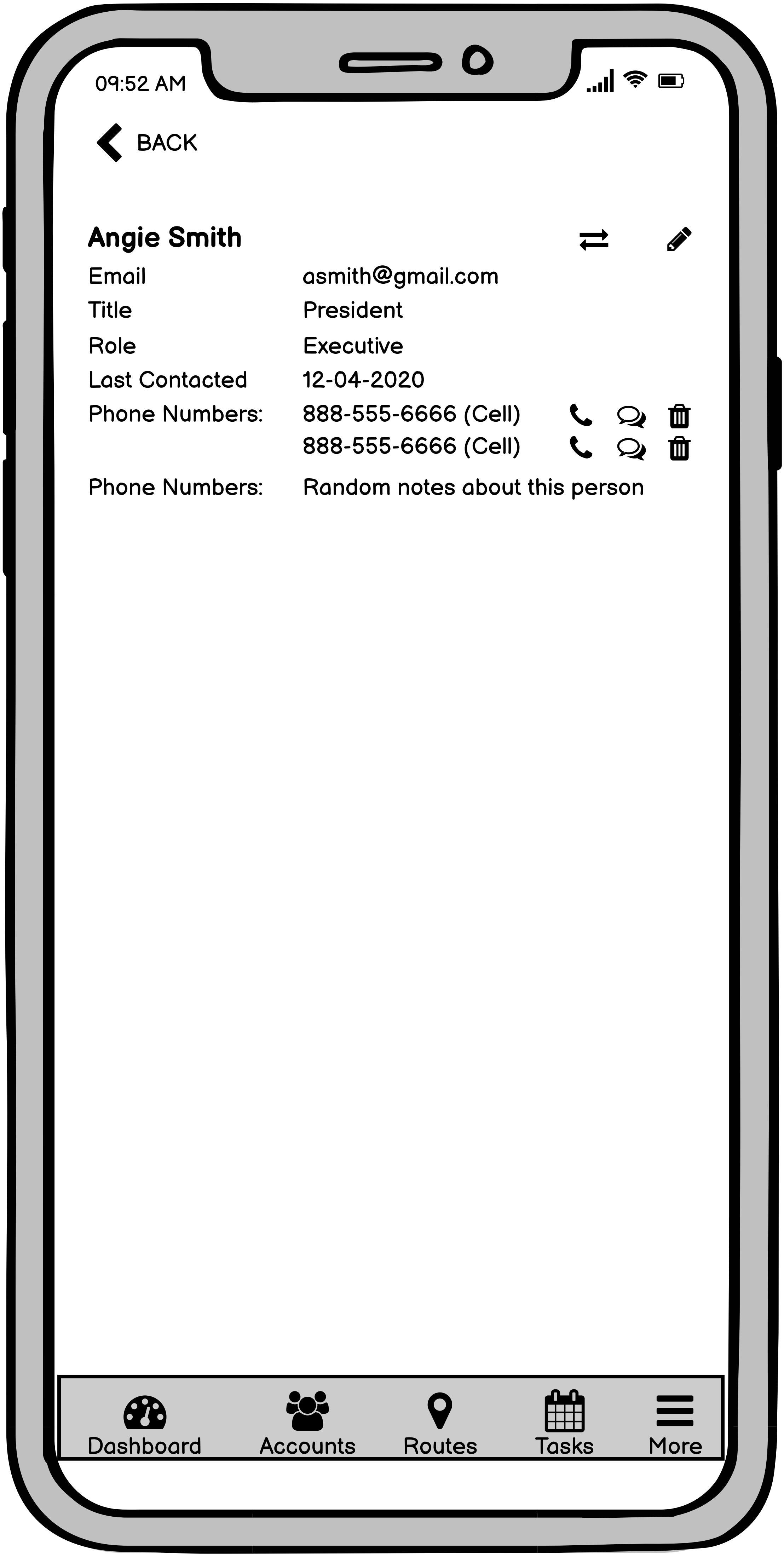
Update Custom Fields

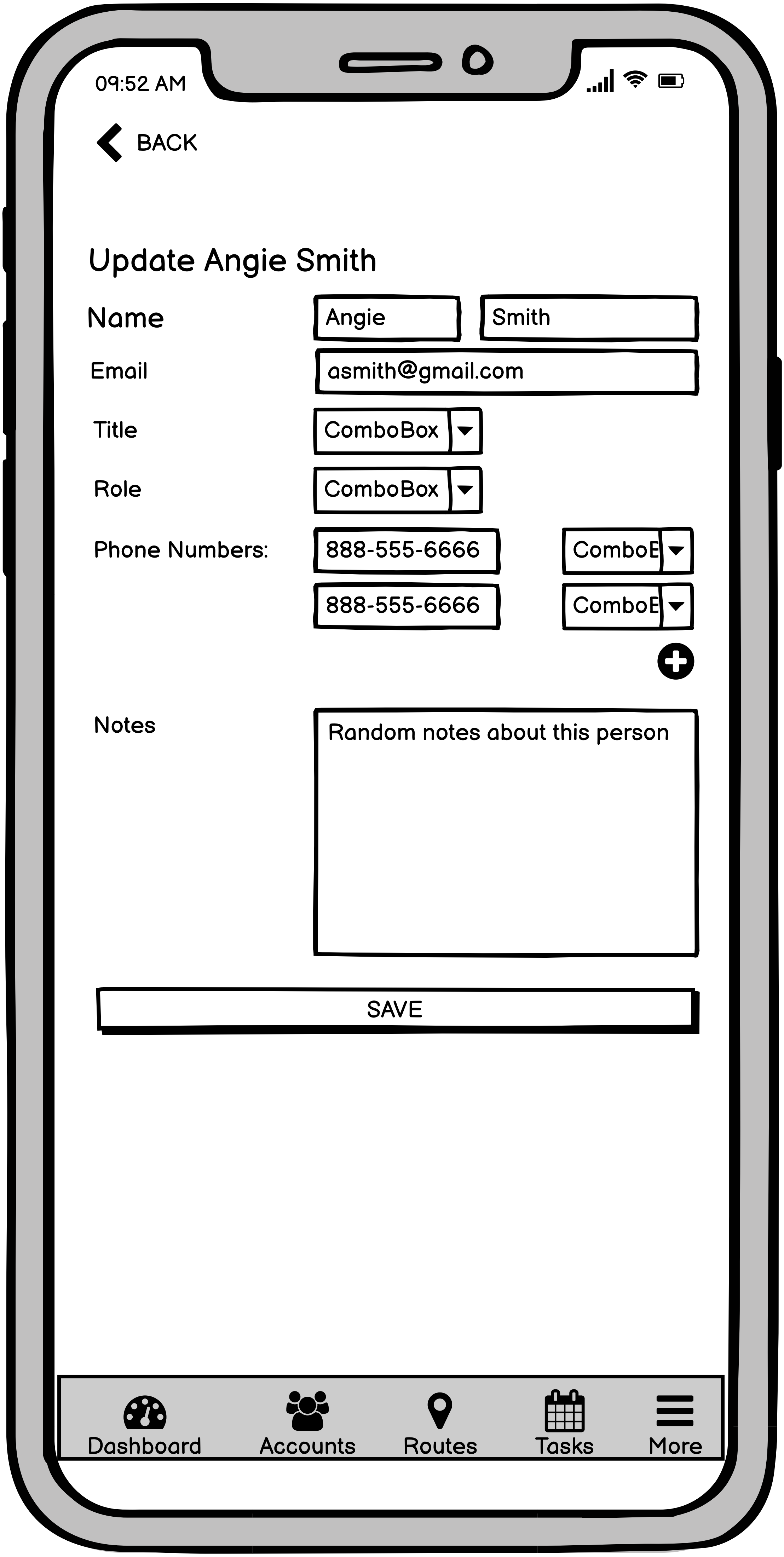
Dashboard | Accounts | Routes | Tasks | More



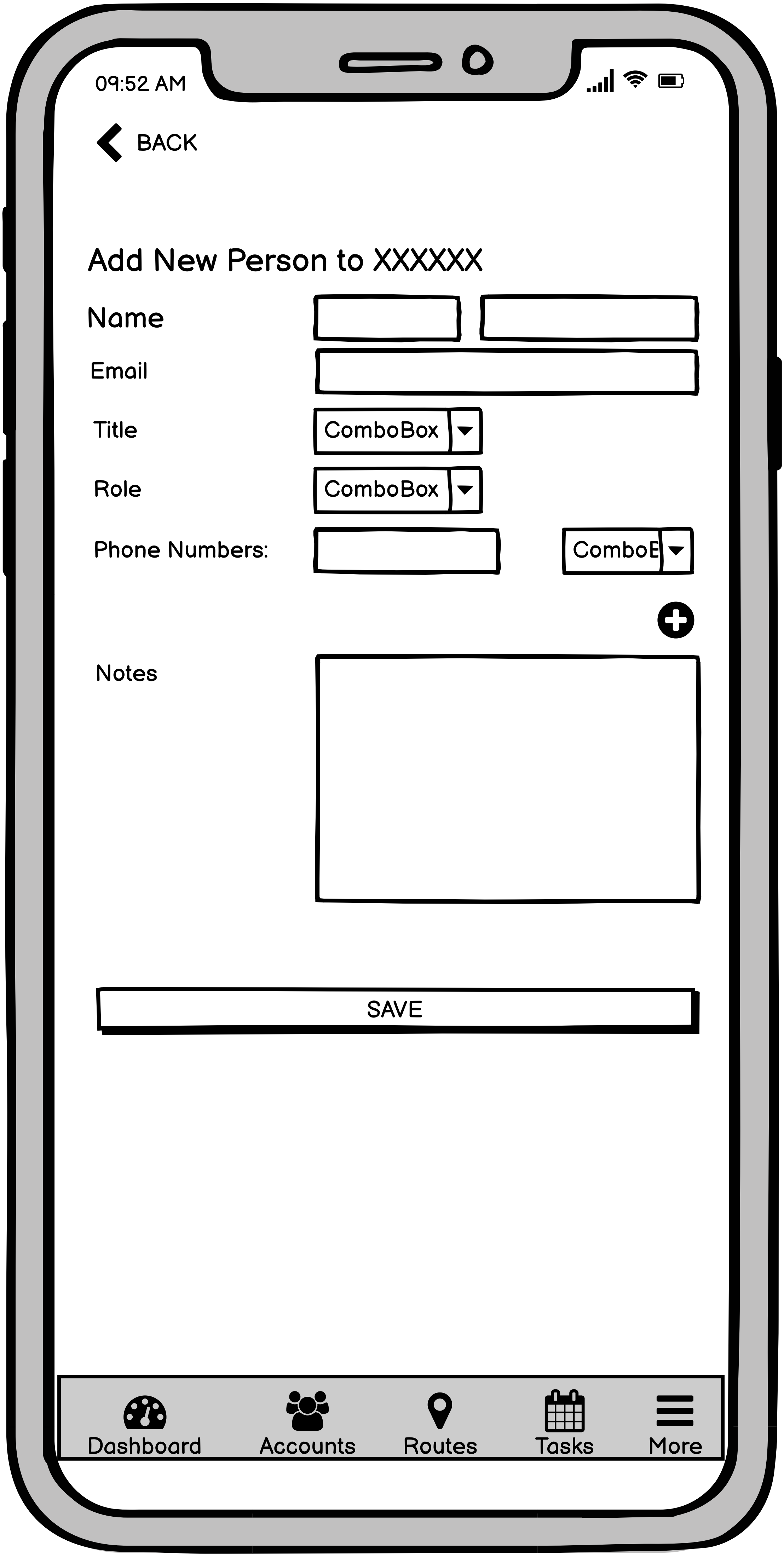
Launch Call dialog were user can select which phone to call

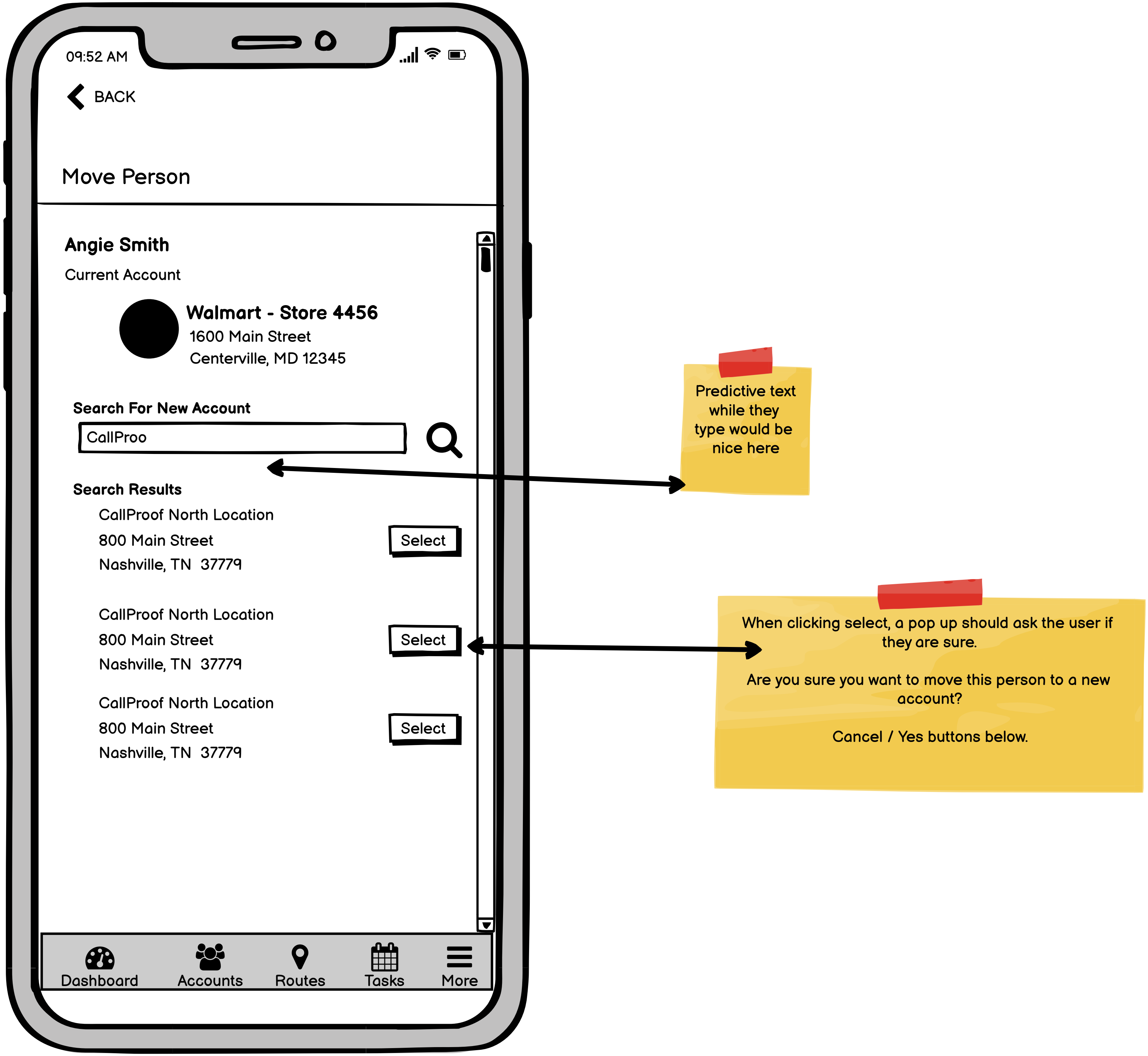
Click anywhere else on the record except the phone icon and it will show the People information page.

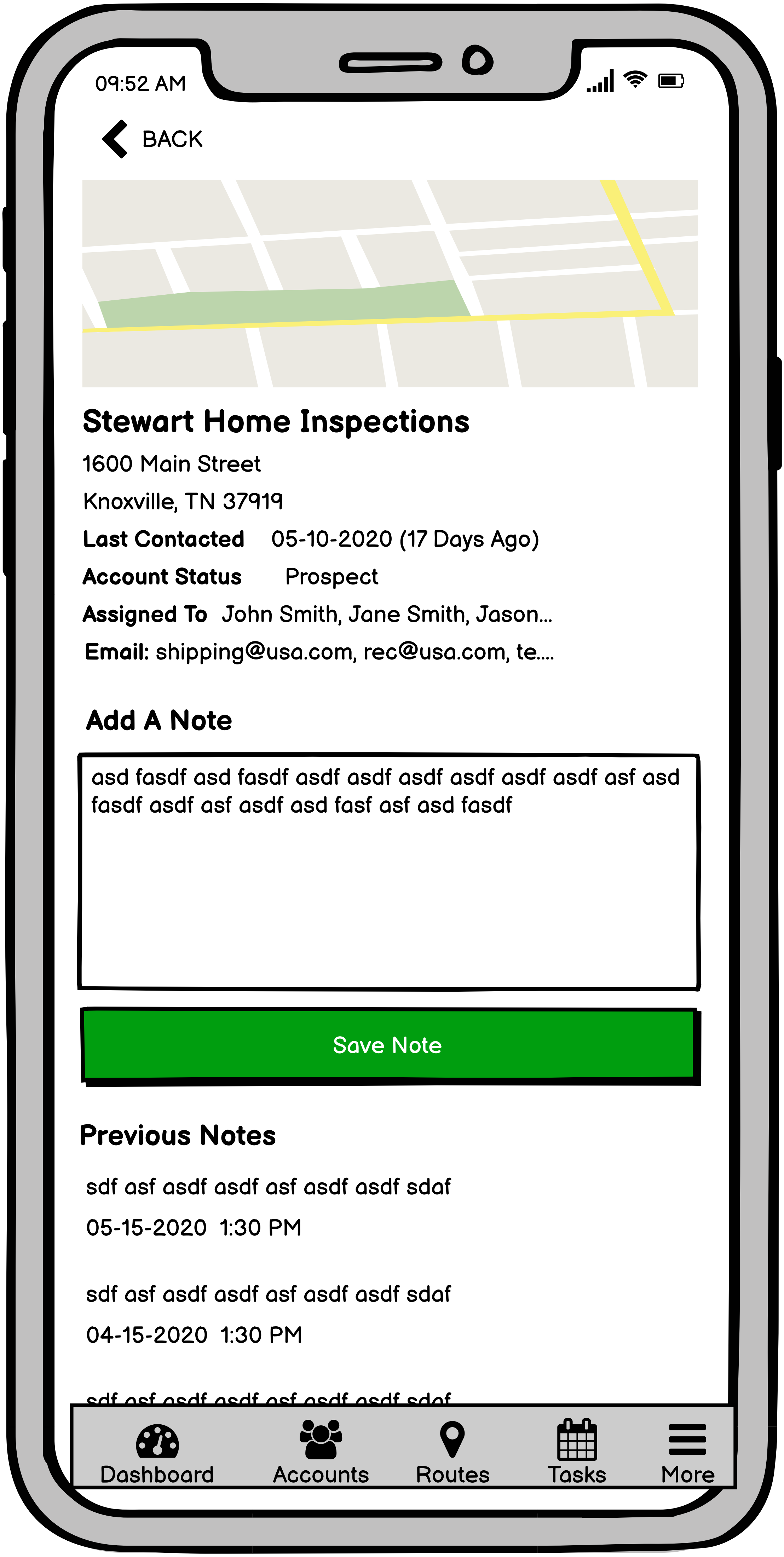

09:52 AM
BACK
Angie Smith
Email
asmith@gmail.com
Title
President
Role
Executive
Last Contacted
12-04-2020
Phone Numbers:
888-555-6666 (Cell)
888-555-6666 (Cell)
Phone Numbers:
Random notes about this person
Dashboard
Accounts
Routes
Tasks
More

