

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - DEFAULT	DATE	OCTOBER 5, 2018	PAGE	1 OF 27

Create Customer Profile - Default

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Create Customer Profile

Cancel Save Customer Profile

GO TO: Customer Details

Customer Details

Contact Info

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Name

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Notifications

Tenant Type

Transient

Basic

Account Name

Profile

Contact First Name

Contact Last Name

Suffix

Title

Phone

Ext

Phone Type

Check if Primary Phone

+ Add phone

Email

Check if Primary Email

+ Add email

Add Another Customer Contact

Address

Address 1

Address 2

Zip

City

State

Notes

Save Note

Add Another Address

Payment Method

Enter Card Number

Expiration Date

Use this card for

Billing Address

Customer Name

Address 1

Address 2

Zip

City

State

Notes

Save Note

A/C Details

Tail

A/C Type

Category

A/C Specs

Notes

Save Note

Preferences

Save Preferences

Preference Category

Accounting Details

This is the complete view of a default customer profile.

This form is accessed from the 'Create New Customer Profile' CTA.

The user will be able to use their keyboard to tab through this form. They will also be able to use their arrow keys as needed for certain input fields, like the dropdown.

The user should also be able to tab to other types of controls, such as a radio button, checkbox, or switch, and click the Enter key to active / deactivate.

The creation of a customer profile will add data to various sections of the application: customer details, address, credit card, aircraft, account details and related contacts. All behaviors, features, functions are still WIP.

Details on following pages.

Note: input field annotations will be a separate file: See XXXXX.

To see full screen view click link and use password Trebuchet07:
<https://xd.adobe.com/view/8b747dde-5f78-4f89-7ff5-f95ce94ecff7-fd45/>

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
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Create Customer Profile - Customer Form

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Customer Details

5

Tenant Type

2

☐ Transient ☐ Base

Account Name

4

Prefix

6

Contact First Name

7

Contact Last Name

8

Suffix

9

Title

Select

Phone

Ext

Phone Type

Select

☐ Check if Primary Phone

+ Add phone

Email

☐ Check if Primary Email

+ Add email

Add Another Customer Contact

Address

The Create New Customer Profile is a single form. A customer profile collects data about the customer (individual or company).

1. Side Title:

See Create Service Request document for details. (This will be a separate PDF)

- User should select if customer is Transient or Base.
- By default, the Customer Details is Open, as it is the first section.
- Account Name will display a type ahead / autocomplete dropdown for the user to select from.
- This text treatment is called a Section Header. It has a divider that extends the width of the div / content.
- Prefix dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
- Contact First Name will display a type ahead / autocomplete dropdown for the user to select from.
- Contact Last Name will display a type ahead / autocomplete dropdown for the user to select from.
- Suffix dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.

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Customer Details

Tenant Type

☒ Transient ☐ Base

Account Name

Southern Energy Transport

Prefix Contact First Name Contact Last Name Suffix

Maggie Toliver

Title

Select

Phone Ext Phone Type

465-563-1121 Mobile

☐ Check if Primary Phone

+ Add phone

Email

mtoliver@set.com

☐ Check if Primary Email

+ Add email

Add Another Customer Contact

- The user can select the contact's position. These selections may depend on the FBO. Dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
- Phone inputs use masked hint text: () - . The user will only need to enter numbers, the field should be formatted automatically: (###) ###-####.
- Phone Type dropdown menu will provide options so user can choose what kind of phone number is being provided (Work, Home, Mobile ...). Dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
- The user can click this secondary CTA button to add another phone number.

International phone numbers are TBD at this time.

OnClick, the data in the input fields will 'roll up', and a new set of input fields will appear. See next page.

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Customer Details

Tenant TypeTransient

Account NameSouthern Energy Transport

Contact NameMaggie Toliver

Title—

Primary ContactYes

Phone(465) 563-1121Ext—Phone TypeMobile

Phone(465) 589-6111ExtPhone TypeWork

+ Add phone

Emailmtoliver@set.com

+ Add email

Add Another Customer Contact

Address

Address 1

Address 2

1. The initial customer profile contact data has been rolled up. Editing functionality is currently WIP.
2. New input fields allow the user to add another phone number. Input field functions and dropdown menu are the same.

