

Winter Bonus - Prius

Started: 11/26/12

Expires: 12/15/12

87% Complete



739/800

61 Calls Remaining

Service Appointment Set & Appointment %
Sales Appointment Set & Appointment %

Call Script

Lorem ipsum dolor sit amet **\$customerName**, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim **\$vehicleYear \$vehicleMake \$vehicleModel** ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et

 Edit

User Status Report

Name	# Assigned	# Complete	# Remaining	# Service Appointment Set	# Sales Appointment Set	
Abby Apple	180	162	18	16	0	Edit
Brian Banana	140	135	5	12	1	Edit
Charlie Chocolate	150	130	20	11	3	Edit
David Donut	170	147	23	13	0	Edit
Erin Eclair	70	70	0	9	1	Edit
Francis Frank	90	90	0	10	2	Edit

Winter Bonus - Prius

11/26/12 - 12/15/12

87% Complete

Call Script

✕

↑

↓

Lorem ipsum dolor sit amet **\$customerName**, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim **\$vehicleYear \$vehicleMake \$vehicleModel** minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occididunt non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et

739/800 61 Calls Remaining

? Service Appointment Set & Appointment
Sales Appointment Set & Appointment

Abby Apple - Assigned Calls

18 currently assigned calls

Reassign calls to

Reassign calls to

12 calls remain assigned

✕ Cancel

✓ Apply

The number of calls reassigned cannot be greater than the number of calls assigned to Abby. If Abby has any remaining calls assigned to her after a reassignment, we'll automatically show another set of fields, but disallow Brian Banana from being selected again.

User Status Report

Name									
Abby Apple									
Brian Banana									
Charlie Chocolate									
David Donut									
Erin Eclair									
Francis Frank									
	150	130	20		11		1		Edit
							3		Edit
	170	147	23		13		0		Edit
	70	70	0		9		1		Edit
	90	90	0		10		2		Edit



Active Campaigns

Created	Campaign Name	Pending Calls
11/25/12	Winter Bonus	37
11/26/12	Winter Bonus - Prius	61
11/27/12	Winter Bonus - Tacoma	82
11/29/12	December Sizzler	120
12/1/12	December Sizzler - Camry	475
12/3/12	[December Sizzler - Rav4	



New Campaign

BDC Reps

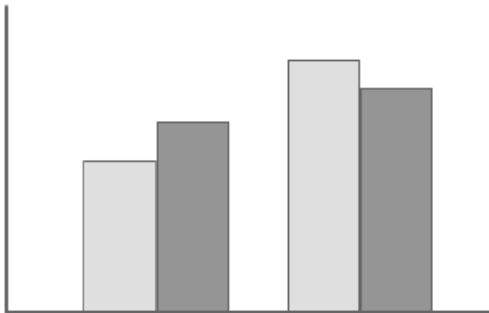
User Name	Pending Calls
Abby Apple	200
Brian Banana	300
Charlie Chocolate	120
David Donut	220
Erin Eclair	172
Francis Frank	189



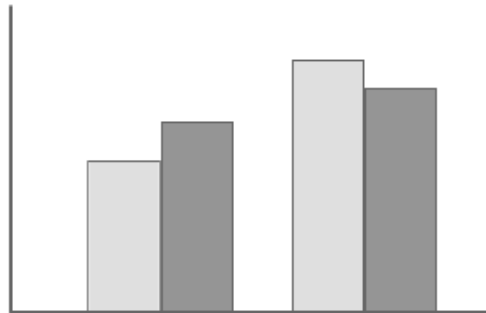
Manage Users

Reporting

Sales



Service



ROI

...
...	Drilldown?	...
...	Drilldown?	...
...	Drilldown?	...
...	Drilldown?	...
...	Drilldown?	...

