

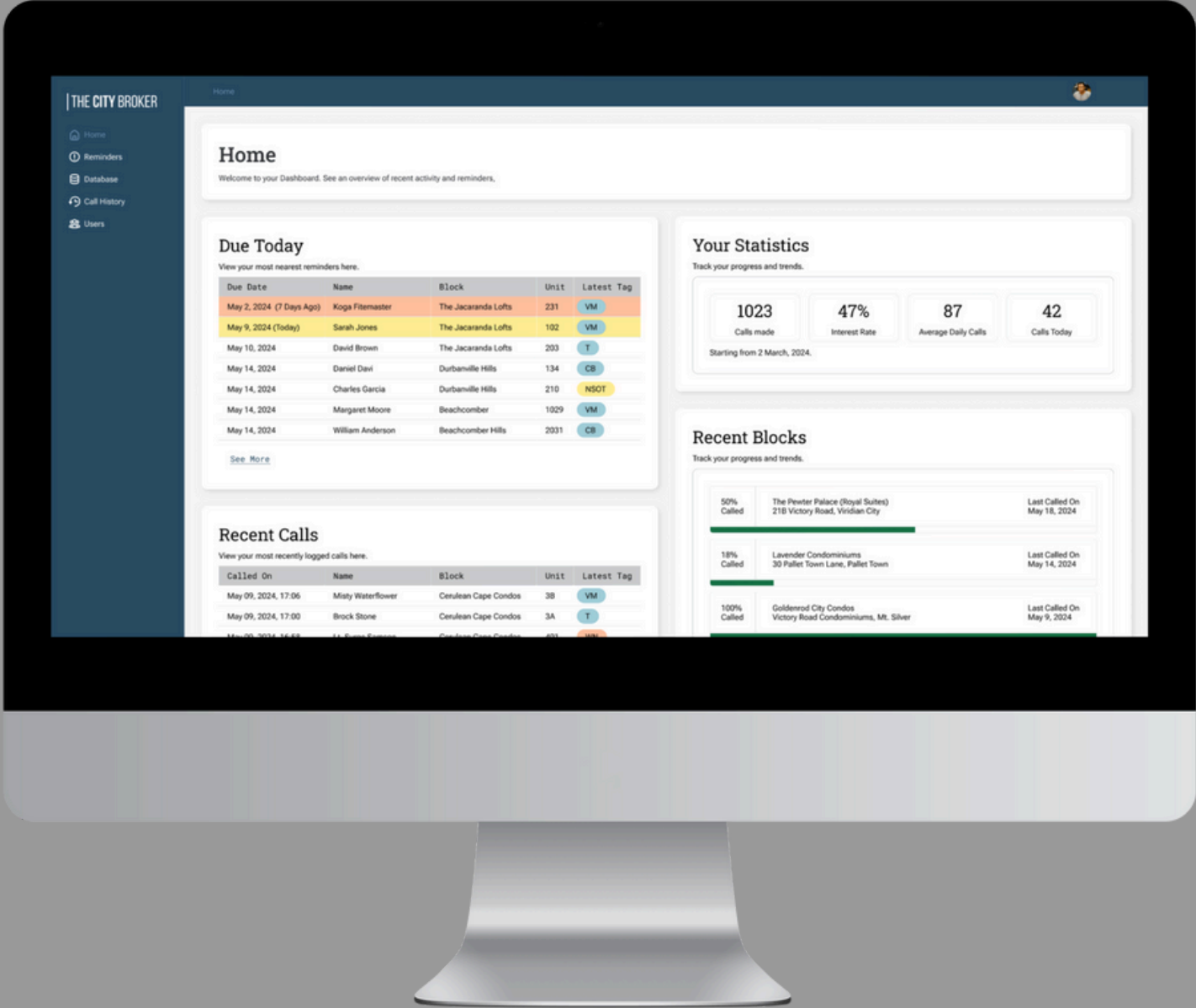
YEAR
2024

PRESENTER
Alison Soutar

CLIENT
Ben Gross “The City Broker”

Web Application Interaction Design

Cold Calling Made Easy: Insights and Solution summary



PROJECT
www.reallygreatsite.com

INTRODUCTION

So, What's The Point?

The following prototypes demonstrate a proposed user interface (UI) and user experience (UX) for a newly redesigned cold-calling site.

Mockups serve as a blueprint by outlining core interactions and concepts before production.

These prototypes are created to illustrate an improved user experience and application interaction.

The goal is to answer three questions. Do these reflect our users' needs? Does this solve the outlined problem? Is the solution user-friendly?

INTRODUCTION

... And You Are?

I'm a UX Researcher and UI Designer.

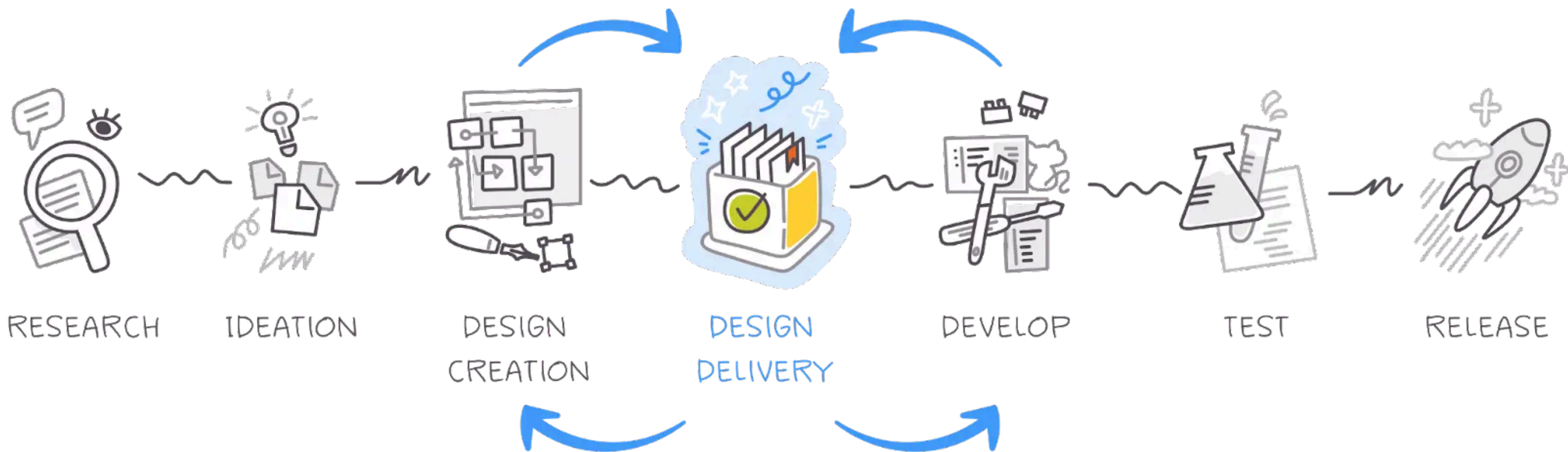
I investigate the current system for improvements and iteratively create an improved recommendation based on user feedback, ensuring a well thought-out and user-friendly solution,

UX

User experience (UX) design is the process design teams use to create products that provide meaningful and relevant experiences to users.

UI

In the industrial design field of human–computer interaction, a **user interface (UI)** is the space where interactions between humans and machines occur.



INTRODUCTION

Project Summary

1.

Problem Statement

The current system is prone to security issues and human error.

2.

Goal

Simplify the process and improve data security.

3.

Proposed Solution

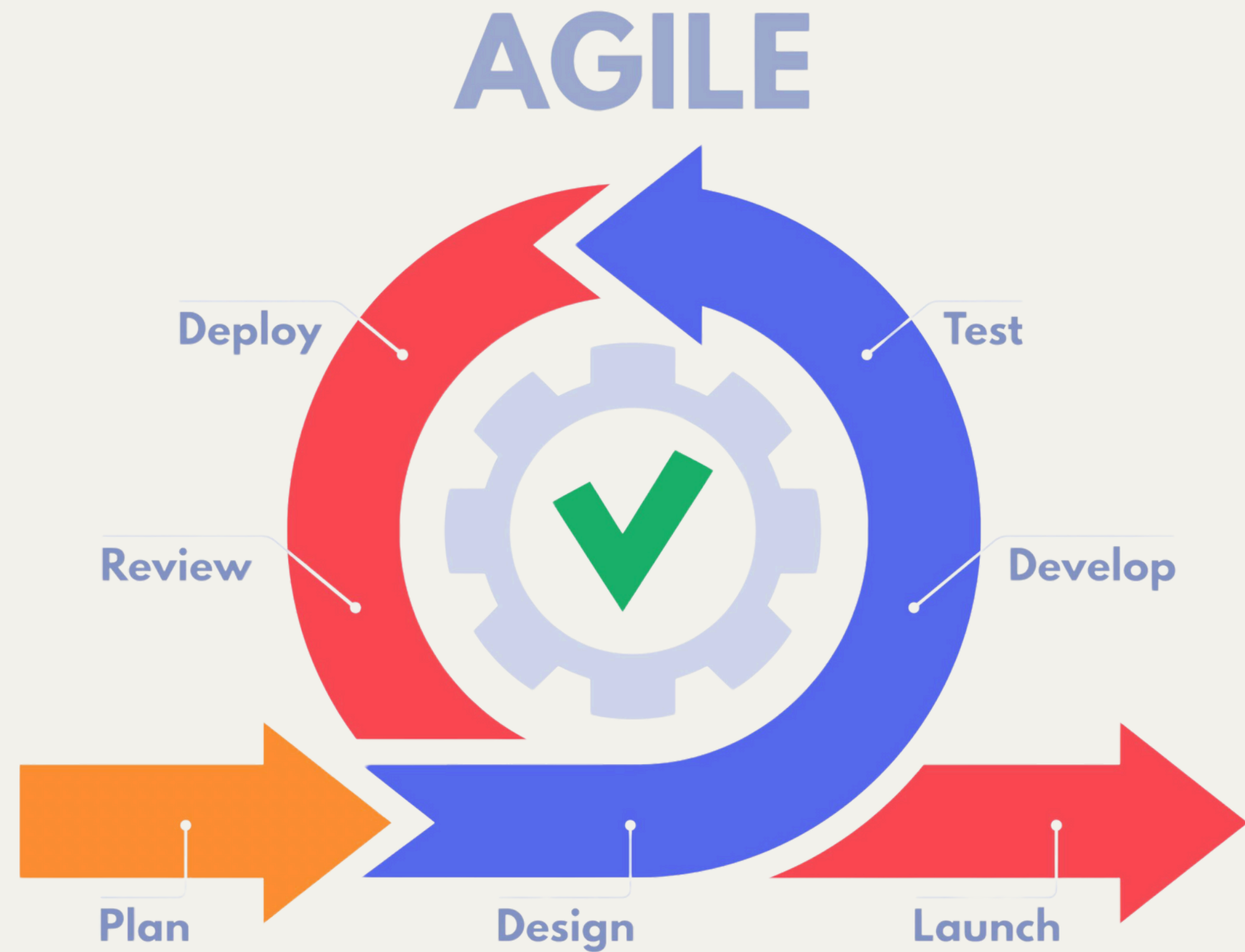
Create a dedicated web-app to replace the current system.

PLANNING

Agile Development

Iterative testing,
evolving design,
consistent improvement.

**MINIMISING RISK,
MAXIMISING REWARDS.**



RESEARCH

Current System: Pitfalls

1. Call Sheets can be downloaded.

Current System: Pitfalls

1. Call Sheets can be downloaded.
2. Difficult to track call progress.

"We also have to track our calls and our leads on a separate excel spreadsheet, so by the end of it we have about three different things open that we need to make notes on."

– Initial user interviews

Current System: Pitfalls

1. Call Sheets can be downloaded.
2. Difficult to track call progress.
3. Messy comments section.

“can get tedious, have so many comments on each entry of the excel sheet and you’re just adding to the mess.”

– Initial user interviews

Current System: Pitfalls

1. Call Sheets can be downloaded.
2. Difficult to track call progress.
3. Messy comments section.
4. Tedious and mistake-prone tracking process.

