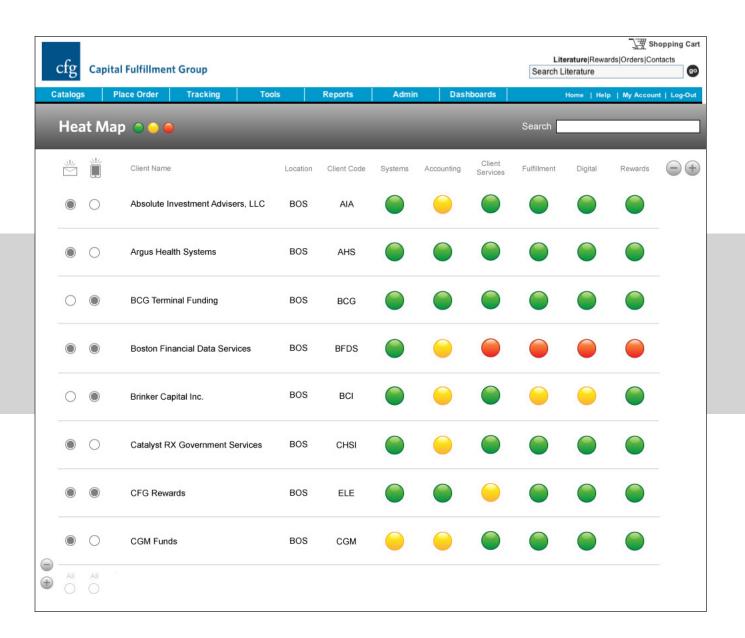# heat map

The **Heat Map** app will allow customers to easily identify the status of multiple aspects of their business. This program allows all who have access to it to quickly view problems and discuss possible solutions.

| | |
|---|---|
| ⊕ | **Add button**. Adds column or row. |
| ⊖ | **Subtract Button**. Subtracts column or row. |
| ✉ | **Email Alert.** An email is sent to you when selected statuses change. |
| 📱 | **Phone Alert.** A text message is sent to you when selected statuses change. |
| ◉ | **Selected**. Feature is currently active. |
| ○ | **Unselected**. Feature is currently inactive. |
| ○ | **Unavailable**. Cannot select due to conflicting feature activation. |
| 🟢 | **Green**. Status is good, no issues. |
| 🟡 | **Yellow**. Some concern, minor issues. |
| 🔴 | **Red**. Extreme concern, major issues. |

---

### cfg Capital Fulfillment Group

🛒 Shopping Cart

Literature|Rewards|Orders|Contacts

Search Literature [ go ]

| Catalogs | Place Order | Tracking | Tools | Reports | Admin | Dashboards | Home | Help | My Account | Log-Out |

## Heat Map 🟢🟡🔴                    Search [_____]

| ✉ | 📱 | Client Name | Location | Client Code | Systems | Accounting | Client Services | Fulfillment | Digital | Rewards | ⊖ ⊕ |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ◉ | ○ | Absolute Investment Advisers, LLC | BOS | AIA | 🟢 | 🟡 | 🟢 | 🟢 | 🟢 | 🟢 | |
| ◉ | ○ | Argus Health Systems | BOS | AHS | 🟢 | 🟢 | 🟢 | 🟢 | 🟢 | 🟢 | |
| ○ | ◉ | BCG Terminal Funding | BOS | BCG | 🟢 | 🟢 | 🟢 | 🟢 | 🟢 | 🟢 | |
| ◉ | ◉ | Boston Financial Data Services | BOS | BFDS | 🟢 | 🟡 | 🔴 | 🔴 | 🔴 | 🔴 | |
| ○ | ◉ | Brinker Capital Inc. | BOS | BCI | 🟢 | 🟡 | 🟢 | 🟡 | 🟡 | 🟢 | |
| ◉ | ○ | Catalyst RX Government Services | BOS | CHSI | 🟢 | 🟡 | 🟢 | 🟢 | 🟢 | 🟢 | |
| ◉ | ◉ | CFG Rewards | BOS | ELE | 🟢 | 🟢 | 🟡 | 🟢 | 🟢 | 🟢 | |
| ◉ | ○ | CGM Funds | BOS | CGM | 🟡 | 🟡 | 🟢 | 🟢 | 🟢 | 🟢 | |

