

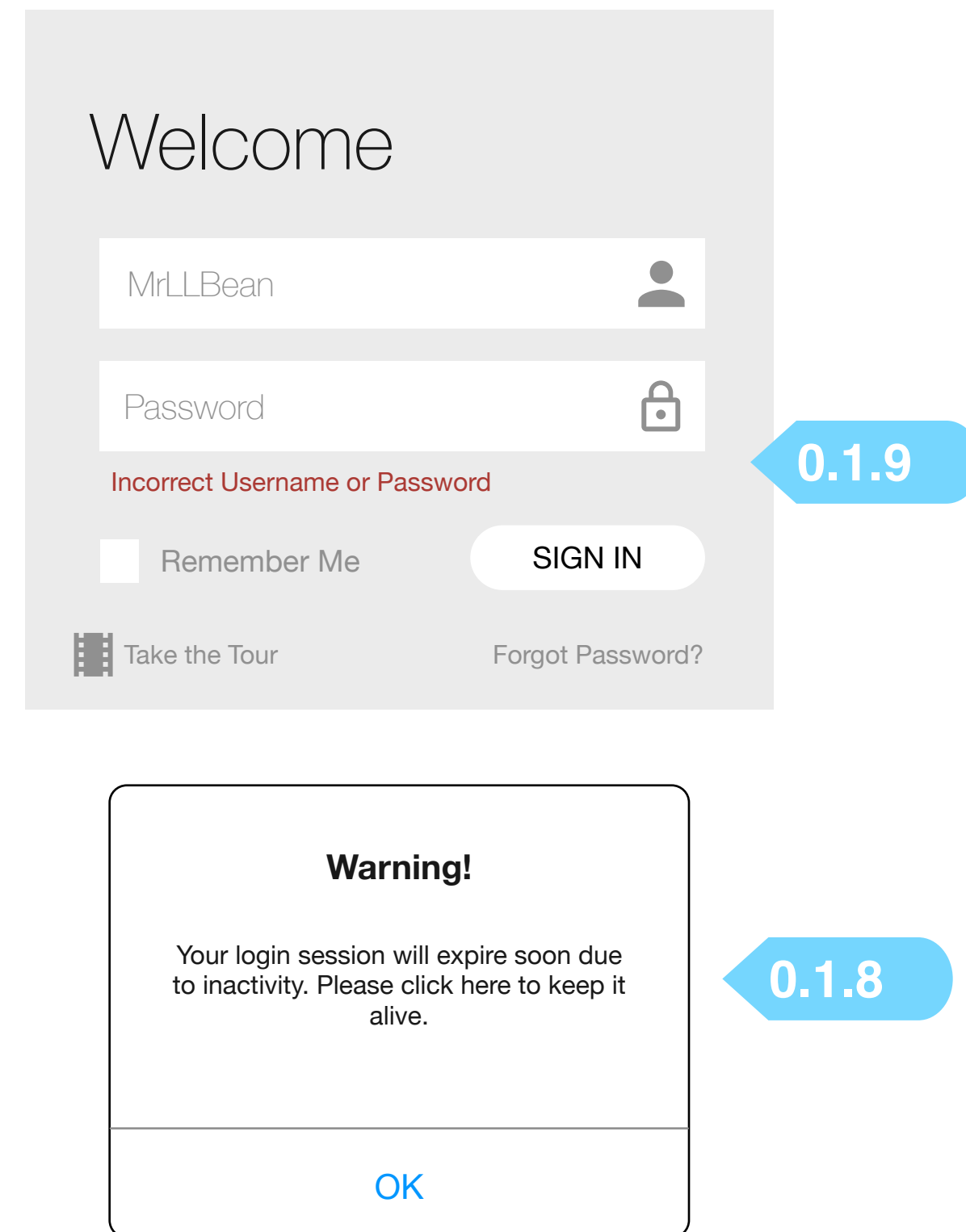
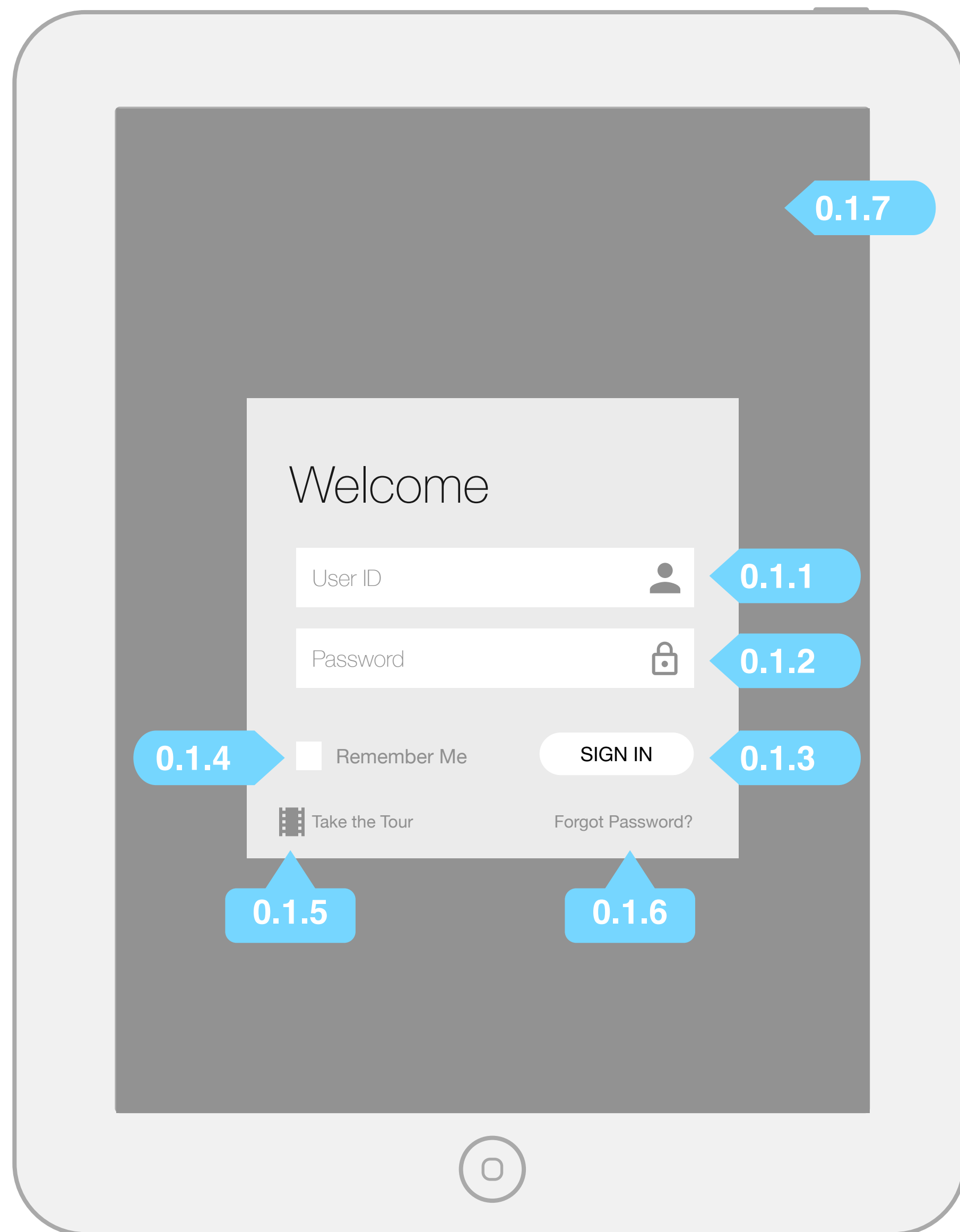
ADP Sales Performance App for iPad