“We also have to track our calls and our leads on a separate excel spreadsheet, so by the end of it we have about three different things open that we need to make notes on.”

– Initial user interviews

“I keep 4 tabs that I use each time I make a call. It’s exhausting”

– Initial user interviews

Current System: Pitfalls

1. Call Sheets can be downloaded.
2. Difficult to track call progress.
3. Messy comments section.
4. Tedious and mistake-prone tracking process.
5. May take a while for Database Manager to update sheets.

“Major flaw I’ve noticed is that a lot of numbers don’t exist, I usually update these myself.”

– Initial user interviews

Current System: Pitfalls

1. Call Sheets can be downloaded.
2. Difficult to track call progress.
3. Messy comments section.
4. Tedious and mistake-prone tracking process.
5. May take a while for Database Manager to update sheets.
6. **It's easy to forget which blocks a user has called recently.**

"It's so difficult to coordinate between people. I get given a spreadsheet every week, and it's difficult to know what everyone else has and if the spreadsheet was used recently."

– Initial user interviews

Current System: Pitfalls

1. Call Sheets can be downloaded.
2. Difficult to track call progress.
3. Messy comments section.
4. Tedious and mistake-prone tracking process.
5. May take a while for Database Manager to update sheets.
6. It's easy to forget which blocks a user has called recently.
7. **Users forget to track their calls.**

“we also have to track our calls and our leads on a separate excel spreadsheet [...] it's tedious and easy to forget to do a step of the process, which obviously isn't good.”

– Initial user interviews

SCOPE

Problem Statement

“IT IS DIFFICULT TO MONITOR AND TRACK CALLS AND LEADS THAT HAVE BEEN MADE AND STILL NEED TO BE MADE WITH THE CURRENT SYSTEM. THIS NEEDS TO BE OPTIMISED TO REMOVE HUMAN ERROR AND INCREASE DATA SECURITY AND INTRA-TEAM COMMUNICATION”.

SCOPE

Proposed Solution

“DEVELOP A WEB-APP TO HELP TEAM MEMBERS TRACK THEIR COLD CALLS
AND ALLOW TEAM LEADER TO MONITOR TEAM MEMBER PROGRESS.”

SCOPE

Databases & Spreadsheets

The current system makes use of **spreadsheets**.

SCOPE

Databases & Spreadsheets

The current system makes use of **spreadsheets**.

SPREADSHEETS ARE COMPUTER PROGRAMS THAT ARRANGE DATA IN A SERIES OF ROWS AND COLUMNS. DATA IS STORED IN INDIVIDUAL CELLS OF THIS ELECTRONIC DOCUMENT. SPREADSHEETS ARE OFTEN COMPARED TO ELECTRONIC LEDGERS.

SCOPE

Databases & Spreadsheets

I suggest we upgrade the system to make use of a **Database**.

DATABASES GATHER INFORMATION FROM EXTERNAL TABLES,
INSTEAD OF STORING DATA IN INDIVIDUAL CELLS. DATABASES ALSO
HAVE A **FLEXIBLE** STRUCTURE, GIVING YOU MORE OPTIONS FOR
STORING AND EVALUATING DATA.

SCOPE

Databases & Spreadsheets

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HAVE A **FLEXIBLE** STRUCTURE, GIVING YOU MORE OPTIONS FOR
STORING AND EVALUATING DATA.

We won't fuss too much about the differences between the two – we largely just care about the interaction and how it will benefit us as users.

SCOPE

Database Views

Large amounts of data stored in the database can be viewed in a number of formats, making it a versatile and robust data storage technique.

TABLE I

Col 1	Col 2	Col 3

TABLE II

Col A	Col B	Col C

SCOPE

Database Views

Large amounts of data stored in the database can be viewed in a number of formats, making it a versatile and robust data storage technique.

TABLE I

Col 1	Col 2	Col 3

TABLE II

Col A	Col B	Col C

DATABASE VIEW 1

???	???	???

Database Views

Large amounts of data stored in the database can be viewed in a number of formats, making it a versatile and robust data storage technique.

TABLE I

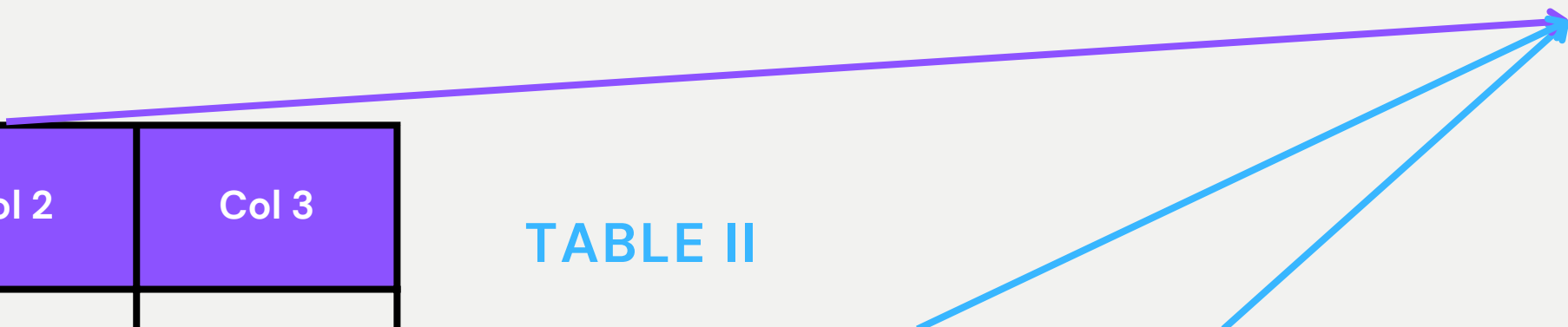
Col 1	Col 2	Col 3

TABLE II

Col A	Col B	Col C

DATABASE VIEW 1

Col 2	Col B	Col C



SCOPE

User Types



MEMBER
(READ)



ADMINISTRATOR
(READ, WRITE, DELETE)

ITERATION 1

Information Architecture

CARDSORTS

A useful way to find common ways of grouping like information together, ensuring your information layout and page structure is logical.

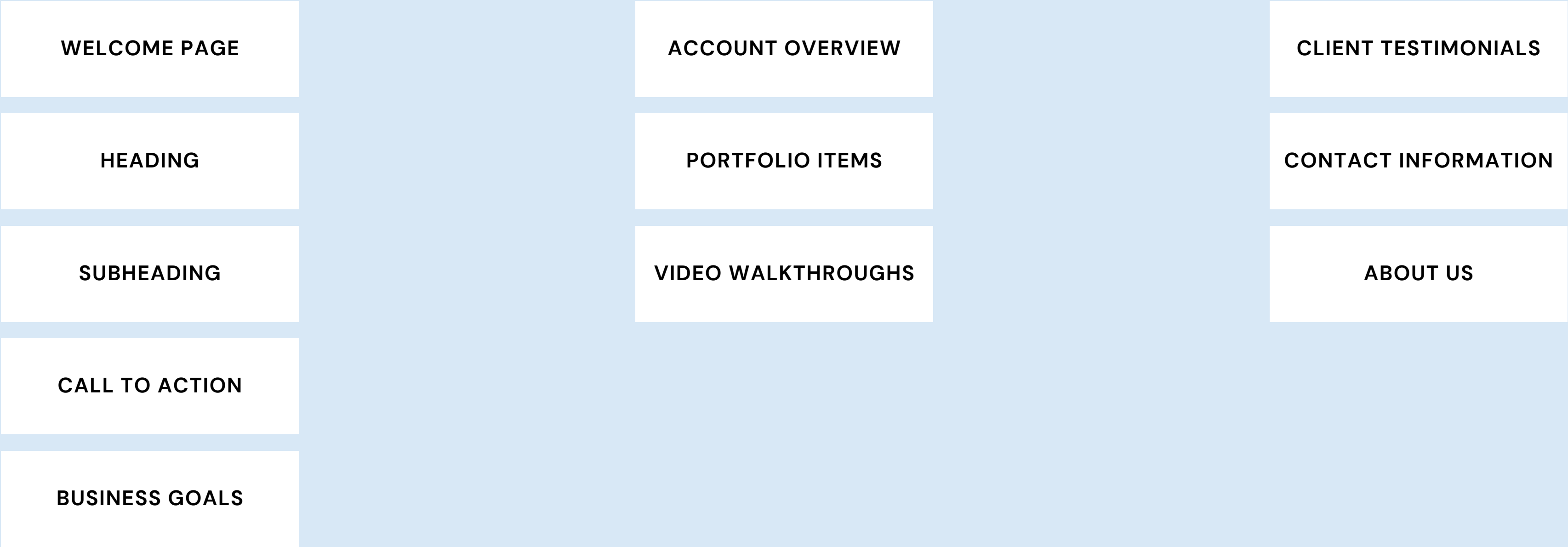


ITERATION 1

Information Architecture

CARDSORTS

Participants group these cards (elements) together in ways they think is logical.



ITERATION 1

Information Architecture

CARDSORTS

Participants group these cards (elements) together in ways they think is logical.

WELCOME PAGE

HEADING

SUBHEADING

CALL TO ACTION

BUSINESS GOALS

ACCOUNT OVERVIEW

PORTFOLIO ITEMS

VIDEO WALKTHROUGHS

CLIENT TESTIMONIALS

CONTACT INFORMATION

ABOUT US

ITERATION 1

Information Architecture

CARDSORTS

... Each participant may do so differently – the idea is to find commonalities in their ways of thinking to make intuitive navigational architecture.