⊖ ⊕ All All
○ ○
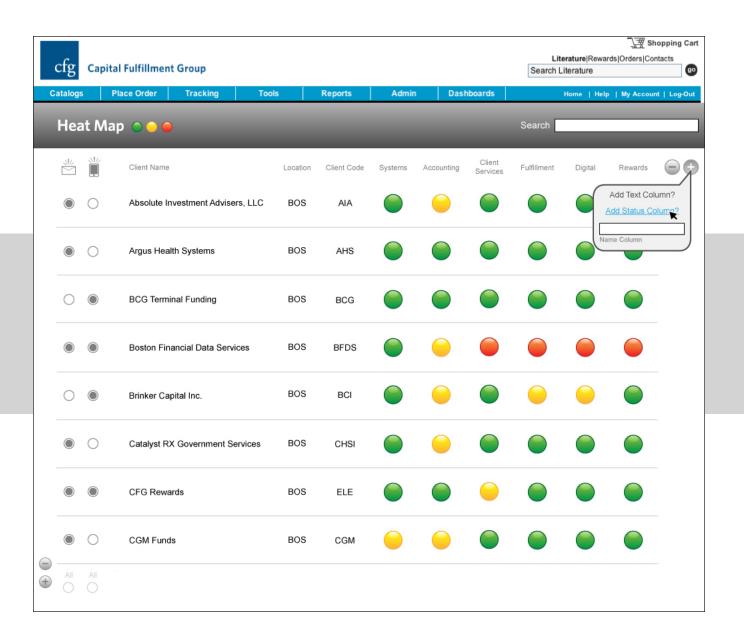
# add column

Adding a column to **Heat Map** is easy and quick. Simply click the (+) button in the upper right. It will change to (+). The pop up menu to the left should appear. From here you name the column and select its type. **\*User cannot add a column without naming first.**

# column types

There are two types of columns. **Text Columns** and **Status Columns**.

**Text Column:**
A column that allows only user generated content. In the example to the left the *Client Name, Location*, and *Client Code* sections are all text columns. **Search bar** will only query cells in these columns.

**Status Column:**
A status column only allows one of the four different statuses below.
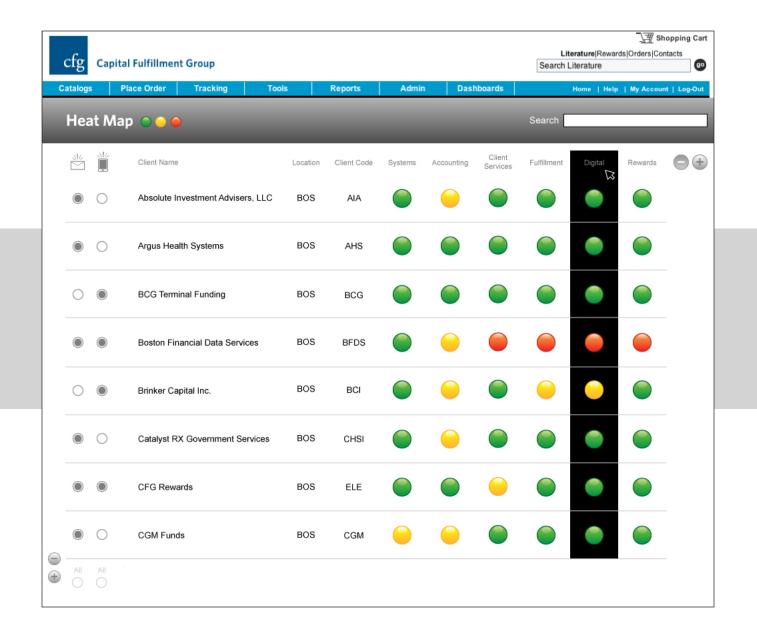
**Green**. Status is good, no issues.