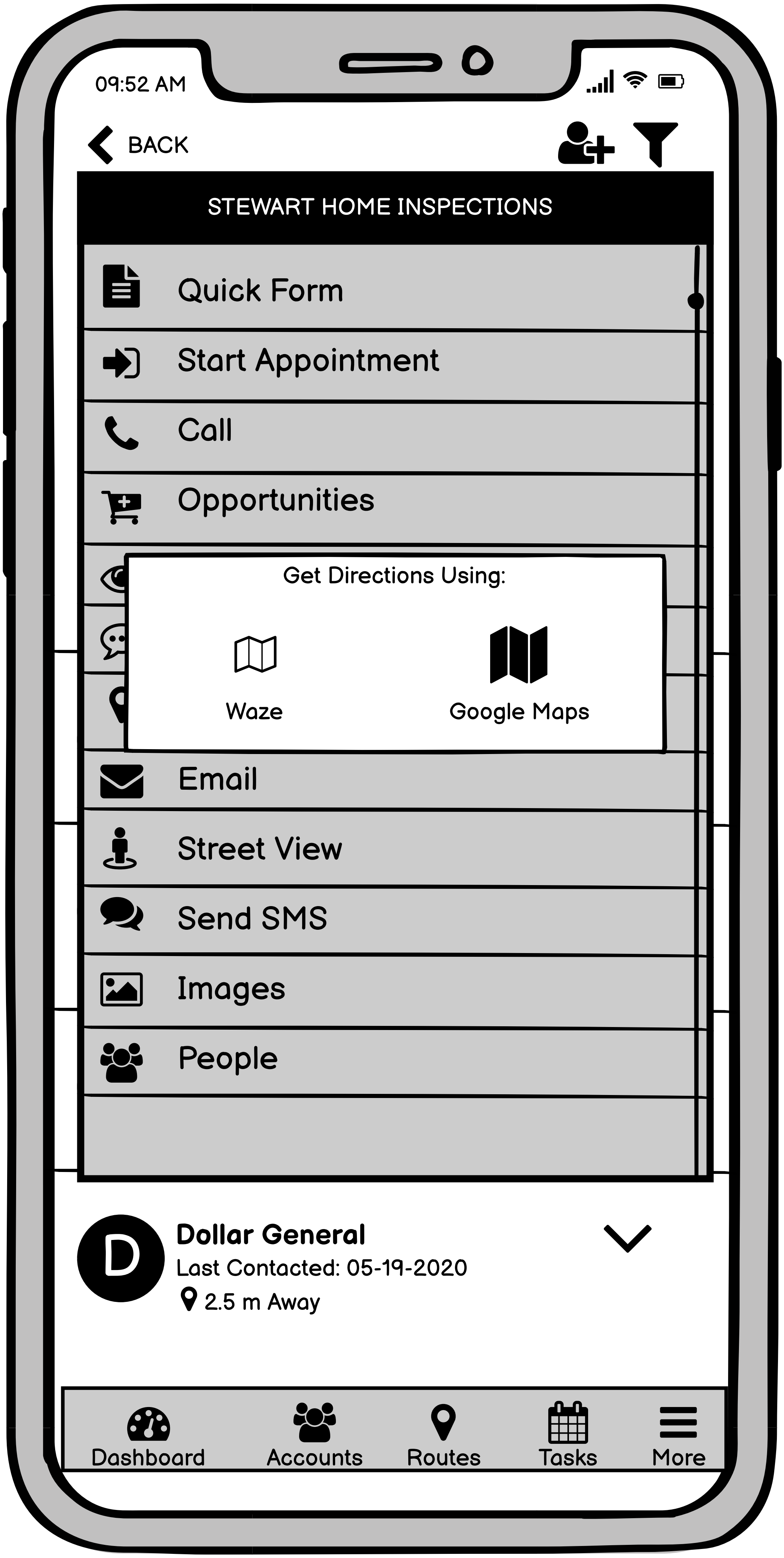


09:52 AM
BACK
Update Angie Smith
Name
Angie
Smith
Email
asmith@gmail.com
Title
ComboBox
Role
ComboBox
Phone Numbers:
888-555-6666
ComboB
888-555-6666
ComboB
Notes
Random notes about this person
SAVE
Dashboard
Accounts
Routes
Tasks
More

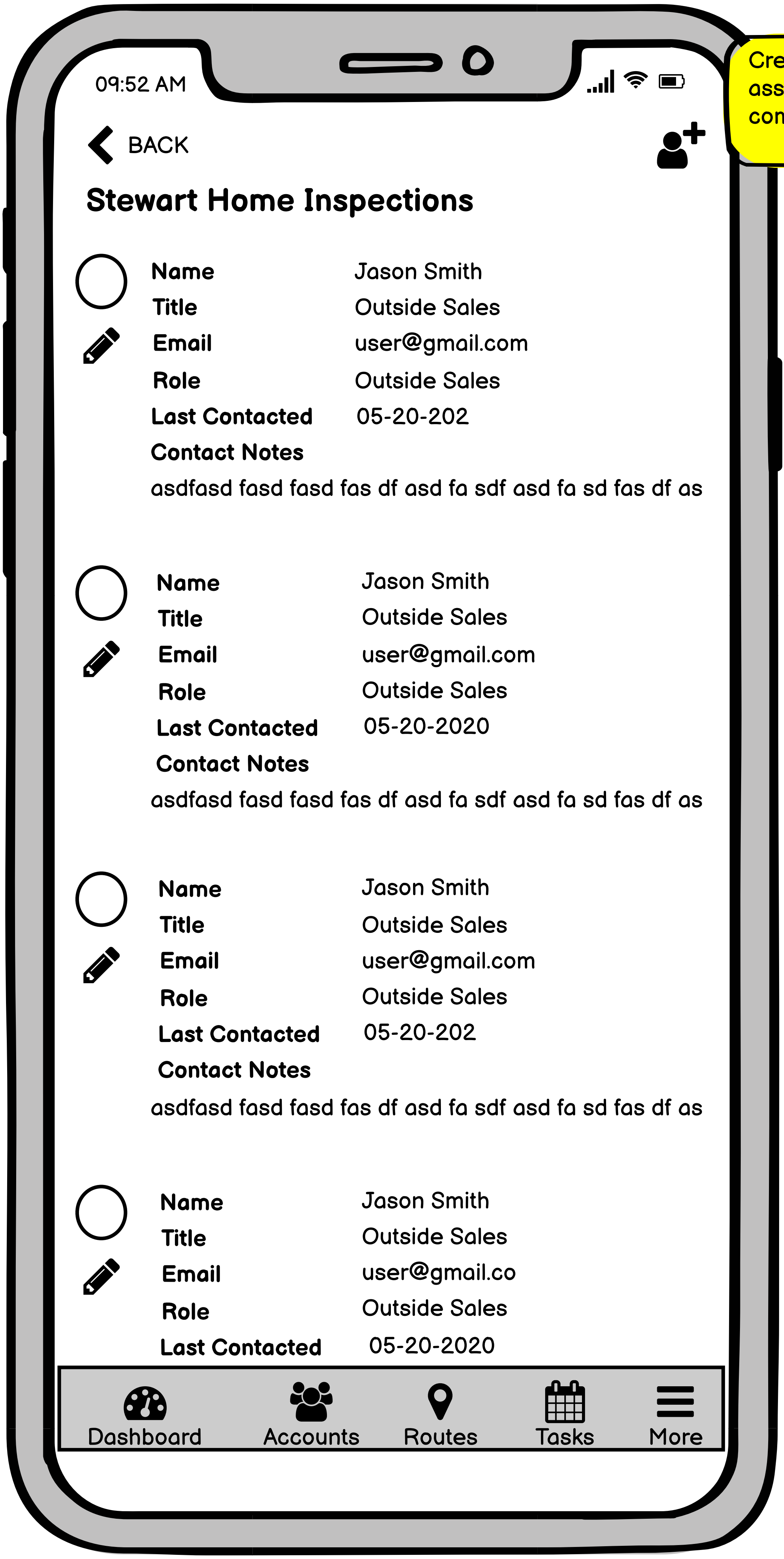

09:52 AM
BACK
Add New Person to XXXXXX
Name
Email
Title
ComboBox
Role
ComboBox
Phone Numbers:
ComboB
Notes
SAVE
Dashboard
Accounts
Routes
Tasks
More


09:52 AM
BACK
Move Person
Angie Smith
Current Account
Walmart - Store 4456
1600 Main Street
Centerville, MD 12345
Search For New Account
CallProo
Search Results
CallProof North Location
800 Main Street
Nashville, TN 37779
Select
CallProof North Location
800 Main Street
Nashville, TN 37779
Select
CallProof North Location
800 Main Street
Nashville, TN 37779
Select
Dashboard
Accounts
Routes
Tasks
More
Predictive text while they type would be nice here
When clicking select, a pop up should ask the user if they are sure.
Are you sure you want to move this person to a new account?
Cancel / Yes buttons below.


09:52 AM
BACK
Stewart Home Inspections
1600 Main Street
Knoxville, TN 37919
Last Contacted 05-10-2020 (17 Days Ago)
Account Status Prospect
Assigned To John Smith, Jane Smith, Jason...
Email: shipping@usa.com, rec@usa.com, te....
Add A Note
asd fasdf asd fasdf asdf asdf asdf asdf asdf asdf asf asd fasdf asdf asf asdf asd fasf asf asd fasdf
Save Note
Previous Notes
sdf asf asdf asdf asf asdf asdf sdaf
05-15-2020 1:30 PM
sdf asf asdf asdf asf asdf asdf sdaf
04-15-2020 1:30 PM
sdf asf asdf asdf asf asdf asdf sdaf
Dashboard
Accounts
Routes
Tasks
More



Need to include Apple Maps on iOS build



Create new Contact (person associated with this company/account)

09:52 AM

BACK

Stewart Home Inspections

1600 Main Street

Knoxville, TN 37919

Last Contacted: 05-10-2020 (17 Days Ago)

Account Type: Prospect

Sales Reps: John Smith, Jane Smith, Jason...

Email: shipping@usa.com, rec@usa.com, te....

Previous Images

Event Form: Lunch and Learn

May 15, 2020; 9:15 a.m.

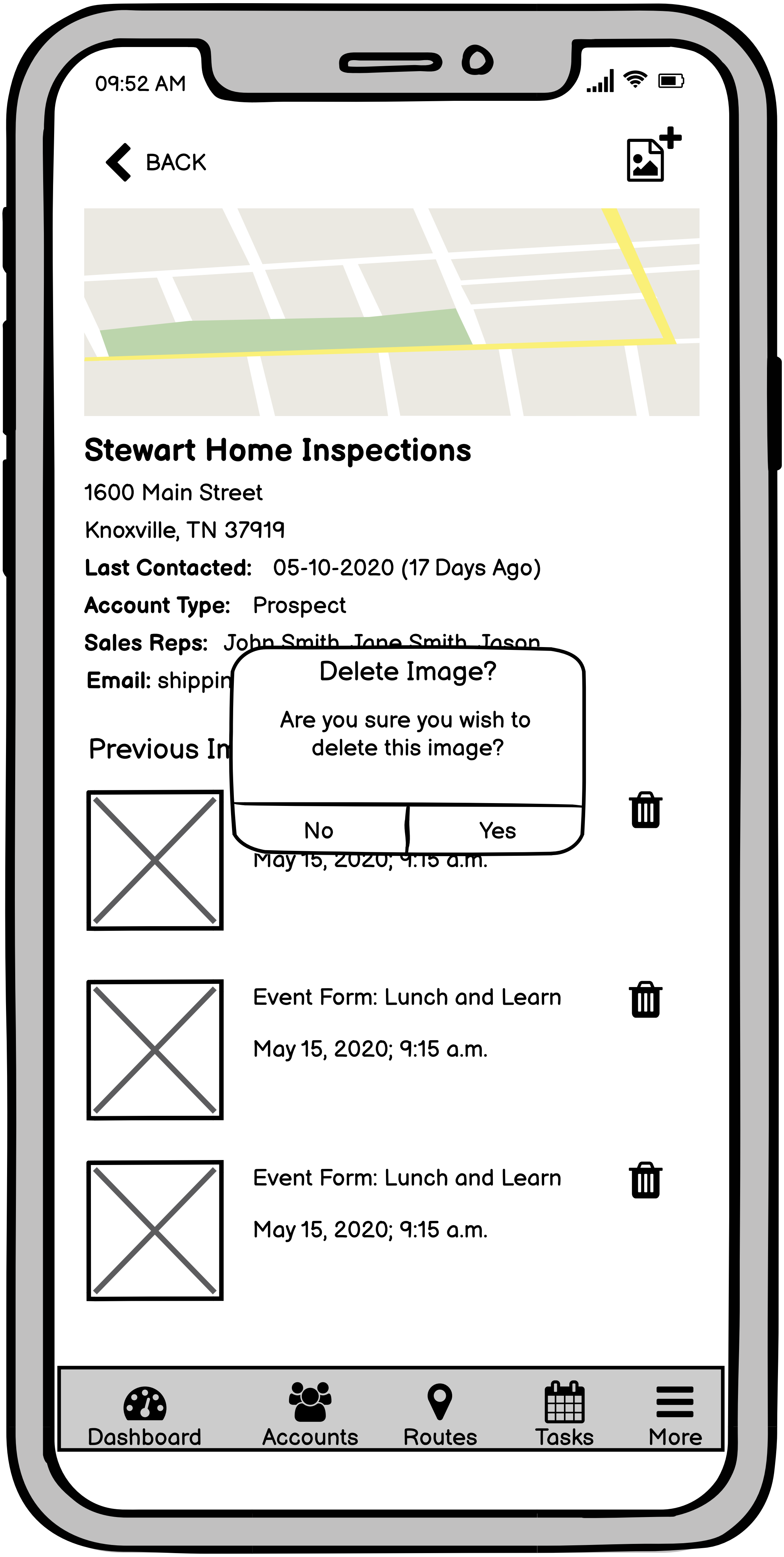
Event Form: Lunch and Learn

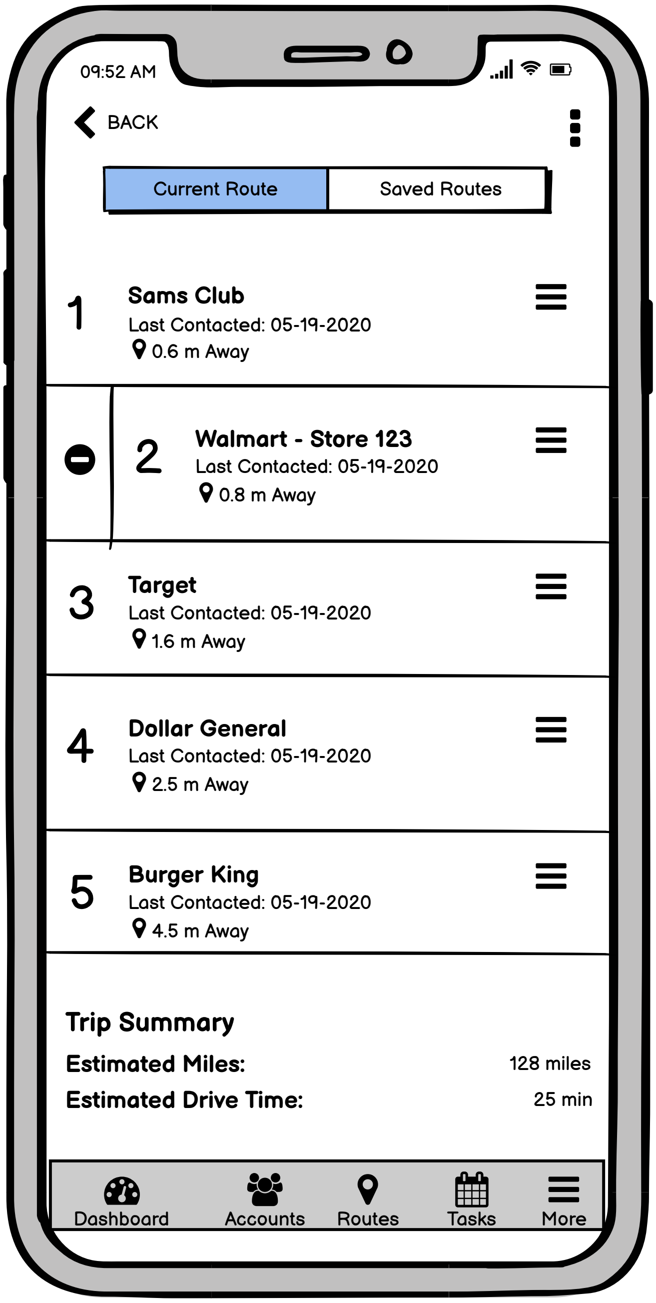
May 15, 2020; 9:15 a.m.

Event Form: Lunch and Learn

May 15, 2020; 9:15 a.m.

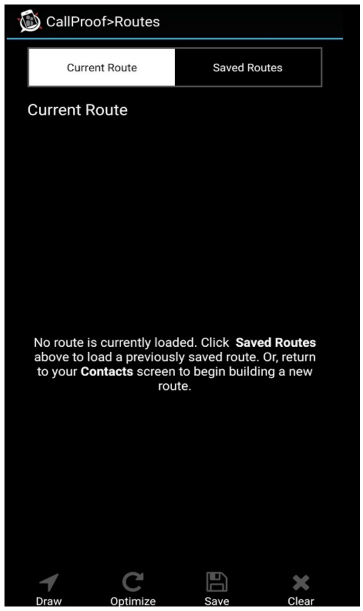
Dashboard | Accounts | Routes | Tasks | More


09:52 AM
BACK
Stewart Home Inspections
1600 Main Street
Knoxville, TN 37919
Last Contacted: 05-10-2020 (17 Days Ago)
Account Type: Prospect
Sales Reps: John Smith, Jane Smith, Jason
Email: shippin
Previous In
Delete Image?
Are you sure you wish to delete this image?
No
Yes
May 15, 2020; 9:15 a.m.
Event Form: Lunch and Learn
May 15, 2020; 9:15 a.m.
Event Form: Lunch and Learn
May 15, 2020; 9:15 a.m.
Dashboard
Accounts
Routes
Tasks
More

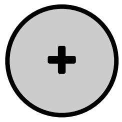


1: How to handle routing options?

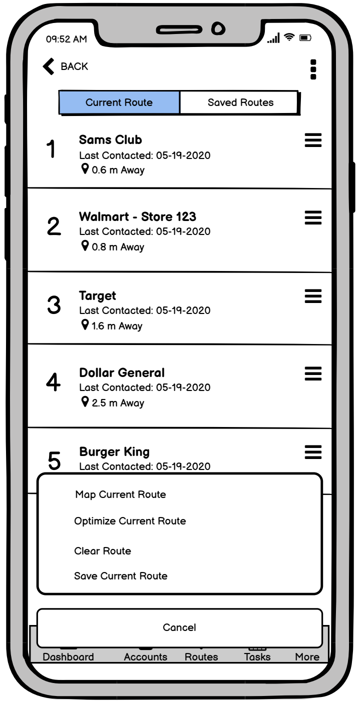
Route Whiteboard
My Routes
All Routes



Need to include an option to switch over and view the Saved Routes



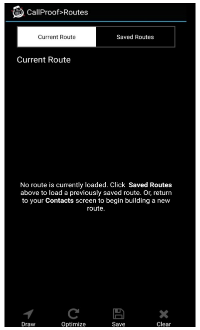
Swipe left shows a 'Delete' option for each entry

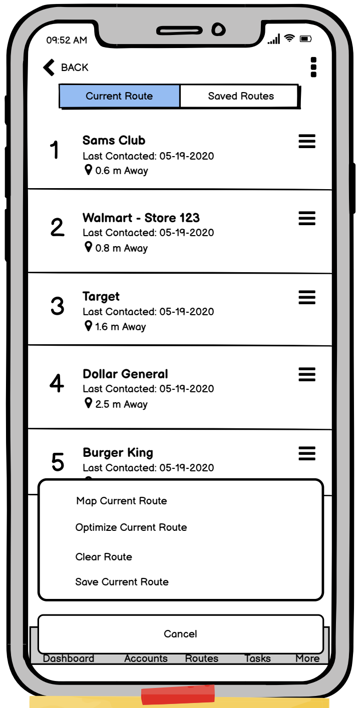


Swipe left shows a 'Delete' option for each entry

1: How to handle routing options?