1 - Global Elements/Login

User Experience Wireframes

0.1 Login

ADP Sales Performance App for iPad.graffle



Annotations

0.1.1 User ID

- Tap to show native keyboard and blinking cursor
- Helper text persists

0.1.2 Password

- Tap to show native keyboard and blinking cursor
- Helper text persists

0.1.3 Sign In button

- Tap to go to [1.1 Dashboard](#)
- Selected state shows on tap and loader appears before showing dashboard

0.1.4 Remember Me checkbox

- Selected state shows on tap
- User credentials are saved

0.1.5 Take the Tour link

- Selected state shows on tap
- Opens ADP onboarding video in native player.
- User can return to login screen by tapping Done from native player.

0.1.6 Forgot Password link

- Selected state shows on tap
- Opens default browser with ADP Forgot Credentials page loaded
- User must exit browser and re-enter ADP Beacon app to return to Login screen

0.1.7 Background

- Rotates through images
- Logo appears in upper right corner

0.1.8 App time out

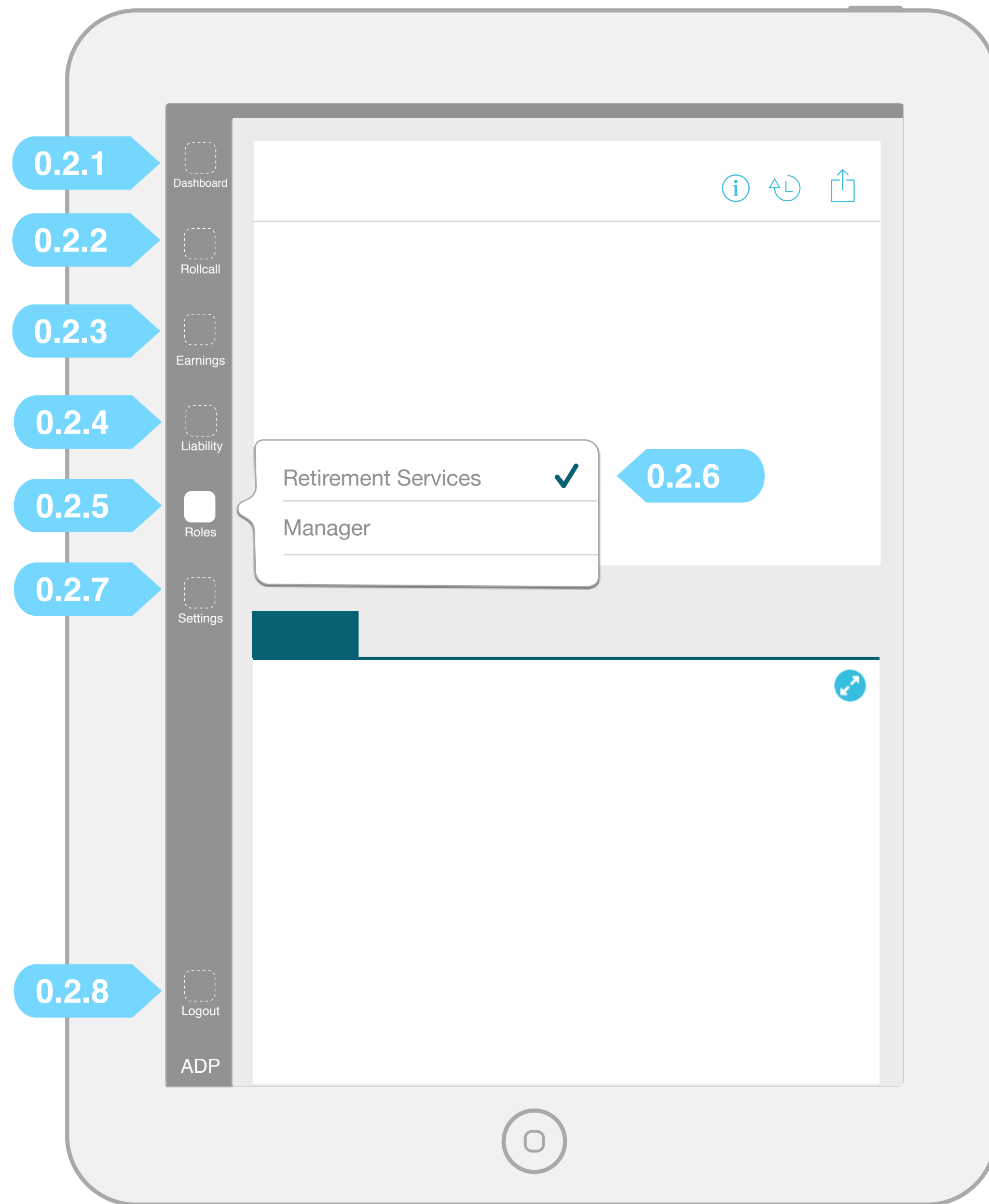
- App times out after period of time
- Notification modal appears before returning to Login screen
- Tap Ok button to close modal