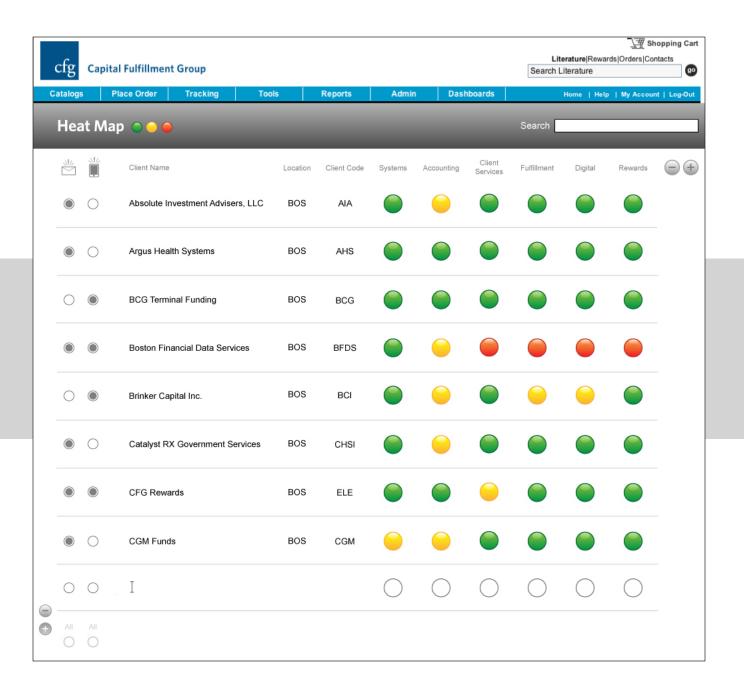**Yellow**. Some concern, minor issues.

**Red**. Extreme concern, major issues.

**No Status**. Currently no status is set.

---

## Screenshot content

cfg **Capital Fulfillment Group**

Shopping Cart

Literature|Rewards|Orders|Contacts
Search Literature [go]

| Catalogs | Place Order | Tracking | Tools | Reports | Admin | Dashboards | Home | Help | My Account | Log-Out |

**Heat Map** ● ● ●   Search

| | | Client Name | Location | Client Code | Systems | Accounting | Client Services | Fulfillment | Digital | Rewards | − + |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ◉ ○ | | Absolute Investment Advisers, LLC | BOS | AIA | ● | ● | ● | ● | ● | | |
| ◉ ○ | | Argus Health Systems | BOS | AHS | ● | ● | ● | ● | ● | ● | |
| ○ ◉ | | BCG Terminal Funding | BOS | BCG | ● | ● | ● | ● | ● | ● | |
| ◉ ◉ | | Boston Financial Data Services | BOS | BFDS | ● | ● | ● | ● | ● | ● | |
| ○ ◉ | | Brinker Capital Inc. | BOS | BCI | ● | ● | ● | ● | ● | ● | |
| ◉ ○ | | Catalyst RX Government Services | BOS | CHSI | ● | ● | ● | ● | ● | ● | |
| ◉ ◉ | | CFG Rewards | BOS | ELE | ● | ● | ● | ● | ● | ● | |
| ◉ ○ | | CGM Funds | BOS | CGM | ● | ● | ● | ● | ● | ● | |

