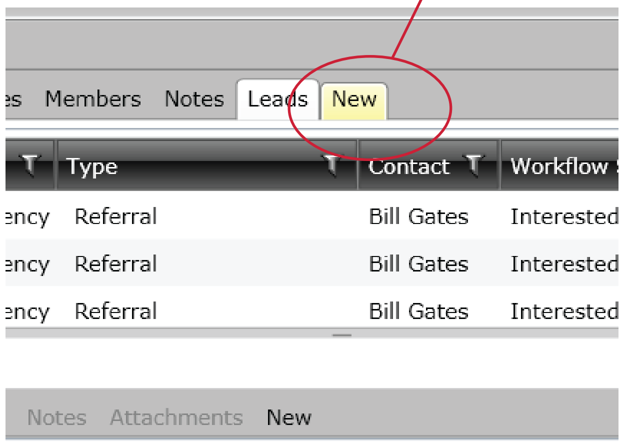
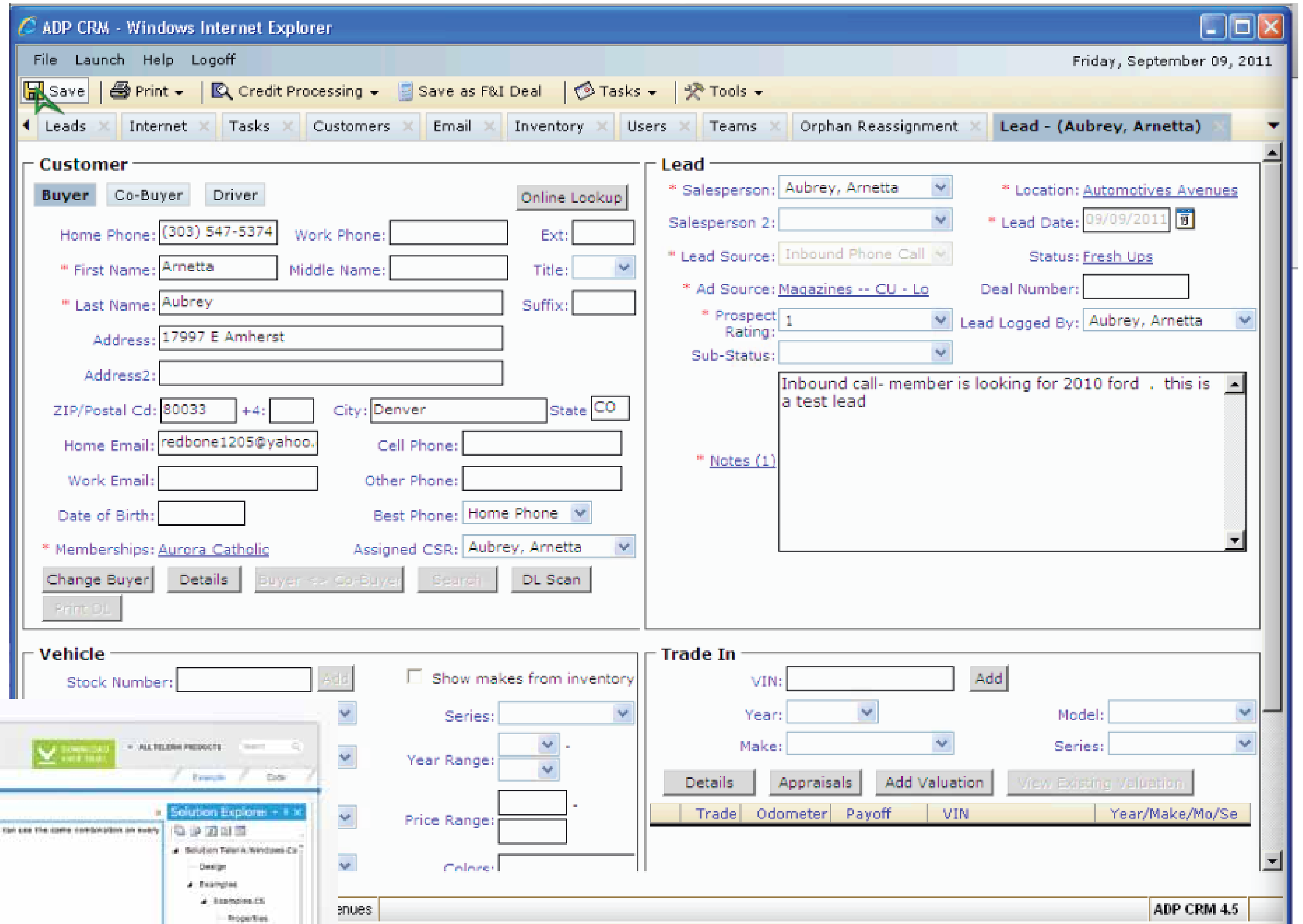
I'm in Clients, looking at Leads... this is where I have a problem