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Customer Details

Tenant Type	Transient				
Account Name	Southern Energy Transport				
Contact Name	Maggie Toliver				
Title	—				
Primary Contact	Yes				
Phone	(465) 563-1121	Ext	—	Phone Type	Mobile
Phone	(465) 589-6111	Ext	—	Phone Type	Work
+ Add phone					
Email	mtoliver@set.com				
+ Add email					
<div>Add Another Customer Contact</div>					

Address

Address 1

Address 2

- Once new phone number is entered, it will roll up and be displayed under the initial phone number.
- The above functionality would be duplicated for the 'Add email' button.
- Once complete, the user can elect to add another customer contact, or tab into the Address fields.

If user elects to tab / click into the Address fields, any newly entered data would 'roll up'.

If the user wants to add another customer contact, duplicate input fields from 'Prefix' to 'Add email' will be displayed. Input field functions and dropdown menu are the same.

The Primary Contact checkbox will also be duplicated. Primary Contact checkbox should be disabled if already checked by the user.

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Save Customer Profile

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Customer Details

Maggie Toliver - CFO

1

Add Another Customer Contact

Address

Address 1

Address 2

Zip

City

State

Notes

Save Note

Add Another Address

Payment Method

Enter Card Number

Expiration Date

1. This screen shows an example of the Customer Details data 'rolled up'. Clicking the text would return the user to an editable text field (previous page).

Clicking any text in this rolled up state activates edit mode, wherein text is shown in an input field so that user can make changes. Edit mode currently WIP.

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Create Customer Profile - Address

1. Address Side Title item becomes active once the user has completed the Customer Details data fields and has tabbed to the Address section.
2. The cursor is shown in the Address 1 input field, and the input field is in an active state. Users would input the address data.
3. Entering the zip will automatically populate the City and State fields.
This is for US addresses only, International TBD.
4. Notes fields: notes only pertaining to this address. The input field becomes active when the user clicks into it. The 'Save Note' button becomes active once the user has entered text. An example of a note might be, 'Use this address for all billing.'
5. Once complete, the user can elect to add another address, or tab into the Payment Method fields. If the user wants to add another address, duplicate input fields from 'Address 1' to 'Notes' will be displayed. Input field functions and dropdown menu are the same.

If user adds another address or If user elects to tab / click into Payment Method fields, any entered data would 'roll up'.

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Name

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Address

211 Lane Pkwy 37160 Shelbyville TN

Add Another Address

Payment Method

Enter Card Number

5424 1000 2368 9800

Expiration Date

11/19

Use this card for

Select

Billing Address

Customer/Name

Maggie Toliver

Address 1

211 Lane Pkwy

Address 2

Zip

37160

City

Shelbyville

State

TN

1. This screen shows an example of the Address data 'rolled up'. Clicking the text would return the user to an editable text field (previous page).

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Name

Credit Card

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Payment Method

Enter Card Number

5424 1000 2368 9800

Expiration Date

11/19

Use this card for

Select

Billing Address

Customer/Name

Maggie Toliver

Address 1

211 Lane Pkwy

Address 2

Zip

37160

City

Shelbyville

State

TN

Notes

Please send invoices at the end of each month

Save Note

A/C Details

1. Payment Method section is TBD.

TBD

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A/C Details

Tail N321CE A/C Type C152 Category Heavy

Notes

Save Note

Preferences

Do not fuel without customer present Save Preference

Preference Category Fuel

Add Another Aircraft

Accounting Details

- Fuel Price
- Exemptions
- Credit Amount
- Statement Settings
- Invoice Settings

Notes

1. The A/C Details section will allow users to add multiple aircraft to their Customer Profile as well as assign specific preferences (Fuel, Ramp, Hangar...).
2. The cursor is shown in the Tail input field, and the input field is in an active state.
3. The 'A/C Specs' button will expand a menu that shows additional specs the user can assign to the aircraft. See next page.

If an A/C has already been added elsewhere in the system, the type-ahead / autocomplete functionality will be triggered.