Add Text Column?
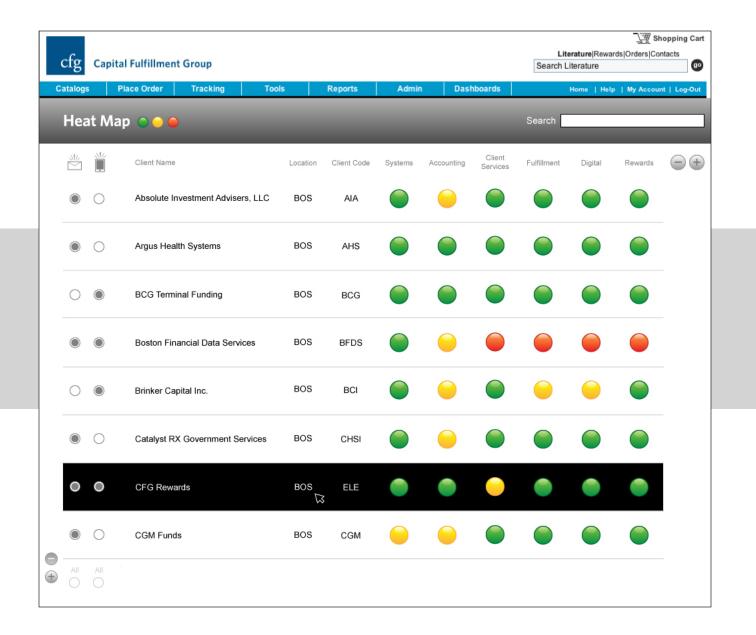Add Status Column?
Name Column

All All

# subtract column

Subtracting a column is also easy. Simply click on the ⊖ in the upper right and it will change to ⊖ activating the subtract mode. Simply hover your mouse cursor over a specific column and it will be highlighted as it is to the left. Simply click the column to delete it and its content.
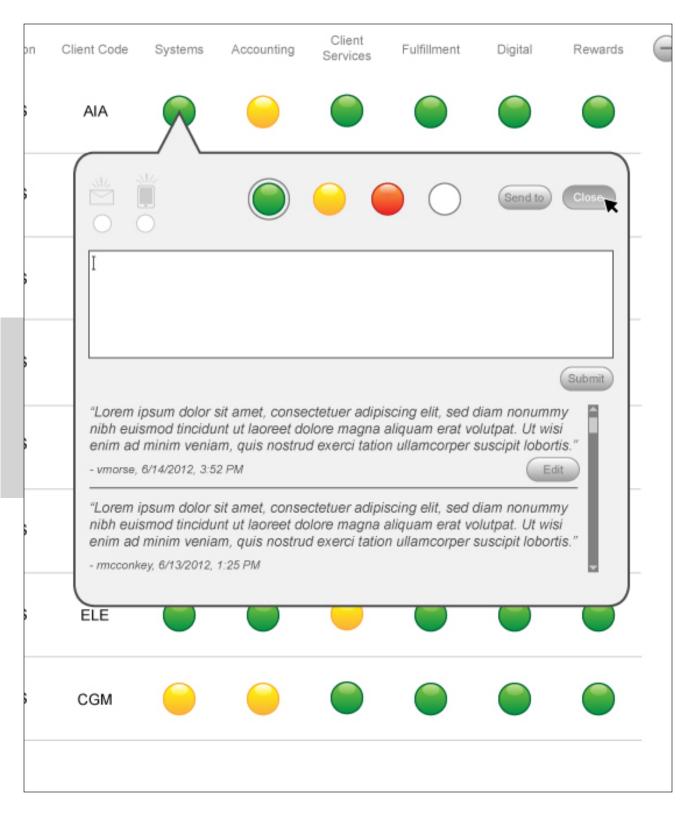
# add row

To add a new row simply click on the ⊕ in the lower left. It will change to ⊕ and a new row will appear at the bottom of the chart. **Text Column** cells will be blank and a cursor will appear when clicked on. **Status Column** cells will have the **No Status** icon set to default.

# subtract row

To subtract a row simply click on the ⊖ in the lower left and it will change to ⊖ activating the subtract mode. Simply hover your mouse cursor over a specific row and it will be hghilighted as it is to the left. Simply click the row to delete it and its content.

# pop-up menu

When a **Status** is clicked upon it will upon up a **Pop-up Menu** where you will be able to set and change statuses as well as a number of other features.

Features in pop-up menu:

- Toggle on and off Email and Text alerts for a specific status.
- Set and change status.
- Email notes to others.
- Submit notes to chat log. 140 character limit. All submitted notes are automatically stamped with the logged in user name, date, and time stamp.
- Edit previous notes. Only available for posts by logged in user.
- Review other users' notes.