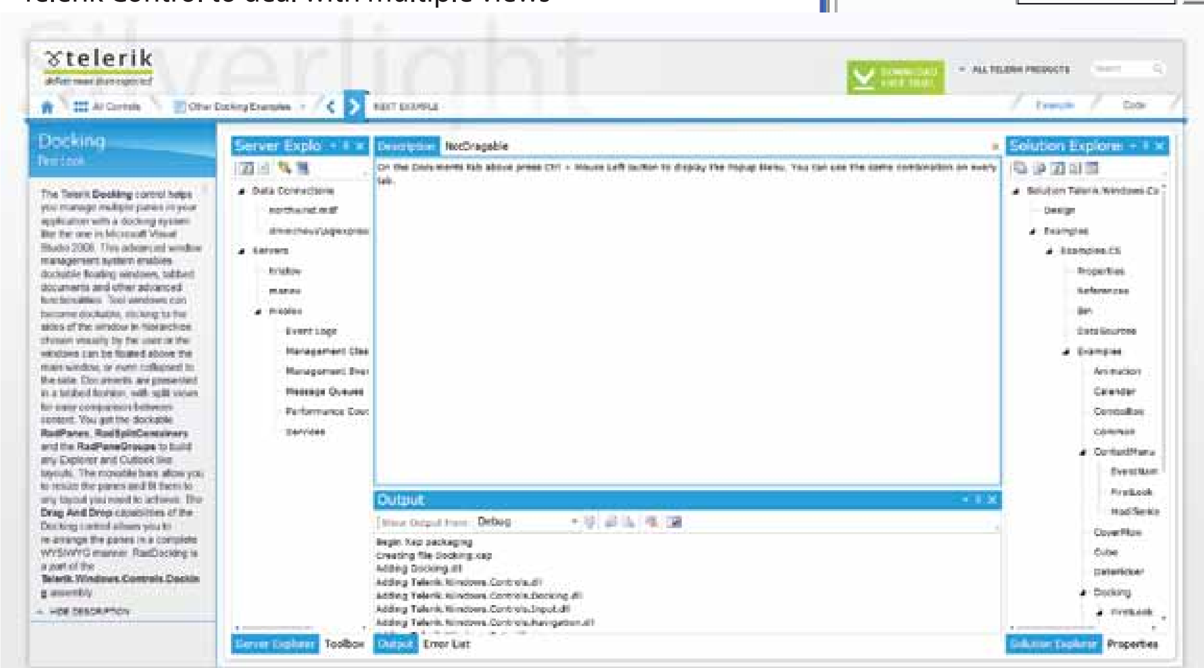
It feels like I am creating a new lead here



Existing CRM



Telerik Control to deal with multiple views



Screen Type 1: Talked about having read only information (this isn't practical)

We need to make Save/Undo the same "strength" as New, no matter where we do it.

Primary Entities

If there's input on current screen then Alert: Do you want to Save?
Type 1. Needs Data Tree with Basic Filtering (Clients, Contacts)
Type 2. Needs Advanced Search
Type 3. Dashboard

Only applicable to create new Primary Entity (in this case clients)

Saves everything that has been changed on page:
Only three kinds of entities can change (without leaving the current page)
- Details
- Calendar
- Notes

The rest are "read only"

Primary Entities "one place removed" (they colorize when active)
They bring up windows within the Primary View

Moves up here

Add Members and Notes to icons in this instance
Notes and Attachments repeats always (I think)

