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## 1 MyNextRide website software design II: Deal manager GUI

### 1.1 Purpose of this note

Purpose of this note is to specify the interface and GUI for the Deal Manager.

### 1.2 Sketch of the requirements for the Deal manager

The Deal manager is a tool which helps the product advisor and customer finalize all the elements of a deal. These elements are (1) vehicle selection (2) agreement on price (3) the names of the people or organizations involved in the deal. (4) any special circumstances or notes - these are also known as conditions.

Either the customer or the product advisor can propose the terms of a deal. However very often the product advisor will need to use the data provided by the customer to pick out a vehicle which is appropriate for the customers needs at an appropriate price. This is helpful for the customer, who is not usually an expert on cars.

The Deal manager helps the deal to be finalized by providing a proposal which can be modified by the customer and product advisor until everyone is satisfied.

## 2 Deal manager setup

Please refer to Figures 1 2 and 3 and their captions.

To set up a deal the product advisor may add a vehicle to the customers short vehicle selection list if the customer has not selected one already. This happens when the Product advisor selects "Propose this vehicle" from his My Recommendations page (Figure 3).

Choosing "Propose this vehicle" will add the vehicle to Customer X's list and return the product advisor to the conversations page. If this would make the list longer than 3, we replace

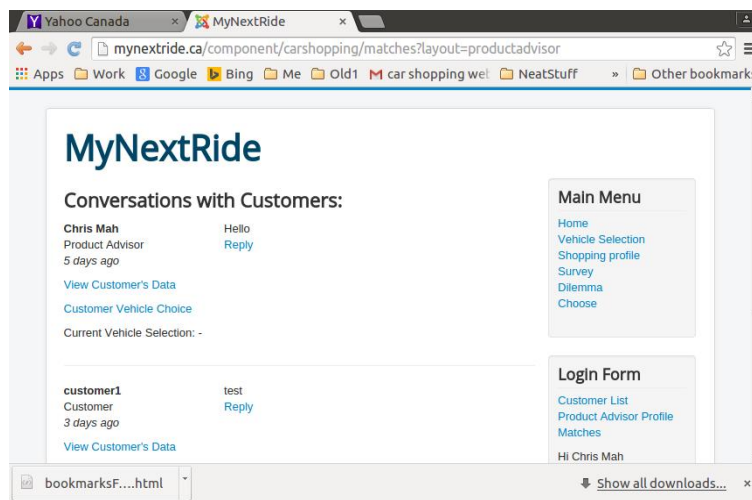
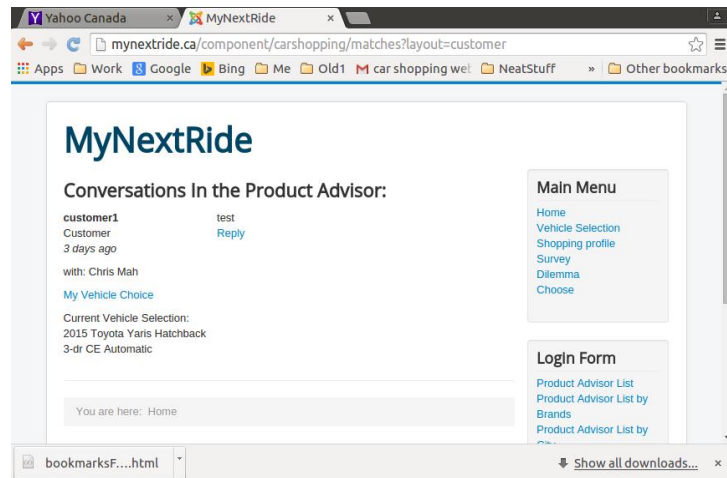


Figure 1: Current screens for Conversations with Product Advisors (above) [not Conversations in the Product Advisor: please fix] Conversations with Customers (below). Customer screen shows **current vehicle selection**. Product advisor screen shows **current vehicle selection** and **customer data** links. To be added: **Buying information** (Deal manager) to both screens. **My Recommendations** link for Product advisor screen.

(clobber) the oldest one on the customer selected vehicle list

Product advisors may also add notes to the displayed vehicles on the Deal manager (**buying information**) page (Figure 2). These notes may be entered in the "Condition" field mentioned in sw\_design1.