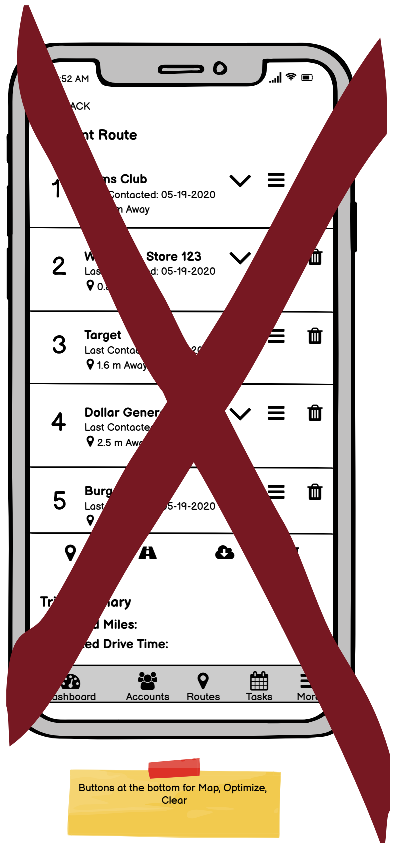
Route Whiteboard
My Routes
All Routes



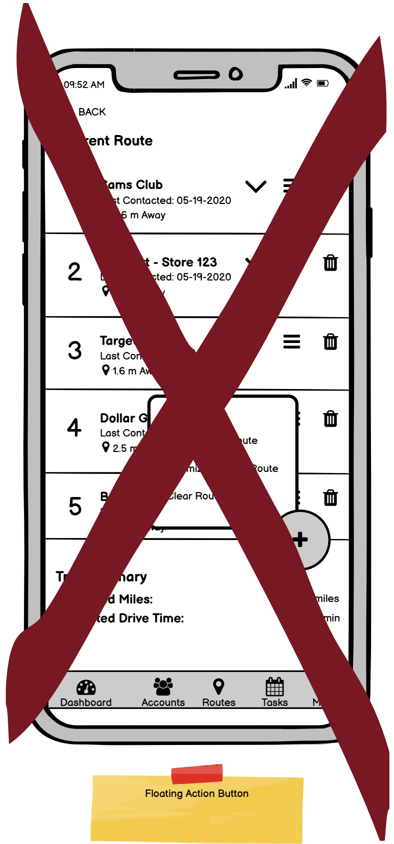


When clicking the ellipsis at the top right...

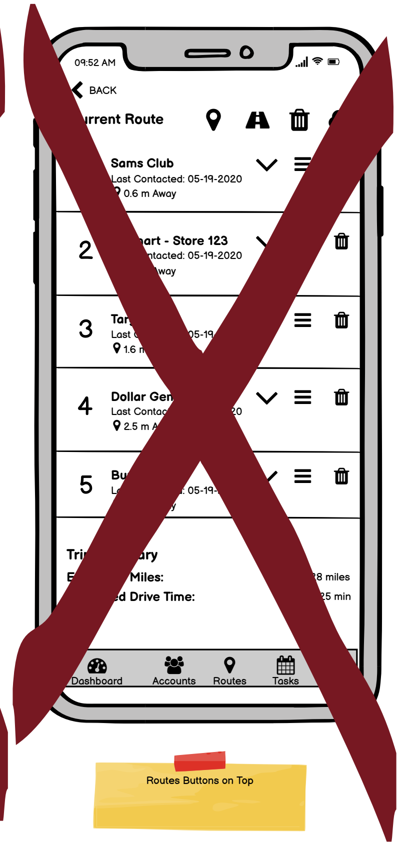
NOTE: This is the design we should use for iOS. Android probably handles ellipsis differently, so we should implement the UX in the way that they would expect, not explicitly as it is shown here.



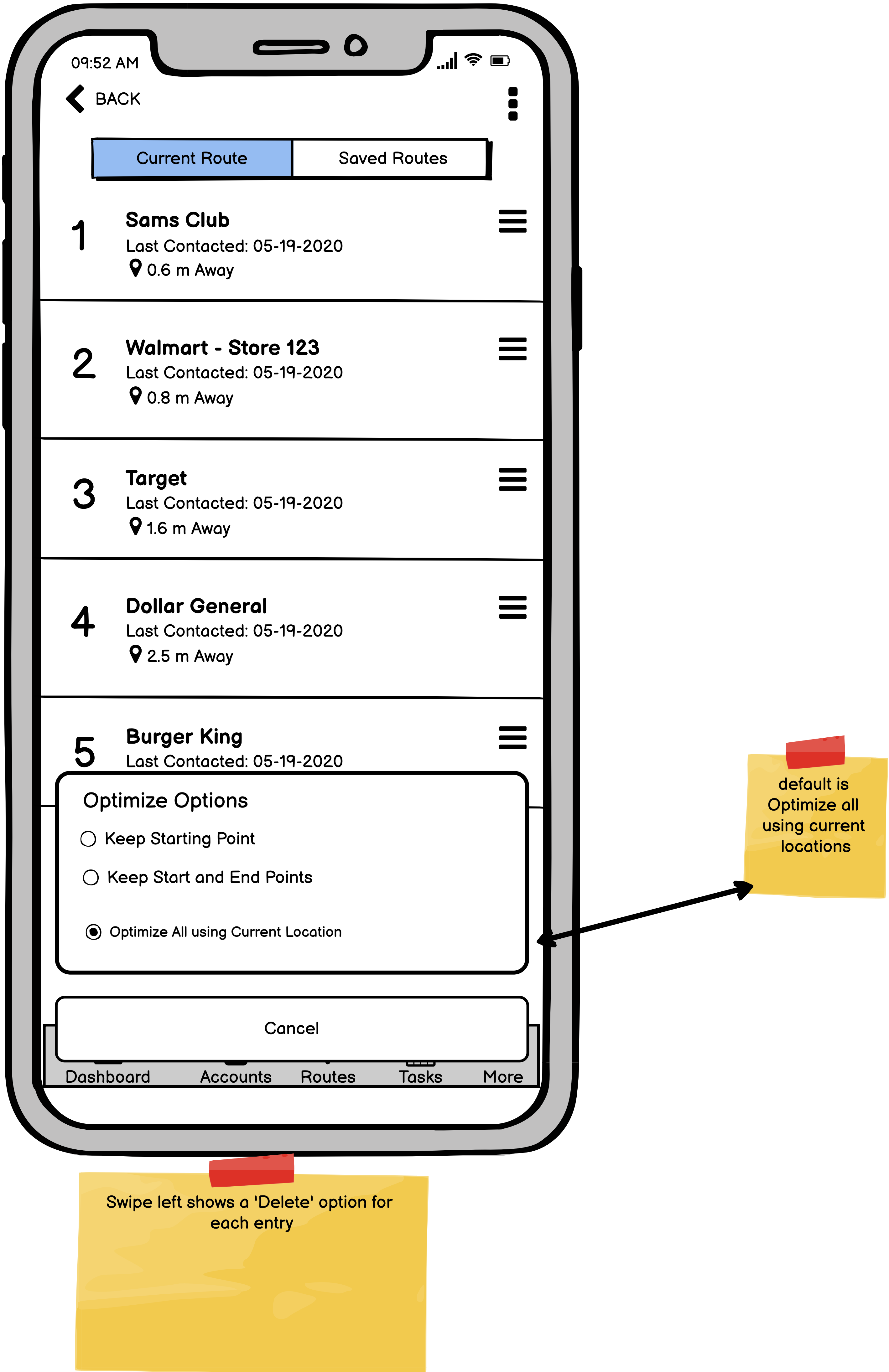
Buttons at the bottom for Map, Optimize, Clear

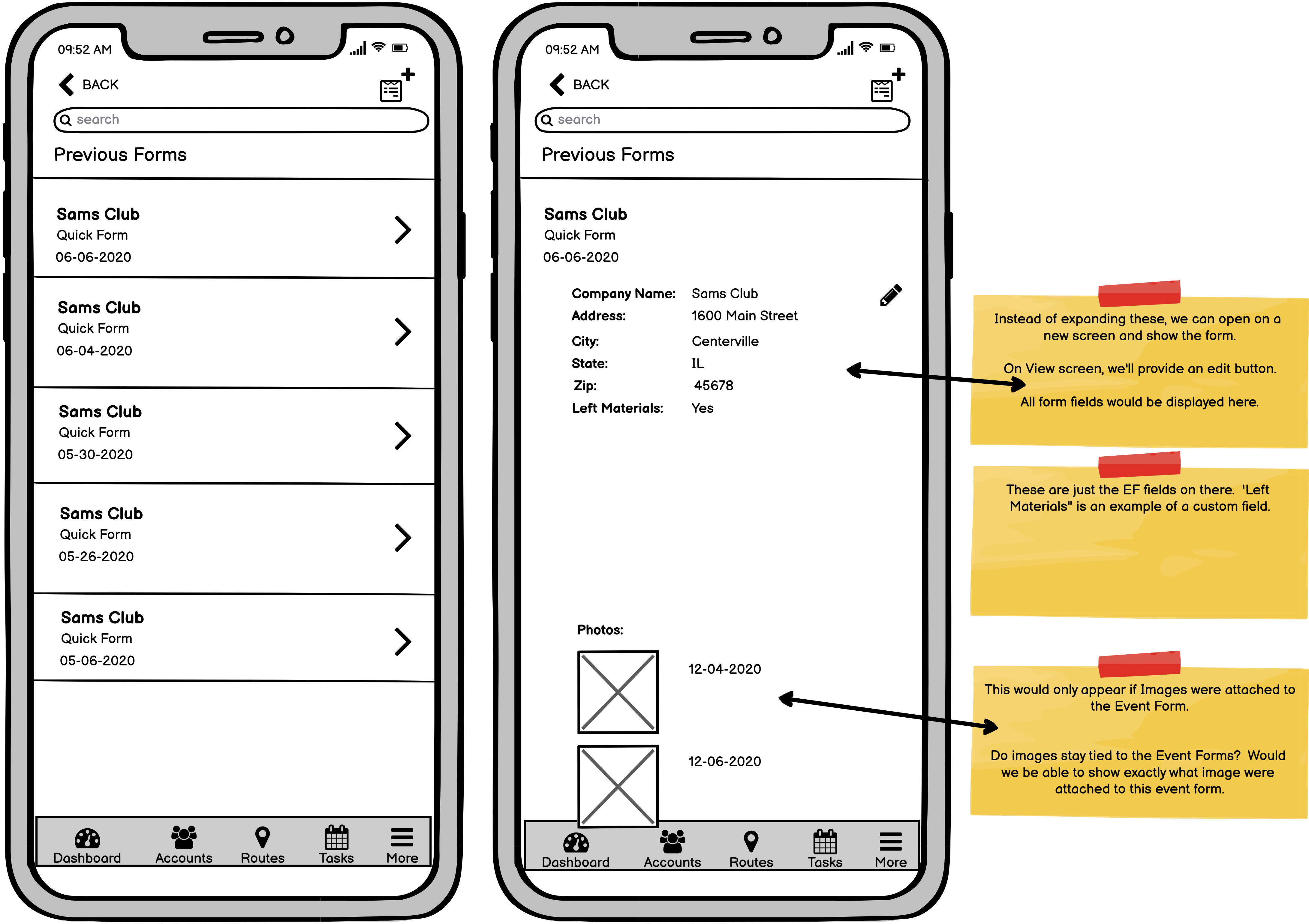


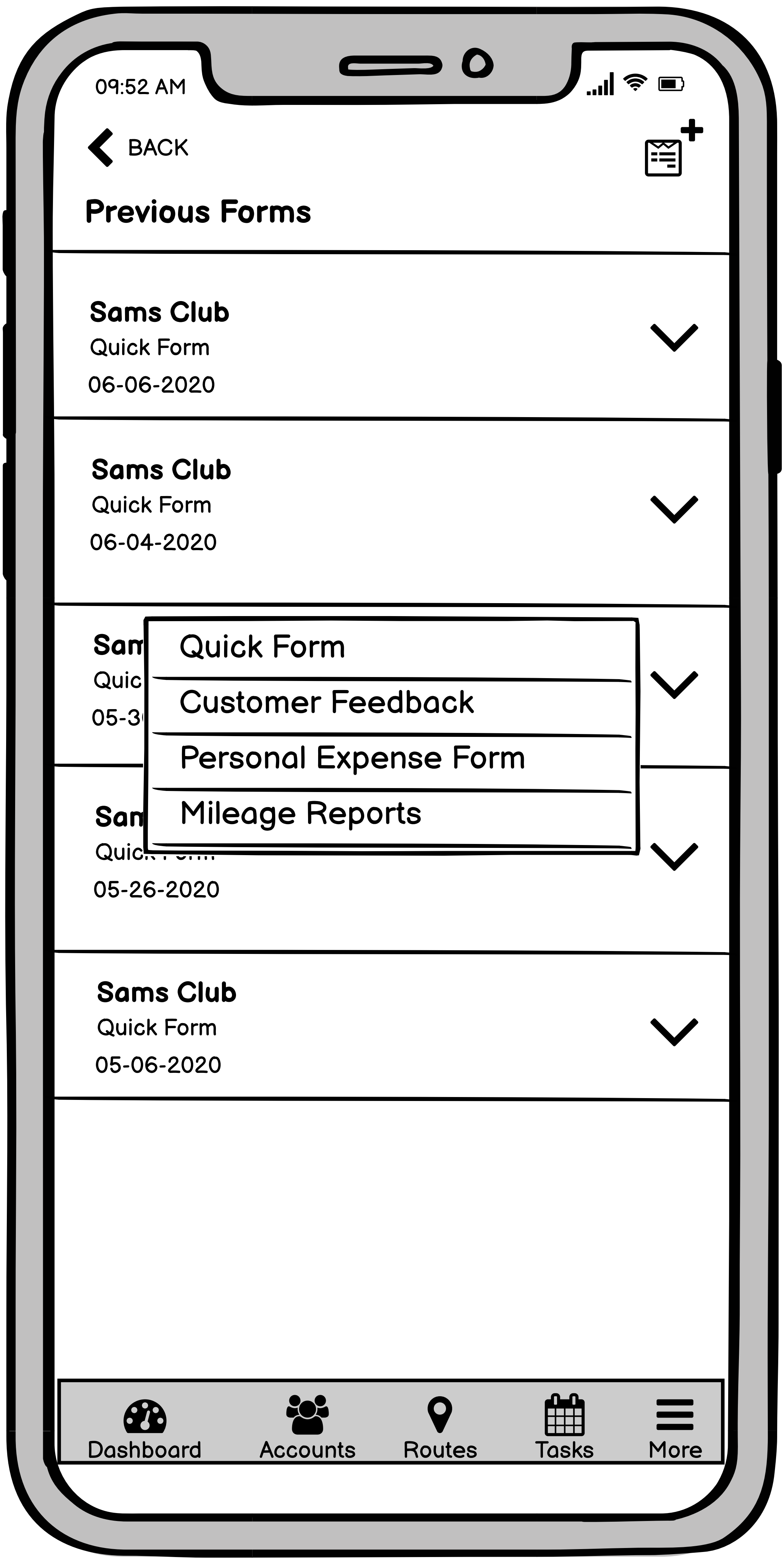
Floating Action Button



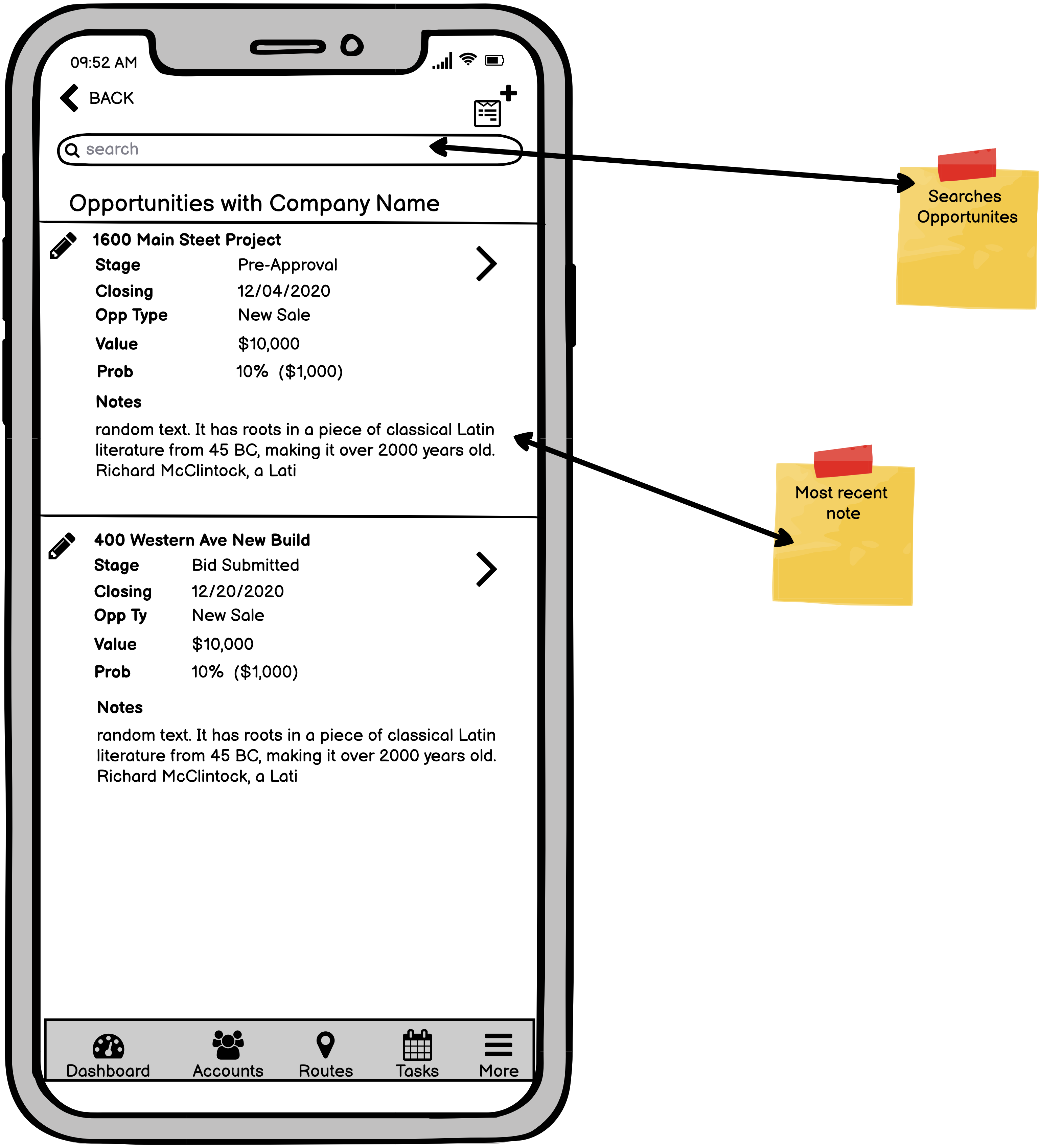
Routes Buttons on Top

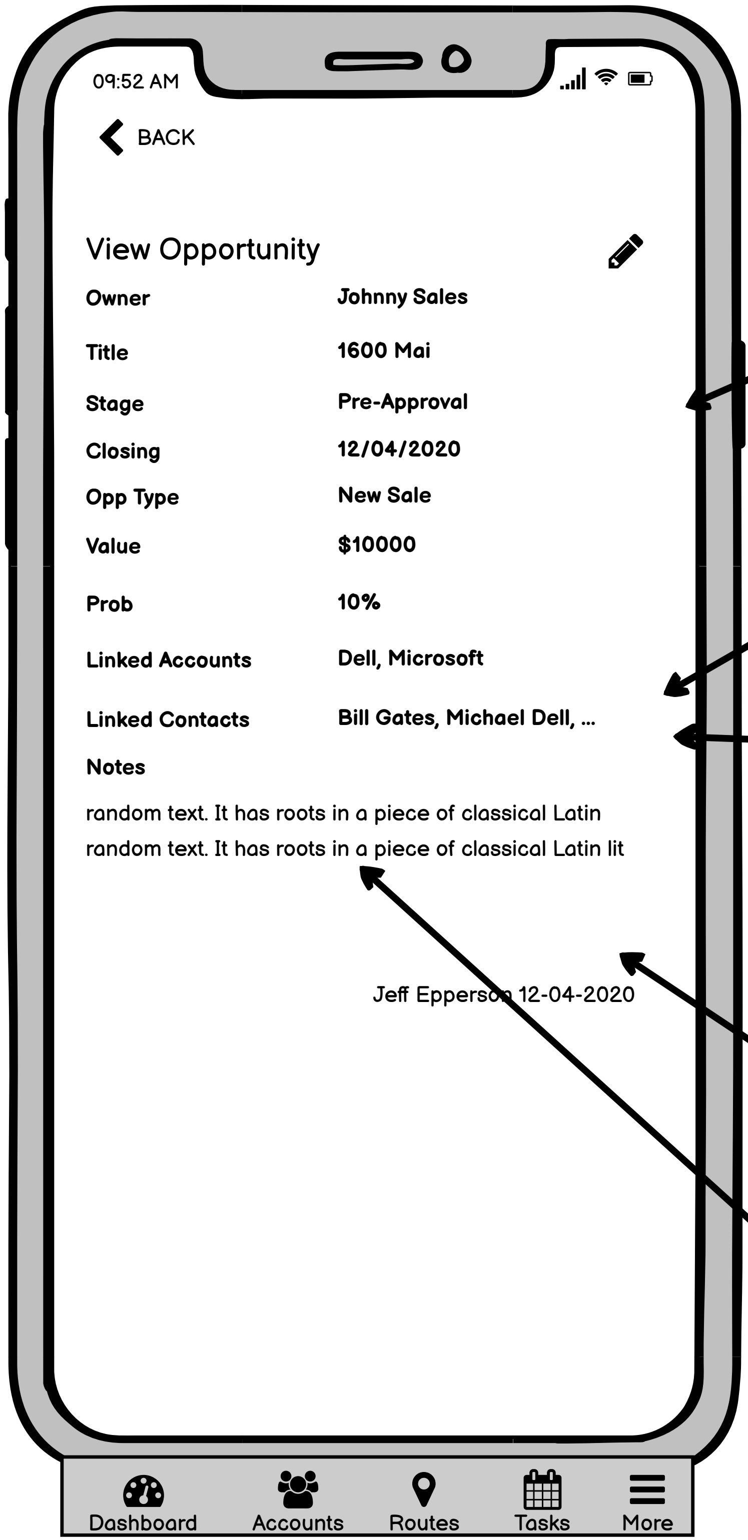

09:52 AM
BACK
Current Route
Saved Routes
1
Sams Club
Last Contacted: 05-19-2020
0.6 m Away
2
Walmart - Store 123
Last Contacted: 05-19-2020
0.8 m Away
3
Target
Last Contacted: 05-19-2020
1.6 m Away
4
Dollar General
Last Contacted: 05-19-2020
2.5 m Away
5
Burger King
Last Contacted: 05-19-2020
Optimize Options
Keep Starting Point
Keep Start and End Points
Optimize All using Current Location
Cancel
Dashboard
Accounts
Routes
Tasks
More
default is Optimize all using current locations
Swipe left shows a 'Delete' option for each entry