0.1.9 Login error states

- If invalid credentials entered, screen shakes and error message appears below form
- Error message is removed once user taps inside user ID or password field

0.2 Global Spine Navigation

ADP Sales Performance App for iPad.graffle



Annotations

0.2.1 Dashboard icon

- Tap to go to [1.1 Dashboard](#)
- Icon is highlighted on tap and when user is on dashboard view

0.2.2 Rollcall

- Tap to go to [2.1 Rollcall](#)
- Icon is highlighted on tap and when user is on dashboard view

0.2.3 Earnings

- Tap to go to [3.1 Earning Summary](#)
- Icon is highlighted on tap and when user is on dashboard view

0.2.4 Liability

- Tap to go to [4.1 Liability](#)
- Icon is highlighted on tap and when user is on dashboard view

0.2.5 Roles icon/modal

- Tap to open pop over modal
- Icon is highlighted when modal is open

0.2.6 Roles Modal

- User can select from list of filters (currently Retirement Services and Manager)
- Tap list element to change current view based on selected category
- Check mark indicates current role selection
- Tap outside modal to close

0.2.7 Settings

- Tap to go to [5.1 Settings](#)
- Icon is highlighted on tap and when user is on dashboard view

0.2.8 Logout

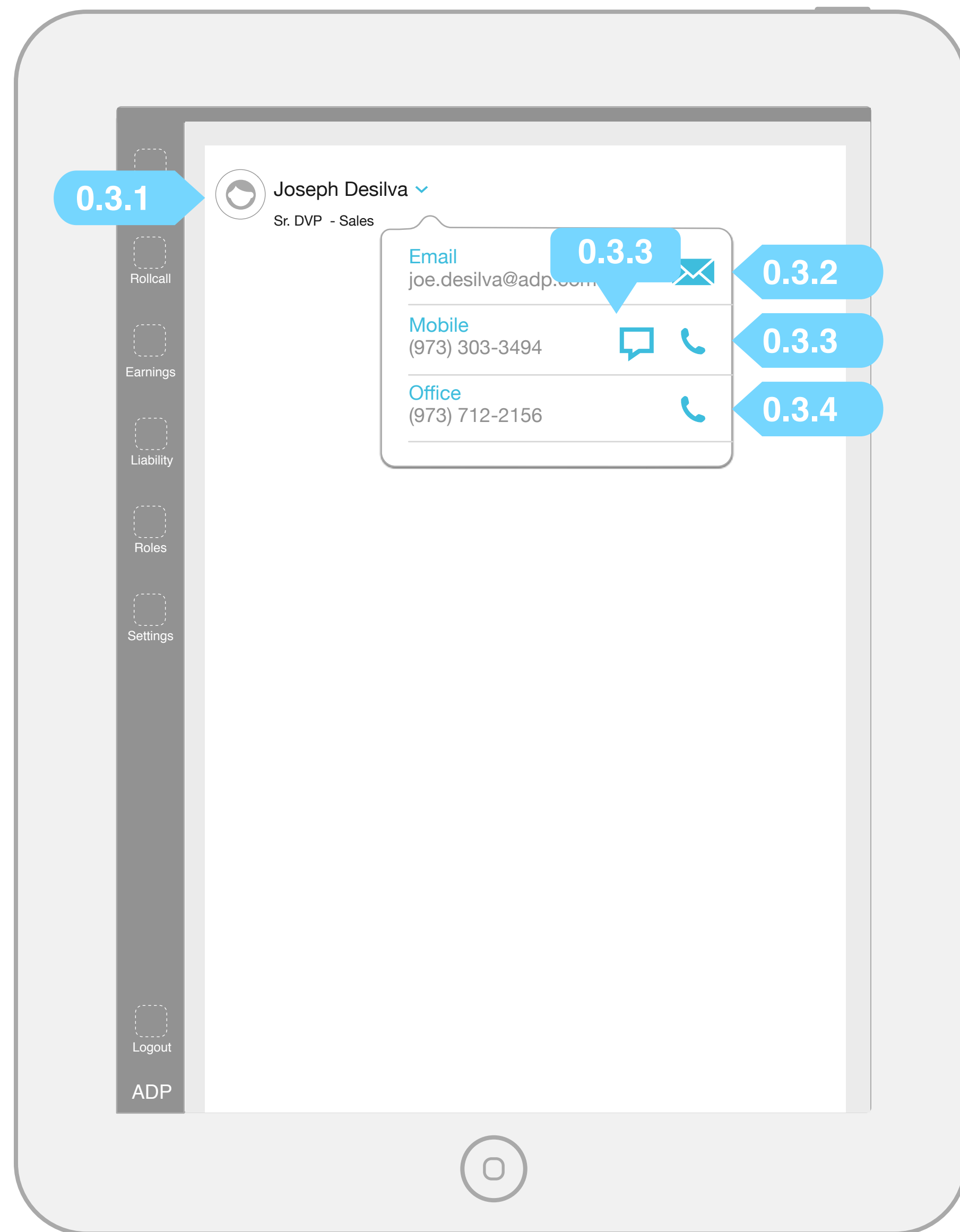
- Tap to go to [0.1 Login](#)

USER SPECS

Rolls not available for Devito or Rigby

0.3 User Profile

ADP Sales Performance App for iPad.graffle



Annotations

0.3.1 User profile area

- Displays user profile image, name, roll and department
- Tap to open User contact info pop over modal

0.3.2 Email

- Displays user's email address
- Tap email icon to open native email client with screenshot of current view loaded