**Close**. Closes the Pop-up Menu.

**Send to**. Opens users Email client with status and note history pasted into the body.

**Submit**. Adds the type from the character box to the notes below. Notes appear chronologically with newest at top.

**Edit**. The selected comment will re-appear in the character box above. When re-submitted the old one will be deleted and the new post will have the current date and time stamp.

**Green** is active.

**Yellow** is active.

**Red** is active.

**No Status** is active.

## email alert

When the **Email Alert** box is checked you will receive an email similar to the one on the left. It will notify you of what statuses have been changed as well as what they've been changed too and any recent comments added.

Emails will be automated with a link to take you directly to your portal log in.

## text alert

When the **Text Alert** box is checked you will receive a text* similar to the one below. It will notify you of what statuses have been changed as well as any recent comments added.

*Standard text message rates may apply.*

This **Text** has been sent to you because you requested a status alert on **[row and/or column]**.

The following status update has been made:
**[color]** to **[color]**

**The following comment has been added:**
"Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis."
- vmorse, 6/14/2012, 3:52 PM

## sent email

When you hit the ( Send to ) button on the pop-up menu you will be prompted to enter a recipient's name and they will be automatically be sent an email similar to the one on the left.

This option may be used if you want to draw particular attention to a specific status or comment. It may also be used as an alternative to an email alert. If you're worried another user may have their alerts turned off you may send them this email for status changes too important to wait.

---

# Heat Map ⬤⬤⬤                    Sent Email

This email was sent to [recipient's name] from [user's name].

Status: 🟢

"Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat  volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis."
- vmorse, 6/14/2012, 3:52 PM

"Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis."
- rmcconkey, 6/13/2012, 1:25 PM

_____

Click here to log in to your account >

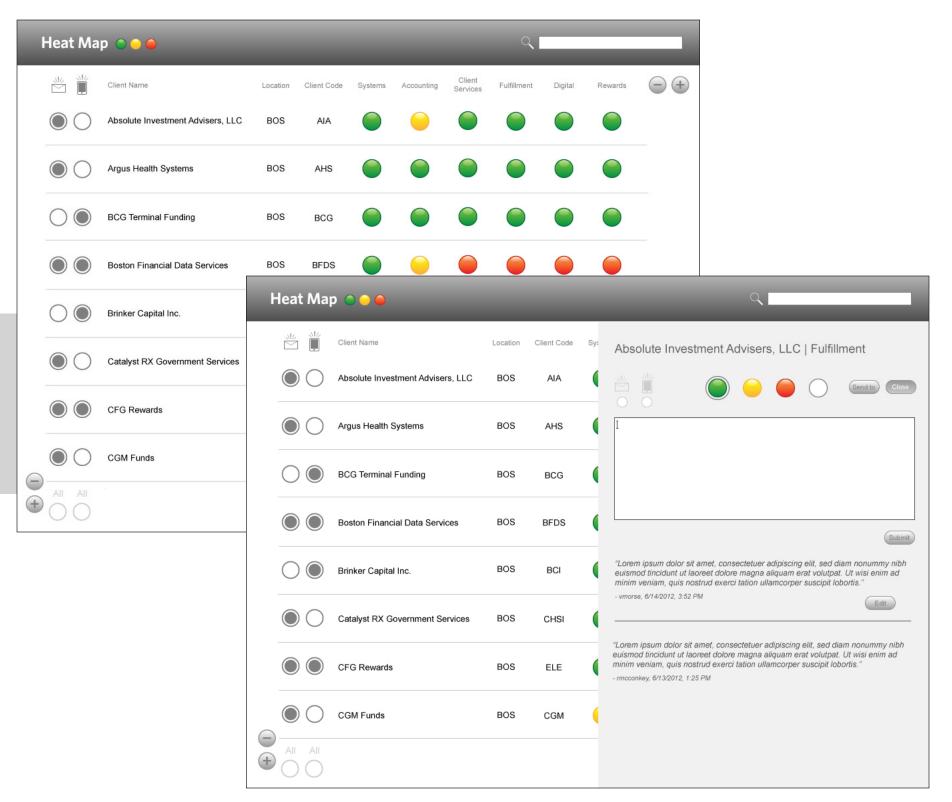Please DO NOT REPLY to this email. This is an automated message.
If you have received this email in error please notify your Heat Map system administrator.