4. The A/C Type dropdown list will be populated with an aircraft type name, the source of the name is TBD with the product owner. A/C Type is not populated by either Make or Model data (See page 11).
5. The Category dropdown list will allow users to classify the aircraft into a specific category. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.

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A/C Details

Tail: N321CE A/C Type: C152 Category: Heavy

1 **A/C Specs**

2 Serial Number:

Make: Model:

3 Engine Type: Manufacture Year: Range: NM = nautical miles

4 Dimensions

Wingspan: Feet Height: Feet Length: Feet

5 Fuel

Fuel Type: Fuel Capacity: Gal

6 Tank Location:

Cancel **Save Customer Profile**

1. Clicking the 'A/C Specs' button will expand a panel that displays additional aircraft specification input fields. These are optional fields and can have values added at any time. Eventually this data will be pulled into the system automatically via API integration, but for now all fields are manual.
2. Users have the option to provide additional information about the aircraft with fields like: Serial Number, Wingspan, Fuel Type and others.

This data will 'roll up' in the panel like what has been established whenever the user enters data and moves on to the next field.

3. The Engine Type dropdown will be a kendo Combobox. Combobox: <https://www.telerik.com/kendo-angular-ui/components/dropdowns/combobox/>. Its options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
4. Input fields will allow users to record the wingspan, height and length of the aircraft. These fields are numeric input fields. Decimals TBD.
5. The Fuel Type dropdown list will allow users to select the type of fuel for the aircraft. The fuel type will be automatically included in the Service Request. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
6. Input field will allow users to identify the location of the aircraft tank.

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Create Customer Profile - A/C Details - Save Preferences

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A/C Details

Tail A/C Type Category

N321CE C152 Heavy

1 ☒ A/C Specs

Notes

Save Note **2**

Preferences

Do not fuel without customer present Save Preference

Preference Category **3** Fuel

Add Another Aircraft

Accounting Details

- Fuel Price
- Exemptions
- Credit Amount
- Statement Settings
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1. If the user adds A/C specs and clicks out of the panel, the panel collapses and the icon changes to a checkmark indicating that data has been saved.
2. Notes - (See page 7).
3. Aircraft Preferences: Users would add any customer preference in the text field then choose what type of preference from the dropdown menu. Examples of types of preferences would be Fuel, Hangar and, Catering. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.

The preferences added and categorized here in the profile will be automatically pulled to the correct section in the Service Request form when a user creates a new Service request for this Tail.

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A/C Details

Tail

A/C Type

Category

N321CE

C152

Heavy

✓ A/C Specs

Notes

Save Note

Customer Fuel Preferences

Do not fuel without customer present

Save Preference

Preference Category

Add Another Aircraft

Accounting Details

✓ Fuel Price

✓ Exemptions

✓ Credit Amount

✓ Statement Settings

✓ Invoice Settings

- Once a preference or note has been added, it becomes a line item that the user can edit or delete. The type of preference will display a label above the preference. Once complete, the user can elect to add another aircraft or tab into the Accounting Details fields.
- If the user wants to add another aircraft, duplicate input fields from 'Tail' to 'Preference Category' will be displayed. Input field functions and dropdown menu are the same.

If user elects to tab / click into Accounting Details fields, any entered data would 'roll up'.

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Accounting Details 1

Fuel Price 2

Fuel Type 2

Price Class 3

Price 4

Assign to 5

Select

Select

+ Add fuel price

Exemptions

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Statement Settings

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Notes

Save Note

Related Contacts

Related contacts can be added now, or can be added, removed or edited once the profile has been saved.

Prefix

First Name

Last Name

ix

☐ Check if Primary Contact

1. The Accounting Details section will be a series of expand/collapse panels allowing users to assign fuel prices, exemptions and establish credit amounts for the customer.
2. Drop down list with fuel type options. Fuel Type options are: Jet A and AvGas. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
3. Text field allows user to create their own price class. The price class would tie into the invoice and fuel and would dictate the price a customer was charged per gallon.
4. Text field for assigning custom fuel price. This is a numeric text field only. USD by default; International TBD.
5. Drop down list lets user assign the price to single or multiple aircraft. MultiSelect: <https://www.telerik.com/kendo-angular-ui/components/dropdowns/multiselect/>

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Fuel Price

Fuel Type

Jet A

Select

Price Class

Retail Minus

Price

\$1.50

Assign to

All Aircraft

Select

+ Add fuel price

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Save Note

Related Contacts

Related contacts can be added now, or can be added, removed or edited once the profile has been saved.