0.3.3 Mobile

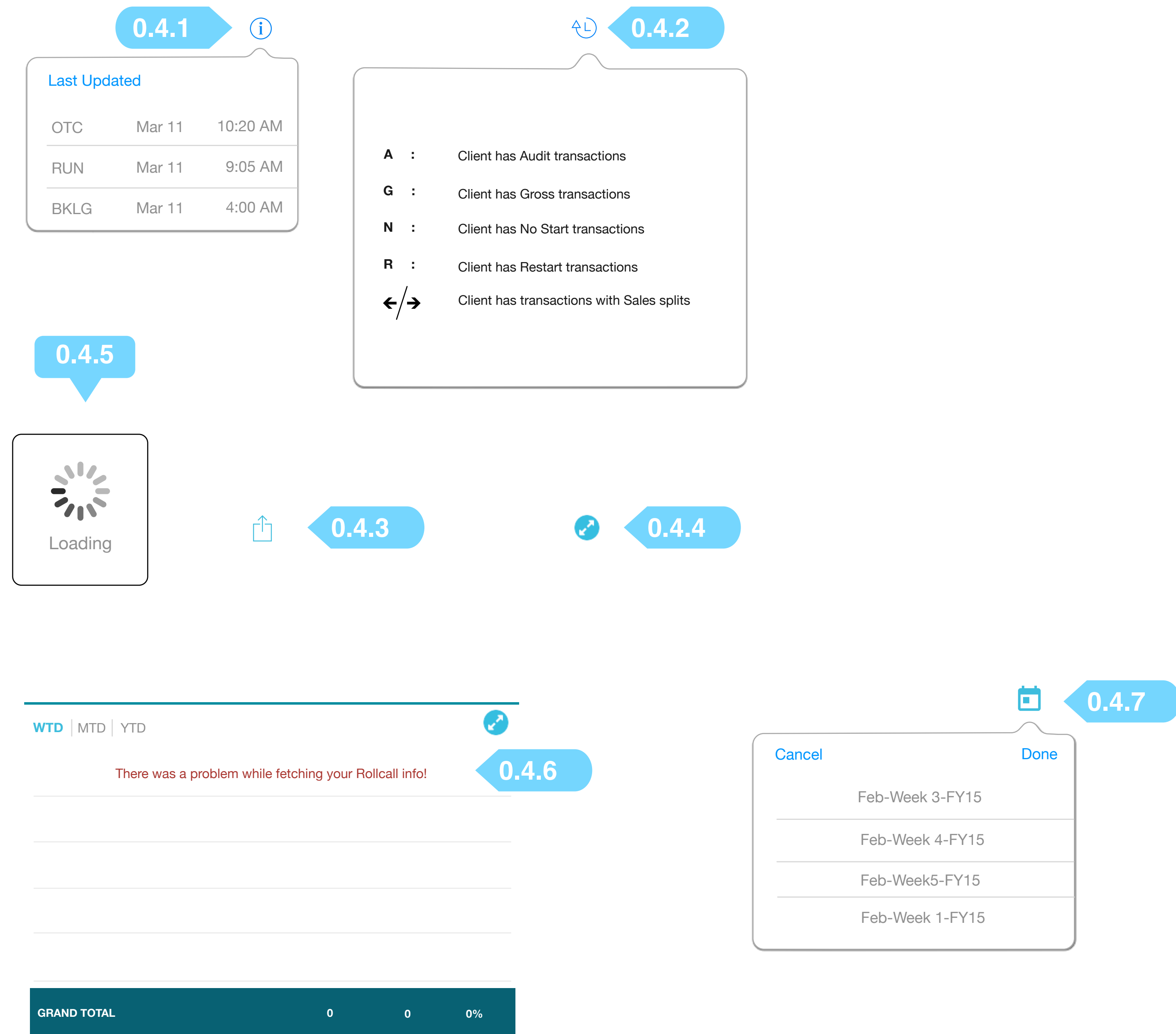
- Displays user's mobile number
- Tap to open native message client with phone number loaded into to field
- Tap phone icon to open native calling app modal prompting user to either call the mobile number or cancel.

0.3.4 Office

- Displays user's office number
- Tap phone icon to open native calling app modal prompting user to either call the office number or cancel.

0.4 Global UI Elements

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Annotations

0.4.1 Info icon

- Appears on Liability screen
- Tap to show show more information
- Pop over modal appears containing a header and formatted table on information
- Tap outside of modal to close

0.4.2 Last updated icon

- Appears on Dashboard, Rollcall, and Liability screens
- Tap to show when information was last updated
- Pop over modal appears containing formatted text
- Tap outside modal to close

0.4.3 Share icon

- Appears on all screens
- Tap to open native email application with screenshot of last screen used loaded to email body
- User must exit email app and return to Sales Beacon app to resume activity

0.4.4 Expand icon

- Tap to expand selected panel to top of screen
- Animates from bottom

0.4.5 Page reload

- Swipe down to reload data
- Loader appears and data refreshes

0.4.6 Error Message

- Displays when data can not load
- Indicates which set of data is not available in message