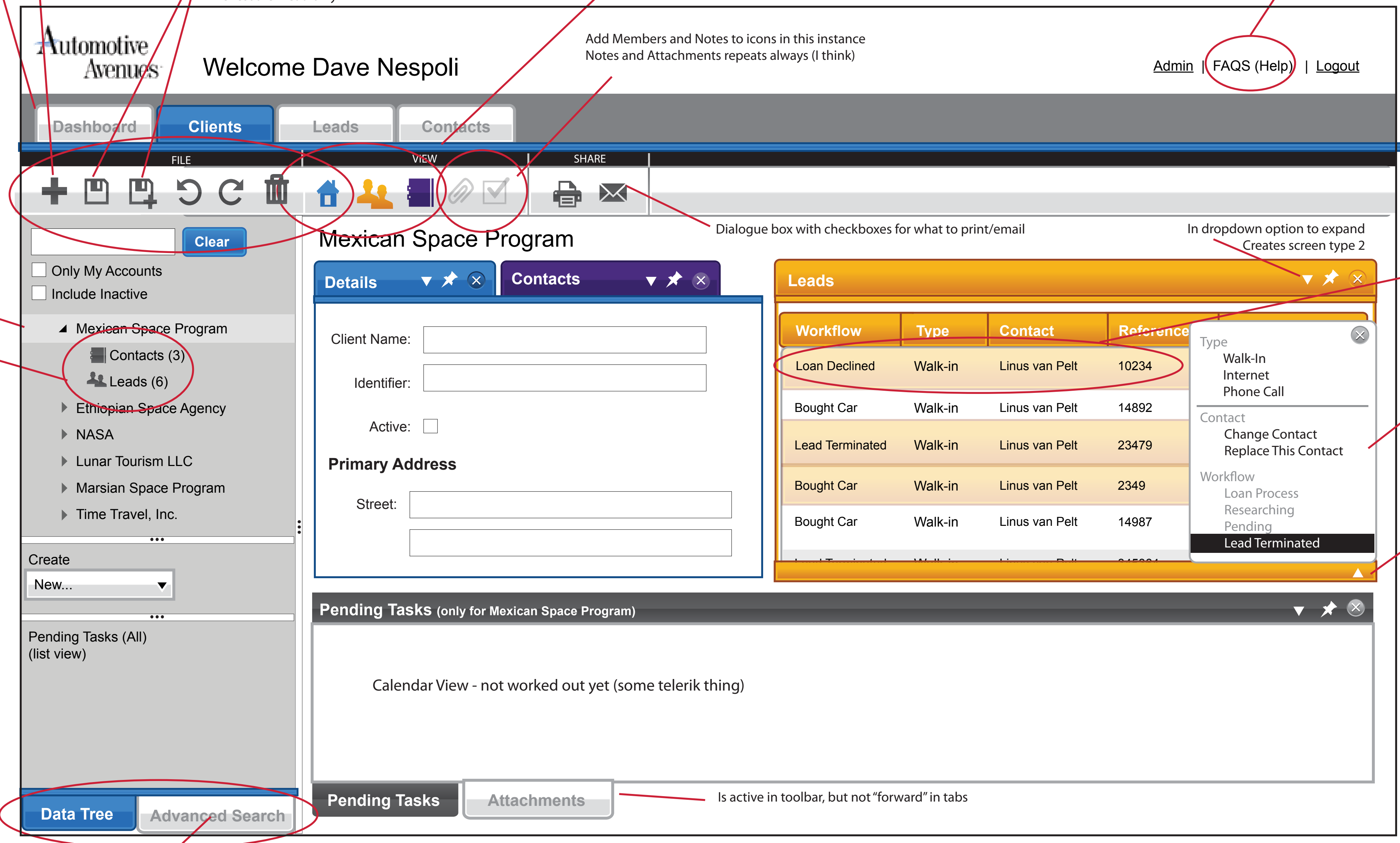
Screen Type 1

This is acting like a "mini-dashboard"
For Client
(Primary Entity - Type 1)
Uses Telerik Docking Control
(telerik - http://demos.telerik.com/silverlight/#Docking/FirstLook

Highest Level in Tree View
Brings up This screen
(in Default layout last used for Clients (Primary Entity - type 1)

These can drill down as far as needed
Whatever user selects becomes the highest tab level in Screen Type 2
(more immediate and don't have to drill down all of the time)

Can you select Multiple clients in Tree View? I think this is too much.