Product advisors will need to select many vehicles, whereas we will limit customer selection to 2-3 vehicles. Therefore, the product advisor will typically have a list of 1 - 15 vehicles that they may have selected for this and for other customers. They will be able to add one of these selected vehicles to the customer selection list.

### 3 Sample layouts

I have prepared 2 GUI example html pages

(1) *deal0.html*, showing the layout for a link called **buying information** (Figure 2) to be added to both the Current screens in figure 1, and (2) *myrecommendations.html* (Figure 3), showing the layout for a **My Recommendations** link to be added to the Product advisors screen from Figure 1. You will also see the actual html pages in the GUI directory on github.

Please follow the layout for the **buying information** (*deal0.html*) link closely. It should display the product advisor picture, and show the same balloon text. Sizes of pictures and text should be reasonably close. The notes I have inserted e.g. "colour to be discussed" etc. are just examples. Product advisor should be able to add a note from this page. If this proves to be difficult, please discuss it with me (CDM).

Please follow the **myrecommendations.html** layout closely, as well, but more liberties are possible with this layout, since it will only be seen by the product advisor. All the functions e.g. "choose another customer", "propose vehicle" "remove vehicle" and "add note" should be implemented however.

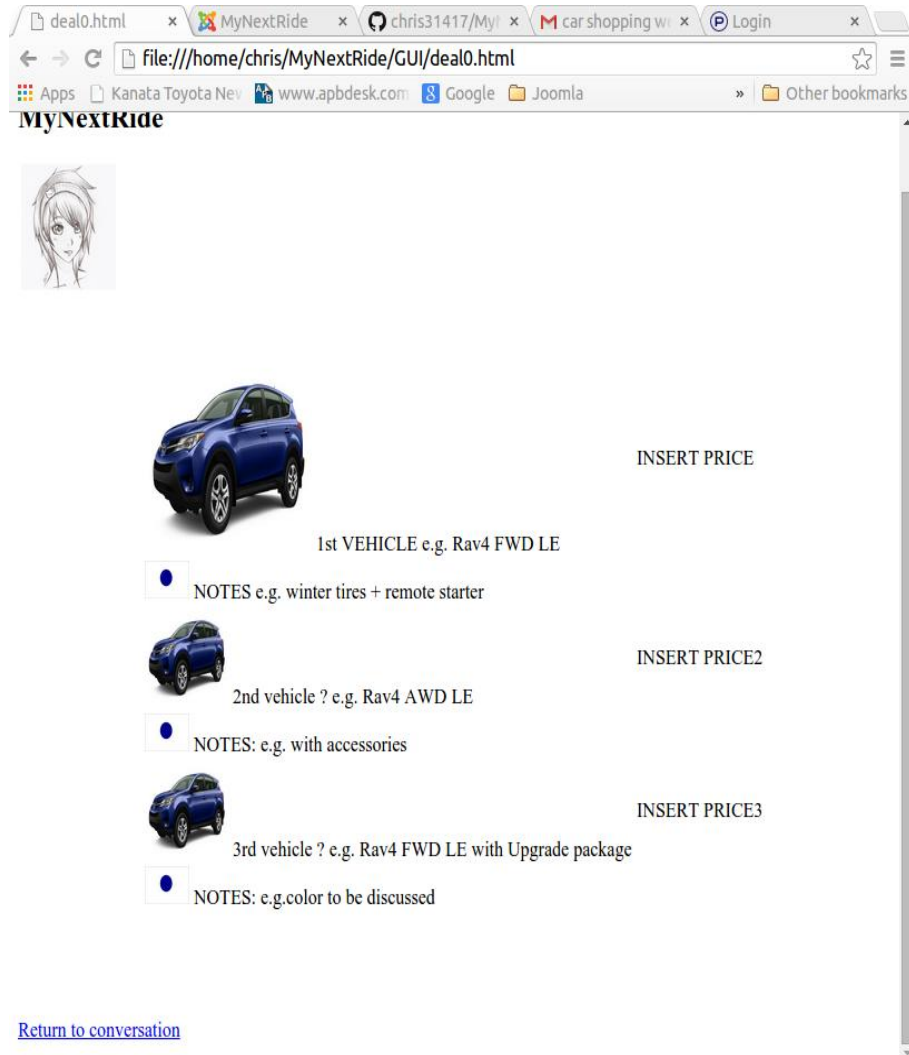


Figure 2: Deal manager screen (**buying information** link) is visible to PA and Customer. *File is deal0.html*. Hovering cursor over vehicle shows "Buy now". Picture of product advisor is shown. Hovering cursor "Here is what we are considering". Hovering cursor over note buttons shows "Insert note" for PA. No more than 3 vehicles are shown. First picture of vehicle 1 is twice the size of the 2nd and 3rd choices.