0.4.7 Calendar icon/Modal

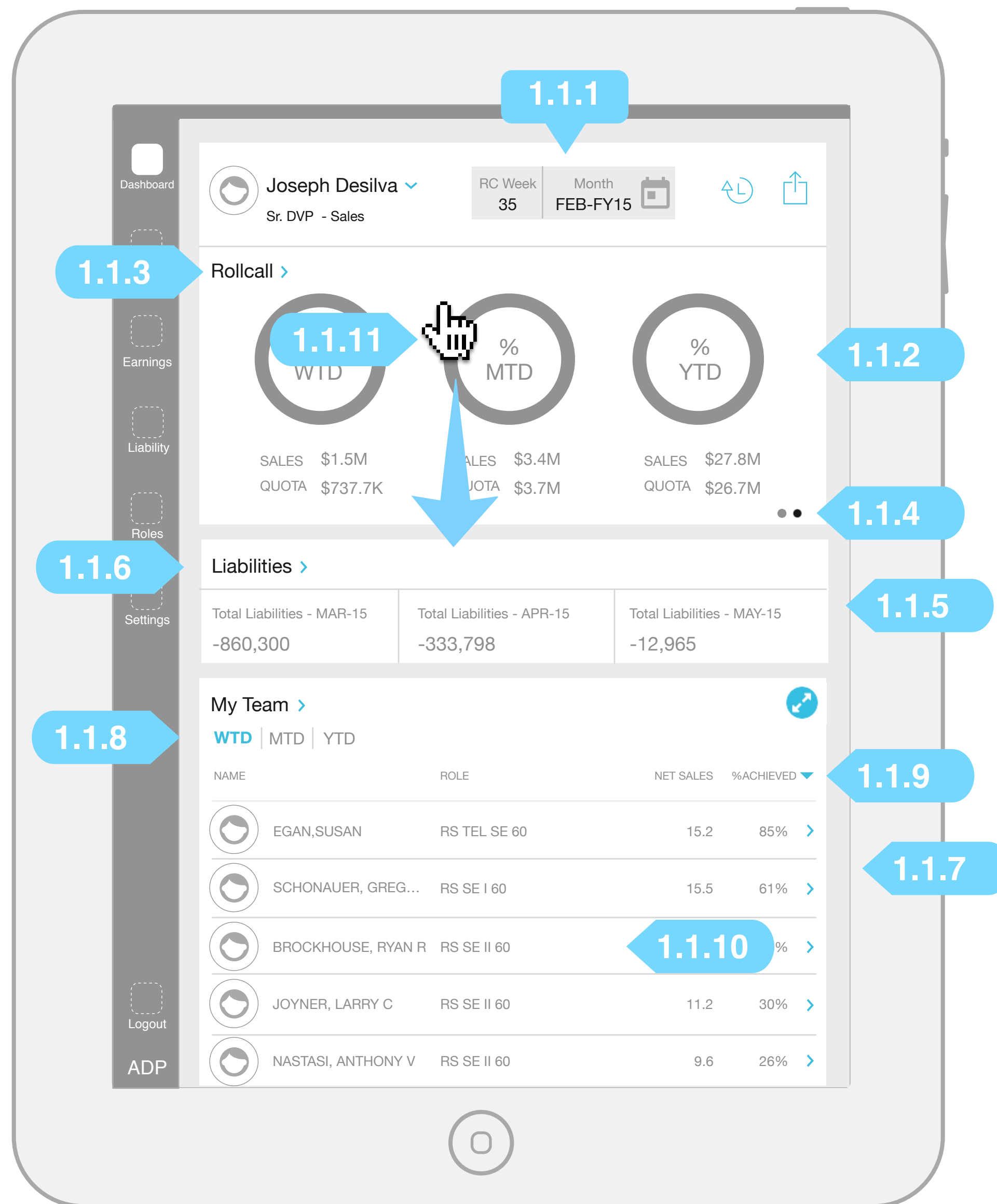
- Tap to open modal
- Users can scroll through date periods list and make selection
- Data is filtered by selection
- Tap Cancel to close modal and keep current settings
- Tap Done to close modal and reload the page with new settings

1 - Dashboard

User Experience Wireframes

1.1 Dashboard

ADP Sales Performance App for iPad.graffle



Annotations

1.1.1 Date

- Displays RC Week and Moth

1.1.2 Rollcall section

- Displays summary view of Rollcall data

1.1.3 Rollcall Header

- Tap to go to [2.1 Rollcall](#)

1.1.4 Rollcall Navigation

- Swipe to view additional Rollcall summary view
- Animates right to left on swipe
- Navigation dot updates
- Table summary of data is shown in second view

1.1.5 Liabilities Section

- Displays summary view of Liabilities data

1.1.6 Liabilities Header

- Tap to go to [4.1 Liability](#)

1.1.7 My Team section

- Header is not clickable
- Displays table view of users on My Team including profile image, name, role, net sales, and % achieved
- If no user profile is available, avatar displays

1.1.8 WTD/MTD/YTD tabs

- Tap to display My Team data filtered by time period selection
- Selected tab is highlighted

1.1.9 % Achieved sort

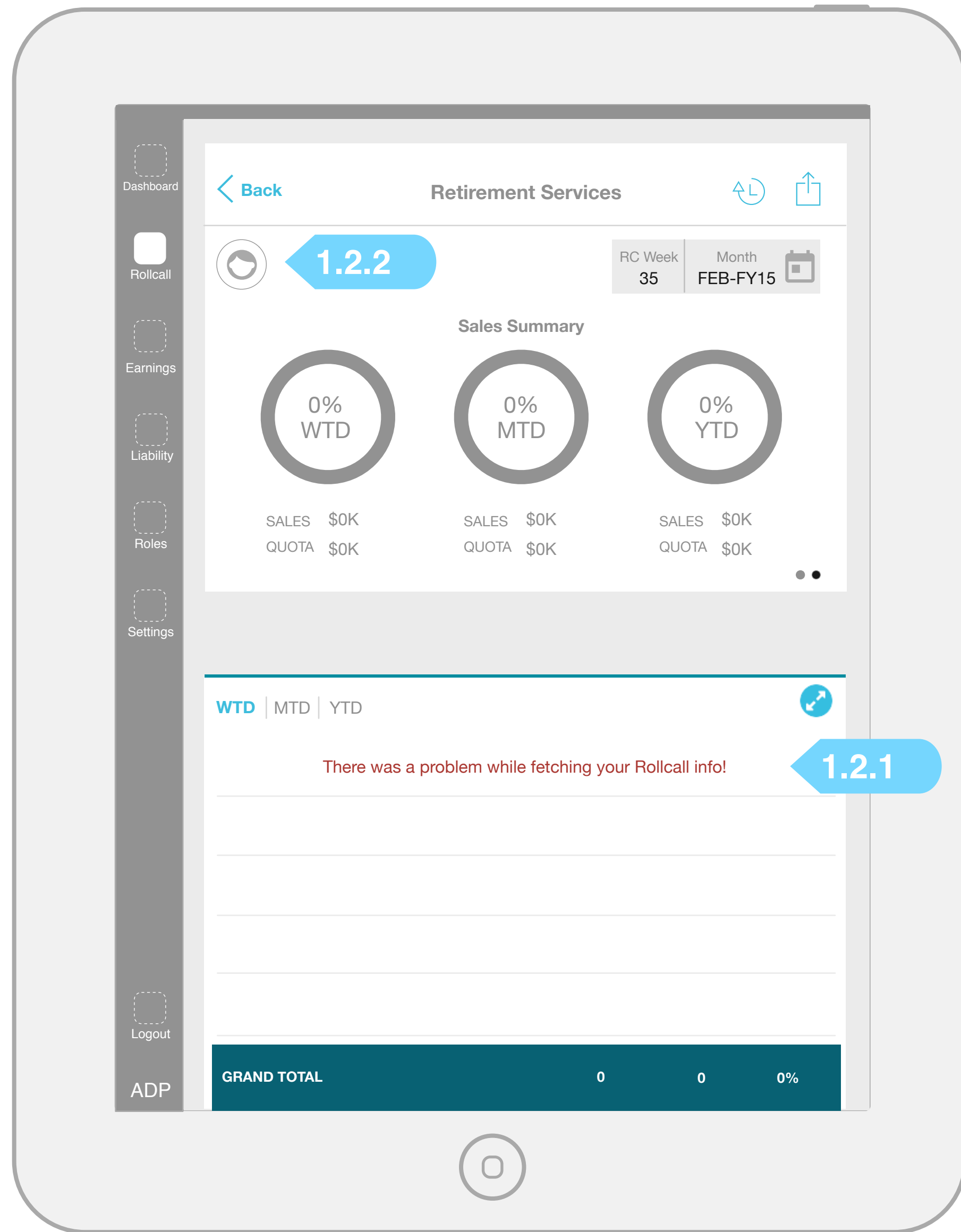
- Tap % Achieved to sort for lowest to highest or highest to lowest
- Highest & shown by default
- Arrow rotates up or down depending on selection