09:52 AM
BACK
search
Previous Forms
Sams Club
Quick Form
06-06-2020
Sams Club
Quick Form
06-04-2020
Sams Club
Quick Form
05-30-2020
Sams Club
Quick Form
05-26-2020
Sams Club
Quick Form
05-06-2020
Dashboard
Accounts
Routes
Tasks
More
09:52 AM
BACK
search
Previous Forms
Sams Club
Quick Form
06-06-2020
Company Name: Sams Club
Address: 1600 Main Street
City: Centerville
State: IL
Zip: 45678
Left Materials: Yes
Photos:
12-04-2020
12-06-2020
Dashboard
Accounts
Routes
Tasks
More
Instead of expanding these, we can open on a new screen and show the form.
On View screen, we'll provide an edit button.
All form fields would be displayed here.
These are just the EF fields on there. 'Left Materials" is an example of a custom field.
This would only appear if Images were attached to the Event Form.
Do images stay tied to the Event Forms? Would we be able to show exactly what image were attached to this event form.



Started by the "Add New" button


09:52 AM
BACK
search
Opportunities with Company Name
1600 Main Steet Project
Stage Pre-Approval
Closing 12/04/2020
Opp Type New Sale
Value $10,000
Prob 10% ($1,000)
Notes
random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Lati
400 Western Ave New Build
Stage Bid Submitted
Closing 12/20/2020
Opp Ty New Sale
Value $10,000
Prob 10% ($1,000)
Notes
random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Lati
Dashboard
Accounts
Routes
Tasks
More
Searches Opportunites
Most recent note

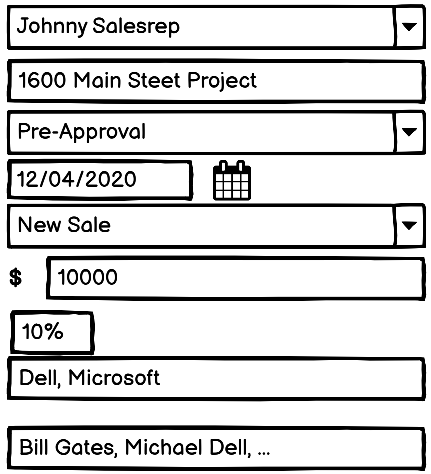


ADD IN FOR OPP PAGES

Additional People (personel)

Add in sales rep selections

This is the current user assigned to this opp.

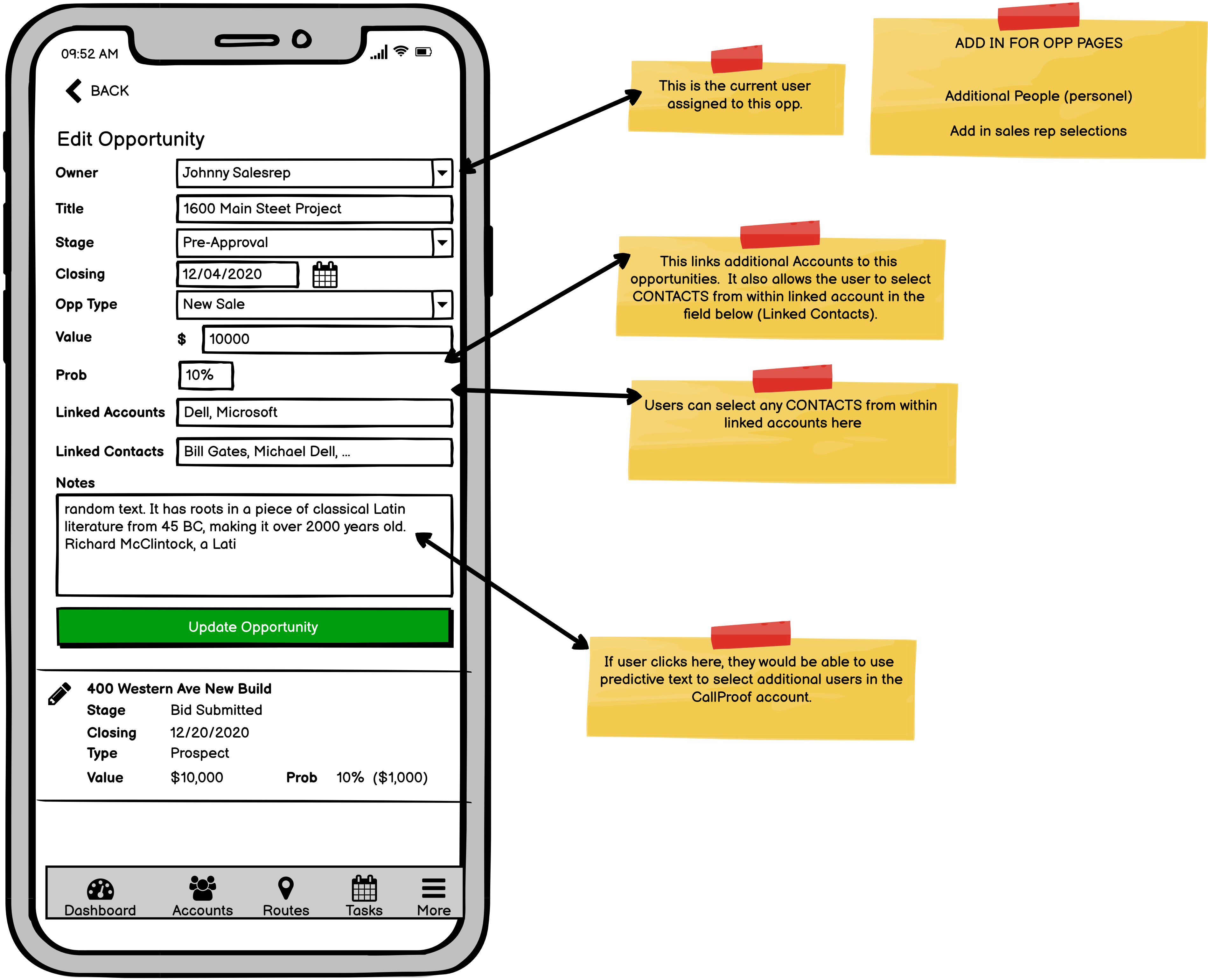


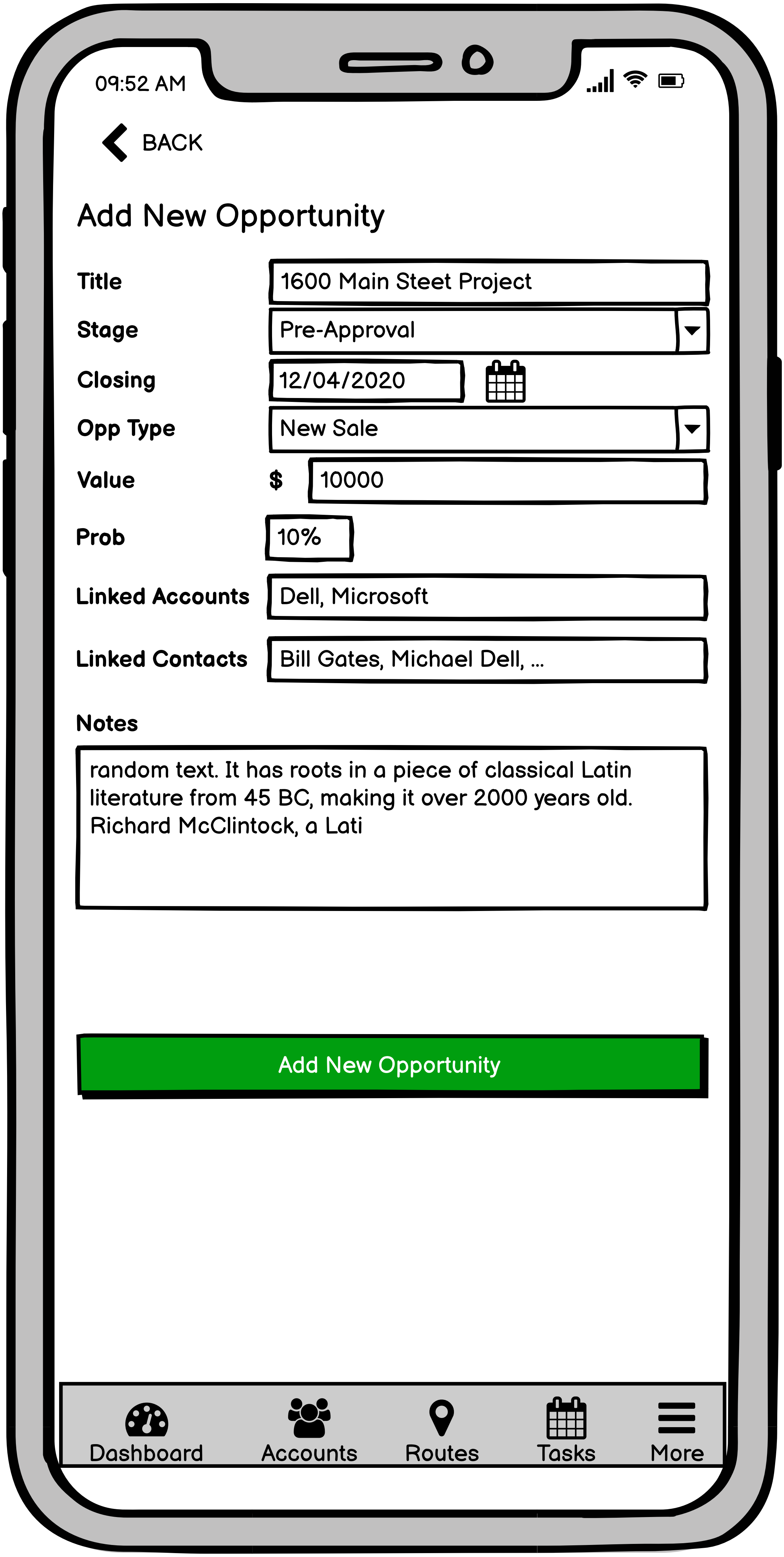
This links additional Accounts to this opportunities. It also allows the user to select CONTACTS from within linked account in the field below (Linked Contacts).

Users can select any CONTACTS from within linked accounts here

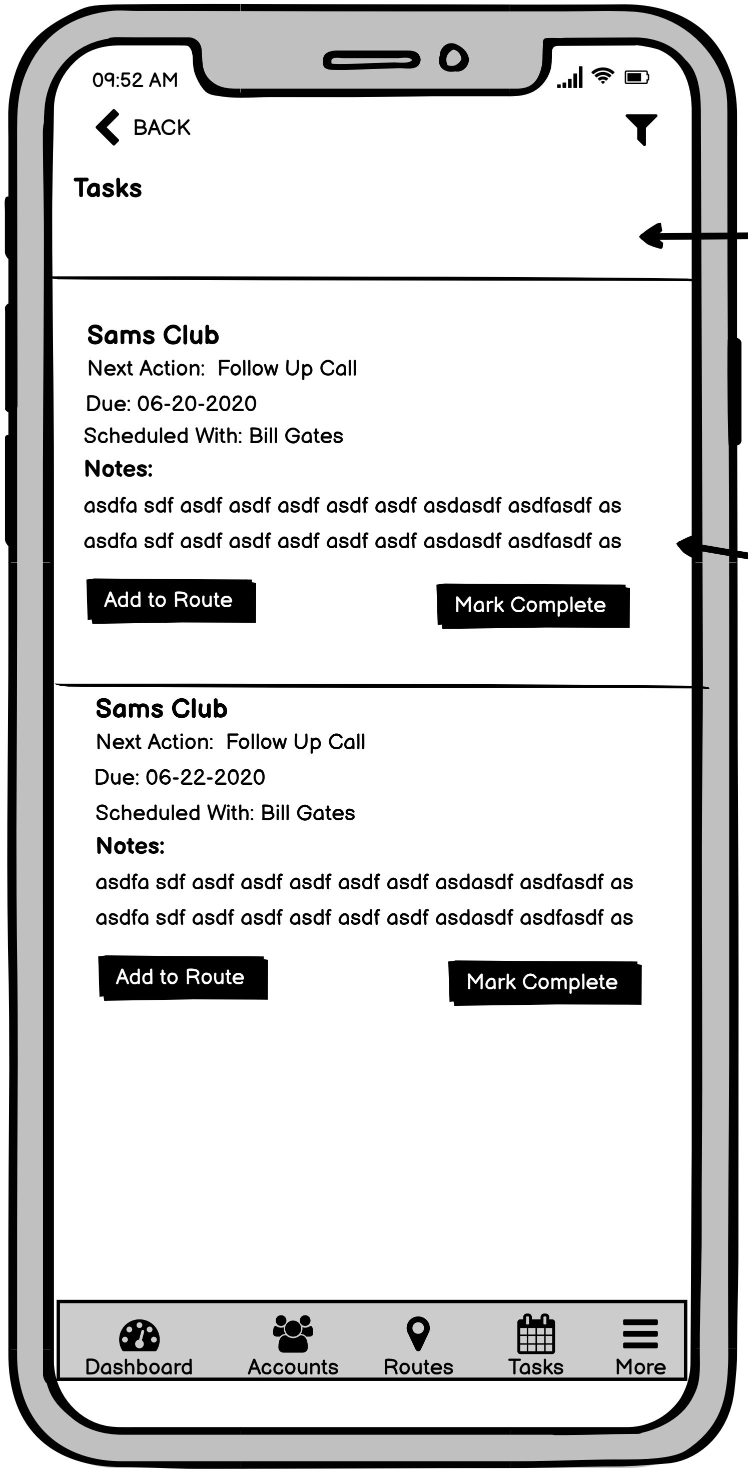
If user clicks here, they would be able to use predictive text to select additional users in the CallProof account.

Any additional opportunity custom fields would go between Linked Contacts and Notes


09:52 AM
BACK
Edit Opportunity
Owner
Johnny Salesrep
Title
1600 Main Steet Project
Stage
Pre-Approval
Closing
12/04/2020
Opp Type
New Sale
Value
$
10000
Prob
10%
Linked Accounts
Dell, Microsoft
Linked Contacts
Bill Gates, Michael Dell, ...
Notes
random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Lati
Update Opportunity
400 Western Ave New Build
Stage
Bid Submitted
Closing
12/20/2020
Type
Prospect
Value
$10,000
Prob
10% ($1,000)
Dashboard
Accounts
Routes
Tasks
More
This is the current user assigned to this opp.
ADD IN FOR OPP PAGES
Additional People (personel)
Add in sales rep selections
This links additional Accounts to this opportunities. It also allows the user to select CONTACTS from within linked account in the field below (Linked Contacts).
Users can select any CONTACTS from within linked accounts here
If user clicks here, they would be able to use predictive text to select additional users in the CallProof account.



09:52 AM
BACK
Add New Opportunity
Title
1600 Main Steet Project
Stage
Pre-Approval
Closing
12/04/2020
Opp Type
New Sale
Value
$
10000
Prob
10%
Linked Accounts
Dell, Microsoft
Linked Contacts
Bill Gates, Michael Dell, ...
Notes
random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Lati
Add New Opportunity
Dashboard
Accounts
Routes
Tasks
More

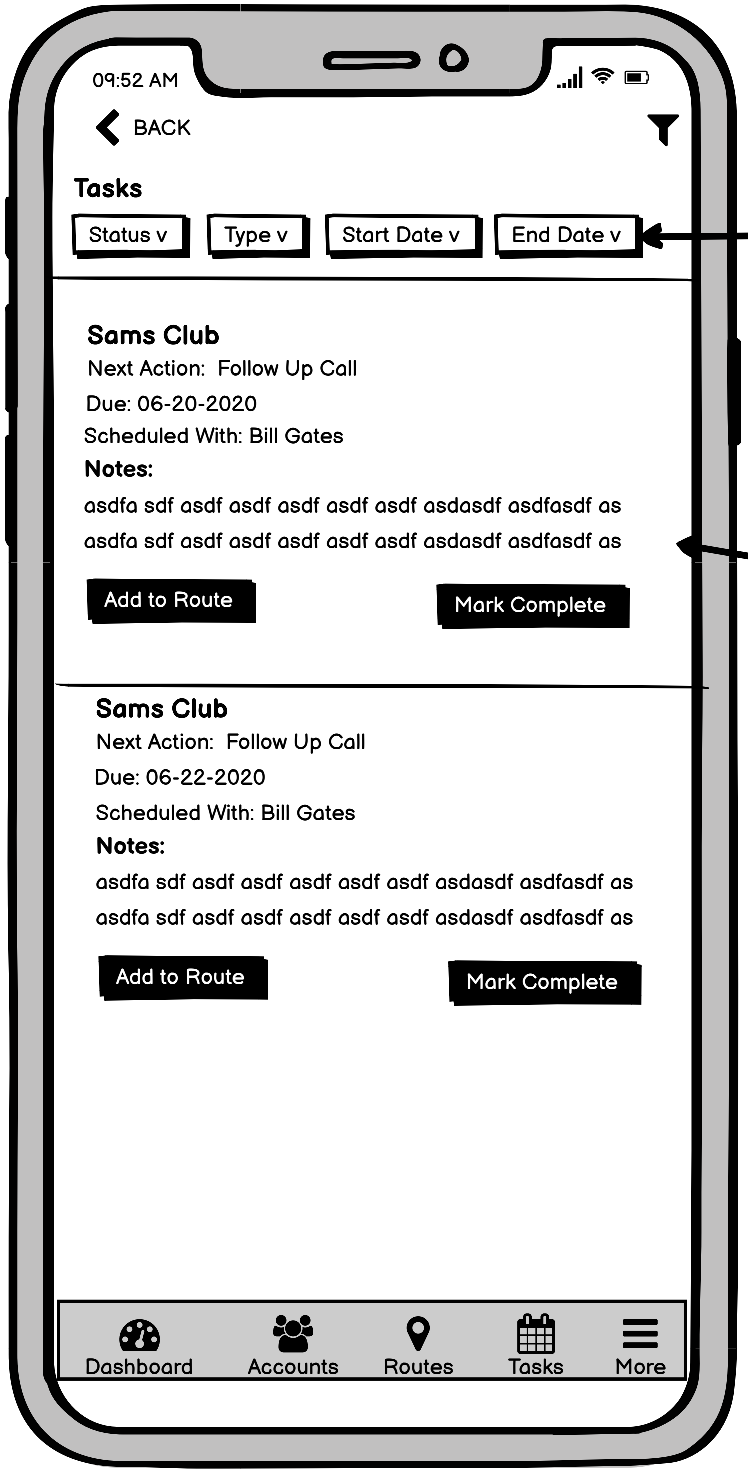


This is created from the home screen by clicking "Tasks"

Date range filter
Type of Follow Up (Call, Appointment, etc.)