Dialogue box with checkboxes for what to print/email

In dropdown option to expand
Creates screen type 2

Double Click for Details
Screen Type 2-B
(Details is ALWAYS in screen type 2-B)

"Specific Action" Contextual Menus do not require Save or Undo (for quick mass changes)

selection is ≥ 1 - contextual menu icon
This situation applied to all items where multiple selection
Shows Actions available for those entities
(Items are greyed out here because the they cannot be applied to ALL items selected)

Is active in toolbar, but not "forward" in tabs

Switch kind of filtering is an option for Primary Entities that can benefit from both Advanced Search and Data Tree Views (Screen Type 2)

Below is Worst Case User Scenario For Saving (they are high in the hierarchy for top tab)

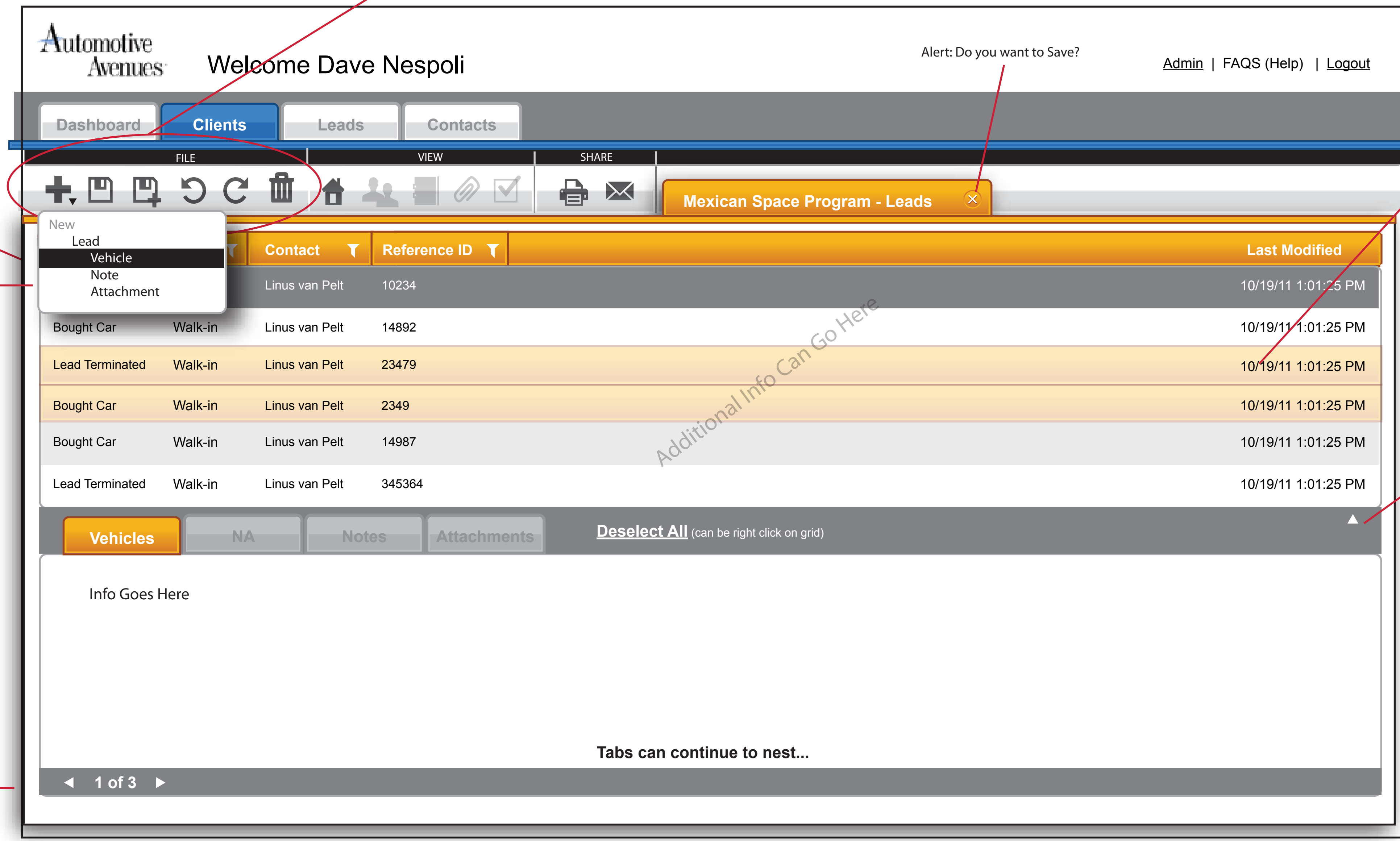
These now apply to all changes made for these leads

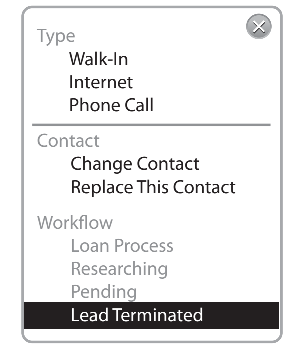
Screen Type 2
Grid View within
Primary Entity

Alert: Do you want to Save?