1.1.11 Scroll

- Header and sidebar navigation is anchored

1.2 User Detail

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Annotations

1.2.1 Data Error Message

- Data load error appears if no Rollcall info is available for team member.

1.2.2 Team Member Image

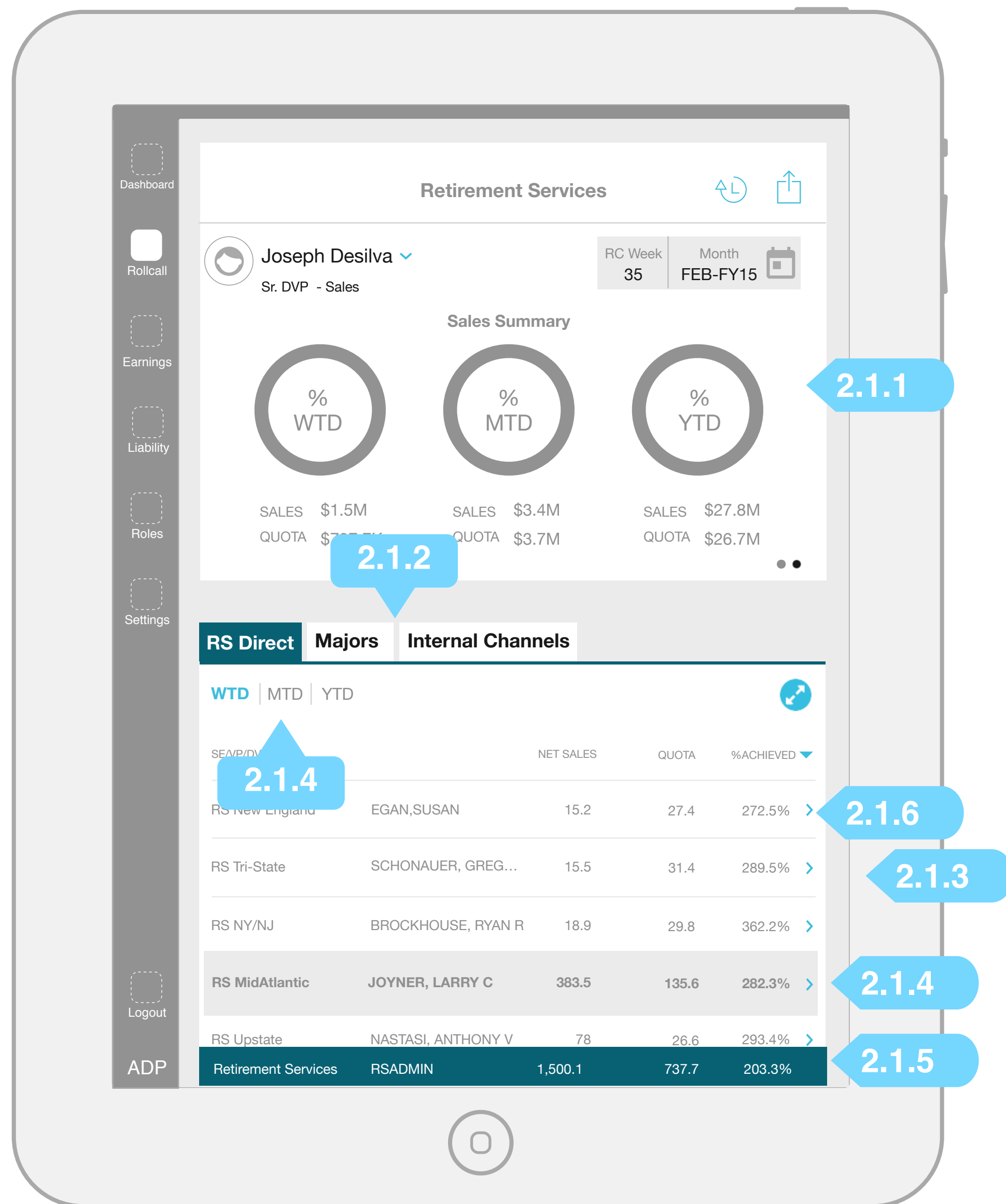
- Team Member image is displayed
- If no image is available, avatar displays

2 - Rollcall

User Experience Wireframes

2.1 Rollcall

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Annotations

2.1.1 Sales Summary

- This section displays the same data and operates the same as dashboard Sales Summary
- Swipe to go to [2.2 Sales Summary Table View](#)
- Navigation dots update

2.1.2 RS Direct/Majors/Internal Channels tabs

- Tap Majors tab to go to [2.3 Majors Tab](#)
- Tap Internal Channels tab to go to [2.4 Internal Channels Tab](#)
- Selected state is shown

2.1.3 RS Direct view

- Displays SE/VP/DVP, name, net sales, quota, and % achieved for team members for RS Direct

2.1.4 WTD/MTD/YTD tabs

- Tap to filter data by WTD/MTD/YTD. These tabs operate the same way as on the dashboard.