Prefix

First Name

Last Name

Suffix

1. The user can click this secondary CTA button to add another fuel price.

OnClick, the data in the input fields will 'roll up', and a new set of duplicate input fields, from 'Fuel Type' to 'Assign to' will appear.

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Accounting Details

☒ Fuel Price

☒ Exemptions

Type

Select

Description

☐ Certification
☐ Override

+ Add exemption

☒ Credit Amount

☒ Statement Settings

☒ Invoice Settings

Notes

Save Note

Related Contacts

Related contacts can be added now, or can be added, removed or edited once the profile has been saved.

Prefix

First Name

Last Name

Suffix

☐ Check if Primary Contact

- Exemptions will be utilized in the Invoices. Will be determined during Invoicing sprint.
- Dropdown list will allow user to select type of exemption. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
- Input field will let users provide a description for the exemption.
- Checkbox will let user indicate if the exemption has been certified or not.
- If "Override" is checked, this will allow an FBO employee to manually override the Exemption during an transaction.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - ACCOUNT DETAILS - CREDIT AMOUNT	DATE	OCTOBER 5, 2018	PAGE	17 OF 27

Create Customer Profile - Account Details - Credit Amount

LOGO

Create New Service Request

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Create Customer Profile

Cancel

Save Customer Profile

GO TO:

Customer Details

Contact Info

Address

Payment Method

A/C Details

Accounting Details

Fuel Price

Exemptions

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Invoice Settings

Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Accounting Details

1

Credit Amount

2

Amount

\$5,000

3

Term

30

Days

4

Allow Extension

Amount

Percentage

\$1000

5

Assign to

All Aircraft

Statement Settings

Invoice Settings

Notes

Save Note

Related Contacts

Related contacts can be added now, or can be added, removed or edited once the profile has been saved.

Prefix

First Name

Last Name

Suffix

Check if Primary Contact

1. Credit Amount will be utilized in the Invoices. Will be determined during Invoicing sprint.
2. Numeric Input field to assign a credit amount.
3. Input field to assign the number of days the credit is in effect.
4. The extension section will allow users to assign either an amount or percentage of the extension. There can be only one or the other. User must select an option, then type in a number.
5. This dropdown should always include All Aircraft and None, and will include all of the tail numbers added to this Customer's profile to date. The user will be able to multi-select tail numbers. All Aircraft or None options will override multi selections.

All screens are wireframes. Fonts, colors, icons, spacing all subject to change.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
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Create Customer Profile - Account Details - Statement

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GO TO:

Customer Details

Contact Info

Address

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Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Create Customer Profile

Cancel

Save Customer Profile

Accounting Details

☒ Fuel Price
☒ Exemptions
☒ Credit Amount

☒ Statement Settings

Select Address

☐ By Mail

Select

☐ By Email

Select

+ Add statement setting

☒ Invoice Settings

Notes

Save Note

Related Contacts

Related contacts can be added now, or can be added, removed or edited once the profile has been saved.

Prefix

First Name

Last Name

Suffix

☐ Check if Primary Contact

1. The statements section will allow users to choose how customers will receive their statements, by mail or email using checkboxes.
2. Dropdown list displaying addresses for user to select. The options will include all added addresses in the Customer profile.
3. Dropdown list displaying email addresses for user to select. The options will include all added email addresses in the Customer profile.
4. Invoices section will operate indentially to Statements.
5. Notes - (See page 7).