# heat map | ipad landscape

The **Heat Map** app for ipad is very similar to the portal version. It is designed to take advantage of both portrait and landscape layouts. Buttons are also large to help compensate for the loss of a mouse cursor.

**Add button.** Adds column or row.

**Subtract Button.** Subtracts column or row.

**Email Alert.** An email is sent to you when selected statuses change.

**Phone Alert.** A text message is sent to you when selected statuses change.

**Selected.** Feature is currently active.

**Unselected.** Feature is currently inactive.

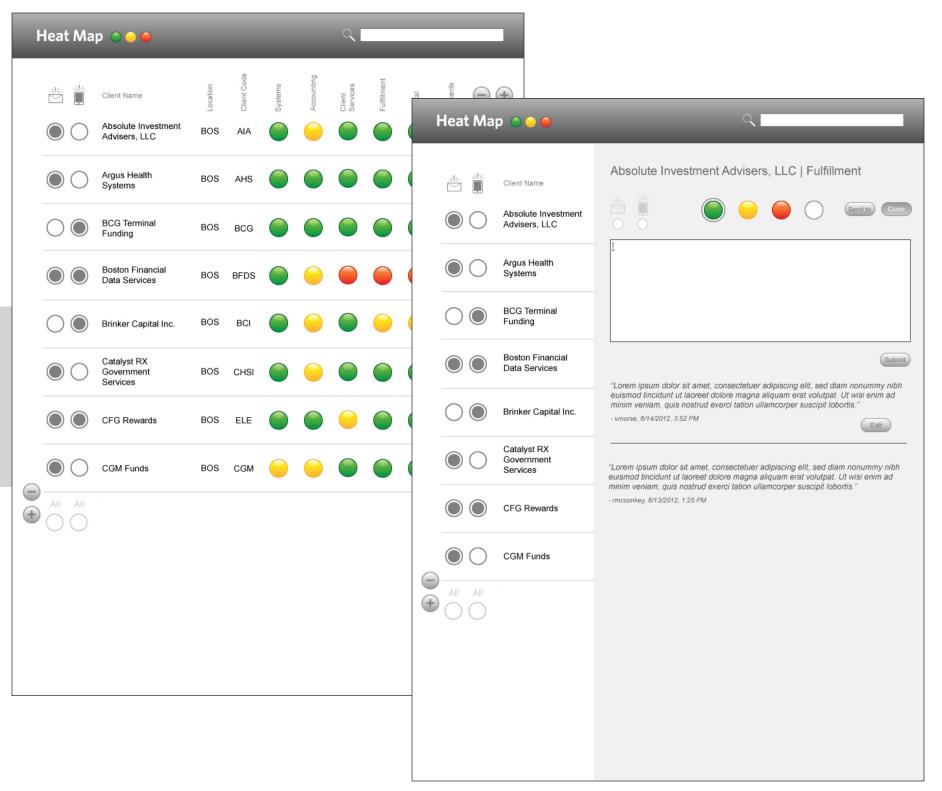**Unavailable.** Cannot select due to conflicting feature activation.

**Green.** Status is good, no issues.

**Yellow.** Some concern, minor issues.

**Red.** Extreme concern, major issues.

# heat map | ipad portrait

The **Heat Map** app for ipad is very similar to the portal version. It is designed to take advantage of both portrait and landscape layouts. Buttons are also large to help compensate for the loss of a mouse cursor.

**Close**. Closes the Pop-up Menu.

**Send to**. Opens users Email client with status and note history pasted into the body.

**Submit**. Adds the type from the character box to the notes below. Notes appear chronologically with newest at top.

**Edit**. The selected comment will re-appear in the character box above. When re-submitted the old one will be deleted and the new post will have the current date and time stamp.