2.1.4 Highlighted lines

- Highlighted lines show regional totals

2.1.5 Retirement Services Total

- Line highlighted in teal shows tally for figures in list
- This line is anchored to the bottom of the screen as users scroll down through list

2.1.6 Team Member detail

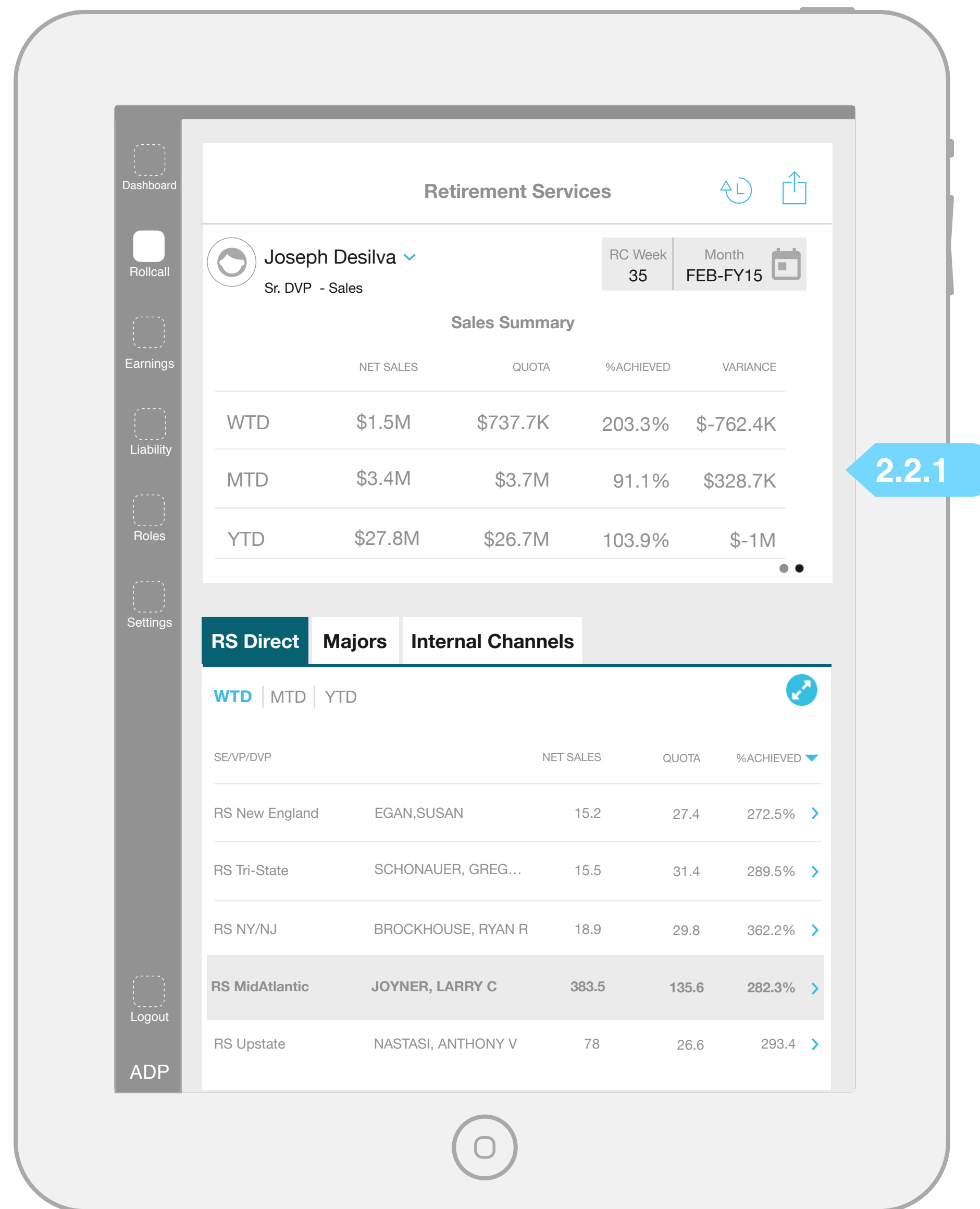
- Tap to go to [1.2 Team Member Detail](#)
- This is available for RS Direct and Majors views

USER SPECS

My Team and Sales Person tabs not available for Rigby.

2.2 Sales Summary Table View

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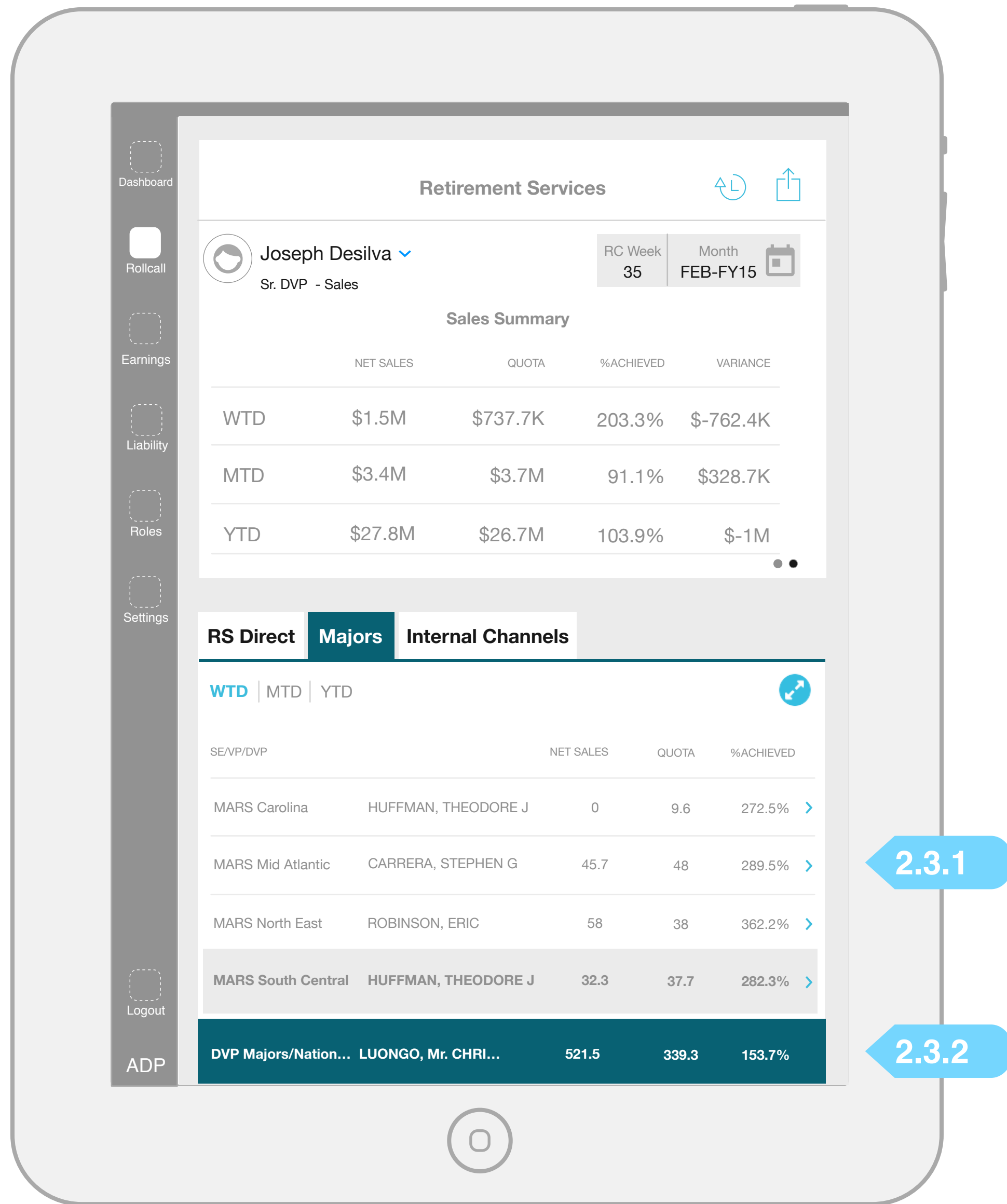
Annotations