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - RELATED CONTACTS	DATE	OCTOBER 5, 2018	PAGE	19 OF 27

Create Customer Profile - Related Contacts

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Create New Service Request

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Create Customer Profile

Cancel Save Customer Profile

GO TO:

Customer Details
Contact Info
Address
Payment Method

A/C Details

Accounting Details
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Invoice Settings

Related Contacts
Name
Credit Card
Reward/Loyalty Programs
Notifications

Related Contacts 1

Related contacts can be added now, or can be added, removed or edited once the profile has been saved.

Prefix First Name Last Name Suffix

Mr Mike Potter

☐ Check if Primary Contact

Title

Chief Pilot

Phone Ext Phone Type

465-152-4455 Mobile

+ Add phone

Email

mpotter@set.com

+ Add email

Notes

Mike has a dairy allergy!!! Save Note

Preferences Preference Category

Save Preferences Select

6 Credit Card

1. The Related Contacts section will allow users to assign additional persons to the customer profile. When a user is creating a new service request, the contacts added to a customer profile will be available as the autocomplete options. Their contact data, notes and preferences will also be available to select from in the service request.
2. Add a phone - (See page 3).
3. Add an email - (See page 5).
4. Notes - (See page 7).
5. Preference - (See page 12).
6. Credit Card is TBD

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - RELATED CONTACTS - REWARDS	DATE	OCTOBER 5, 2018	PAGE	20 OF 27

Create Customer Profile - Related Contacts - Rewards

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Create Customer Profile

GO TO:
Customer Details
Contact Info
Address
Payment Method
A/C Details
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Fuel Price
Exemptions
Credit Amount
Statement Settings
Invoice Settings
Related Contacts
Name
Credit Card
Reward/Loyalty Programs
Notifications

+ Add phone

Email

mpotter@set.com

+ Add email

Notes

Mike has a dairy allergy!!!

Save Note

Preferences

Save Preferences

Preference Category

Select

Credit Card

^ Reward/Loyalty programs 1

Select or Enter a Provider

Marriott 2

Loyalty/Rewards Program Number

#000000000000 3

Add Another Program 4

Notifications

Add Another Related Contact

1. The system will be able to save a Contact's reward and loyalty program accounts. This data will be available for a contact when creating a new service request. Rewards/Loyalty Programs is an expanding panel.
2. Input field - Users can select a provider by typing the name. The name would autopopulate the field if the name is in the database. The user can also enter the name of new provider if they aren't in database. All options for initial set-up to be provided in a separate document, currently WIP.
3. Input field - Users can enter the Rewards program number. Since numbers will vary and may use both alphabetical and numerical input, inline validation would only be triggered if a user has entered a single character and has click off of the input field. This is subject to change.
4. Once complete, the user can elect to add another program, or tab into the Notifications panel.

If user elects to tab / click into the Notifications fields, any entered data would 'roll up'.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - RELATED CONTACTS - NOTIFICATIONS	DATE	OCTOBER 5, 2018	PAGE	21 OF 27

Create Customer Profile - Related Contacts - Notifications

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Create New Service Request

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GO TO:

Customer Details

Contact Info

Address

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Accounting Details

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Statement Settings

Invoice Settings

Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Email

mpotter@set.com

+ Add email

Notes

Mike has a dairy allergy!!!