Double Click Row or
Click "Details" icon after selection
To get to Screen 2-B

New Dropdown
if multiple levels
Screen Type 2-A



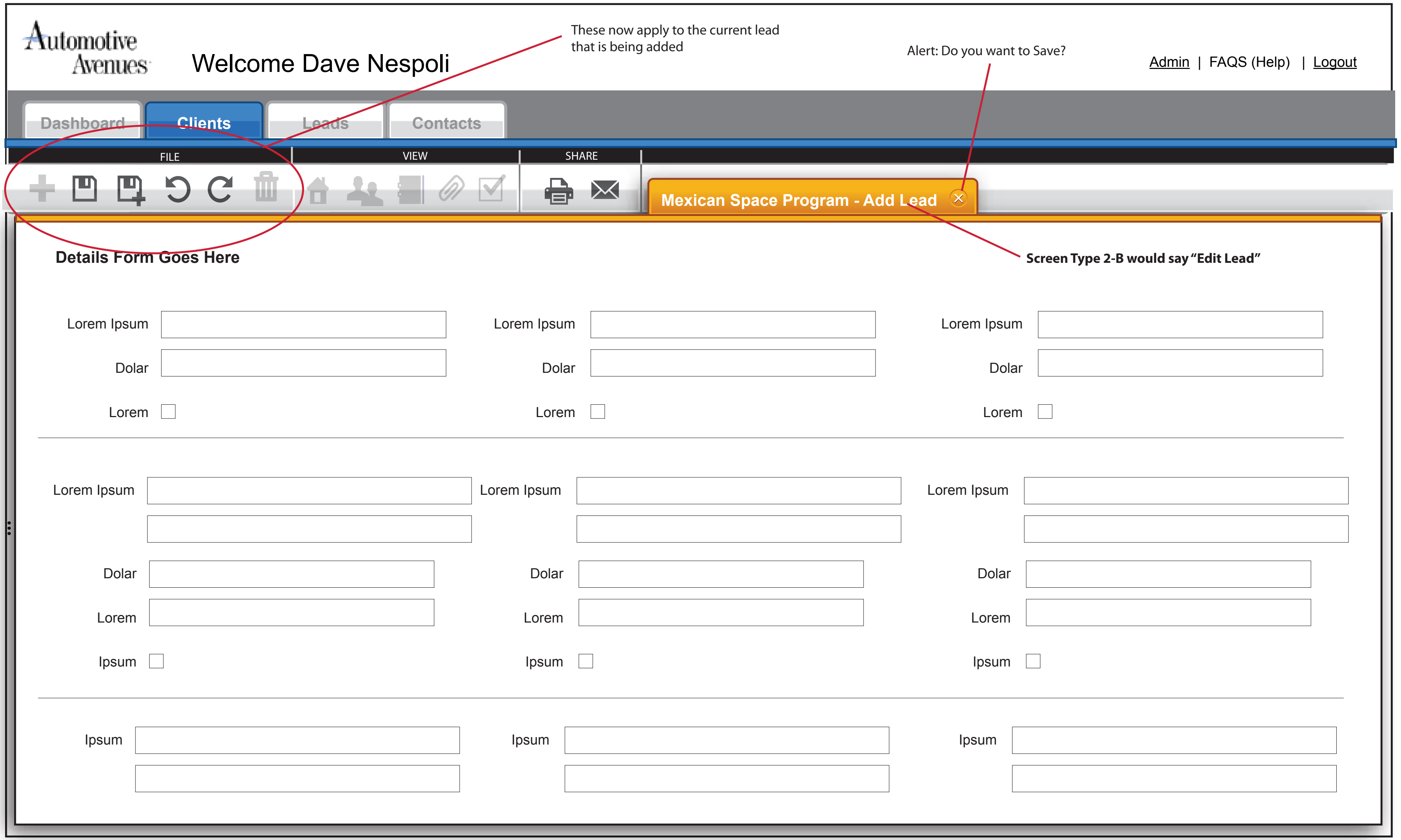


Multiple Selection
Only some of these secondary tabs can support multiple selection (in this instance only Vehicles makes sense) Thus The tabs are greyed out in this instance

selection is ≥ 1 - contextual menu icon
This situation applied to all items where multiple selection