WELCOME PAGE

HEADING

SUBHEADING

CALL TO ACTION

ABOUT US

ACCOUNT OVERVIEW

PORTFOLIO ITEMS

BUSINESS GOALS

CONTACT INFORMATION

VIDEO WALKTHROUGHS

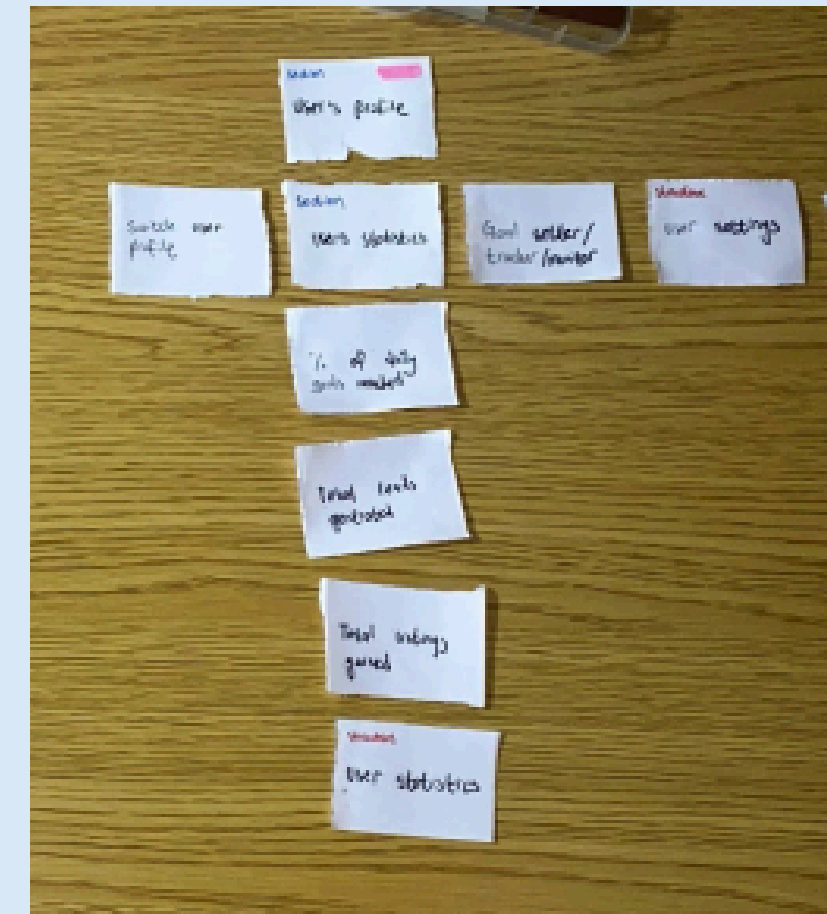
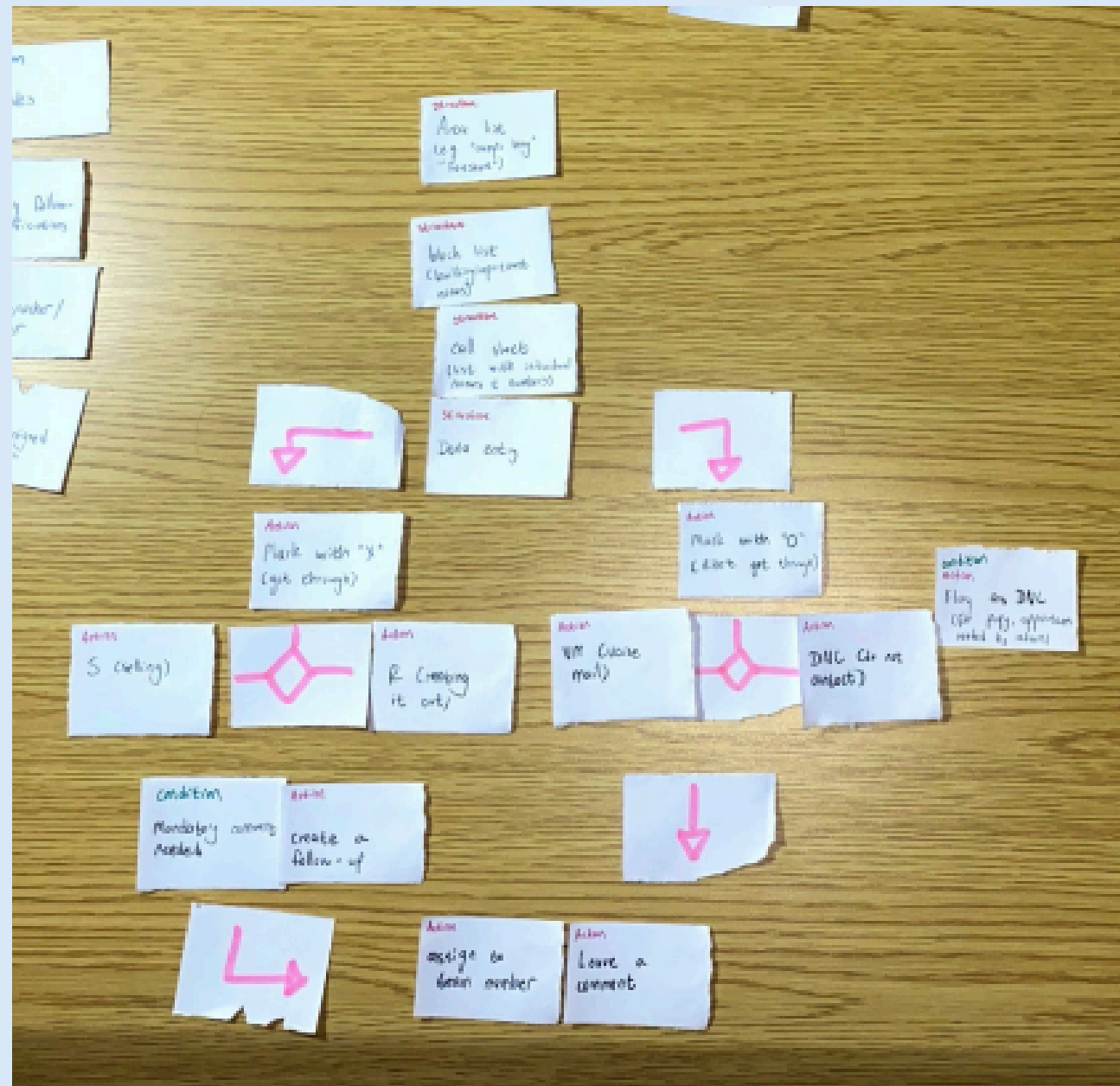
CLIENT TESTIMONIALS

ITERATION 1

Information Architecture

CARDSORTS

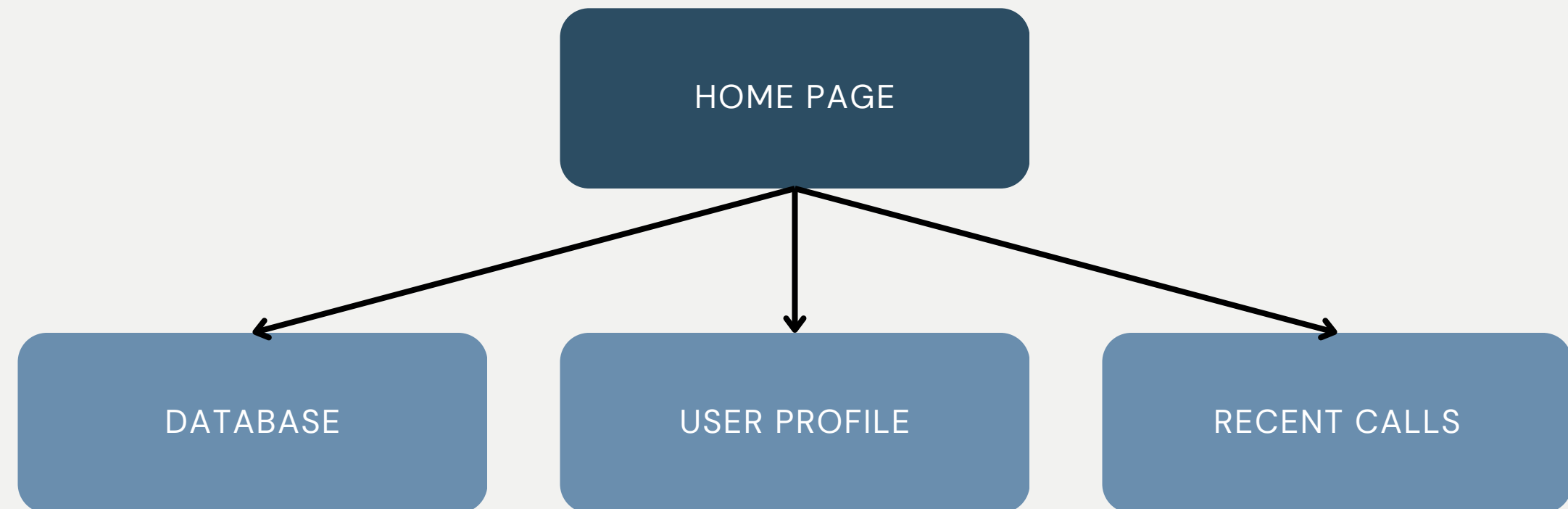
An example of a card sort done for this project.



ITERATION 1

Information Architecture

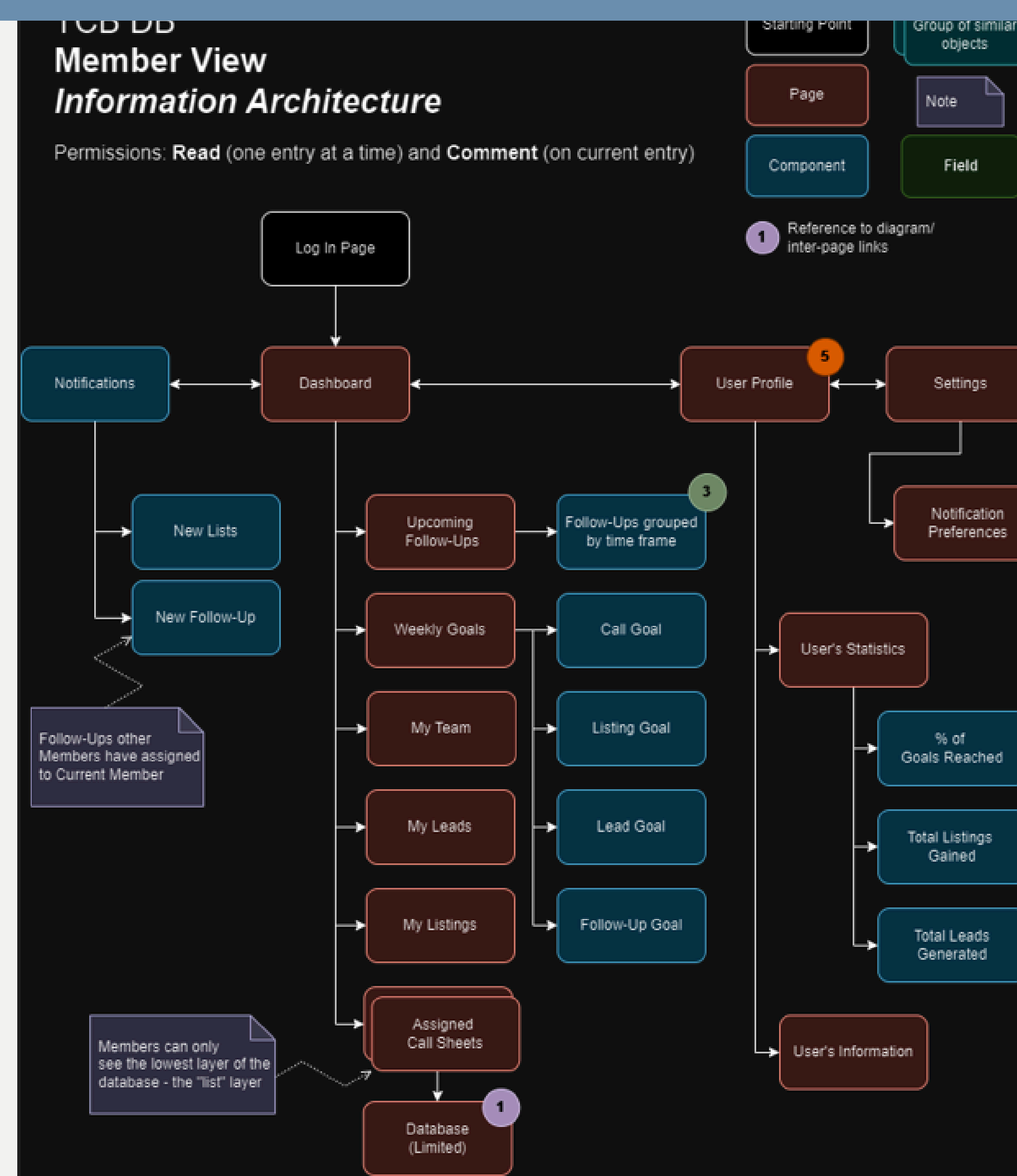
... And this would eventually lead us to something like this.



ITERATION 1

Information Architecture

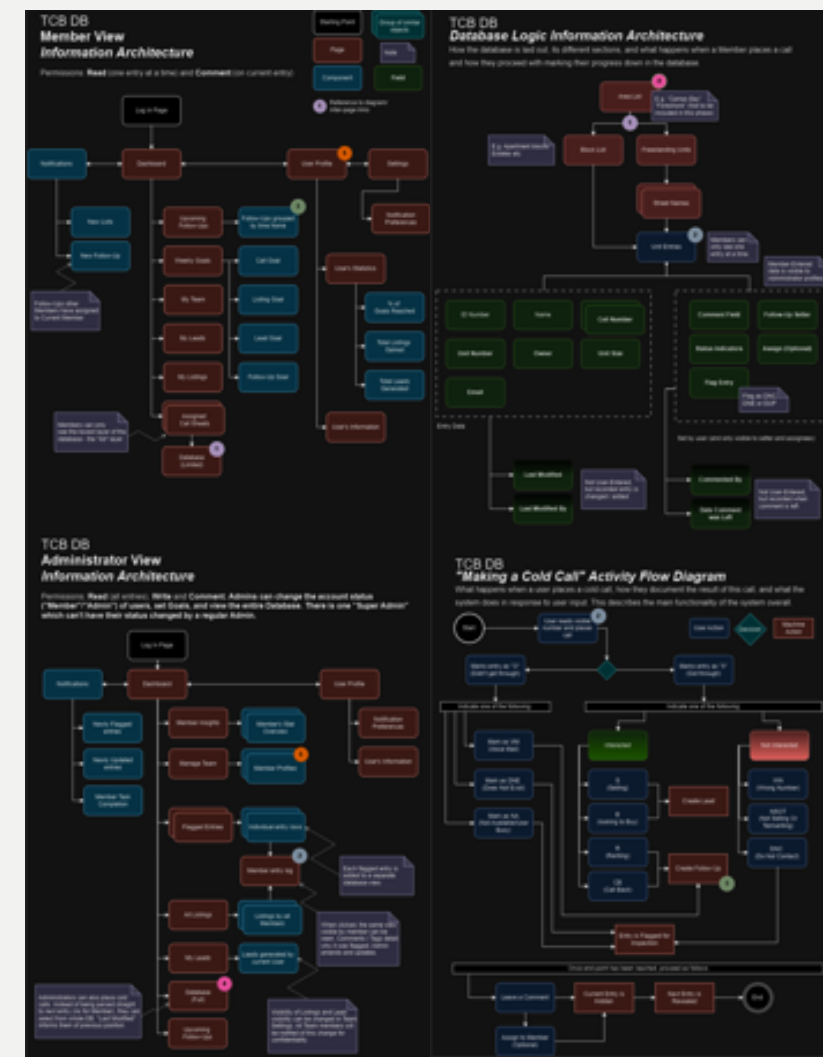
Once you've added a bit more detail, you get something that looks quite intimidating.