Save Note

Preferences

Save Preferences

Preference Category

Select

Credit Card

Reward/Loyalty programs

Notifications

Service

Fuel

Status

Complete

SMS/Text

(469) 255-4545

Email

mpotter@set.com

Ramp Service

Incomplete

(469) 255-4545

mpotter@set.com

+ Add notification

Add Another Related Contact

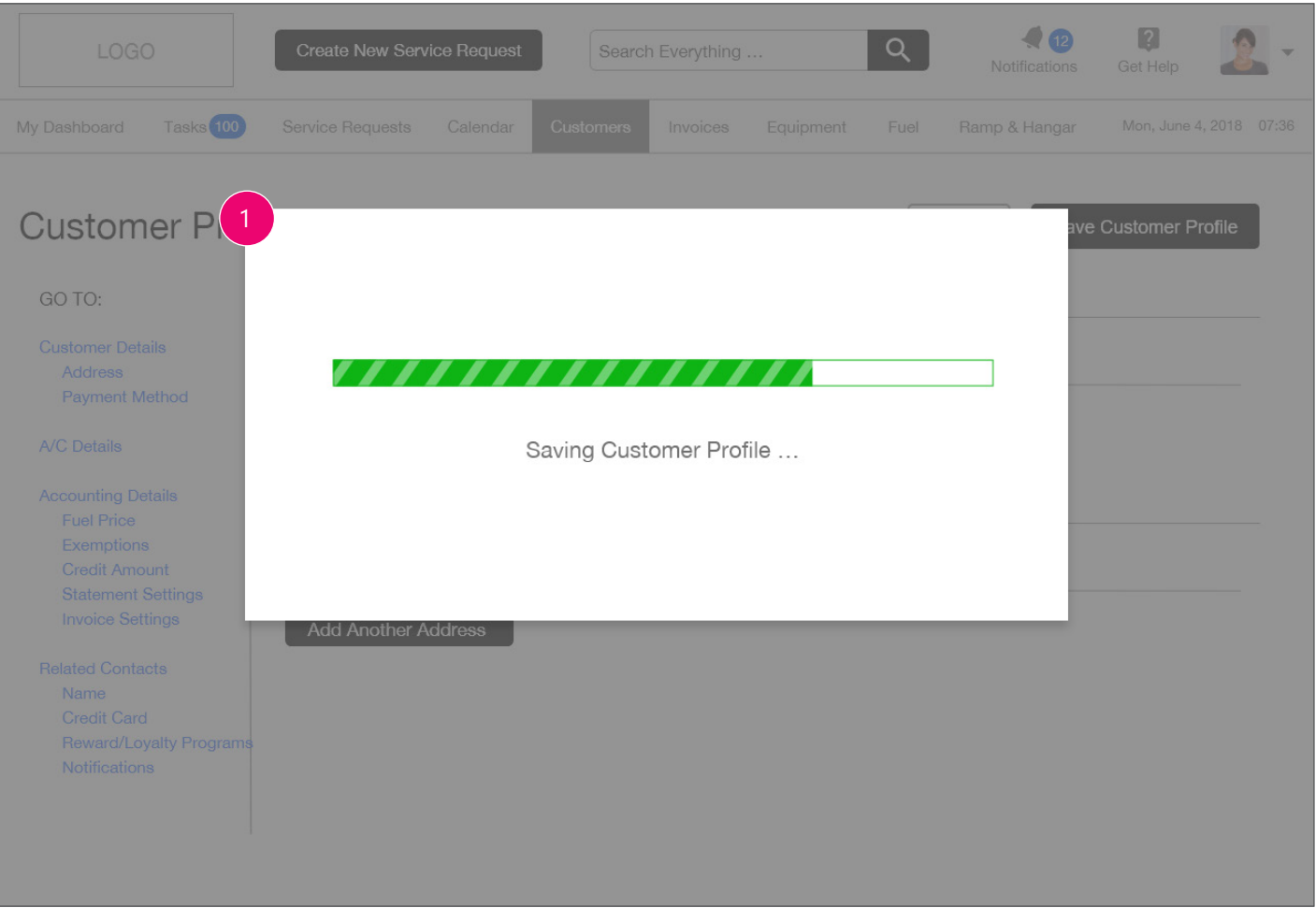
Cancel

Save Customer Profile

- Notifications is an expanding panel that will allow users to select how notifications will be sent for different services (Fueling, Ramp Services...) either text or email. Implementation is currently WIP. Email and Text content is TBD.
- Dropdown list allows user to select specific service notifications. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
- Dropdown list allows user to assign a status to the notification. All dropdown options will be in Pre-determined_Dropdown_Content_WFSCatapult.xlsx.
- Dropdown list allows user to select from saved phone numbers for SMS/Text messages. These phone numbers were entered earlier in the Profile.
- Dropdown list allows user to select from saved email addresses. These email addresses were entered earlier in the Profile.
- Once complete, the user can elect to add another notification, or tab into the Add Another Related Contact button.
- The user may save a Customer Profile at any time. What data is optional and what data is required upon initial creation is currently WIP.
- The user may Cancel customer profile creation at any time. Pending content that has been entered, clicking Cancel would trigger a guard modal. Content, CTAs WIP.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - PROGRESS INDICATOR	DATE	OCTOBER 5, 2018	PAGE	22 OF 27