Active Campaigns

Created	Campaign Name	Pending Calls
11/25/12	Winter Bonus	37
11/26/12	Winter Bonus - Prius	61
11/27/12	Winter Bonus - Tacoma	
11/29/12	December Sizzler	
12/1/12	December Sizzler - Can	
12/3/12	[December Sizzler - Ray	

BDC Reps

User Name	Pending Calls
Abby Apple	200
Brian Banana	300
	120
	220
	172
	189

Create a New Campaign



Create Custom Campaign



Use Campaign Gallery Template

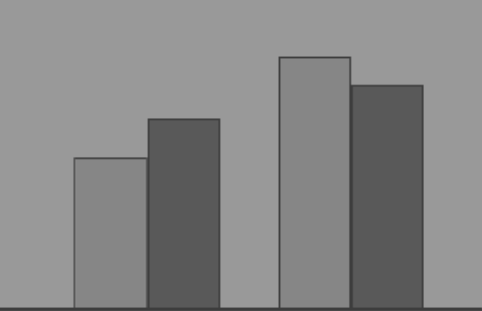
[Cancel](#)



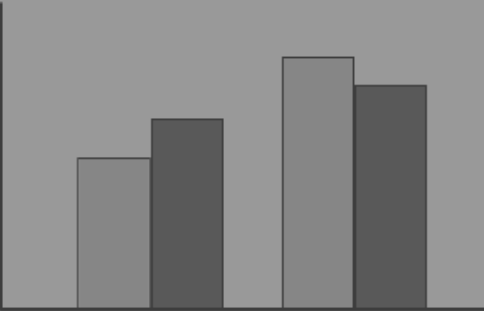
Manage Users

Reporting

Sales



Service



ROI

...
...	Drilldown?	...
...	Drilldown?	...
...	Drilldown?	...
...	Drilldown?	...
...	Drilldown?	...

The diagram illustrates the three states of a Call Log interface, connected by red arrows indicating the flow of user actions.

State 1: Initial State

- Annotation:** The first time a rep visits this call, no activity has been logged.
- UI Elements:** A grey box with the text "No calls have been logged." and a button labeled "Record New Call" with a telephone handset icon.

State 2: Editing State

- Annotation:** When a rep starts a new call, we create a new entry with a user stamp, a date stamp and allow for notes to be entered. "Save" commits the call info, "Cancel" backs it out in case they're interrupted between starting and actually engaging a call.
- UI Elements:** A form titled "Call Log" with fields for "Made by: Brian Banana", "Date: 11/27/12 3:16 PM", "Notes:" (containing "Left mes"), and "Disposition: - Select -". It includes "Cancel" and "Save Log Entry" buttons.

State 3: Read-only State

- Annotation:** Read-only messages are available in the log.
- UI Elements:** A form titled "Call Log" with fields for "Made by: Brian Banana", "Date: 11/27/12 3:16 PM", "Notes:" (containing "Left message."), and "Disposition: - Select -". It includes a "Record New Call" button.

- 1 Only after a entry has been logged with the customer can the call be completed (and closed out).
- 2 Reps can schedule an action outside the scope of a call, but we could create confusion by showing both sets of buttons at the same time. Should we hide the scopeless button set when a call is being viewed?

Adelle Almond

Preferred Number: (123) 456-7890

Details History Actions

Priority Due Date	Title Description	Type	Call Attempts
3 12/06/12	Winter E Save big		1

Camp

Lorem
sed do
\$vehic
exerci
aute irure dolor in
fugiat nulla pariatu
culpa qui officia des
consectetur adipisci
dolore magna aliqua
ullamco laboris nisi ut

Date defaults
to current
date to make
it easier to
start recording
inbound calls.

Create a New Call or Schedule a Followup to {{\$nameOfReferringCall}}

Due Date: / /



Description:

Reason: - Select a Reason -

Complete {{\$nameOfReferringCall}} call?

☒ Yes☐ No

Disposition: - Select Disposition -

Cancel

Save

/27/12 3:16 PM

Record New Call

Complete and Close Call

Schedule Sales

Schedule Service

Schedule Follow-up Call

If an existing call is the referrer
for this call, allow the user to
close that call out and set its
disposition. We should also grab
the referring call's type and
apply it to the new call.