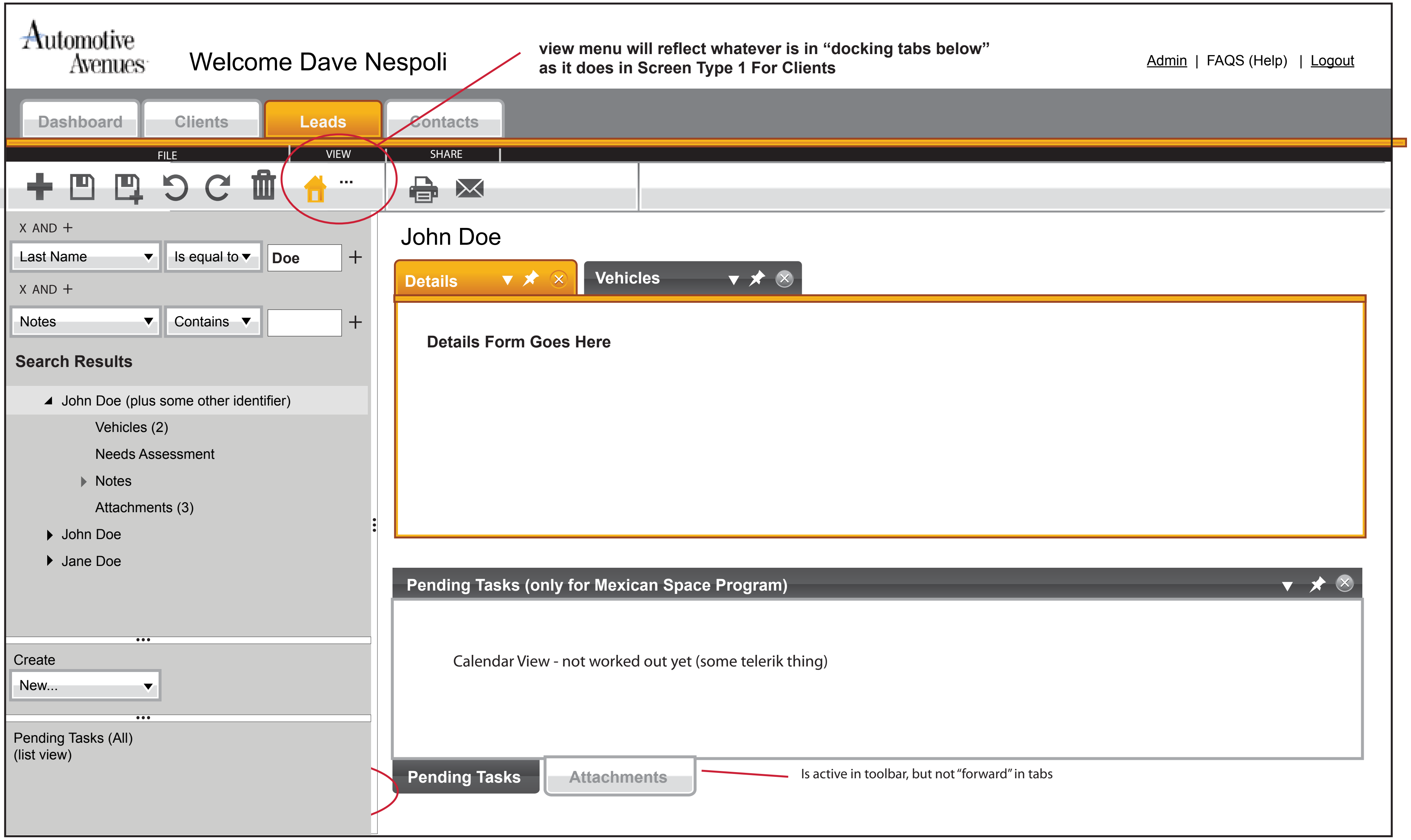
Multiple Selection
Next and Back
Highlights (Grey) active item in grid
((If beyond scroll, will have to "move back up" to it))

Screen Type 2-A = “ADD...”
Screen Type 2-B =”EDIT...”



Screen Type 1
But with advanced search

Customer Name
Phone Number
Date of Birth
Email Address
Notes
Customer Number
VIN Number
Deal Number
RO Number
Car Make
Car Model]



Leads belong to Clients
Leads belong to Contacts
Contacts MAY belong to Clients (but don't have to)

There's a lot of things that belong to Leads
That's why it has the search window to narrow it down.