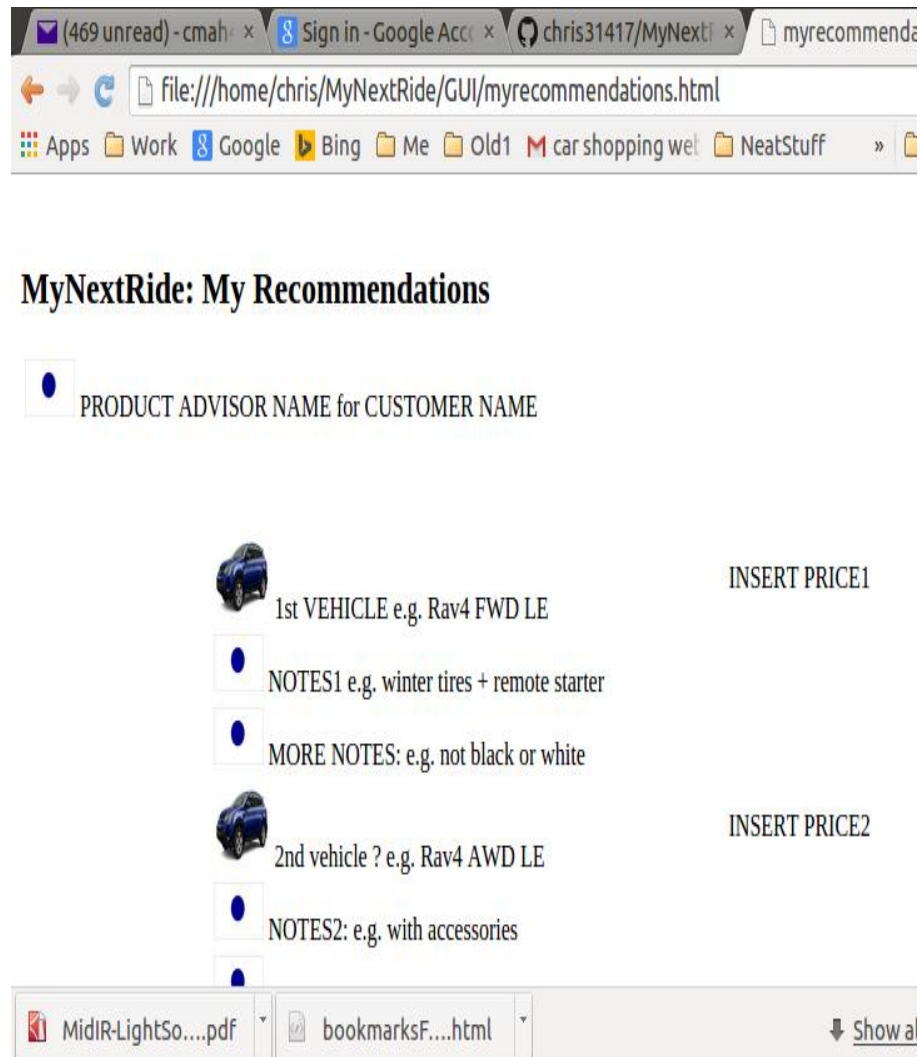


Figure 3: **My recommendations** screen visible to PA. *File is myrecommendations.html*. Hovering cursor over button near "PRODUCT ADVISOR NAME FOR CUSTOMER NAME" displays "Pick another customer". Hovering cursor over vehicle image "Propose this vehicle". This action adds vehicle to customer list; it also shows "Remove vehicle from this list"; this action removes vehicle from recommendation list. Hovering cursor over Notes:"Insert note (for PA)" "; allows notes to be edited or added. At most 2 pages of vehicles would be shown, probably less than 15.