ITERATION 1

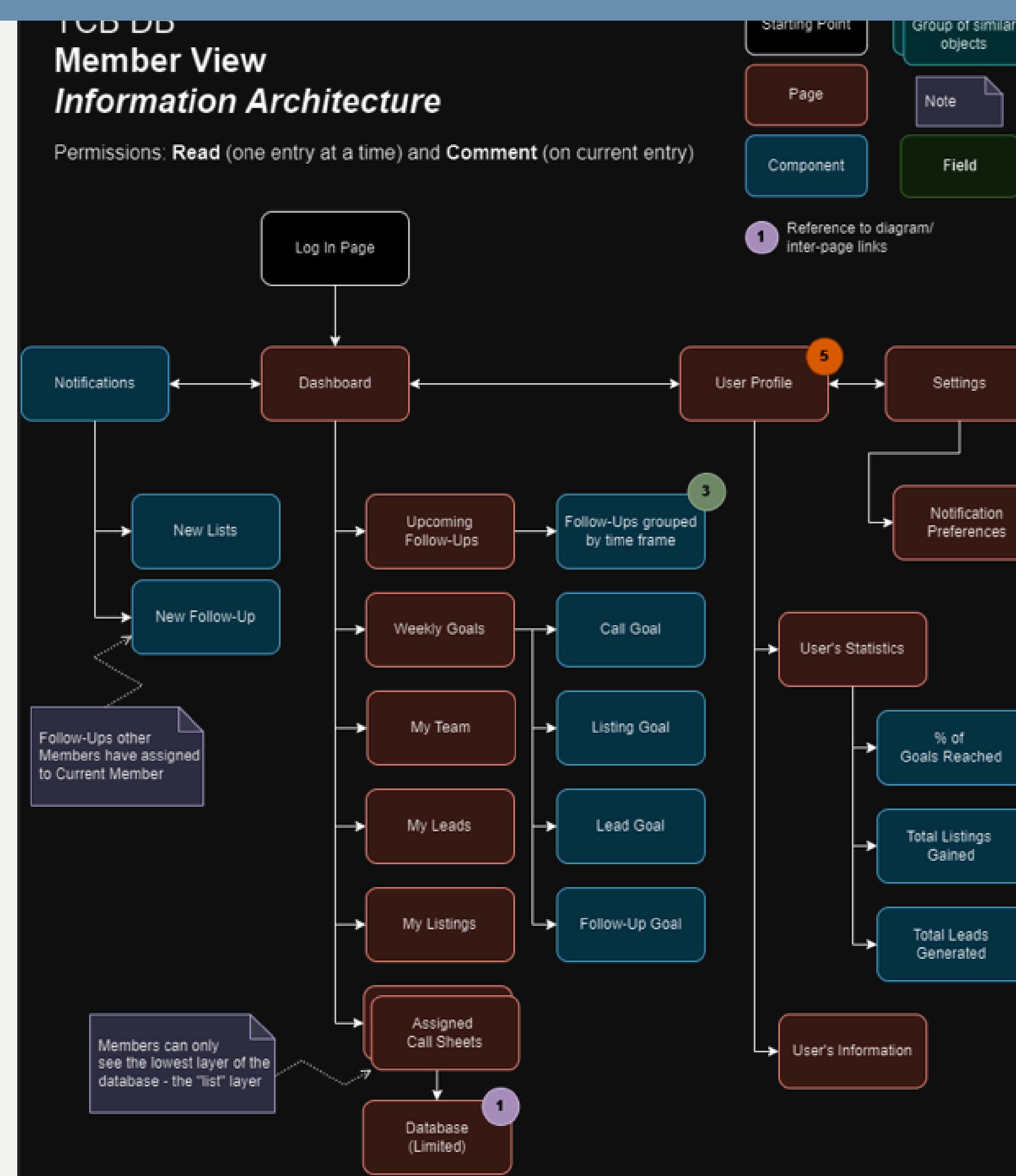
Information Architecture

Once you've added a bit more detail, you get something that looks quite intimidating.



There's a whole lot more.

But don't worry! This is just to help visualise overall design and interactions to help the designers and the developers.

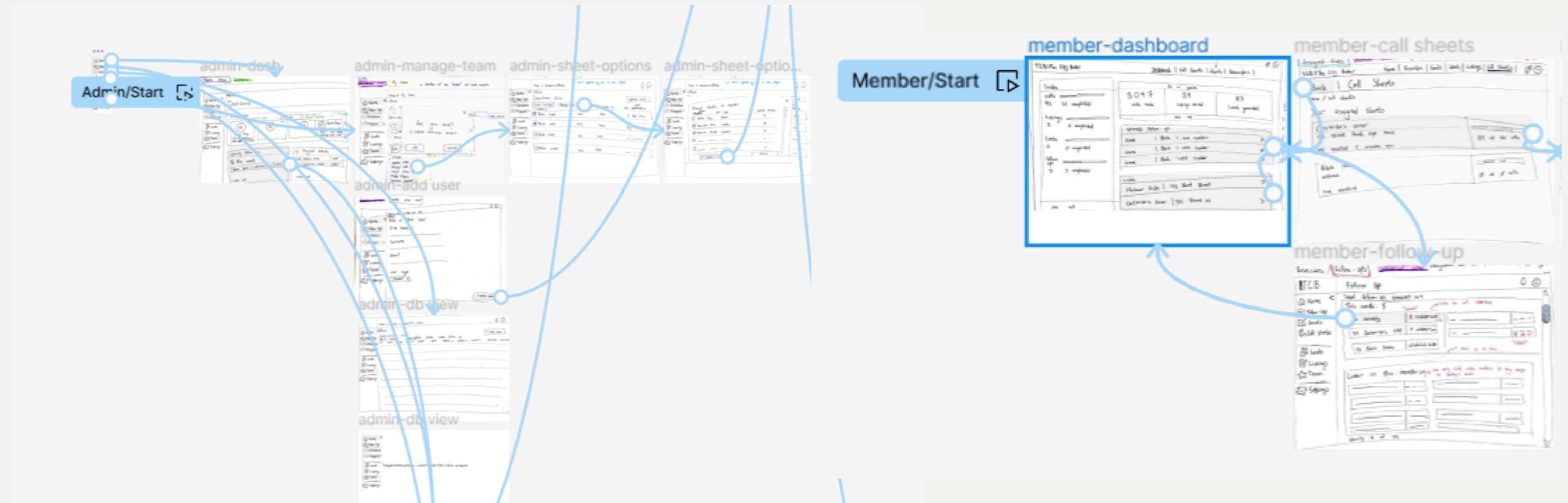


ITERATION 1

Lo-Fi Wireframes

GETTING AN IDEA

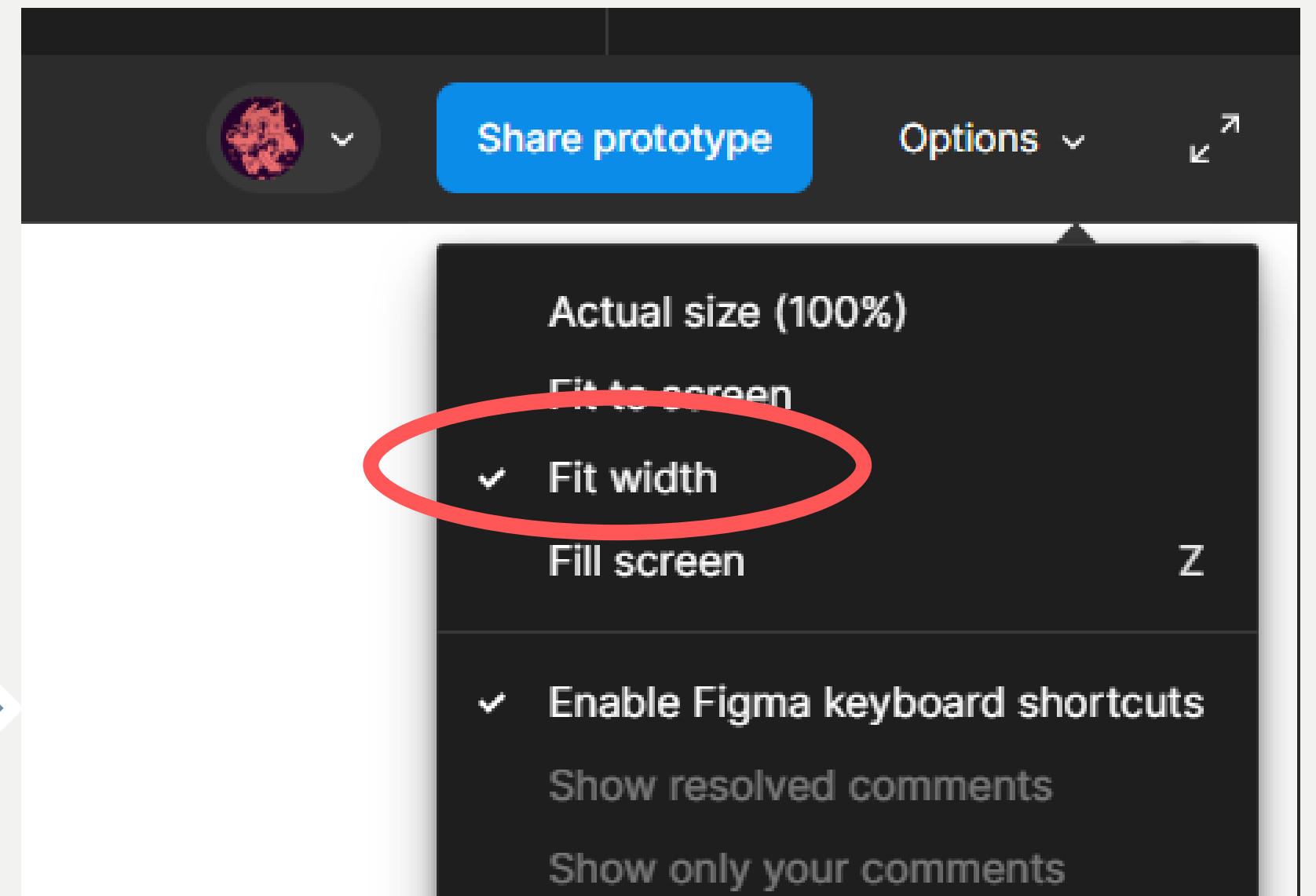
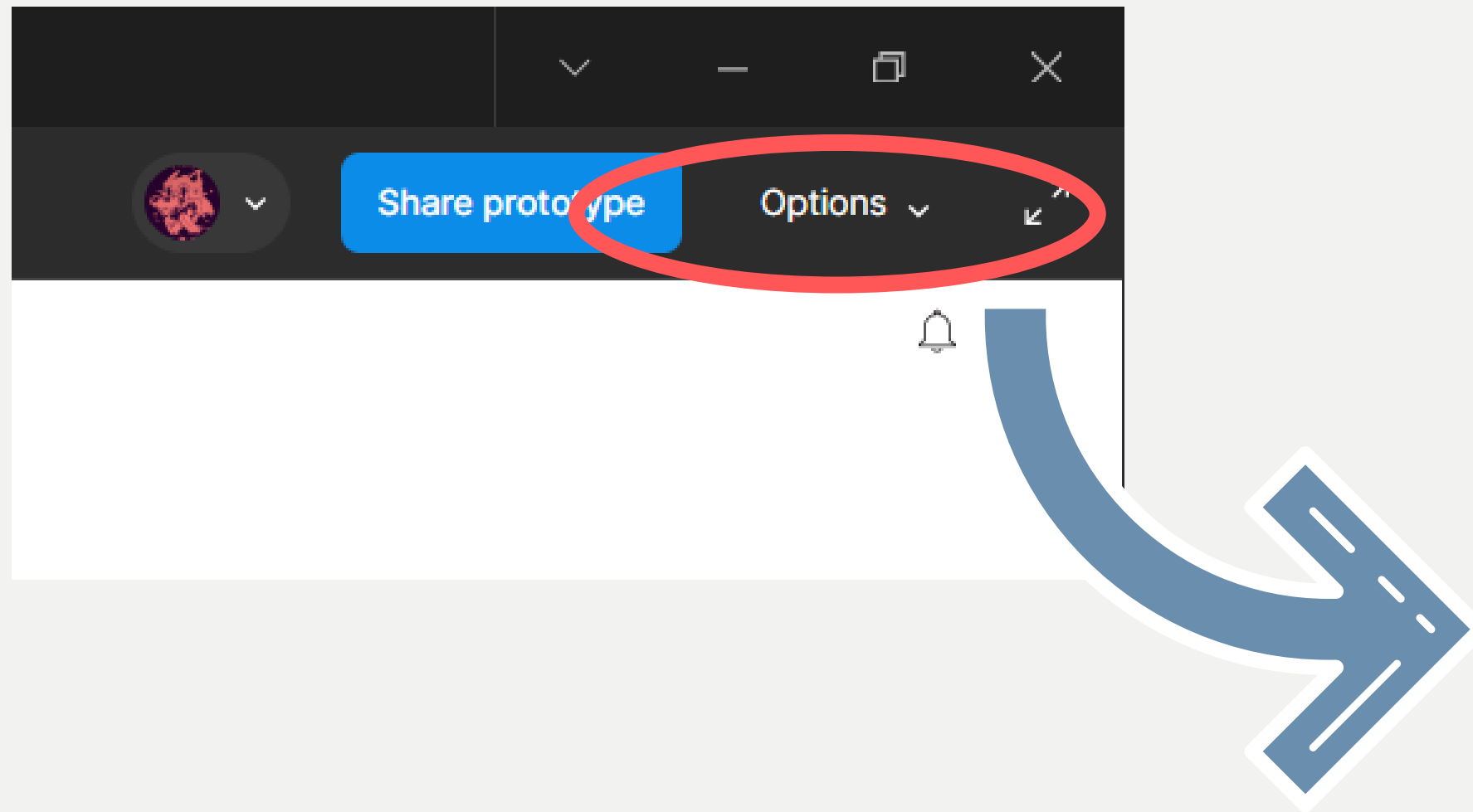
Quick & Easy wireframes to block out general ideas of where certain components should go, and how they connect.