Create Customer Profile - Progress Indicator



1. A progress indicator will display to the user showing their Customer Profile is being saved.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - CREATED SUCCESSFULLY	DATE	OCTOBER 5, 2018	PAGE	23 OF 27

Create Customer Profile - Created Successfully

LOGO

Create New Service Request

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Customer Profile Successfully Created

1

Back to All Customers

Southern Energy Transport

2

Create New Customer Profile

Actions

Primary Contact

Phone

Email

Maggie Toliver

465-463-1121

mtoliver@set.com

WIP

Details
Activity
Notes

GO TO:

Customer Details

Contact Info

Address

Payment Method

A/C Details

Accounting Details

Fuel Price

Exemptions

Credit Amount

Statement Settings

Invoice Settings

Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Customer Details

▼ Maggie Toliver - CFO

Check if Primary Contact

Add Another Customer Contact

Address

▼ 211 Lane Pkwy 37160 Shelbyville TN

Add Another Address

Payment Method

Card Number

Visa *9800

Expiration Date

11/19

1. A toast alert message will display above the profile showing the user the profile was successfully saved. System error messaging WIP.
2. Upon saving, the Create Customer Profile screen changes to the Customer Profile Detail screen.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - ALERT: SIMILAR ACCOUNT NAME FOUND	DATE	OCTOBER 5, 2018	PAGE	24 OF 27

Create Customer Profile - ALERT: Similar Account Name Found

The wireframe shows a user interface for creating a customer profile. At the top, there's a navigation bar with a logo, a 'Create New Service Request' button, a search bar, and user profile information. Below this is a dashboard with tabs like 'My Dashboard', 'Tasks', 'Service Requests', 'Calendar', 'Customers' (active), 'Invoices', 'Equipment', and 'Ramp & Hangar'. The main content area is titled 'Create Customer Profile' and includes a 'Cancel' button and a 'Save Customer Profile' button. On the left, there's a 'GO TO:' sidebar with links for 'Customer Details' (selected), 'Contact Info', 'Address', 'Payment Method', 'A/C Details', 'Accounting Details', and 'Related Contacts'. The 'Customer Details' section has a 'Tenant Type' selector (Transient selected, Base unselected). The 'Account Name' field contains 'Wayland Corp' and is highlighted with a red alert box. The alert box contains the text: 'Alert: A similar account already exists: Weyland Corp. Do you want to continue creating a new account?' and two buttons: 'Yes, continue creating' and 'No, cancel & return to all Customers'. The 'Last Name' field contains 'Katherine'. There are also fields for 'Suffix', 'Check if Primary Contact', 'Title', 'Phone', 'Ext', 'Phone Type', 'Email', and an 'Add Another Customer Contact' button. Numbered callouts 1 through 4 are placed on the form: 1 on the 'GO TO:' sidebar, 2 on the 'Check if Primary Contact' checkbox, 3 on the 'Last Name' field, and 4 on the 'Account Name' field.

1. When creating a new Account, if the user continues to manually enter an Account Name into the input field and it does not exist, the system will return no results and the user may continue creating the new account.

However, if a similar name is found, the system should communicate this to the user to prevent the user from creating a duplicate or redundant account, which may cause tracking, invoicing and reporting errors.

2. If it is a new account [with similar name], the user may ignore this warning and click the 'Yes, continue creating' CTA. This will close the warning and return the user to the form so they can continue to create a new form.

Final messaging, styles WIP.

3. If the user realizes that the account already exists, they can cancel creation from the 'No, cancel & return to all Customers' CTA, which will close the form and return them to the Customers Subpage.

Final messaging, styles WIP.