12/20/12	Scheduled Appointment Reminder
01/05/13	Campaign Follow-up Call customer in January about trading in Camry

Service

0

Sales

0

Adelle Almond

Preferred Number: (123) 456-7890

[Details](#) [History](#) [Actions](#)



Priority Due Date	Title Description	Type	Call Attempts
3 12/06/12	Winter E Save big		1

Campaign Call Script






Lorem ipsum dolor sit
sed do eiusmod temp
\$vehicleYear \$vehic
exercitation ullamco l
aute irure dolor in rep
fugiat nulla pariatu. El
culpa qui officia deser
consectetur adipisicing
dolore magna aliqua.
ullamco laboris nisi ut

Complete {{\$nameOfReferringCall}} call

Let's add some confirmation text here and instructions on selecting 'disposition'

Disposition:  Cancel Save

/27/12 3:16 PM

 Record New Call Complete and Close Call Schedule Sales Schedule Service Schedule Follow-up Call

12/20/12	Scheduled Appointment Reminder	Service	0
01/05/13	Campaign Follow-up Call customer in January about trading in Camry	Sales	0



Appointment Referral: Winter Bonus - Prius

[Cancel Appointment Creation and](#)[Dealership Management](#)[AutoBook](#)[Campaign Manager](#)[AutoQuote](#)[Anderson Autos ▾](#)[Cory Chase ↗](#)**autobook™**[Support ▾](#)[Settings ▾](#)[Dashboard](#)[Appointments](#)[Next Appointment](#)[Customers](#)**Adelle Almond - 2010 Toyota Prius****1** Customer**2** Vehicles**3** Services**4** Appointment**Customer**

DMS# 56c0b76cc3aa43eeb1cb72d053614cdb
First Name
Last Name

Contact Information

Email
Mobile Phone
Home Phone
Work Phone
Preferred Phone ▾

Address

Street
City
State ▾
Zip Code

Dealership Account Details[Create Dealership Account](#)[Manage Communication Preferences](#)**Appointment History**

Date	Vehicle	Advisor	RO#
11/19/12	2012 Toyota 4Runner	Ben Afleck	
07/26/12	2012 Acura CL	AutoLoop Test	
06/27/11	2012 Toyota 4Runner	Balthier	
06/27/11	2012 Acura CL	Marc Anthony	

[CANCEL](#)[SAVE & CLOSE](#)[NEXT](#)





Adelle Almond

Preferred Number: (123) 456-7890

Filter criter would function like checkboxes, styled based on activation. "All" would enable all options, clicking an option again would disable its filter.

☐ Disabled Example

[Details](#)
[History](#)
[Actions](#)
☒ All

☒ 2010 Toyota Prius

☒ 2009 Toyota Camry

☒ Notifications

[+ Add Vehicle](#)

Activity Timeline

⚙	11/15/12
☎	10/08/12
⚙	06/19/12
☎	03/11/12
⚙	12/16/11
📅	09/21/11
⚙	07/14/11
📅	03/30/11

- o YMM
- o Open Date
- o Invoiced Date
- o Closed Date
- o Email Collection Status
- o Advisor
- o Vehicle stock #
- o Mileage
- o Invoice Total
- o Warranty Total
- o Job Lines
 - Complaint
 - Cause
 - Correction
 - OpCode
 - Labor Type
 - Tech

There are 6 content types for this space. Deferring those layouts to a later phase.

5 criteria for flagging each entry.

ROs:

- Declined Repairs
- Lane Inspection
- AutoMechanic Entries

Appointments:

- Missed Appointments

Quote:

- Lowered Payment for equal payment type.

- o ASR (if available) – Show the ASR Declines from ASR and provide a link to download the PDF booklet if available
- o AutoMechanic Records – Ability to view images and descriptions associated with the repair order
- o Lane Inspection Records – Ability to pull the inspection form from the visit and view
- o SA ONLY
 - Inserted
 - Updated
 - Source
 - View Raw Data



Adelle Almond

Preferred Number: (123) 456-7890

Details History Actions

● All

● 2010 Toy

Activity Timeline

11/15/12

10/08/12

06/19/12

03/11/12

12/16/11

09/21/11

07/14/11

03/30/11

01/02/11

10/25/10

Add New Vehicle

Year:

VIN:

Make:

Plate:

Model:

Color:

Currently Owned: ☒ Yes
☐ No

Mileage:

Cancel

Save

- Cause
- Correction
- OpCode
- Labor Type
- Tech

- o ASR (if available) – Show the ASR Declines from ASR and provide a link to download the PDF booklet if available
- o AutoMechanic Records – Ability to view images and descriptions associated with the repair order
- o Lane Inspection Records – Ability to pull the inspection form from the visit and view

- o SA ONLY
 - Inserted
 - Updated
 - Source
 - View Raw Data

Admins


[Dashboard](#)

BDC Manager

BDC Queue

 Customer Search



 Search

Search by name, contact info, RO number or DMS ID


Reps

[Dashboard => BDC Queue](#)

...

 Customer Search



 Search

Search by name, contact info, RO number or DMS ID

Work In Progress

Activities

Is "Queue" the right word for this section? Seems like we've got a dashboard and search area to factor in...

Admins Only

Dashboard Upcoming Calls

- Select User -


Task Queue

Overdue	6
Today	15
This Week	37
Next Week	91

I don't know about this pattern -- I think it's a poor use of space and isn't as likely to change as it is in the AutoQuote dashboard. Providing this for feedback, but I'd prefer an operational section on this dashboard for a handful of buttons that won't work in the mast navigation.

Personal Dashboard

Call Efficiency

54% 

Last 24 hours Over Last 7 Days

Personal Results

	Scheduled	Set	Missed	Show Rate
Service Appointments	10	9	8	7
Sales Appointments	6	5	4	3

Active Campaigns

Created	Campaign Name	Call Progress
11/25/12	Winter Bonus	<div></div>
11/26/12	Winter Bonus - Prius	<div></div>
11/27/12	Winter Bonus - Tacoma	<div></div>
11/29/12	December Sizzler	<div></div>
12/1/12	December Sizzler - Camry	<div></div>
12/3/12	[December Sizzler - Rav4	<div></div>

128 of 140 Calls Complete.
18 Calls Remain

Show 3 points plus something graphical in this area poses a problem.

- Calls Complete
- Calls Remaining
- Total Calls

Labeling a stacked bar chart could work, but there's a serious risk of overlapping the labels.

I think the best solution is to provide an at-a-glance stacked bar chart and then allow for details in a tooltip.

Activities

[Dashboard](#) [Upcoming Calls](#)

- Select User -

Filter

Campaign Name:

Campaign Name:

Sales,
Service,
Task,
Other???

Priority

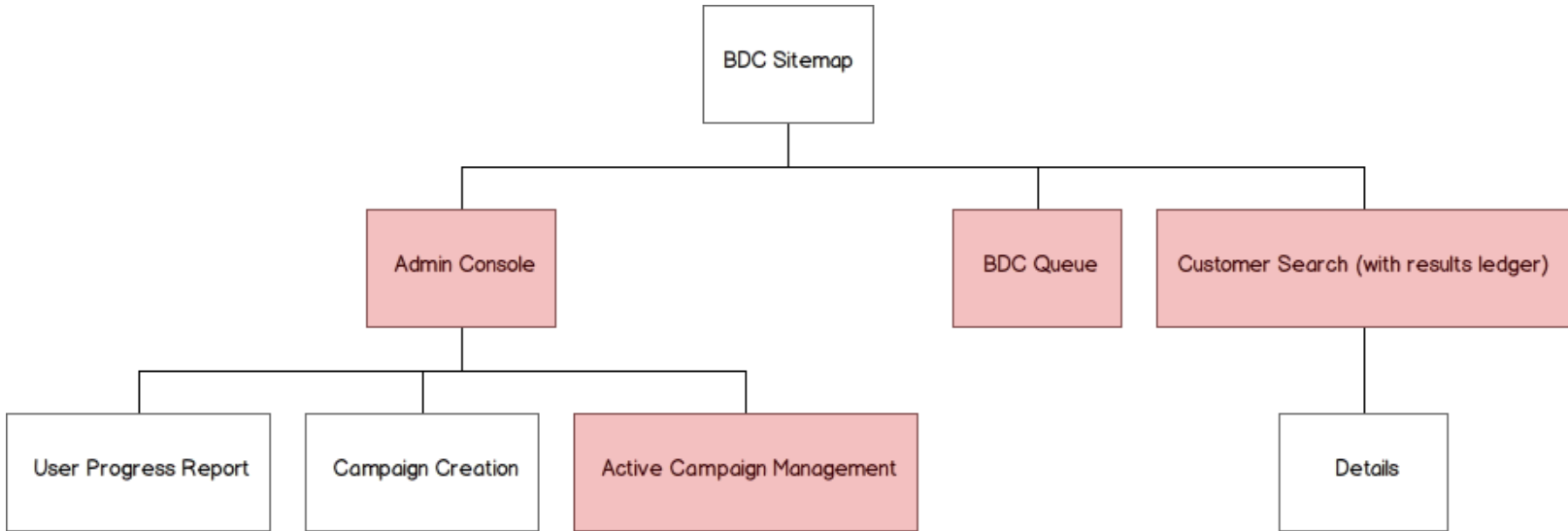
High???,
Medium???,
Low???