**Green** is active.

**Yellow** is active.

**Red** is active.

**No Status** is active.

---

## Heat Map

Search

| | | Client Name | Location | Client Code | Systems | Accounting | Client Services | Fulfillment | | Rewards |
|---|---|---|---|---|---|---|---|---|---|---|
| ● | ○ | Absolute Investment Advisers, LLC | BOS | AIA | 🟢 | 🟡 | 🟢 | 🟢 | | |
| ● | ○ | Argus Health Systems | BOS | AHS | 🟢 | 🟢 | 🟢 | 🟢 | | |
| ○ | ● | BCG Terminal Funding | BOS | BCG | 🟢 | 🟢 | 🟢 | 🟢 | | |
| ● | ● | Boston Financial Data Services | BOS | BFDS | 🟢 | 🟡 | 🔴 | 🔴 | | 🔴 |
| ○ | ● | Brinker Capital Inc. | BOS | BCI | 🟢 | 🟡 | 🟢 | 🟡 | | |
| ● | ○ | Catalyst RX Government Services | BOS | CHSI | 🟢 | 🟡 | 🟢 | 🟢 | | |
| ● | ● | CFG Rewards | BOS | ELE | 🟢 | 🟢 | 🟡 | 🟢 | | |
| ● | ○ | CGM Funds | BOS | CGM | 🟡 | 🟡 | 🟢 | 🟢 | | |

All  All

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## Heat Map

Search

### Absolute Investment Advisers, LLC | Fulfillment

🟢 🟡 🔴 ○   Send to   Close

"Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis."
- vmorse, 6/14/2012, 3:52 PM    Edit

"Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis."
- rmcconkey, 6/13/2012, 1:25 PM

| | | Client Name |
|---|---|---|
| ● | ○ | Absolute Investment Advisers, LLC |
| ● | ○ | Argus Health Systems |
| ○ | ● | BCG Terminal Funding |
| ● | ● | Boston Financial Data Services |
| ○ | ● | Brinker Capital Inc. |
| ● | ○ | Catalyst RX Government Services |
| ● | ● | CFG Rewards |
| ● | ○ | CGM Funds |

All  All

A slimmed down version of the full **Heat Map** app so that you may view your statuses on the go! It's intent is to be more of a supplement to the full version on your iPad or computer.

*\*Cannot delete, add, or edit columns and rows in the iPhone version of the software.*
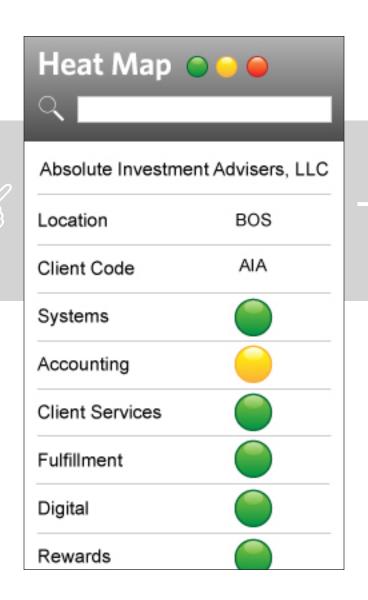


Heat Map

Client Name

Absolute Investment Advisers, LLC

Absolute Investment Advisers, LLC

Argus Health Systems

BCG Terminal Funding

All      All



Heat Map

Absolute Investment Advisers, LLC

| Location | BOS |
| --- | --- |
| Client Code | AIA |
| Systems | |
| Accounting | |
| Client Services | |
| Fulfillment | |
| Digital | |
| Rewards | |



Heat Map

Send to      Close

Submit

*"Lorem ipsum dolor sit amet, con-sectetuer adipiscing elit, sed diam non-ummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.*

- vmorse, 6/14/2012, 3:52 PM      Edit

*"Lorem ipsum dolor sit amet, con-*