4. Whether the existing account name in the Warning message is linked to that account is TBD / moved to future phase.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
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Create Customer Profile - Contact First Name Autocomplete

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Create Customer Profile

Cancel

Save Customer Profile

GO TO:

Customer Details

Contact Info

Address

Payment Method

A/C Details

Accounting Details

Fuel Price

Exemptions

Credit Amount

Statement Settings

Invoice Settings

Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Customer Details

Tenant Type

☒ Transient☐ Base

Account Name

Select or Enter a Contact:

Prefix

Contact First Name

Contact Last Name

Suffix

Kate

Kate Abnernathy

Kate Davis

Kate Lacey

Kate Parker-Hoffman

Kate Su-Jin

Kate Zuza

☒ Check if P

Title

Phone

Select

+ Add phone

Email

+ Add email

Add Another Customer Contact

1. Contact First Name will display a type ahead / autocomplete dropdown for the user to select from.

Any characters that the user has entered will be bolded in the returned results.
2. If the user selects an option, the system automatically populates all saved data for this contact.

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - CONTACT LAST NAME AUTOCOMPLETE	DATE	OCTOBER 5, 2018	PAGE	26 OF 27

Create Customer Profile - Contact Last Name Autocomplete

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Create Customer Profile

Cancel Save Customer Profile

GO TO:

Customer Details

Contact Info

Address

Payment Method

A/C Details

Accounting Details

Fuel Price

Exemptions

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Statement Settings

Invoice Settings

Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Customer Details

Tenant Type

☒ Transient
☐ Base

Account Name

Select or Enter a Contact:

Prefix

Contact First Name

Contact Last Name

Suffix

Alden Parker
Matt Parker
Helen Michelle Parker
Kate Parker-Hoffman
John Parker-Hoffman
Lindsay Parkes

☒ Check if Primary Contact

Title

Phone

Ext

Phone Type

Select

+ Add phone

Email

+ Add email

Add Another Customer Contact

1. User has entered a variation on a first name manually and has tabbed into the last name input field.

2. Contact Last Name will display a type ahead / autocomplete dropdown for the user to select from.

Any characters that the user has entered will be bolded in the returned results.

3. If the user selects an option, the system automatically populates all saved data for this contact.

The user could noticed the same autocomplete option presented to them as the First Name input field. They now have a 2nd chance to select pre-existing data. Selecting a name from the options presented automatically populates all saved data for this contact.

If the user manually enters a last name, the system will look for duplicates (see next page).

PROJECT	CATAPULT - PHASE 1	DOC	ANNOTATED WIREFRAMES	VERSION	3.3	AUTHOR	KPIT
CLIENT	WORLD FUEL SERVICES	SCREENS	CREATE CUSTOMER PROFILE - ALERT: SIMILAR CONTACT NAME FOUND	DATE	OCTOBER 5, 2018	PAGE	27 OF 27

Create Customer Profile - ALERT: Similar Contact Name Found

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Create New Service Request

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Create Customer Profile

Cancel

Save Customer Profile

GO TO:

Customer Details

Contact Info

Address

Payment Method

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Accounting Details

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Related Contacts

Name

Credit Card

Reward/Loyalty Programs

Notifications

Customer Details

Tenant Type

☒ Transient
☐ Base

Account Name

Wayland Corp

Select or Enter a Contact:

Prefix

Contact First Name

Contact Last Name

Suffix

1

Katherine

Parker-Hoffman

4

☒ Check if P

Alert: A similar contact already exists: Kate Parker-Hoffman.
Do you want to use this contact?

Yes, use this contact

No, continue creating new contact

2

Title

3

Phone

Ext

Phone Type

+ Add phone

Email

+ Add email

Add Another Customer Contact

1. The system should communicate this to the user to prevent the user from creating a duplicate or redundant contact, which may cause tracking, invoicing and reporting errors.

2. If the user realizes that the account already exists, the user may click the 'Yes, use this contact' CTA. This will close the warning and return the user to the form, where the system will autocomplete all known data for the known contact.

Final messaging, styles WIP.

3. It's possible there will be contacts will similar or the exact same name. If it is a new contact [with similar name], the user may ignore this warning and click the 'No, continue creating new contact' CTA. This will close the warning and return the user to the form so they can continue to create a new form.

Final messaging, styles WIP.

4. Whether the existing contact name in the Warning message is linked to that account is TBD / moved to future phase.