Due Date (range):

Start: End: ☒ Filter

Upcoming Calls

Priority ▲	Due Date▲	Customer (vehicle)	Campaign (description) ▲	Type ▲	Last Action	Call
1	12/15/12	Adelle Almond 2010 Toyota Prius	Winter Bonus - Prius <i>An incredible winter savings</i>	Sales	12/04/12	Call
3	12/15/12	Bonnie Banana 2009 Toyota Camry	Winter Bonus - Camry <i>An incredible winter savings event for</i>	Sales	12/02/12	Call
3	12/15/12	Charles Cherry 2009 Toyota Camry	Winter Bonus - Camry <i>An incredible winter savings event for</i>	Sales	12/02/12	Call
3	12/15/12	Debra Dairy 2009 Toyota Camry	Winter Bonus - Camry <i>An incredible winter savings event for</i>	Sales	12/02/12	Call
3	12/15/12	Erin Eclair 2009 Toyota Camry	Winter Bonus - Camry <i>An incredible winter savings event for</i>	Sales	12/02/12	Call
3	12/15/12	Fran Fritter 2009 Toyota Camry	Winter Bonus - Camry <i>An incredible winter savings event for</i>	Sales	12/02/12	Call





Search by name, contact info, RO number or DMS ID

Application's mast navigation for given user role ...



Customer Search Results for "{search criteria}"

search criteria should
populate this field
regardless of entry point

Customer	Vehicles	Actions
Adelle Almond Home:(123) 456-7890 Mobile: (567) 890-1234 Email: aapple@example.com	2010 Toyota Prius 2009 Toyota Camry	<input type="button" value="Call"/> <input type="button" value="Book"/>
Barry Banana Home:(123) 456-7890 Mobile: (567) 890-1234 Email: aapple@example.com	2010 Toyota Prius 2009 Toyota Camry	<input type="button" value="Call"/> <input type="button" value="Book"/>
Craig Cherry Home:(123) 456-7890 Mobile: (567) 890-1234 Email: aapple@example.com	2010 Toyota Prius 2009 Toyota Camry	<input type="button" value="Call"/> <input type="button" value="Book"/>
David Dietaryfiber Home:(123) 456-7890 Mobile: (567) 890-1234 Email: aapple@example.com	2010 Toyota Prius 2009 Toyota Camry	<input type="button" value="Call"/> <input type="button" value="Book"/>
Erica Eggwhite Home:(123) 456-7890 Mobile: (567) 890-1234 Email: aapple@example.com	2010 Toyota Prius 2009 Toyota Camry	<input type="button" value="Call"/> <input type="button" value="Book"/>
Fred Fruit Home:(123) 456-7890 Mobile: (567) 890-1234 Email: aapple@example.com	2010 Toyota Prius 2009 Toyota Camry	<input type="button" value="Call"/> <input type="button" value="Book"/>

Adelle Almond

Preferred Number: (123) 456-7890

- Details
- History
- Actions

Customer Overview

DMS ID	123456789123456
First Name	Adelle
Last Name	Almond
Home Phone	(123) 456-7890
Work Phone	
Mobile Phone	(456) 789-0123
Preferred	
Email	aalmond@example.
Address	1234 Sesame Stre NYC New York 123
Birthday	09/30/1980

Edit Custom

Communication Summary

Portal Administration

Communication Preferences

Contact	Type	Alerts	Campai	Marketin
(123) 456-7890	SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(123) 456-7890	Voice Call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(456) 789-0123	Voice Call	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
aalmond@example.	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
(Address)	Mail	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select all communications the customer wants to receive, deselect to opt-out.