If user checks the box, it will be marked completed and sent to "Completed / Previous Tasks"

Task follow up note

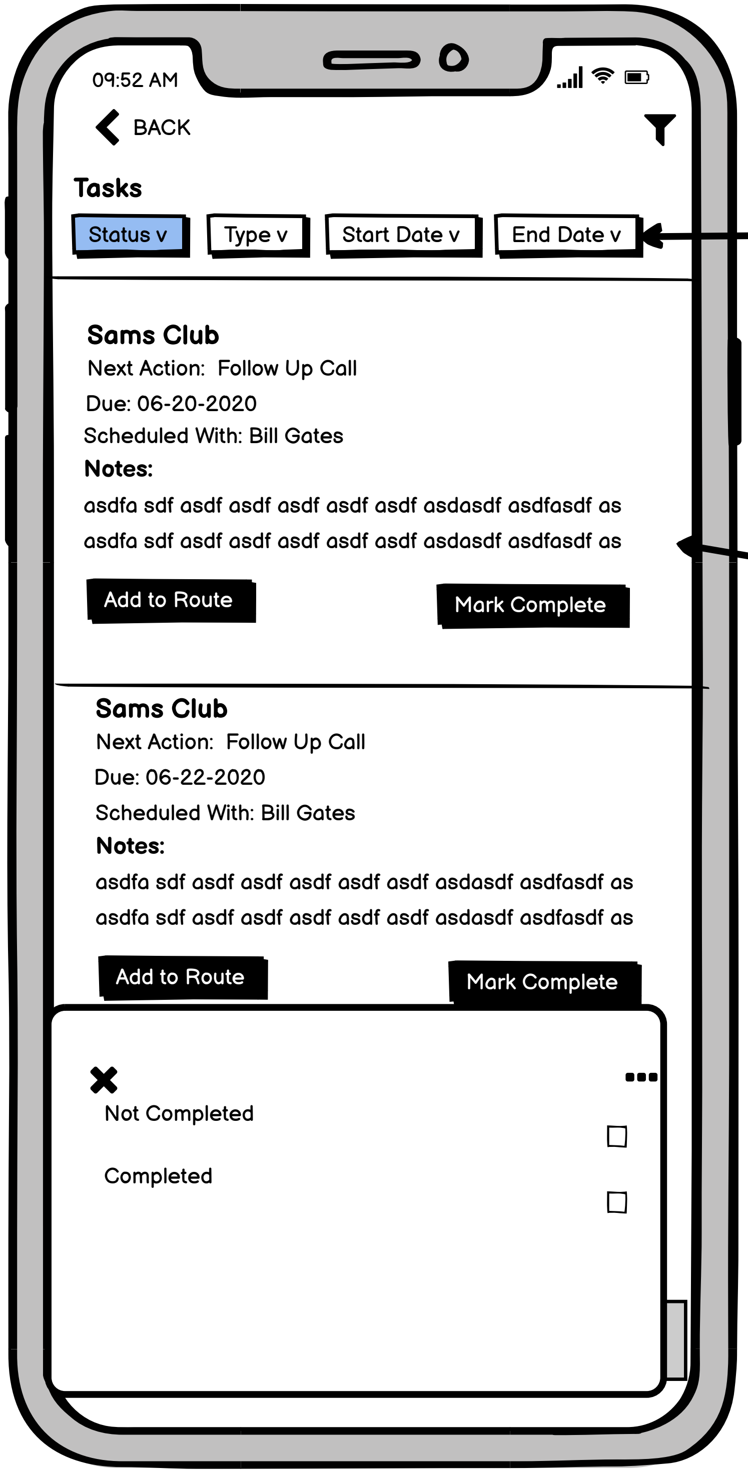


This is created from the home screen by clicking "Tasks"

Date range filter
Type of Follow Up (Call, Appointment, etc.)

Task follow up note

If user checks the box, it will be marked completed and sent to "Completed / Previous Tasks"

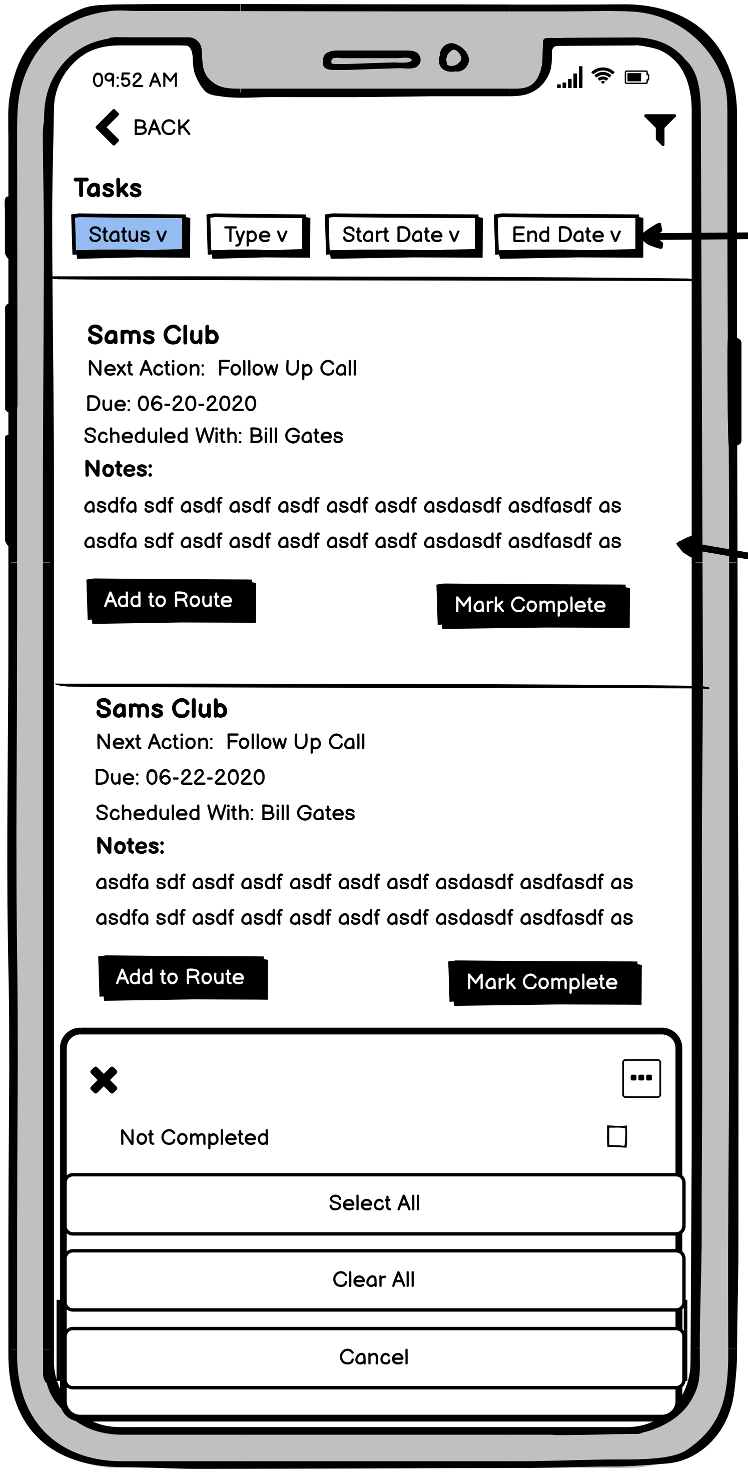


This is created from the home screen by clicking "Tasks"

Date range filter
Type of Follow Up (Call, Appointment, etc.)

Task follow up note

If user checks the box, it will be marked completed and sent to "Completed / Previous Tasks"



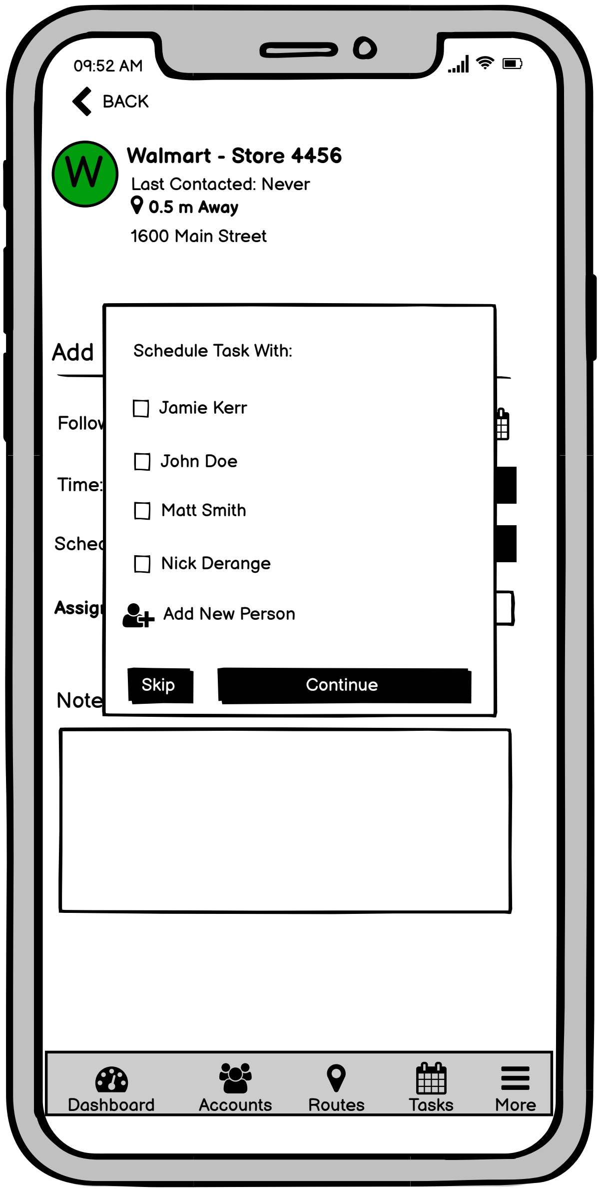
This is created from the home screen by clicking "Tasks"

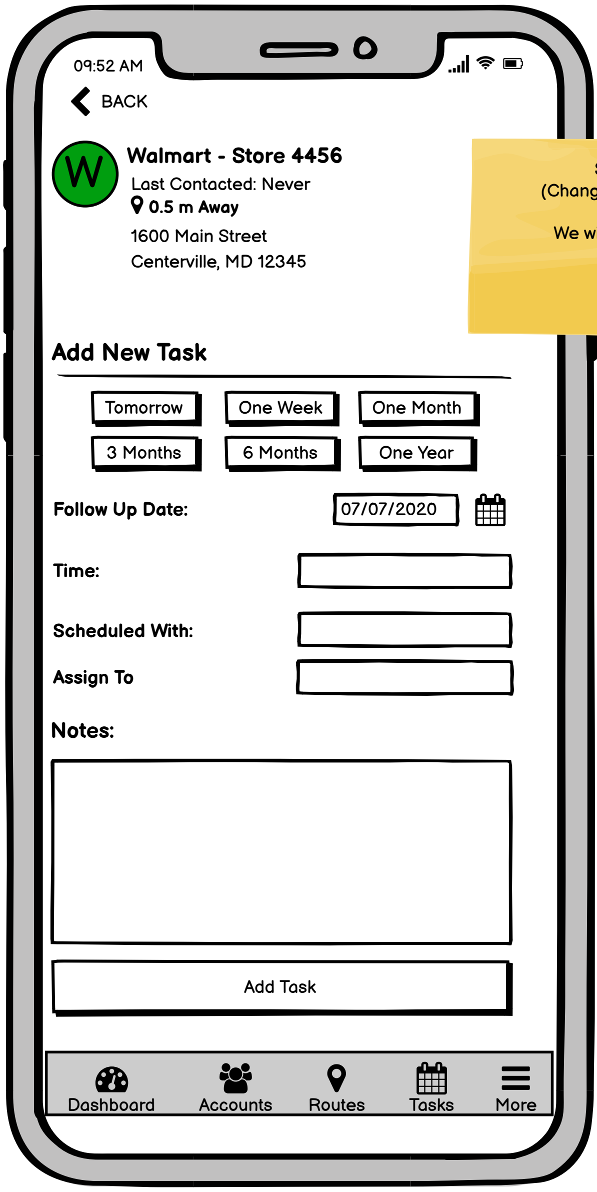
Date range filter
Type of Follow Up (Call, Appointment, etc.)

If user checks the box, it will be marked completed and sent to "Completed / Previous Tasks"

Task follow up note

Select All/Clear All pop over the top of the UI to allow them to clear the options in the current filter. The other stuff is darkened to make it obvious that Select All and Clear All are the options. Clicking Cancel will take the user back to the underlying filter without modifying it.

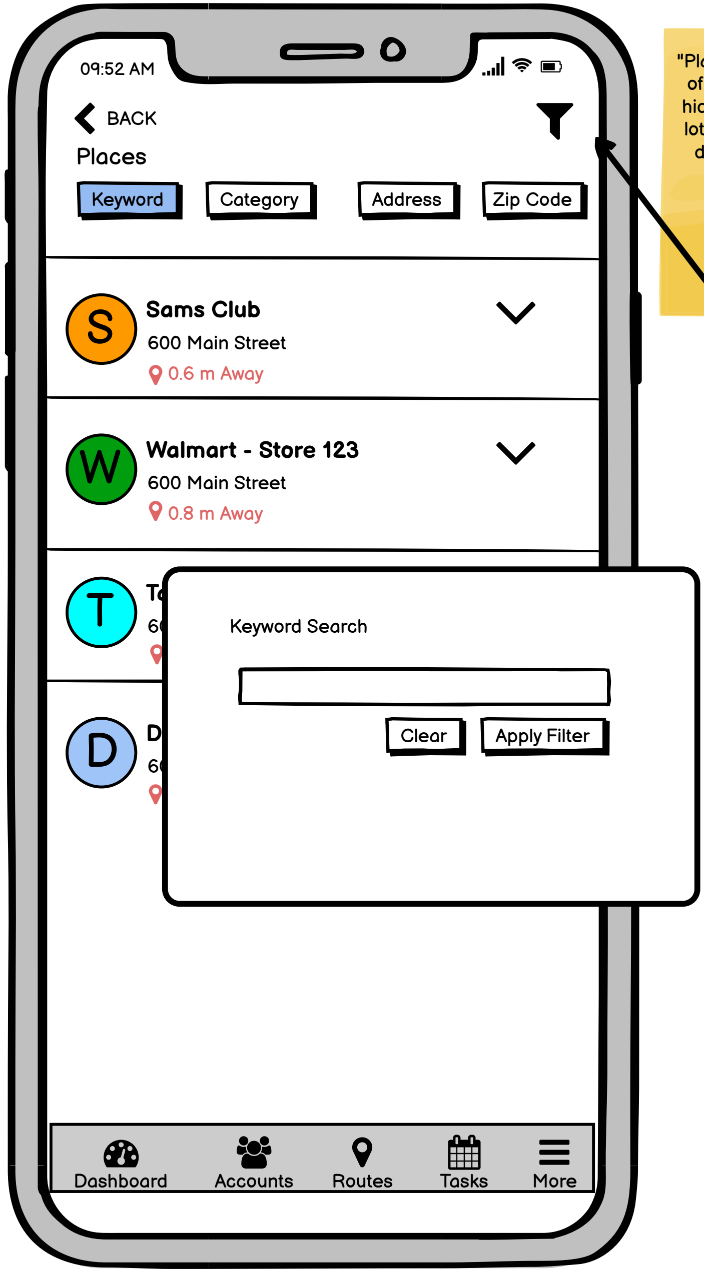




Single Rep Assignment
(Change from how it currently works)

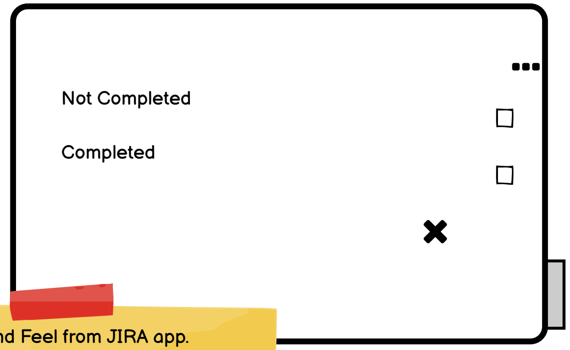
We will keep tasks to a single rep.

WARN: Need to select a Company before you can create a task.



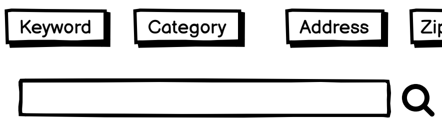
"Places" is used to import from the Point of Interest database. This is a little bit hidden because users were creating a lot of duplicate contacts because they didn't realize there was a difference between Contacts and Places.

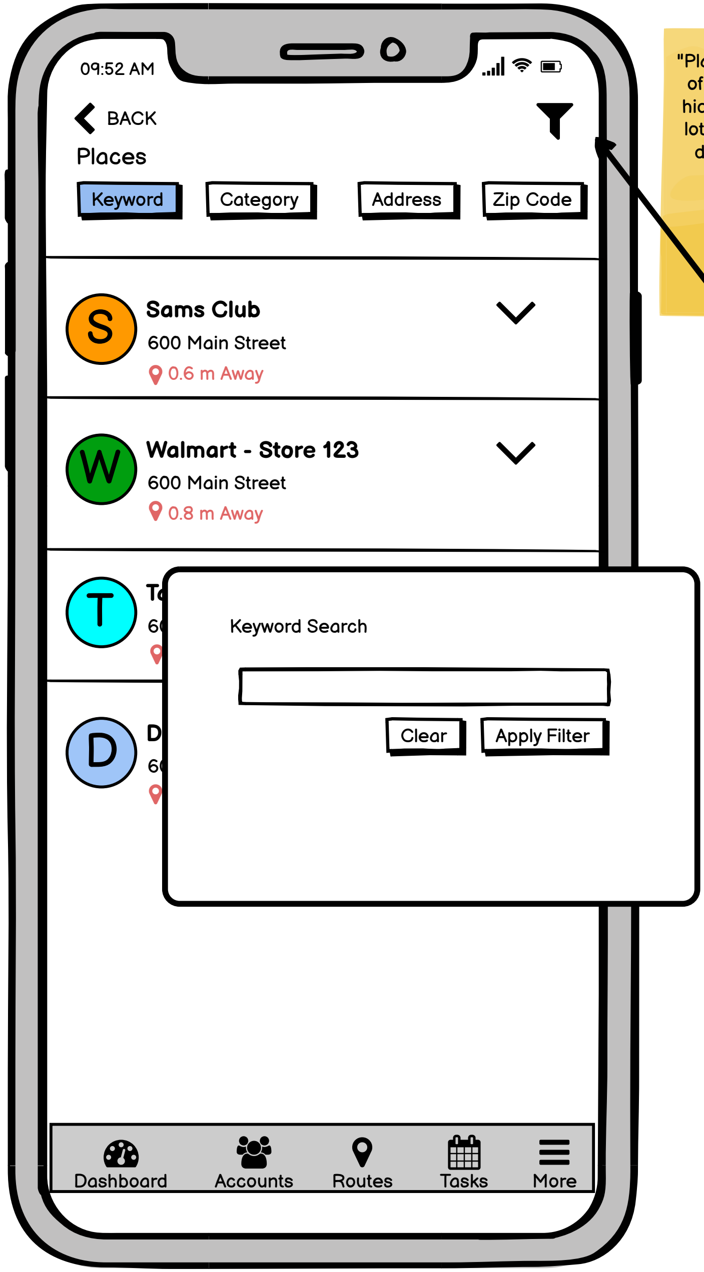
This will open the filters / categories / zip code / address search



Look and Feel from JIRA app.