P.S.

A Side Note

WHEN VIEWING PROTOTYPES, SET VIEW TO “FIT WIDTH” UNDER OPTIONS (TOP RIGHT).



DEMONSTRATION

From Concept to Prototype

AN EXAMPLE

Before we get started, I want to run through an example of the development process.

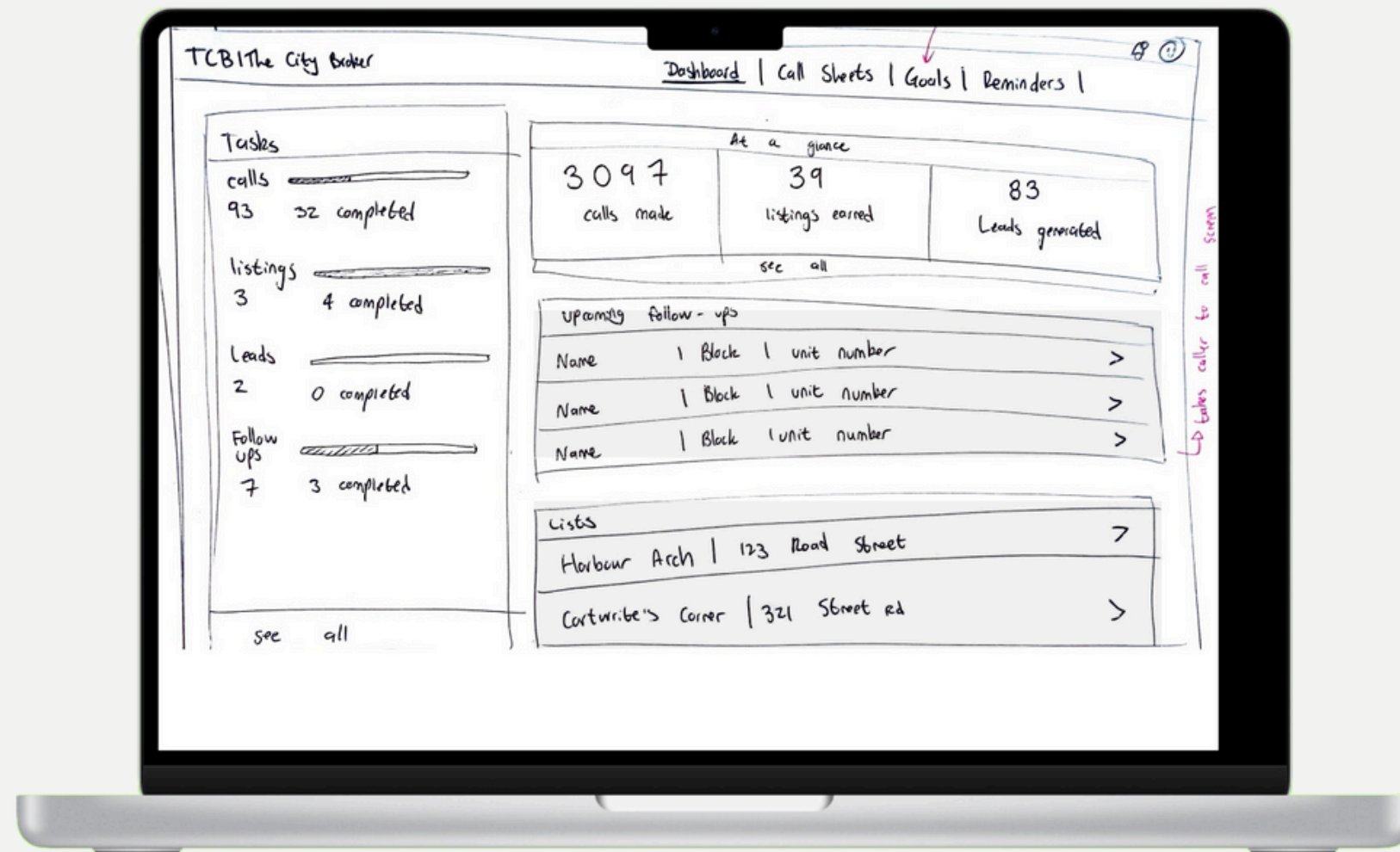
“Placing a Cold Call”
User Journey Development Process

ITERATION 1

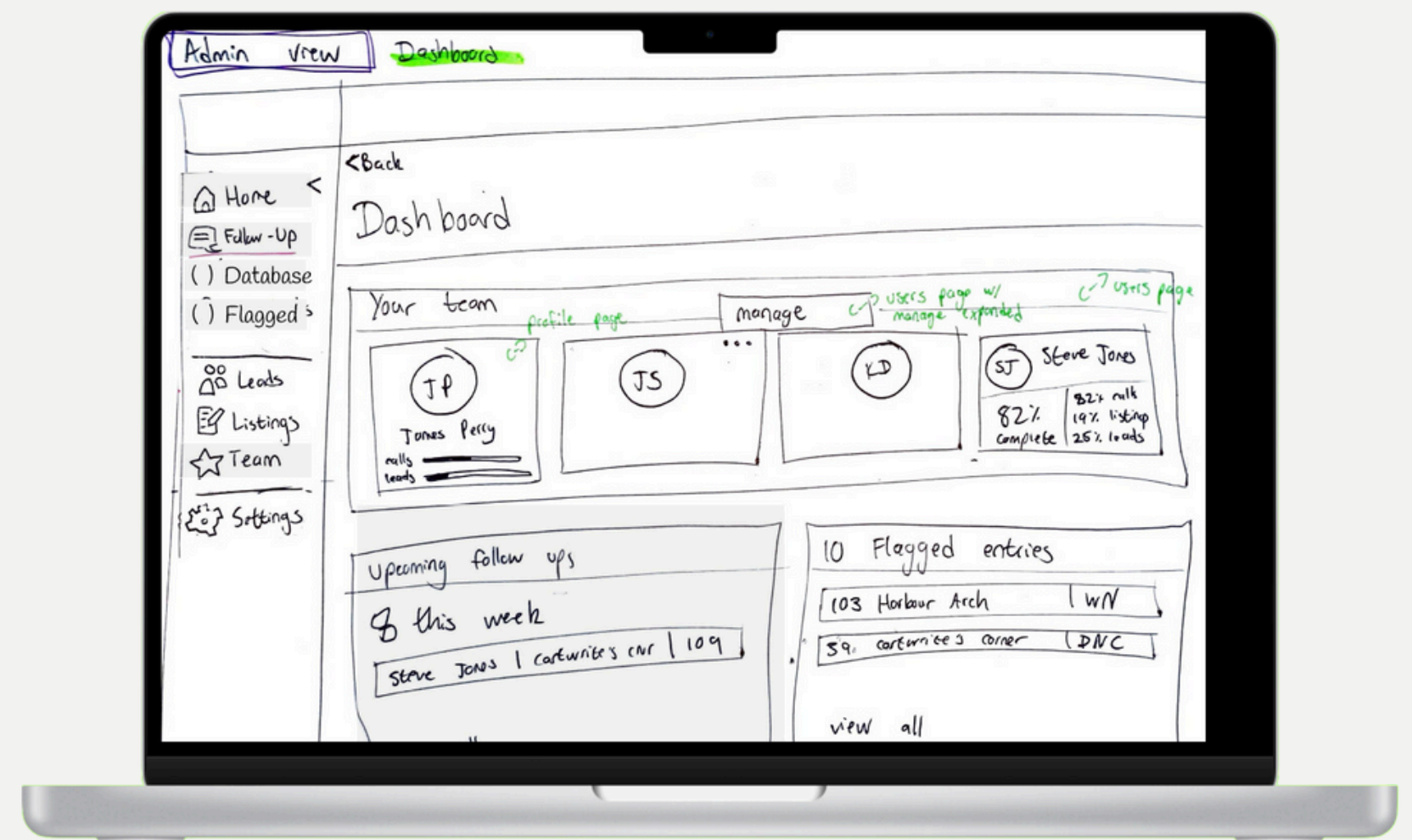
Lo-Fi Wireframes

TESTING SIMPLE INTERACTIONS

Paper wireframes converted to digital to help users understand the digital space.