Cancel

Save

SA Section

Only visible to SA/Loop Support. Minimized by default. Content TBD.

Adelle Almond

Preferred Number: (123) 456-7890

- Details
- History
- Actions

Customer Overview

Communication Summary

Portal Administration

DMS ID	123456789123456
First Name	Adelle
Last Name	Almond
Home Phone	(123) 456-7890
Work Phone	
Mobile Phone	(456) 789-0123
Preferred	
Email	aalmond@example.
Address	1234 Sesame Stre NYC New York 123
Birthday	09/30/1980

Edit Custom

Merged Customer Details

Here be merge details

Unmerge



...co

d, EULA not

☒ Send Password Reset Email

DMS ID

324599

Merge Another

SA Section

Only visible to SA/Loop Support. Minimized by default. Content TBD.

Adelle Almond

Preferred Number: (123) 456-7890

- Details
- History
- Actions

Customer Overview

Communication Summary

Portal Administration

DMS ID	123456789123456
First Name	Adelle
Last Name	Almond
Home Phone	(123) 456-7890
Work Phone	
Mobile Phone	(456) 789-0123
Preferred	
Email	aalmond@example.
Address	1234 Sesame Stre NYC New York 123
Birthday	09/30/1980

Edit Custom

Merge a Customer

DMS ID:

Merge Customer

We should provide some kind of verification here on successful merge or error if we can't find the customer.



.co

d, EULA not

☒ Send Password Reset Email

DMS ID

324599

Merge Another

SA Section

Only visible to SA/Loop Support. Minimized by default. Content TBD.

Adelle Almond

Preferred Number: (123) 456-7890

- Details
- History
- Actions

Customer Overview

DMS ID	123456789123456789
First Name	Adelle
Last Name	Almond
Home Phone	(123) 456-7890
Work Phone	
Mobile Phone	(456) 789-0123
Preferred	Home
Email	aalmond@example.com
Address	1234 Sesame Street NYC New York 12345
Birthday	09/30/1980

 Edit Customer Info

Communication Summary

Total Calls	6
Total Emails	56
Total SMS	3
Total Mail	4
Total ROs	10
Total RO Customer Pay	\$243
Total Deals	2
Total Deal Profit	\$6050
Customer Value	\$6293

 Manage Preferences

Portal Administration

Username: aalmond@example.co

Status: Account Locked, EULA not accepted

Last Activity: 10/25/11

 Send Password Reset Email

Family/Merged

Name	DMS ID
Adam Almond	324599

 Merge Another

SA Section

Only visible to SA/Loop Support. Minimized by default. Content TBD.

Adelle Almond

Preferred Number: (123) 456-7890

- Details
- History
- Actions

Customer Overview

DMS ID	123456789123456789
First Name	Adelle
Last Name	Almond
Home Phone	(123) 456-7890
Work Phone	
Mobile Phone	(456) 789-0123
Preferred	Home
Email	aalmond@example.com
Address	1234 Sesame Street
Birthday	09/30/1980

✕ Cancel

💾 Save Changes

✎ Manage Preferences

Communication Summary

Total Calls	6
Total Emails	56
Total SMS	3
Total Mail	4
Total ROs	10
Total RO Customer Pay	\$243
Total Deals	2
Total Deal Profit	\$6050
Customer Value	\$6293

Portal Administration

Username: aalmond@example.co
Status: Account Locked, EULA not

✉ Send Password Reset Email

Family/Merged

Name	DMS ID
Adam Almon	324599

📄 Merge Another

SA Section

Only visible to SA/Loop Support. Minimized by default. Content TBD.