Filter buttons brings up serach criteria fields. They can then be selected, turn highlighted, etc. Clear resets. ETC





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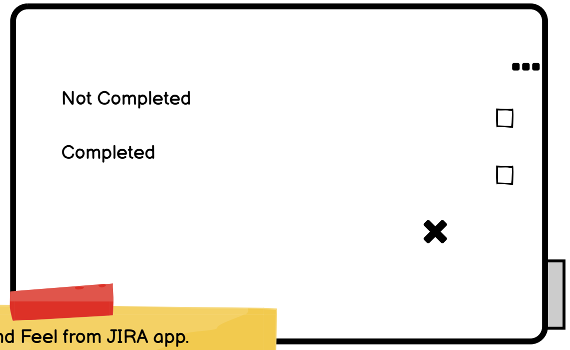
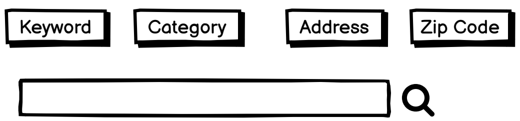
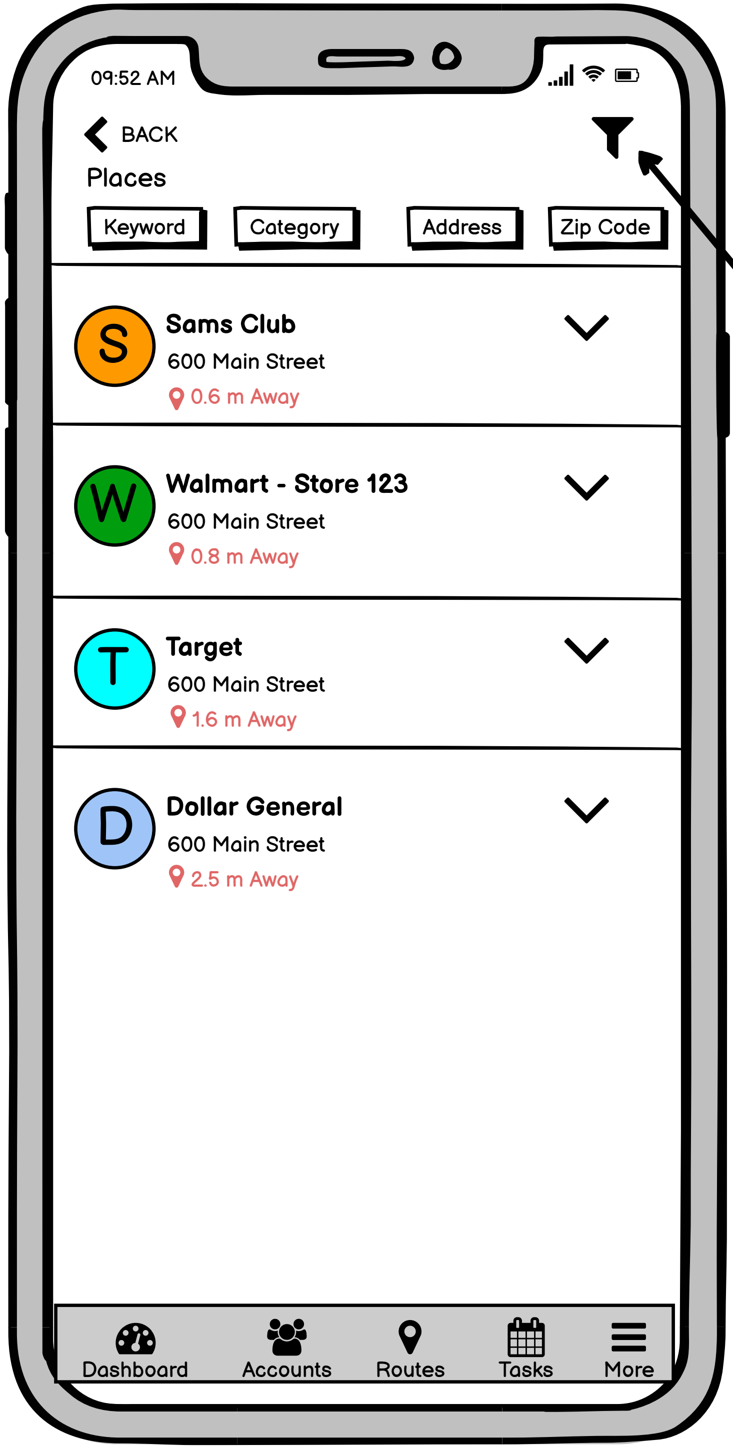
This will open the filters / categories / zip code / address search



Look and Feel from JIRA app.

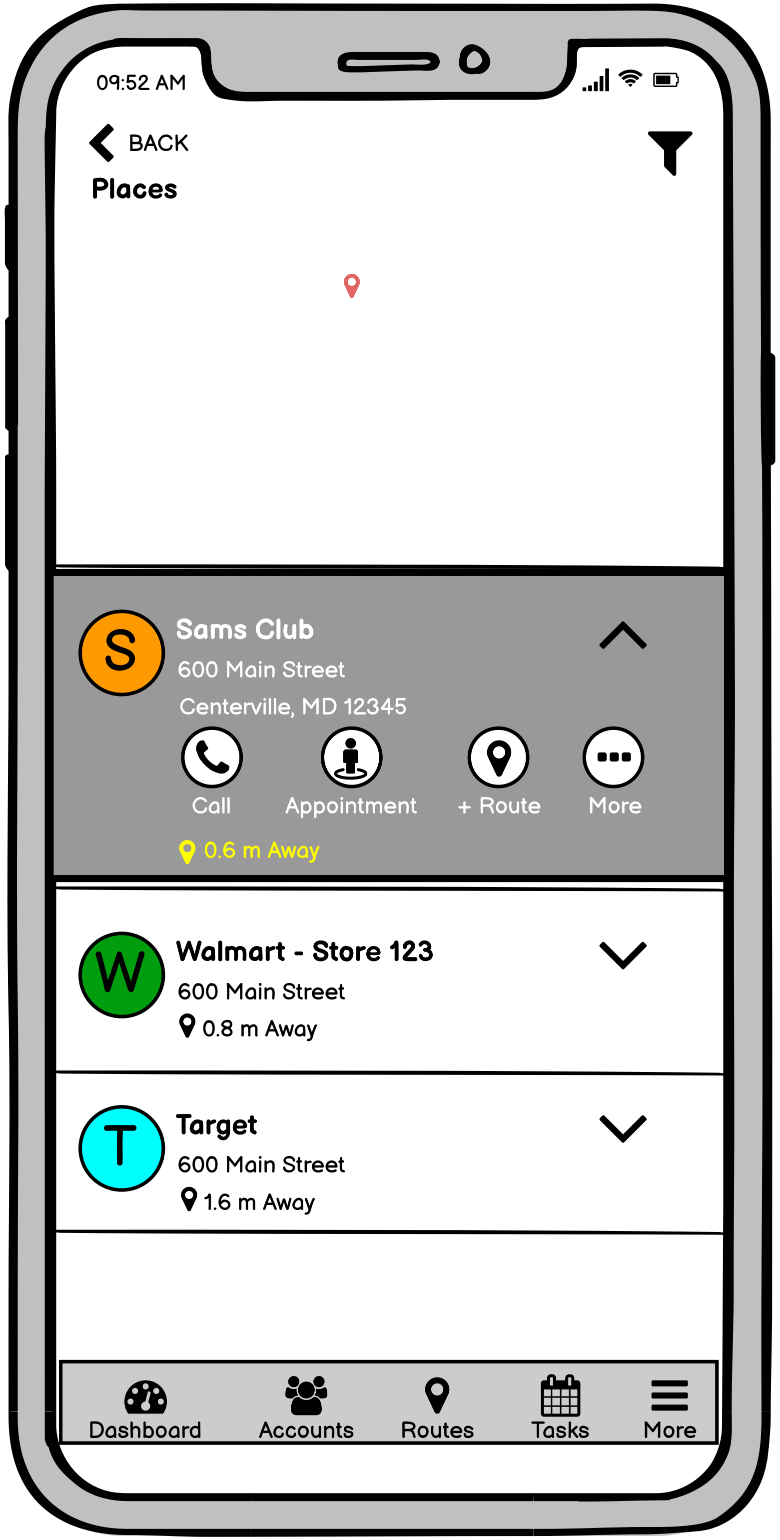
Filter buttons brings up serach criteria fields. They can then be selected, turn highlighted, etc. Clear resets. ETC





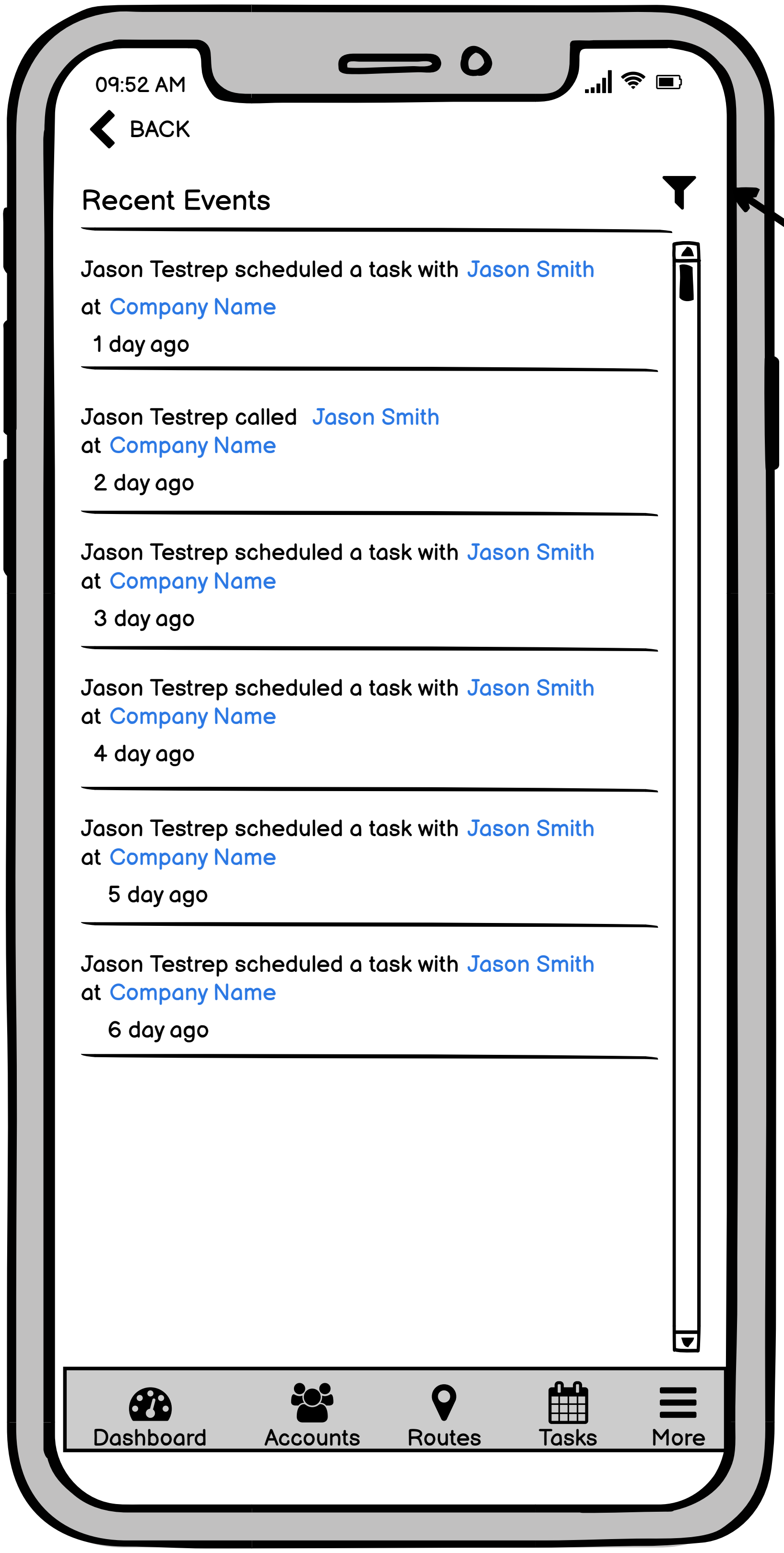
"Places" is used to import from the Point of Interest database. This is a little bit hidden because users were creating a lot of duplicate contacts because they didn't realize there was a difference between Contacts and Places.

This will open the filters / categories / zip code / address search



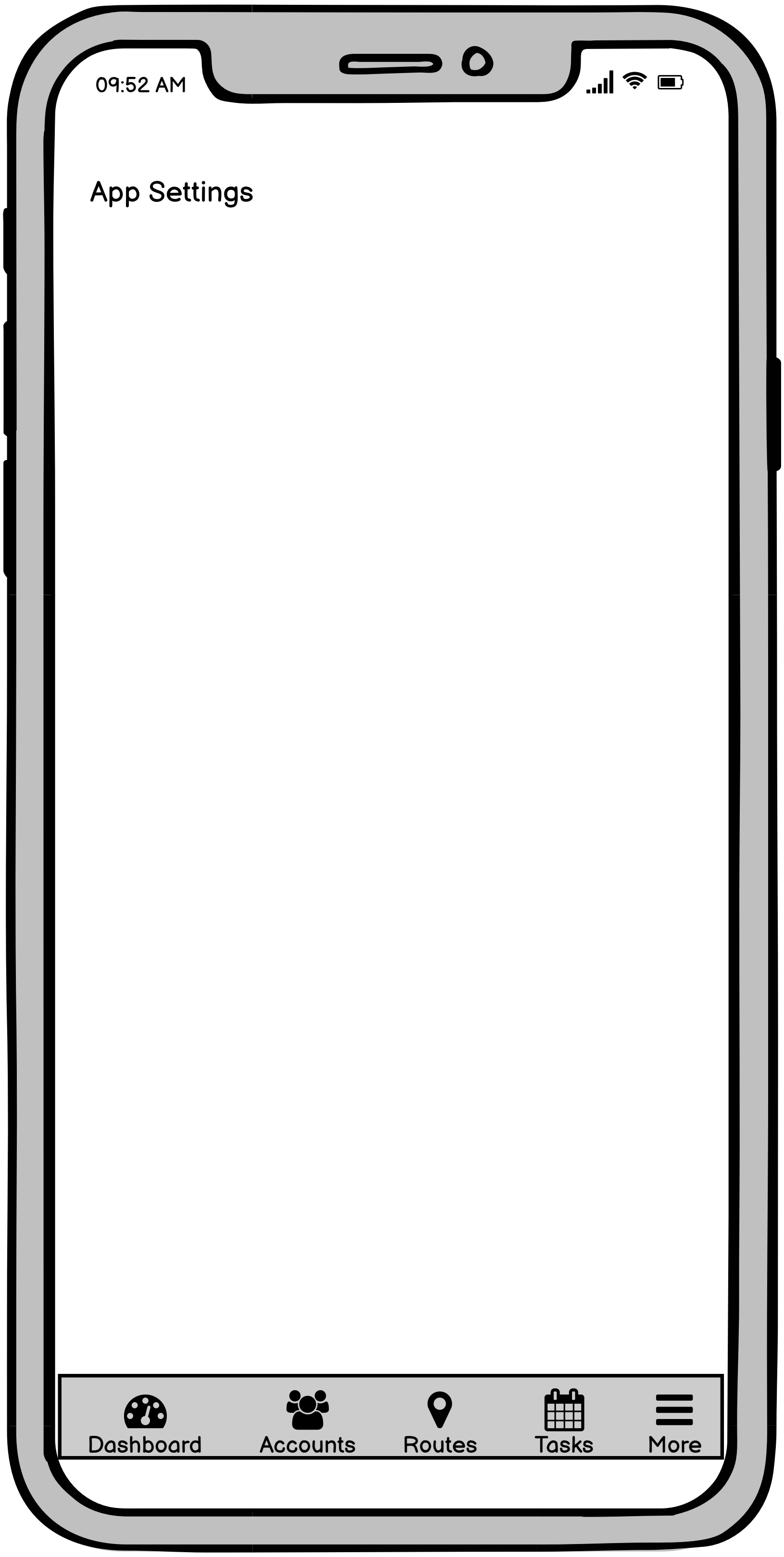
If the user clicks any of these, it imports the Contact from the POI database and then does whatever the action is.

09:52 AM
BACK
Team
A
Amy Smith
888-444-5555
C
CallProof Support
222-444-5555
C
Clayton Geiser
777-444-5555
J
Jeff Epperson
333-444-5555
Dashboard
Accounts
Routes
Tasks
More



Filter allows Manager to select other reps.

This also include a drop down for selecting an event type like the current app.



This is an example of what will be here.

More (button)

- Events
- Team
- Location Access
- Camera Access
- Photo Library Access
- Calendar Sync Info
- Device Notifications
- Enable Follow Up Daily Pop-Up
- Hide Appointment Pop-Up
- Open to Contacts
- My Opportunities
- How to Use
- What's New
- Logout

Additional Options

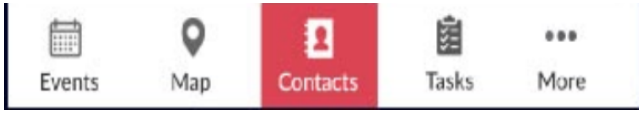
- Settings

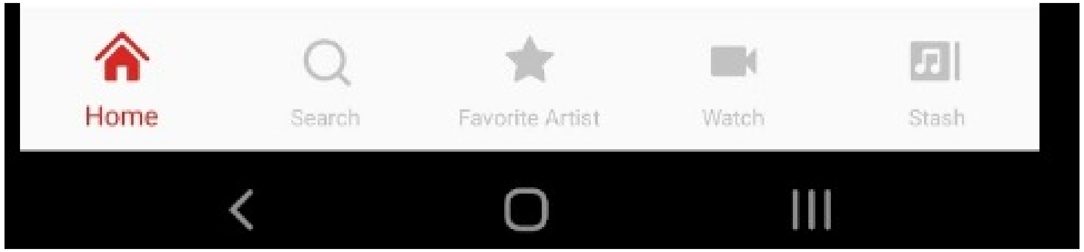
Screens further down are either old, retired, or no longer applicable. Disregard for now.