[VIEW MEMBER LO-FI PROTOTYPE](#)



[VIEW ADMIN LO-FI PROTOTYPE](#)

Home

Follow-Up

Database

Flagged's

Leads

Listings

Team

Settings

< Back

Joe Soap

unit number	size

ID Number

email

contact 1

contact 2

contact 3

Activity history

filter v

22 April 2024

X got through	DNC	
comment "Frustrated with cold callers"		

! Flagged for review

12 october 2023

X got through	R renting	
comment "He was waiting for lease end"		

! Follow-Up Created

25 February 2023

O not received	VB working	
"called twice, always unsuccessful"		

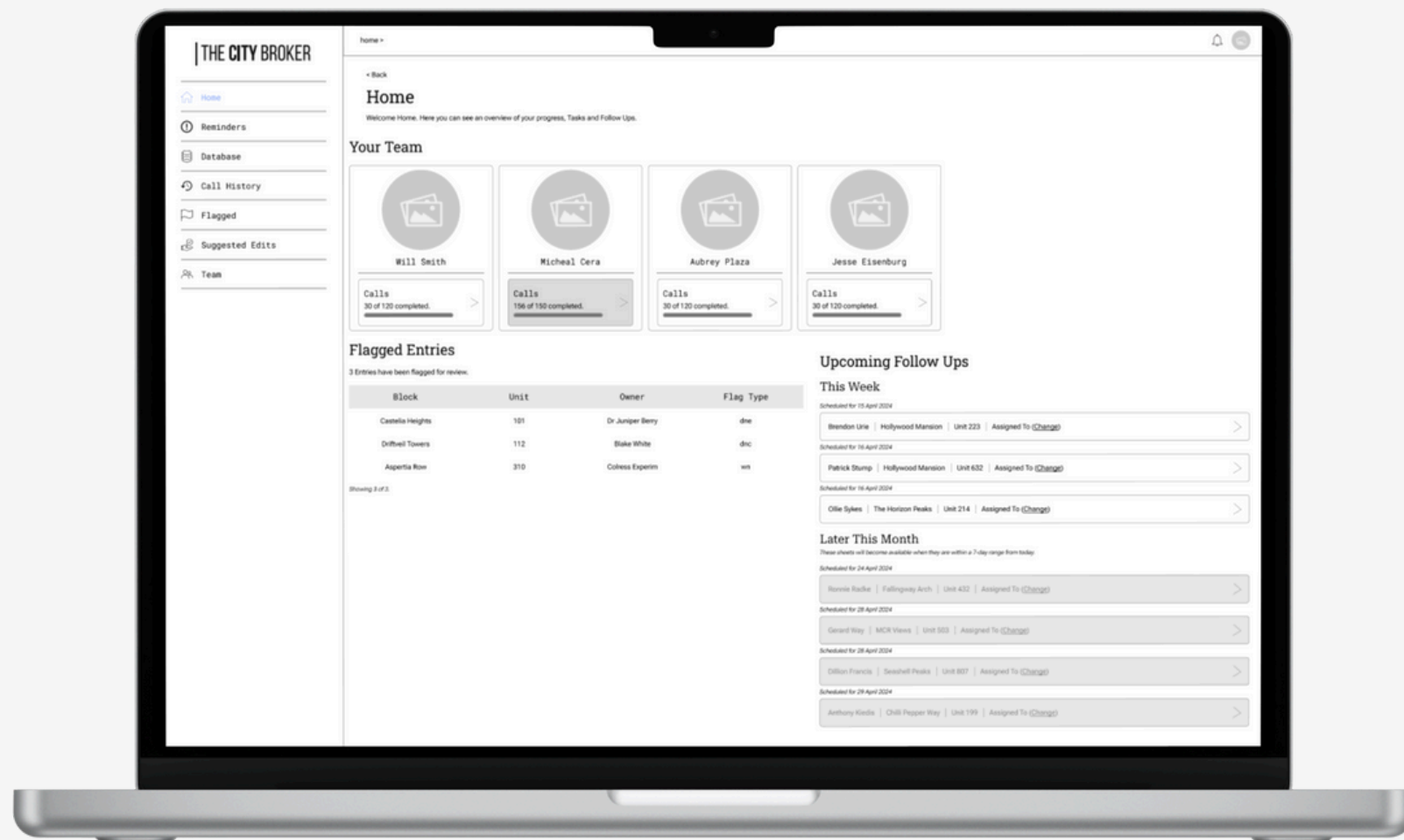
that's all.

ITERATION 2

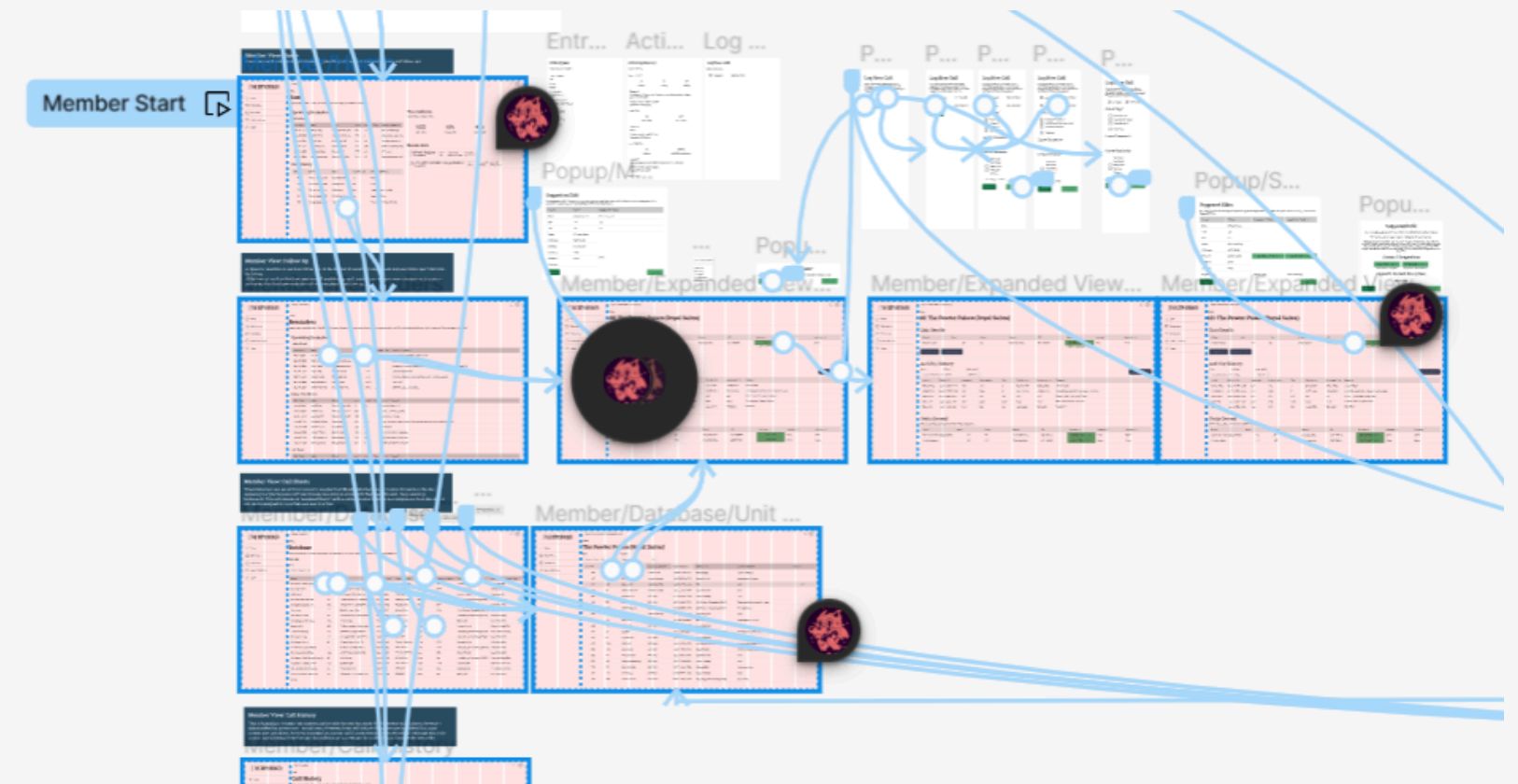
Mid-Fi Wireframes

WORKING ON SOME DETAILS

After some basic interaction checks, we can add a little more detail to test more thoroughly.



Mid-Fi Member Homepage (What users see)



Member Interaction Overview Preview (What the designer sees)

ITERATION 2

User Testing

NOW LET'S SEE WHAT WE CAN DO BETTER.

Now that users are able to make sense of what they see on screen, we can conduct usability testing.

ITERATION 2

User Testing

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Now that users are able to make sense of what they see on screen, we can conduct usability testing.

1. Users wished to move freely through the entries.

“If someone calls me back then I go back and edit my entire entry. Not being able to move freely through a list would be an issue”

– Initial user interviews

ITERATION 2

User Testing

NOW LET'S SEE WHAT WE CAN DO BETTER.

Now that users are able to make sense of what they see on screen, we can conduct usability testing.

1. Users wished to move freely through the entries.

2. Users wanted to see who's calling what

“Want to see who's calling what.
Administration issues, sometimes we get
assigned lists that have been called recently.”

– Initial user interviews

ITERATION 2

User Testing

NOW LET'S SEE WHAT WE CAN DO BETTER.

Now that users are able to make sense of what they see on screen, we can conduct usability testing.

1. Users wished to move freely through the entries.
2. Users wanted to see who's calling what
3. Users think the statistics may not demonstrate effort accurately.

"I'm managing 7 listings right now, so I don't really need to make new cold calls. It could look bad on me to have not met my tasks, but I'm busy with non-quantifiable duties."

– Initial user interviews

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4. Users are protective over their contacts.

"If I get a callback from one person I don't want someone else stealing my lead."

– Initial user interviews

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3. Users think the statistics may not demonstrate effort accurately.
4. Users are protective over their contacts.
5. Users didn't need Listings or Leads tabs.

"Not sure if listings section is useful – we have PropData for that"

– Initial user interviews

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6. Users wish to see Flagged Entries.

"Keep [flagged entries] visible, I would want to be able to skip through flagged entries but still see that they're there."

– Initial user interviews

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6. Users wish to see Flagged Entries.
7. Users feel they have a lack of agency.

"I feel like I'm being micro-managed."

– Initial user interviews

"Being limited to Member functionality would frustrate me."

– Initial user interviews

"I think the user should go back and fourth to jump between number to number. This feels like a complete block."

– Initial user interviews

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6. Users wish to see Flagged Entries.
7. Users feel they have a lack of agency.
8. Flagging entries for review is not efficient.

"If I was a caller then I'd want to edit, but I can see how giving admin access to callers is problematic."

– Initial user interviews

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7. Users feel they have a lack of agency.
8. Flagging entries for review is not efficient.
9. Users want to know who has flagged an entry.

"Says who it's assigned to, not who flagged it.
Who flagged it? That's just what I want to
know"

– Initial user interviews

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9. Users want to know who has flagged an entry.
10. Users enjoyed the "Focused View" for entry data.

"It puts blinkers on you, you don't get overwhelmed by a whole bunch of future tasks."

– Initial user interviews

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– Initial user interviews

- Home
- Reminders
- Database
- Call History
- Team



< Back

101 The Pewter Palace (Royal Suites)

Unit Details

Block	Unit	Size	Owner	ID	Contact 1	Contact 2	Contact 3
Driftveil Towers	101	92	Dr Juniper Berry	6827193314	Click to view <i>Suggested by Aubrey Plaza.</i>	None	None

Flag Entry

Suggest Edit

Activity History

SortFilterHide Null

Last Called Oldest > NewestNoneNone

Log New Call +

Caller	Called On	Answered	Interested	Tag	Follow Up	Assigned To	Comment
Aubrey Plaza	Apr 27, 2024, 11:54	True	True	S	Apr 26, 2024	Aubrey Plaza	not interested
Aubrey Plaza	Apr 25, 2023, 10:24	True	False	R	Apr 26, 2024	Aubrey Plaza	Currently have tenants. Lease expires in a year.
Miceal Cera	Mar 13, 2023, 15:41	null	null	null	null	null	System: Number viewed, no call logged.
Will Smith	Jan 1, 2023, 9:23	True	False	NSOT	None	None	Not interested, happy with unit
Will Smith	Jan 1, 2023, 9:23	False	Null	VM	Jan 2, 2023	Will Smith	No answer

Units Owned

Other units owned by the same ID number as current entry.