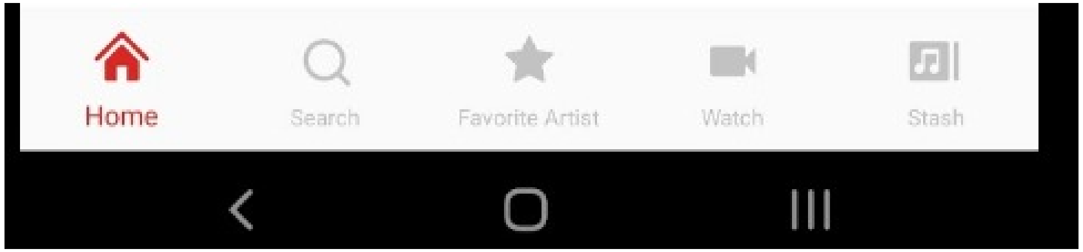
Add a Text(SMS) button on this screen

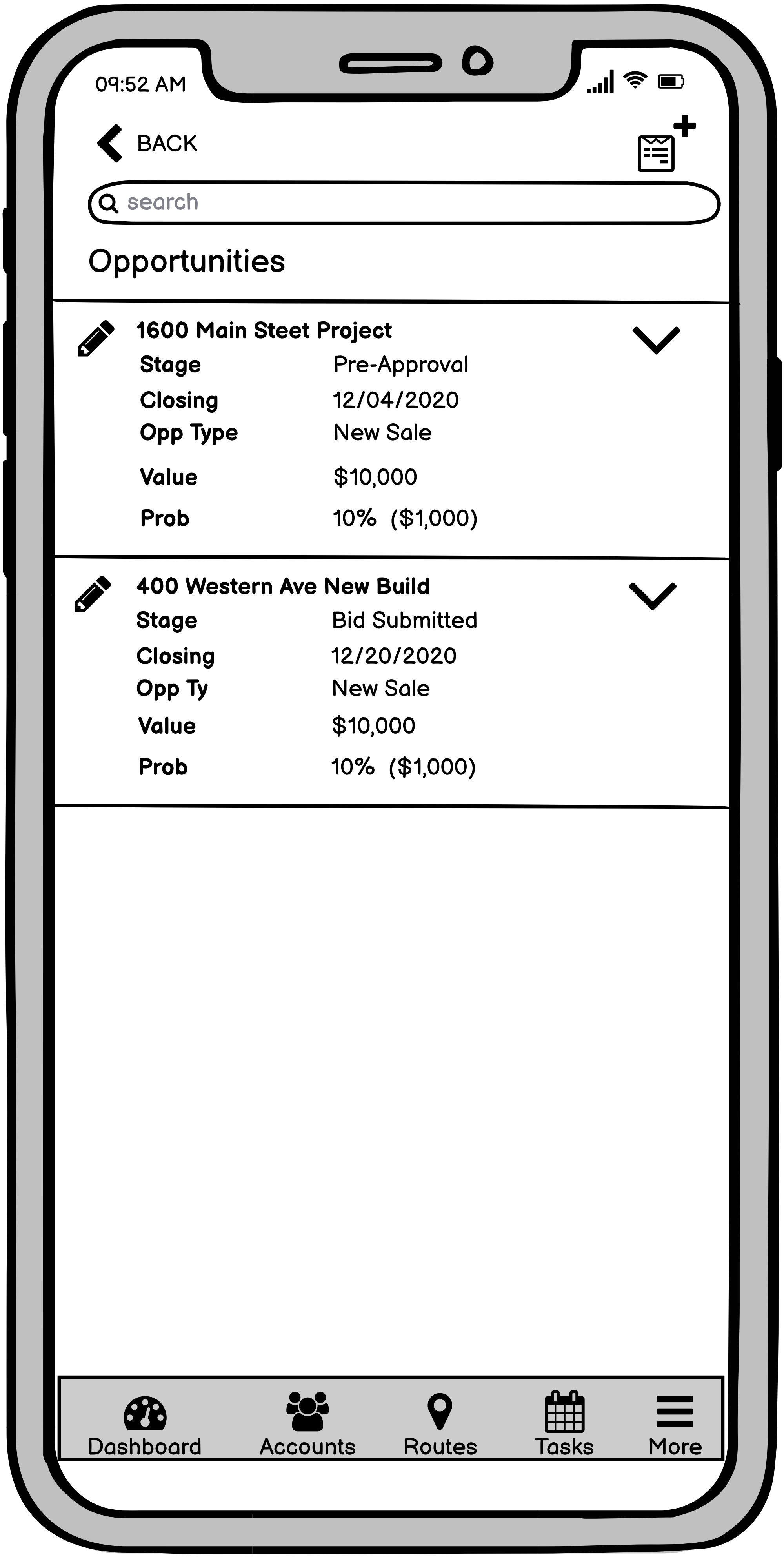
Need to be able to edit these

Example menu bars for the bottom of the app.



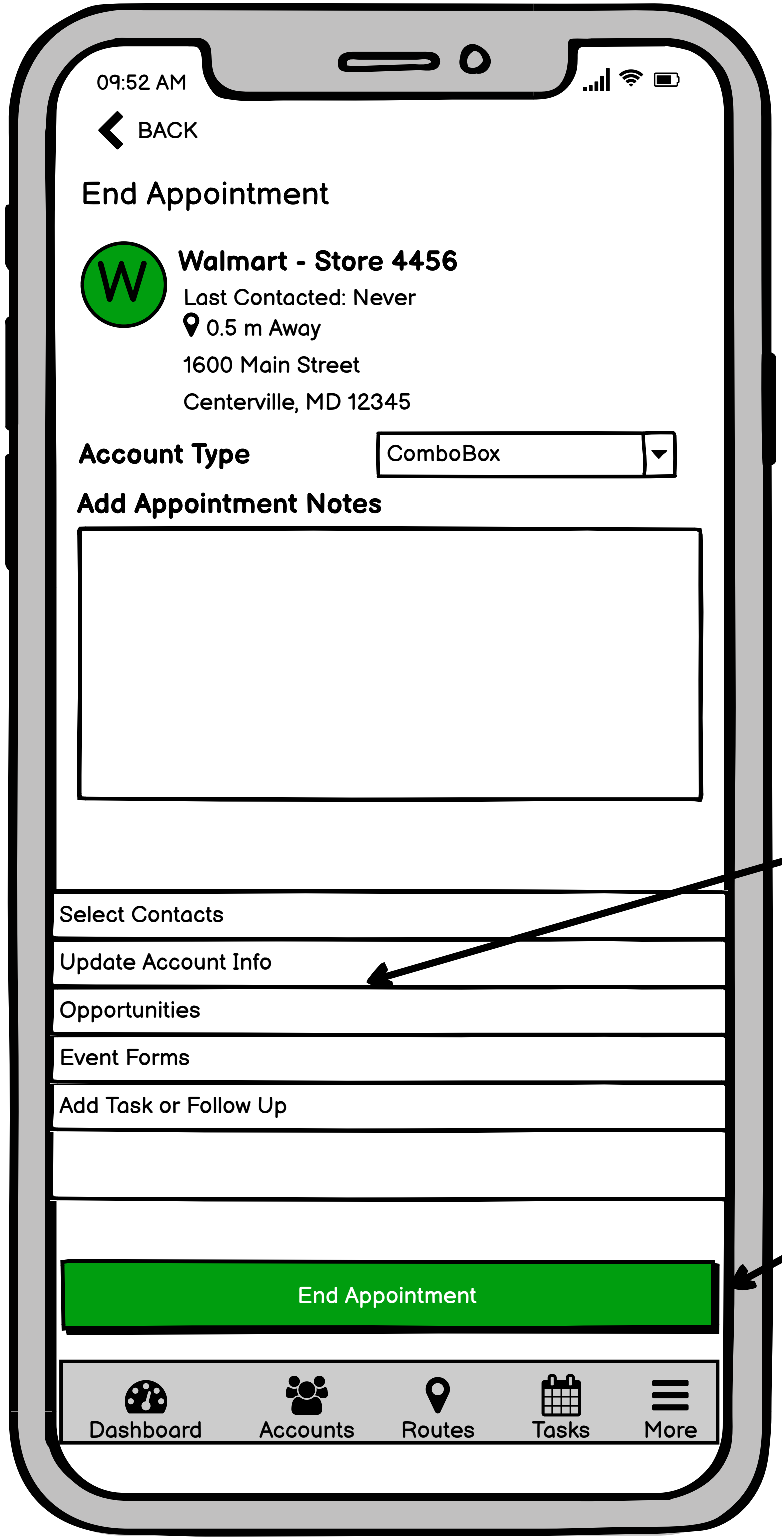






Update to "Opp Type" on Sept 2

Roles is a dropdown that can be queried per account



This mockup uses an accordian for some of the options starting at "Select Contacts" and below, but it's ok to use a different type of control for this workflow. I'm open to different options for this screen, so long as it is consistent between iOS and Android.

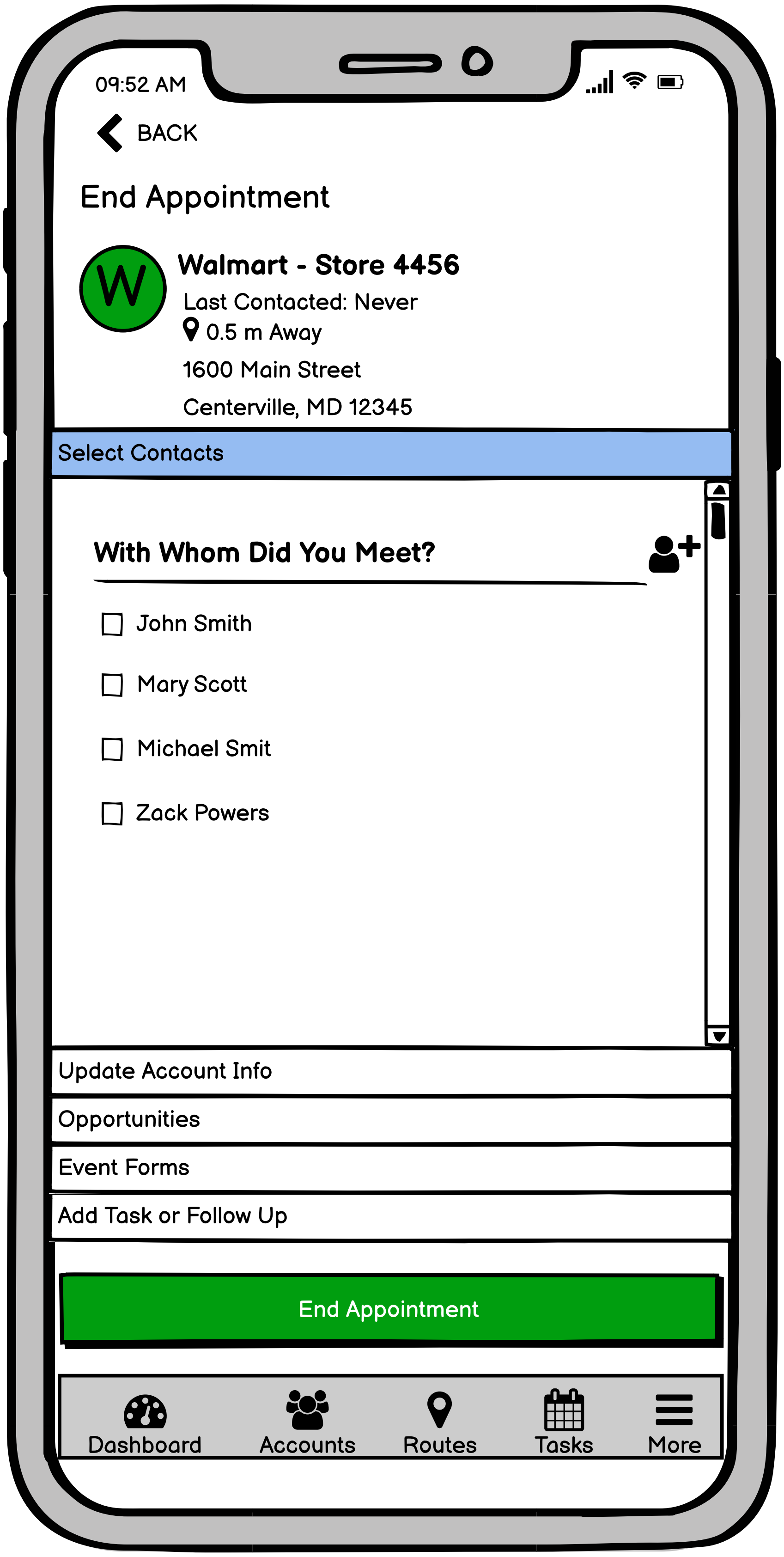
The user simply needs to be able to quickly enter or skip over any of the relevant 'pages' of data where they might need to enter information about the appointment.

The main section at the top shows the most common items the user will need to interact with, followed by other actions which are optional shortcuts to things they may want to do along the way.

Custom Fields: Any custom fields that are not set as "Hide on checkout" should show up under Add Appointment Notes.

If the user clicks "End Appointment" but hasn't entered any notes or changed any other data from the other possible screens, display a message that says "You haven't entered any notes. Are you sure you wish to mark this appointment as completed?" The options should be "Go Back" and "Save & Exit".

A comment



This mockup does not show the notes and custom fields from the previous screen. It assumes the user scrolled down.

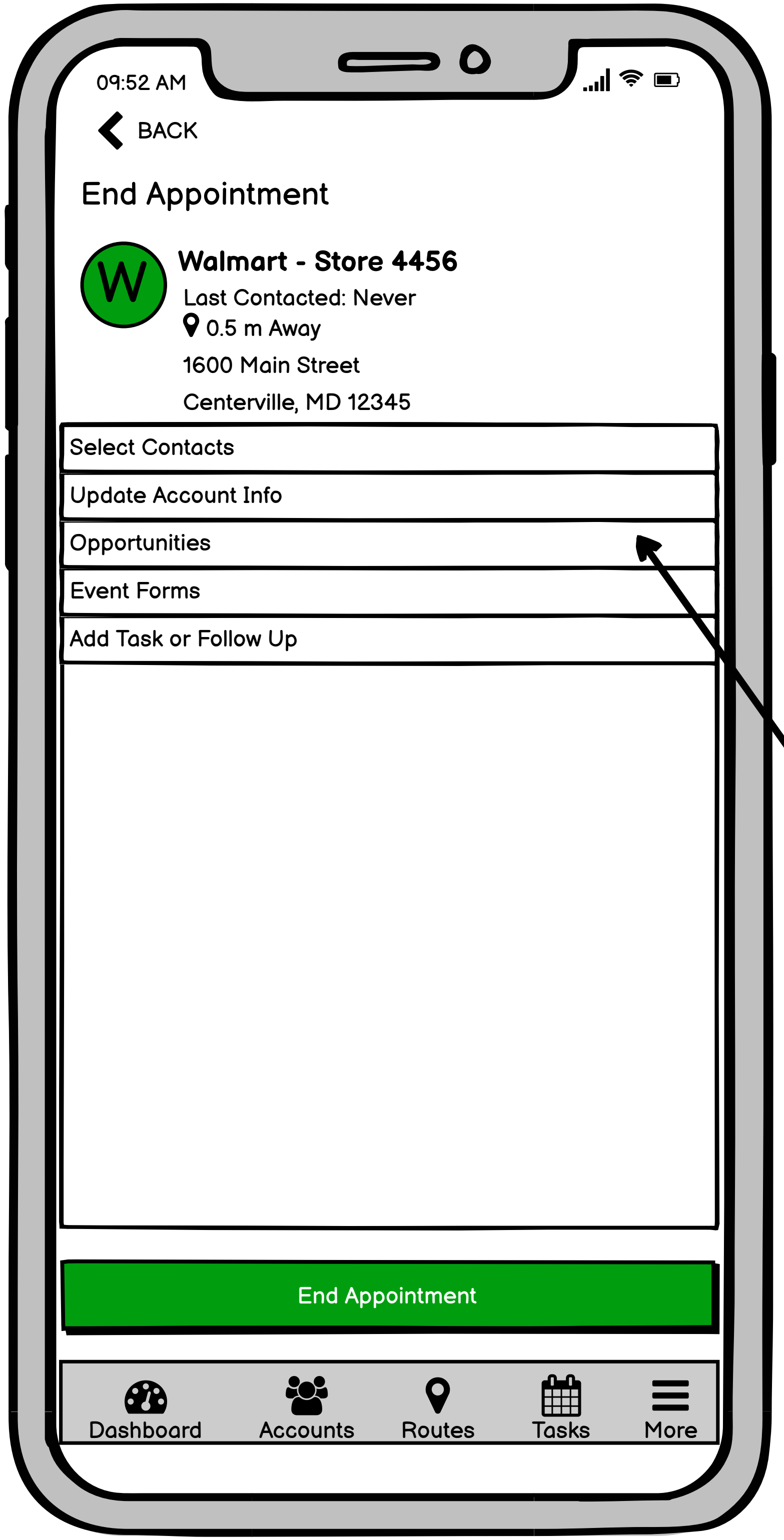
It's ok if the Account information shown at the top scrolls up and off the screen when selecting these addtional options.

Mani, Mike and Jeff discussed nav problems with the accordian method.

Going to try Mani's suggestion of moving these to a seperate screen, then returning and showing a checkmark or something similar.


09:52 AM
BACK
End Appointment
W
Walmart - Store 4456
Last Contacted: Never
0.5 m Away
Select Contacts
Update Account Info
Account Number
abc123
Company Name
Walmart - Store 4456
Parent Company
Walmart
Address
1600 Main Street
Address 2
City
Centerville
State/Province
MD
ZIP/Postal Code
12345
Country
ComboBox
Company Email
support@example.com
Company Phone
123-867-5309
Country Code
ComboBox
Website
https://www.example.co
Opportunities
Event Forms
Add Task or Follow Up
End Appointment
Dashboard
Accounts
Routes
Tasks
More
This would be like the existing default end appointment screen in regards to fields presented or hidden.
Dropdown
United States (default)
Canada
Mexico
Costa Rica
Israel

<All other countries in alphabetical order>

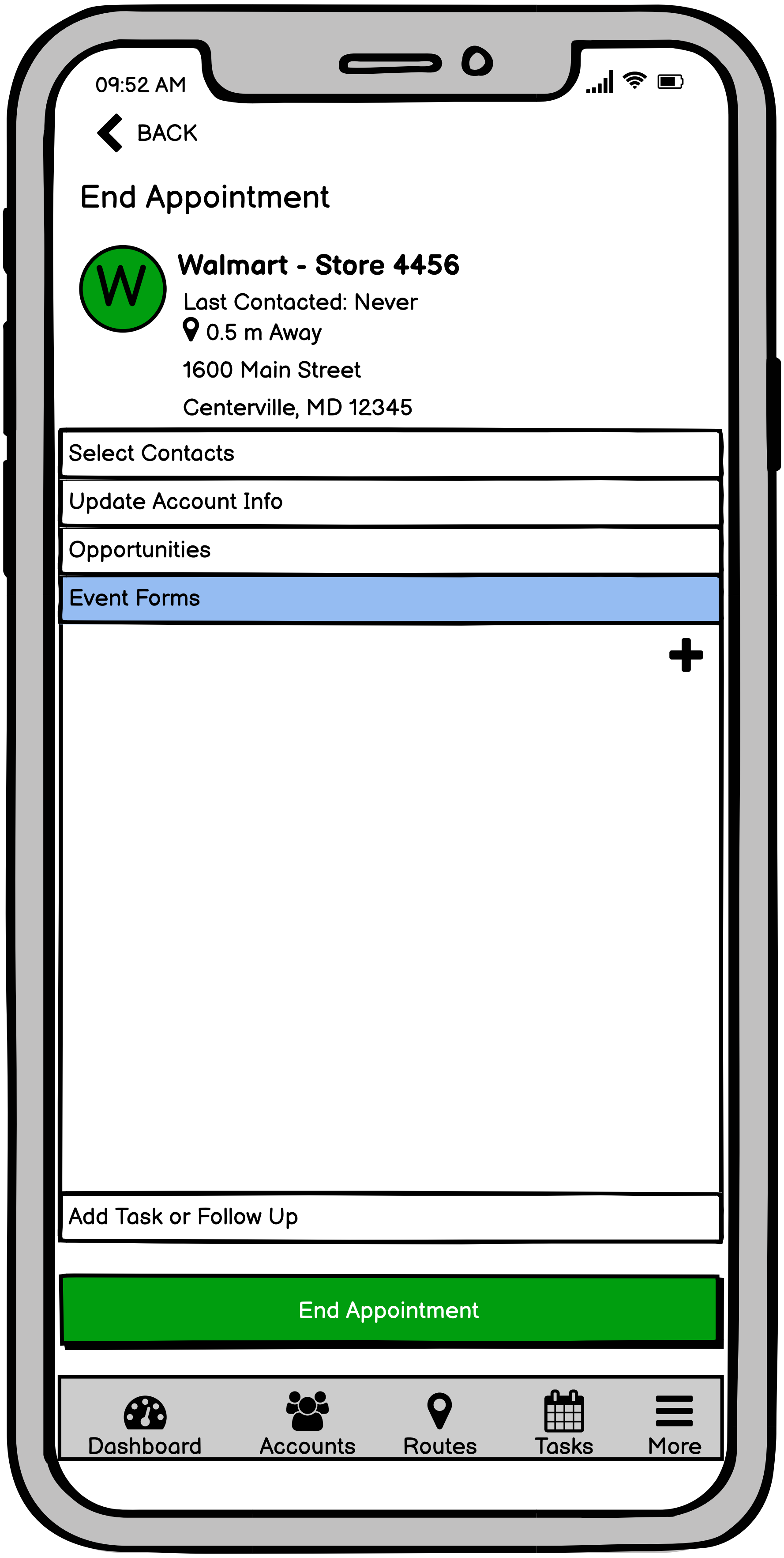


Opportunities can be tied to multiple accounts. These only come out on the reports a single time.
Allow multiple opportunities to be added/edited.
Custom Fields can be into the opportunities that would need to be displayed.
Existing opportunities that relate to this Account should be displayed here.

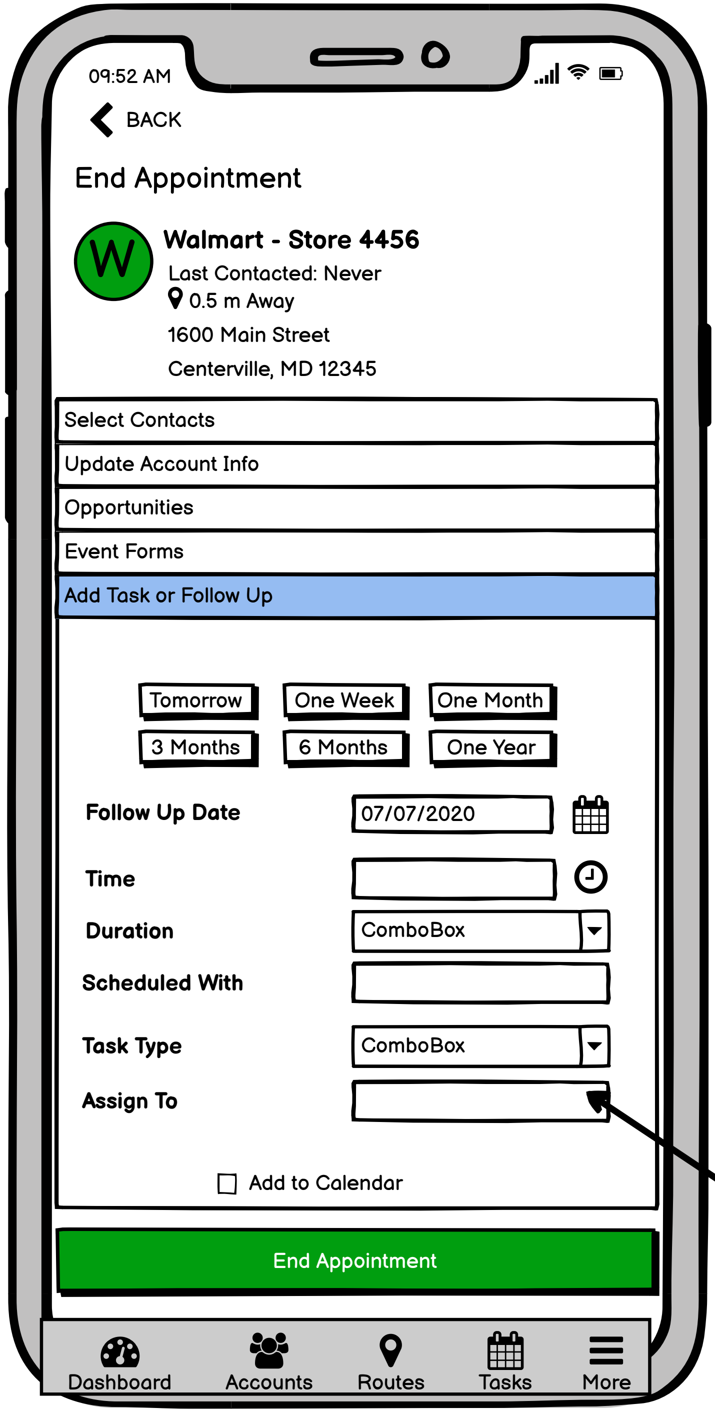
Opportunities should create a new page for user to view/edit/update existing opportunites or add a new one.

Having additional scroll bars here, and data entry is not ideal and should be done on their own screens.

After viewing/updating/adding opportunites, user would return back to this screen.



Event Forms will be dynamically generated and would need to be displayed here.
Allow multiple event forms to be added.
Existing event forms that pertain to this Account should be displayed with an option to allow the user to edit those existing forms.



These sections are not required. A user should be able to hit "End Appointment" at any time and save whatever is filled out.

"Scheduled With" is a multi-select of the Contacts in this Account.
If the user doesn't have a calendar, then the "Add to Calendar" option should be disabled and next to it, there's a button that says "Link Calendar". Clicking that button will allow them to link their calendar to CallProof.
Users should be able to add multiple tasks/follow ups and for each one, be able to view or edit it. This screen shows them as if you were adding a new one.

This will default to the current user. They will be able to select other users on the account to create a follow up for them, too.

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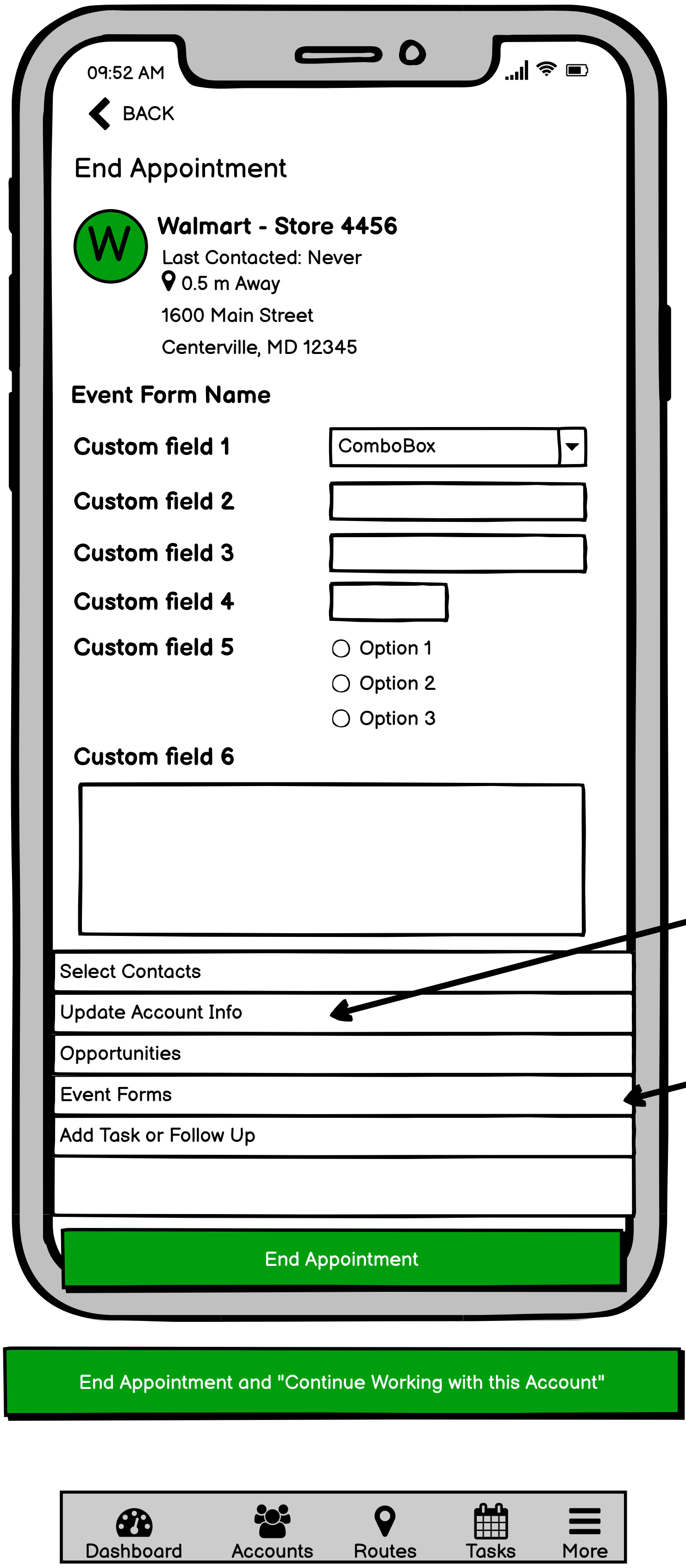


This mockup uses an accordian for some of the options starting at "Select Contacts" and below, but it's ok to use a different type of control for this workflow. I'm open to different options for this screen, so long as it is consistent between iOS and Android.

The user simply needs to be able to quickly enter or skip over any of the relevant 'pages' of data where they might need to enter information about the appointment.

The main section at the top shows the most common items the user will need to interact with, followed by other actions which are optional shortcuts to things they may want to do along the way.

If an Event Form is being used, the selected Event Form will replace the standard Contact Type and Notes box.

Custom Fields: Any custom fields that are not set as "Hide on checkout" should show up under Add Appointment Notes.

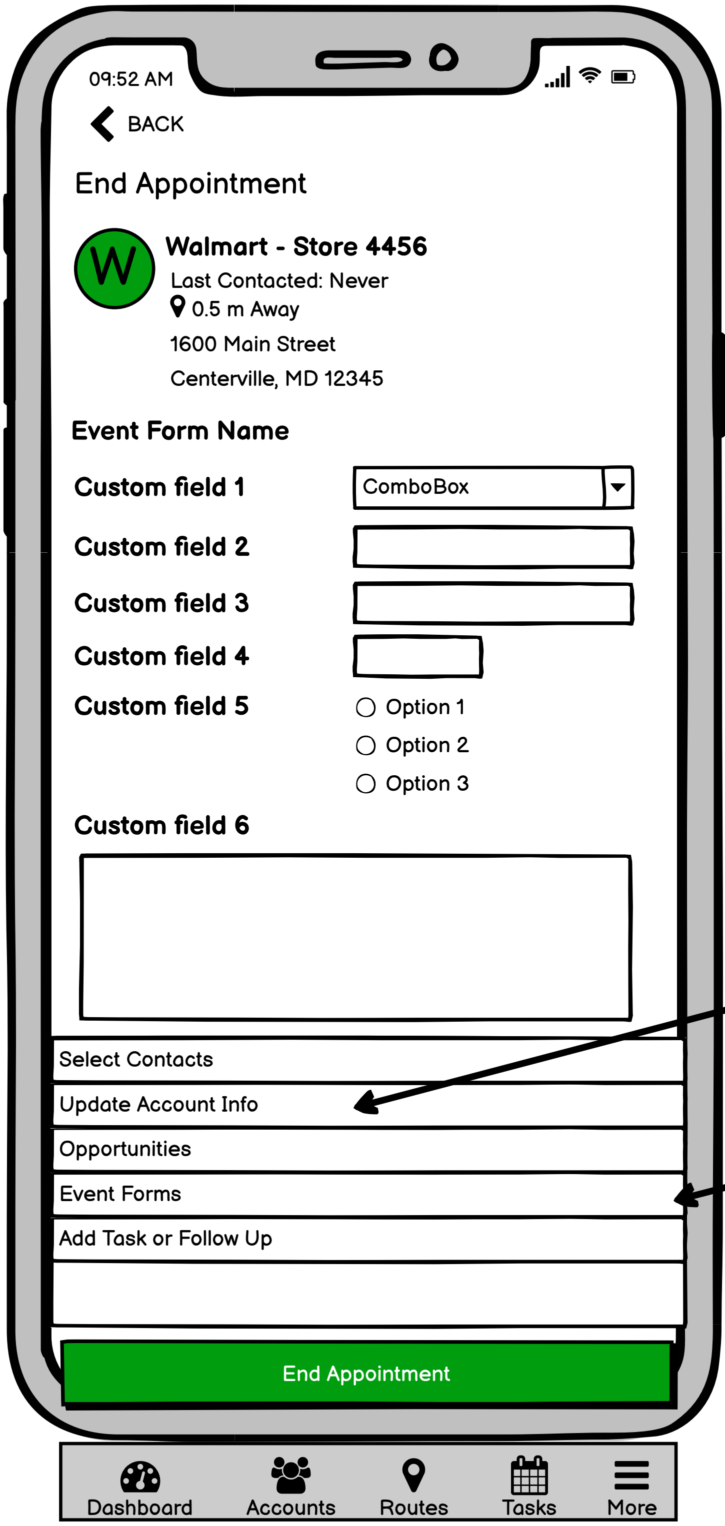
- When an event form is used, we also need to exclude any fields that appear on the form being used.

Also exclude event form being used from appearing here (this would exclude any event forms used as appointments)

If there is a custom field that is required and is empty, we need to check that when we load this end appointment screen.

If a req field is empty, we should show a warning that "Update Account Info" needs some info.

If End Appointment is clicked, show a warning that "Some Account Info Fields are Required" and send them into the Update Account Info.



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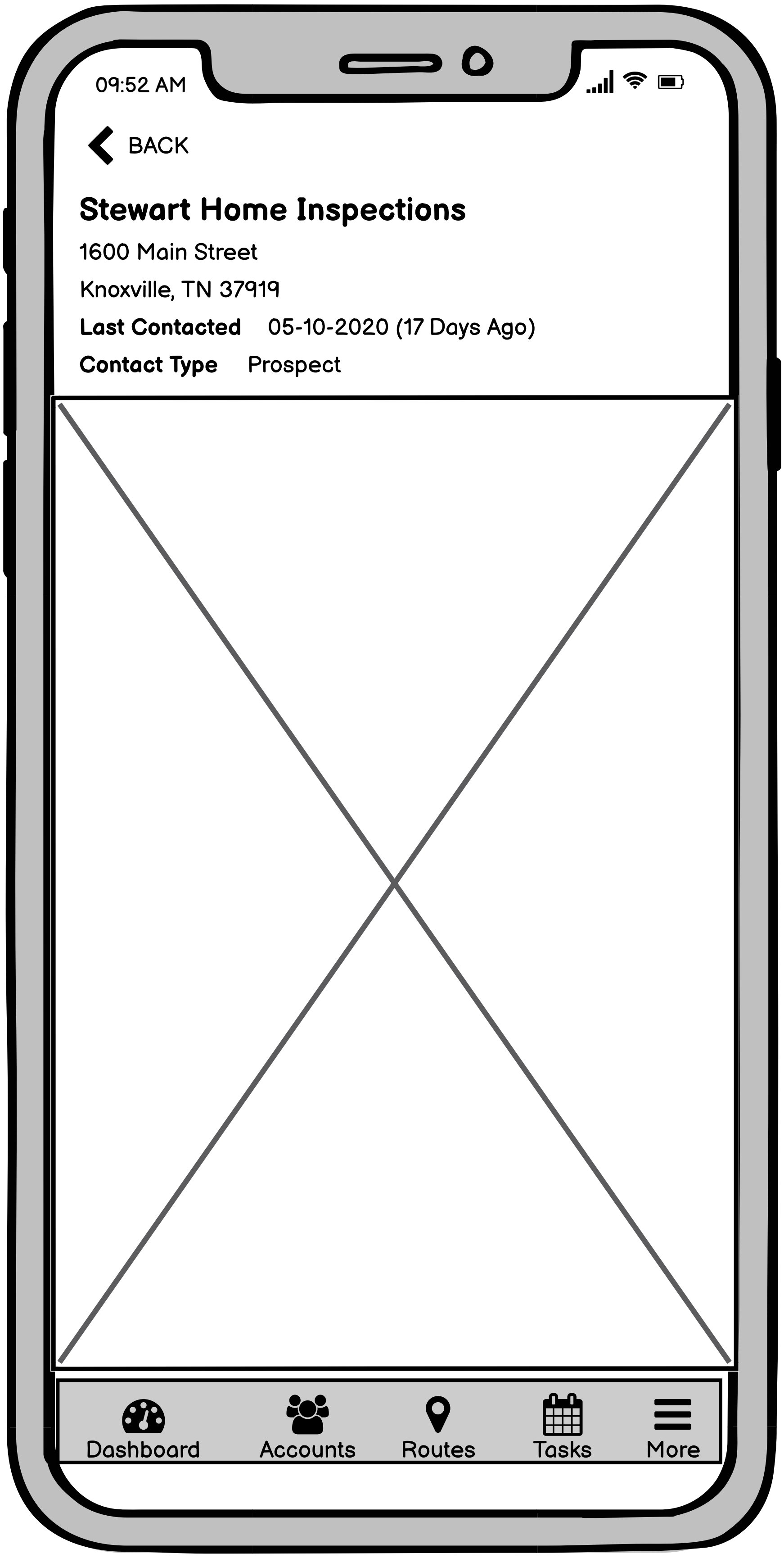
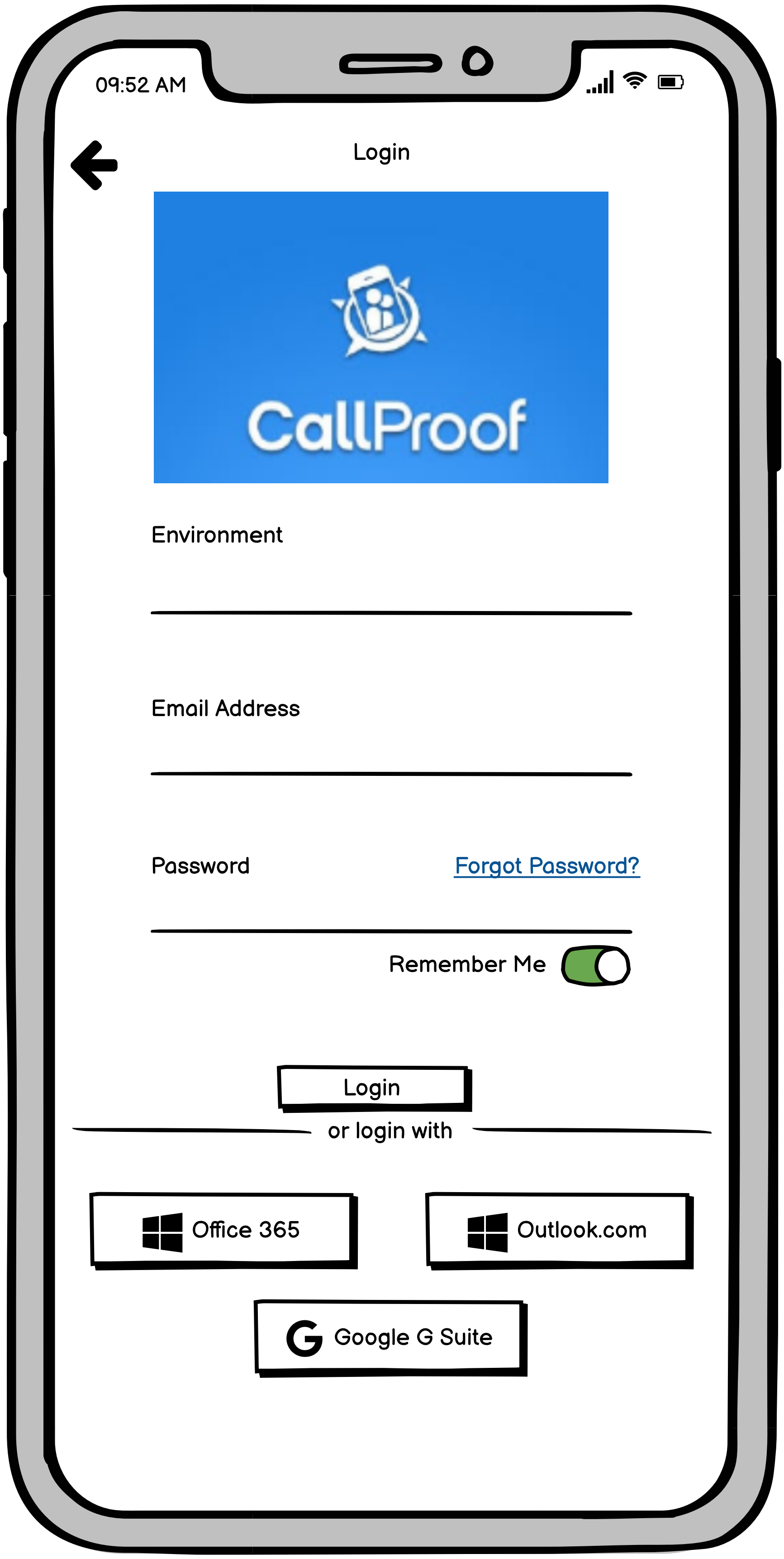


We can send users to Google instead of displaying inside the app.



When Forgot Password is clicked, check if email is entered. If not, tell user to enter email address. Otherwise, show a message that a link to reset password has been sent.

For Outlook.com, use the Outlook logo

Outlook