Block	Unit	Size	Owner	ID	Contact 1	Contact 2	Contact 3
The Pewter Palace (Royal Suites)	101	92	Dr Juniper Berry	6827193314	Click to view	None	None
Castelia Heights	712	132	Dr Juniper Berry	6827193314	Click to view	None	None

- Home
- Reminders
- Database
- Call History
- Team

< Back

101 The Pewter Palace (Royal Suites)

Unit Details

Block	Unit	Size	Owner	ID	Contact 1	Contact 2
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Flag Entry

Suggest Edit

Activity History

Sort

Filter

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Last Called Oldest > Newest							
None		None					
Caller	Called On	Answered	Interested	Tag	Follow Up	Assigned To	Comment
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Castelia Heights	712	132	Dr Juniper Berry	6827193314	Click to view	None

Log New Call

Log a new call for current entry. Be as descriptive as possible, as this will help yourself and future users create meaningful feedback and high-quality service.

☒ Answered ☐ Not Answered

☒ Interested ☐ Not Interested

Select Tags*

- ☐ Buying (b)
- ☐ Selling (s)
- ☒ Renting (r)
- ☐ Call Back (cb)

Leave Comment*

Create Reminder

- ☐ Tomorrow
- ☐ Next Week
- ☐ Next Month
- ☐ Next Year
- ☐ Custom

mm | dd | yyyy HH:MM

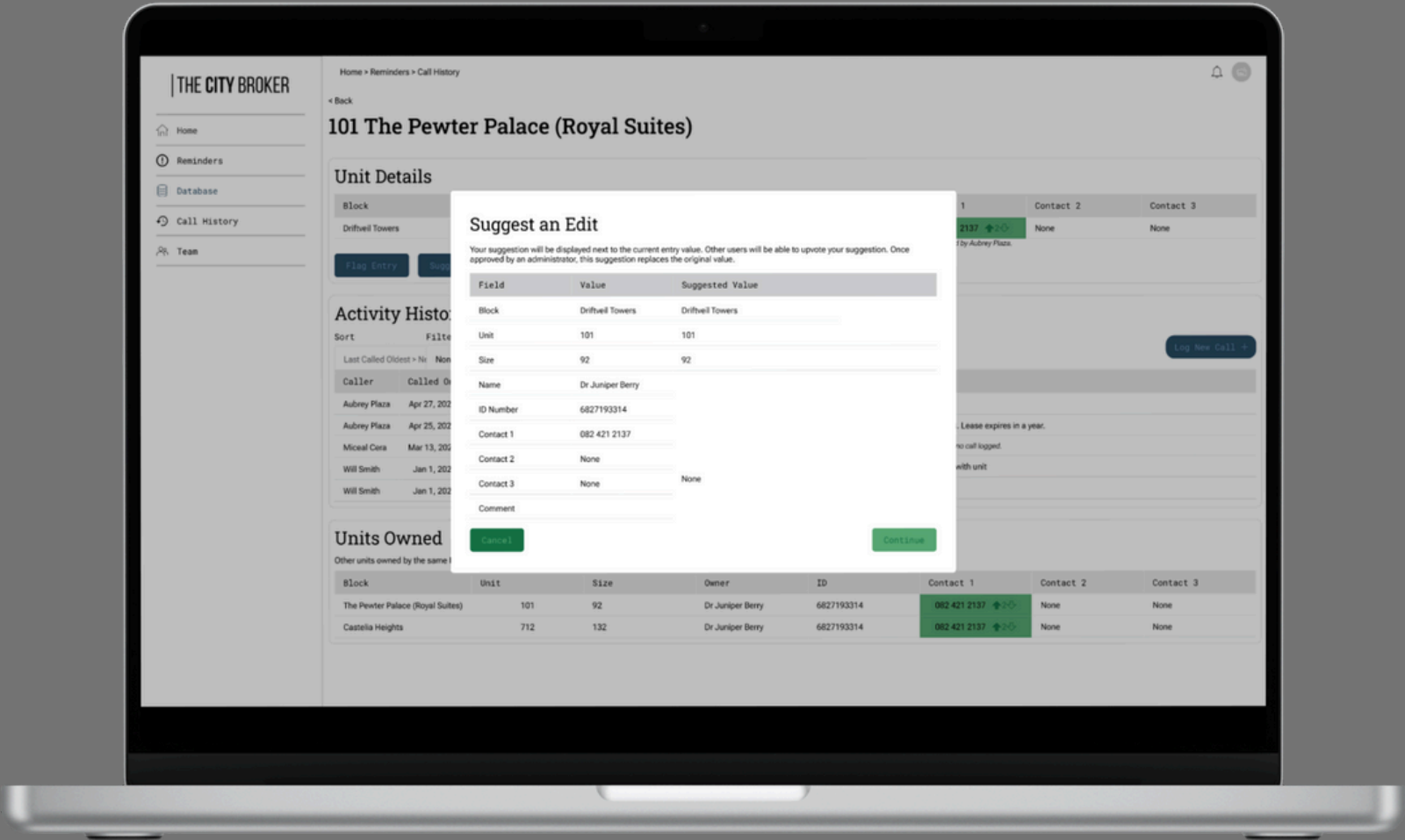
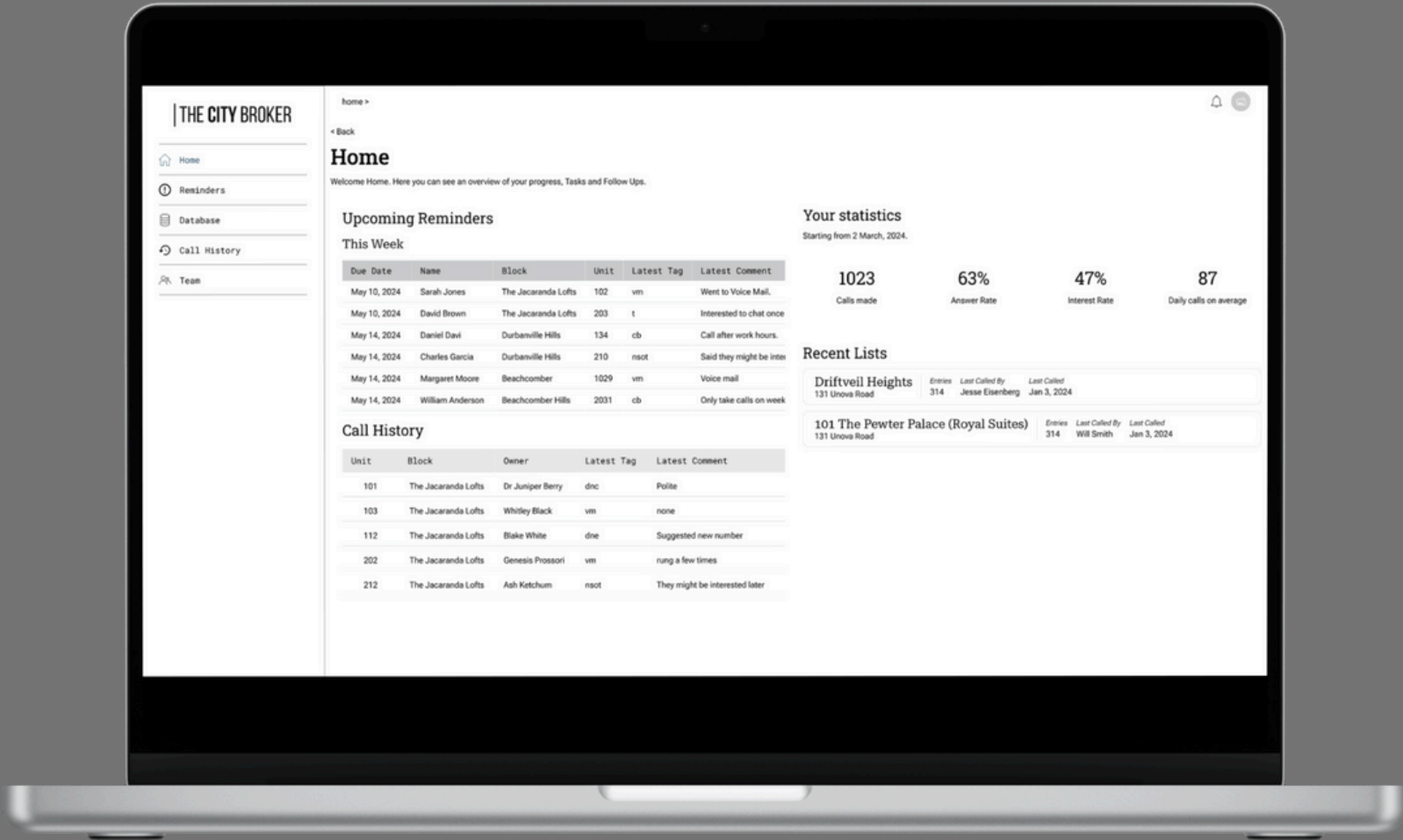
Cancel

Continue

ITERATION 3

Mid-Fi: Second Cycle

AND WE JUST KEEP GETTING BETTER.



[VIEW MEMBER MID-FI PROTOTYPE](#)

[VIEW ADMIN MID-FI PROTOTYPE](#)

ITERATION 3

User Testing

USER VIEW

- Users found design to be bland.

“Not everything needs to be like a spreadsheet”

"If I was looking at this for long periods of time I'd not like it"

ITERATION 3

User Testing: Insights

USER VIEW

- Users found design to be bland.
- Users were unsure what the upvote/downvote arrows were for.

“If you didn’t explain that to me afterwards I never would have guessed.”

ITERATION 3

User Testing: Insights

USER VIEW

- Users found design to be bland.
- Users were unsure what the upvote/downvote arrows were for.
- User had trouble processing expanded unit view.

“My eyes are unable to skim and pick up what the page is about.”

ITERATION 3

User Testing: Insights

USER VIEW

- Users found design to be bland.
- Users were unsure what the upvote/downvote arrows were for.
- User had trouble processing expanded unit view.
- User believes the overall design is "too simple"

"colour separation might make things easier to digest after longer periods of time."

"Very straightforward... I don't know if it's in a positive way or not."

ITERATION 3

User Testing: Insights

USER VIEW

- Users found design to be bland.
- Users were unsure what the upvote/downvote arrows were for.
- User had trouble processing expanded unit view.
- User believes the overall design is "too simple"
- Finding a specific unit was intuitive.

Positive Test Results

ITERATION 3

User Testing: Insights

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- Finding a specific unit was intuitive.
- Users had no issue logging a cold call.

Positive Test Results

ITERATION 3

User Testing: Insights

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- Users had no issue logging a cold call.
- Users had no issue suggesting an edit.

Positive Test Results

ITERATION 3

User Testing: Insights

USER VIEW

- Users found design to be bland.
- Users were unsure what the upvote/downvote arrows were for.
- User had trouble processing expanded unit view.
- User believes the overall design is "too simple"
- Finding a specific unit was intuitive.
- Users had no issue logging a cold call.
- Users had no issue suggesting an edit.
- Users understood how to read call log and find oldest entry.

Positive Test Results

ITERATION 3

User Testing: Insights

ADMIN VIEW

- Users didn't know which edited entry to approve.

"I see two numbers, so I don't know which to see. They're both different to current, I don't know which to choose."

"I'd rather have a comment. Didn't realise this was upvote/downvote style"

ITERATION 3

User Testing: Insights

ADMIN VIEW

- Users didn't know which edited entry to approve.
- Users were unable to locate block statistics.

All users entered the unit list rather than the block overviews. This also needs to be added into the unit list

–Designer note

ITERATION 3

User Testing: Insights

ADMIN VIEW

- Users didn't know which edited entry to approve.
- Users were unable to locate block statistics.
- Struggled with distinction between "upload sheet" and "add entry"

Swapped between the two options for a while before making final selection.

–Designer note

ITERATION 3

User Testing: Insights

ADMIN VIEW

- Users didn't know which edited entry to approve.
- Users were unable to locate block statistics.
- Struggled with distinction between "upload sheet" and "add entry"
- Users understand "Flagging" an entry and how to resolve flags.

Positive Test Results

ITERATION 3

User Testing: Insights

ADMIN VIEW

- Users didn't know which edited entry to approve.
- Users were unable to locate block statistics.
- Struggled with distinction between "upload sheet" and "add entry"
- Users understand "Flagging" an entry and how to resolve flags.
- Users easily found how to upload a sheet.

Positive Test Results

ITERATION 3

User Testing: Insights

ADMIN VIEW

- Users didn't know which edited entry to approve.
- Users were unable to locate block statistics.
- Struggled with distinction between "upload sheet" and "add entry"
- Users understand "Flagging" an entry and how to resolve flags.
- Users easily found how to upload a sheet.
- Users understood how to promote another user.

Positive Test Results

ITERATION 3

User Testing: Insights

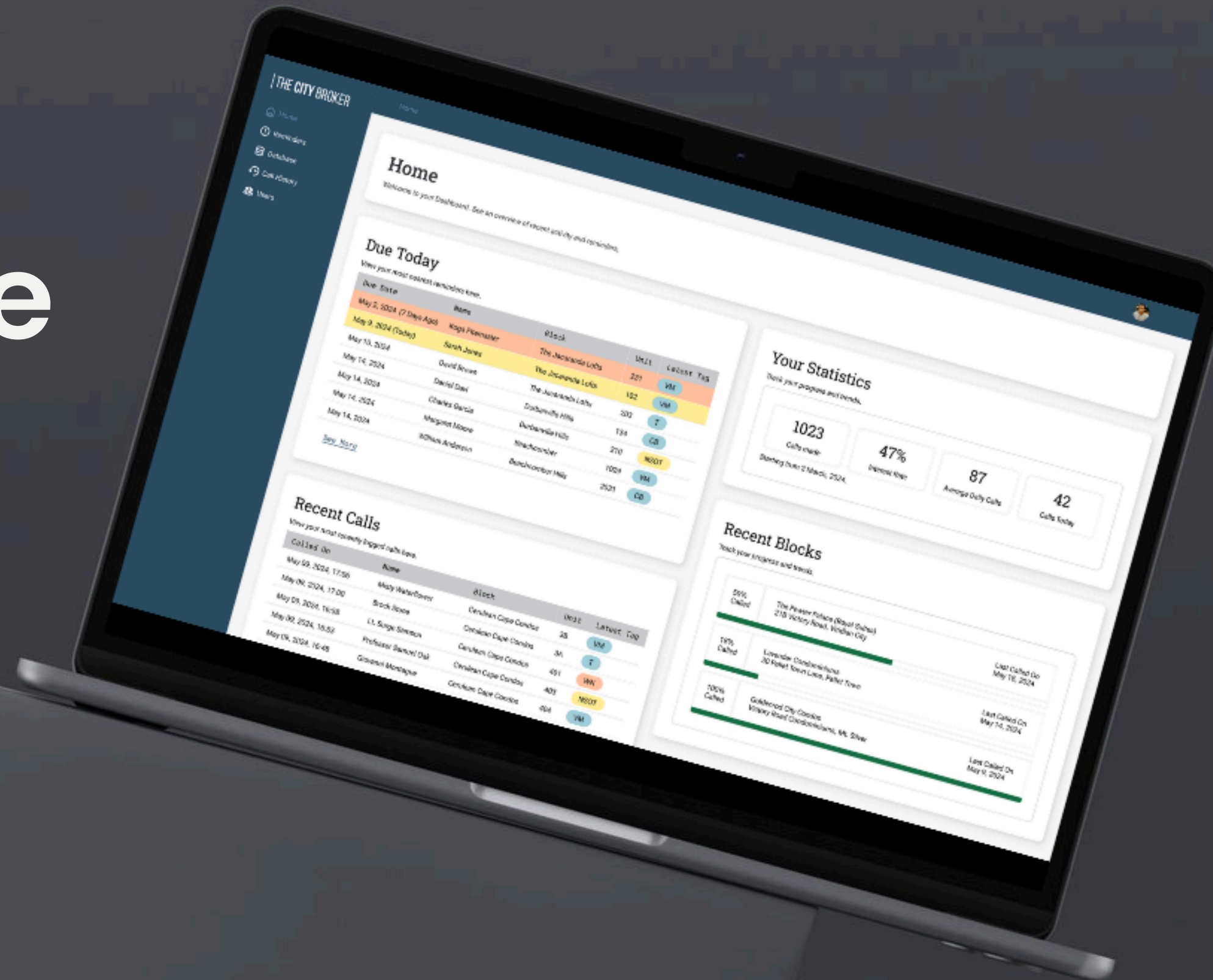
ADMIN VIEW

- Users didn't know which edited entry to approve.
- Users were unable to locate block statistics.
- Struggled with distinction between "upload sheet" and "add entry"
- Users understand "Flagging" an entry and how to resolve flags.
- Users easily found how to upload a sheet.
- Users understood how to promote another user.
- Users preferred the visually engaging design of Admin over Member.

Positive Test Results

ITERATION 4

Hi-Fi Prototype



[VIEW MEMBER HI-FI PROTOTYPE](#)

[VIEW ADMIN HI-FI PROTOTYPE](#)



< Back

Unit 101: The Pewter Palace (Royal Suites)

View all call logs, unit and owner details for the chosen entries,

0

19

Unit Details

Unit Number	Size	Bedrooms	Bathrooms	Parkings
112	92	3	2.5	1

Owner Details

Owner	ID	Contact 1	Contact 2	Contact 3
Dr Juniper Berry	88012300009	082 418 2913	021 748 1832	None

Suggest Edit

Log New Call

- ☒ Answered
- ☐ Not Answered
- ☐ Interested
- ☒ Not Interested

- ☐ Wrong Number
- WN
- ☐ Do Not Contact
- DNC
- ☒ Not Selling or Tenanting
- NSOT

Comment

- Home
- Reminders
- Database
- Call History
- Users

Log New Call

☒ Answered

☐ Not Answered

☐ Interested

☒ Not Interested

☐ Wrong Number

WN

☐ Do Not Contact

DNC

☒ Not Selling or Tenanting

NSOT

Comment

Your comment here...

Create a Reminder for Unit 101 The Pewter Palace (Royal Suites) (Optional)

09/5/2024

10 : 00 : AM

Assign to Team Member (Optional)

None Selected

Cancel

Continue

Call Log

Called On	Caller	Answered	Interested	Tag	Comment
Apr 22, 2024, 9:02	Annie January	True	True	CB	Call on the weekend.
Apr 27, 2024, 10:04	Annie January	False	null	UB	Call was declined.
Dec 12, 2023, 9:03	Ron Swanson	True	True	T	Unit is currently being rented out. Might get new tenants next year.
Jun 21, 2023, 13:03	Troy Barnes	True	True	NSOT	They're living there.

ITERATION 4

Hi-Fi Prototype: User Journeys

USER VIEW

- Navigating Database and selecting list to call.

ITERATION 4

Hi-Fi Prototype: User Journeys

USER VIEW

- Navigating Database and selecting list to call.
- Logging a New Call

ITERATION 4

Hi-Fi Prototype: User Journeys

USER VIEW

- Navigating Database and selecting list to call.
- Logging a New Call
- Suggesting an Edit

ITERATION 4

Hi-Fi Prototype: User Journeys

USER VIEW

- Navigating Database and selecting list to call.
- Logging a New Call
- Suggesting an Edit
- Creating a Reminder

ITERATION 4

Hi-Fi Prototype: User Journeys

USER VIEW

- Navigating Database and selecting list to call.
- Logging a New Call
- Suggesting an Edit
- Creating a Reminder
- Accessing entry Call Log history

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries
- Editing existing Entries

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries
- Editing existing Entries
- Adding a new User

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries
- Editing existing Entries
- Adding a new User
- Promoting a user to Admin

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries
- Editing existing Entries
- Adding a new User
- Promoting a user to Admin
- Approving Suggested Edits

ITERATION 4

Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries
- Editing existing Entries
- Adding a new User
- Promoting a user to Admin
- Approving Suggested Edits
- Resolving Flagged Entries

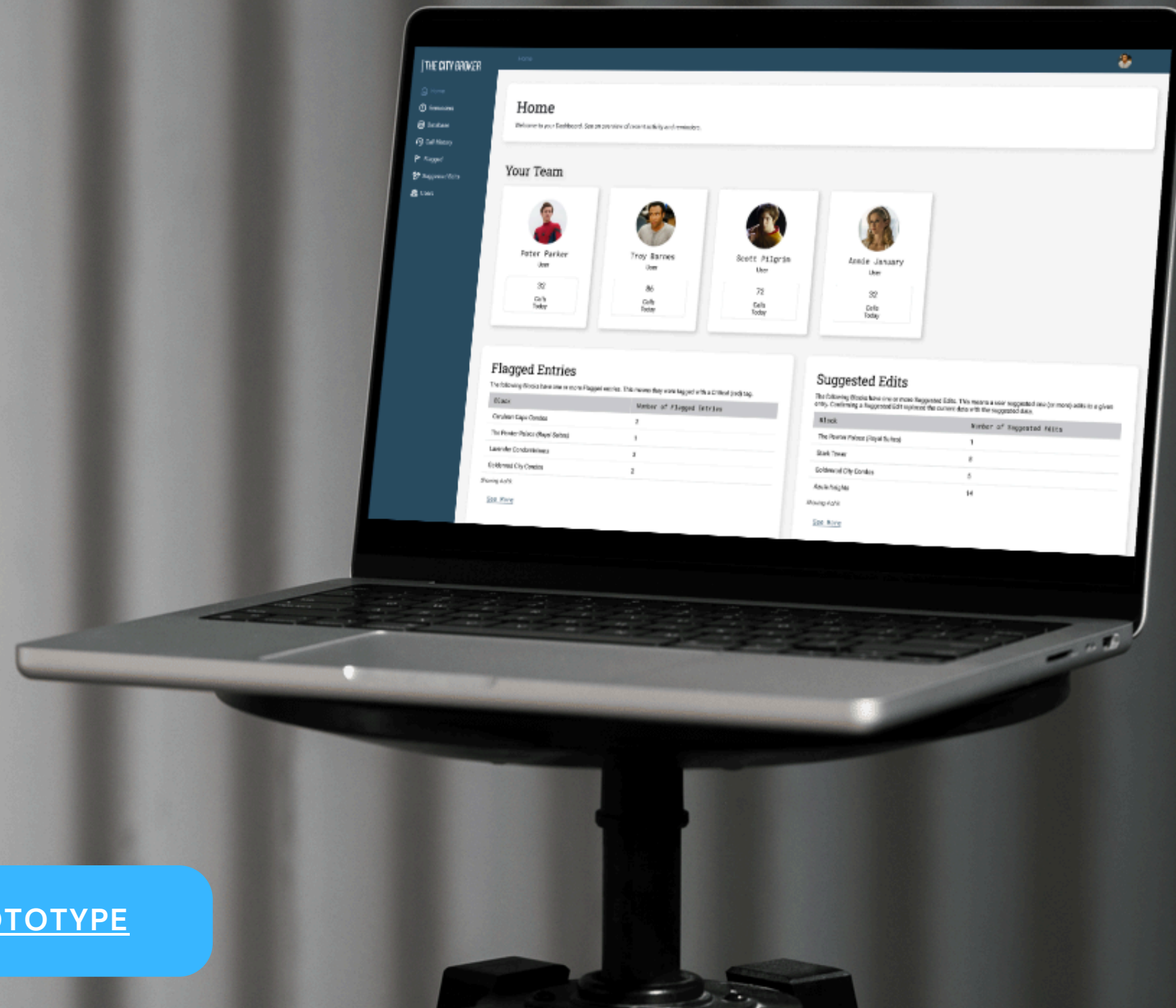
Hi-Fi Prototype: User Journeys

ADMIN VIEW

- Uploading Block Sheets
- Adding new Entries
- Editing existing Entries
- Adding a new User
- Promoting a user to Admin
- Approving Suggested Edits
- Resolving Flagged Entries
- Viewing and creating Reminders

ITERATION 4

Live Demonstration



[VIEW MEMBER HI-FI PROTOTYPE](#)

[VIEW ADMIN HI-FI PROTOTYPE](#)