2.2.1 Sales Summary Table

- Displays Sales Summary data in table format

2.3 Majors Tab

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Annotations

2.3.1 Majors view

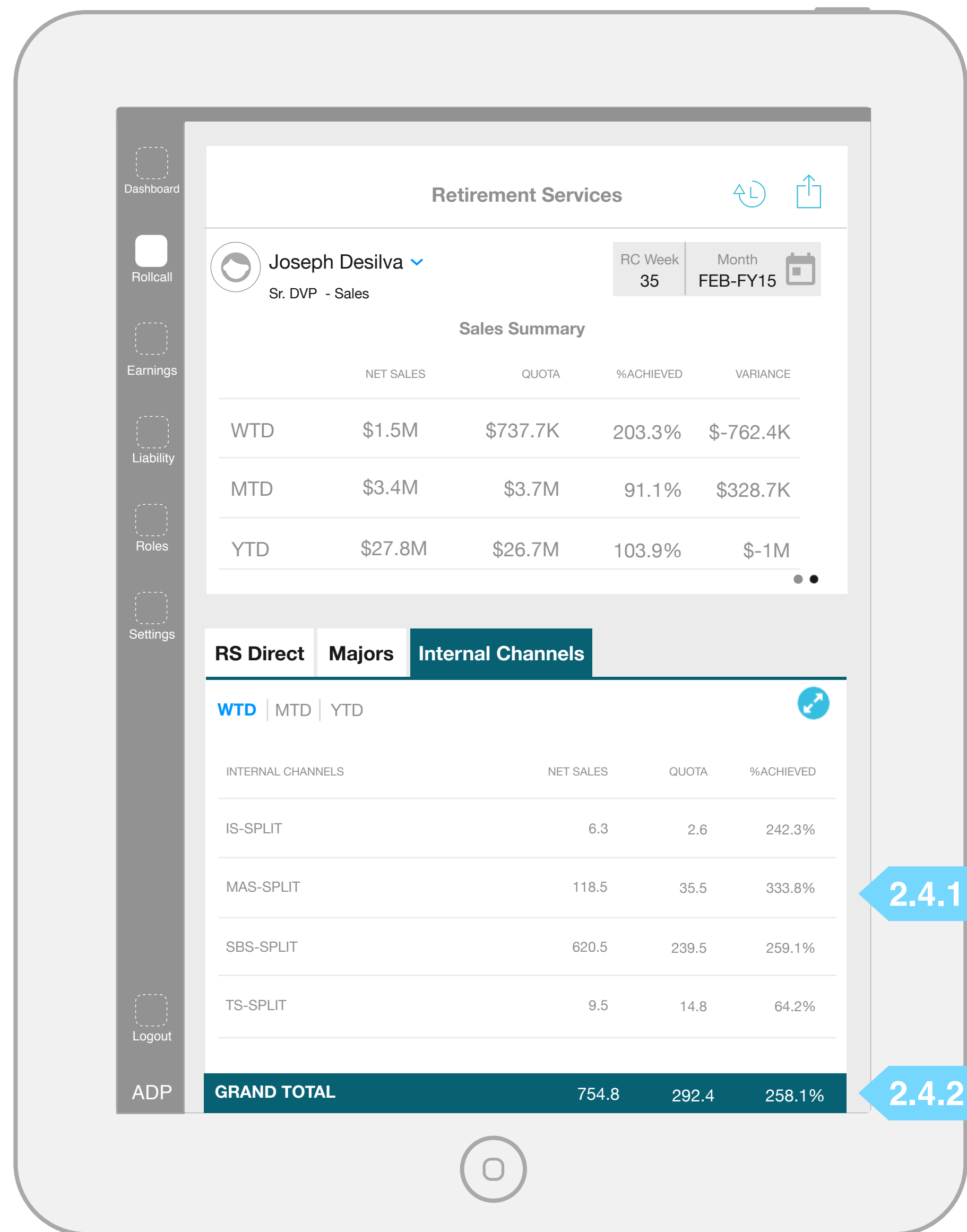
- Displays SE/VP/DVP, name, net sales, quota, and % achieved for team members for Majors

2.3.2 Majors Services Total

- Line highlighted in teal shows tally for figures in list
- This line is anchored to the bottom of the screen as users scroll down through list

2.4 Internal Channels Tab

ADP Sales Performance App for iPad.graffle



Annotations

2.4.1 Internal Channels view

- Displays summary view of net sales, quota, and % achieved for Internal Channels

2.4.2 Internal Channels Total

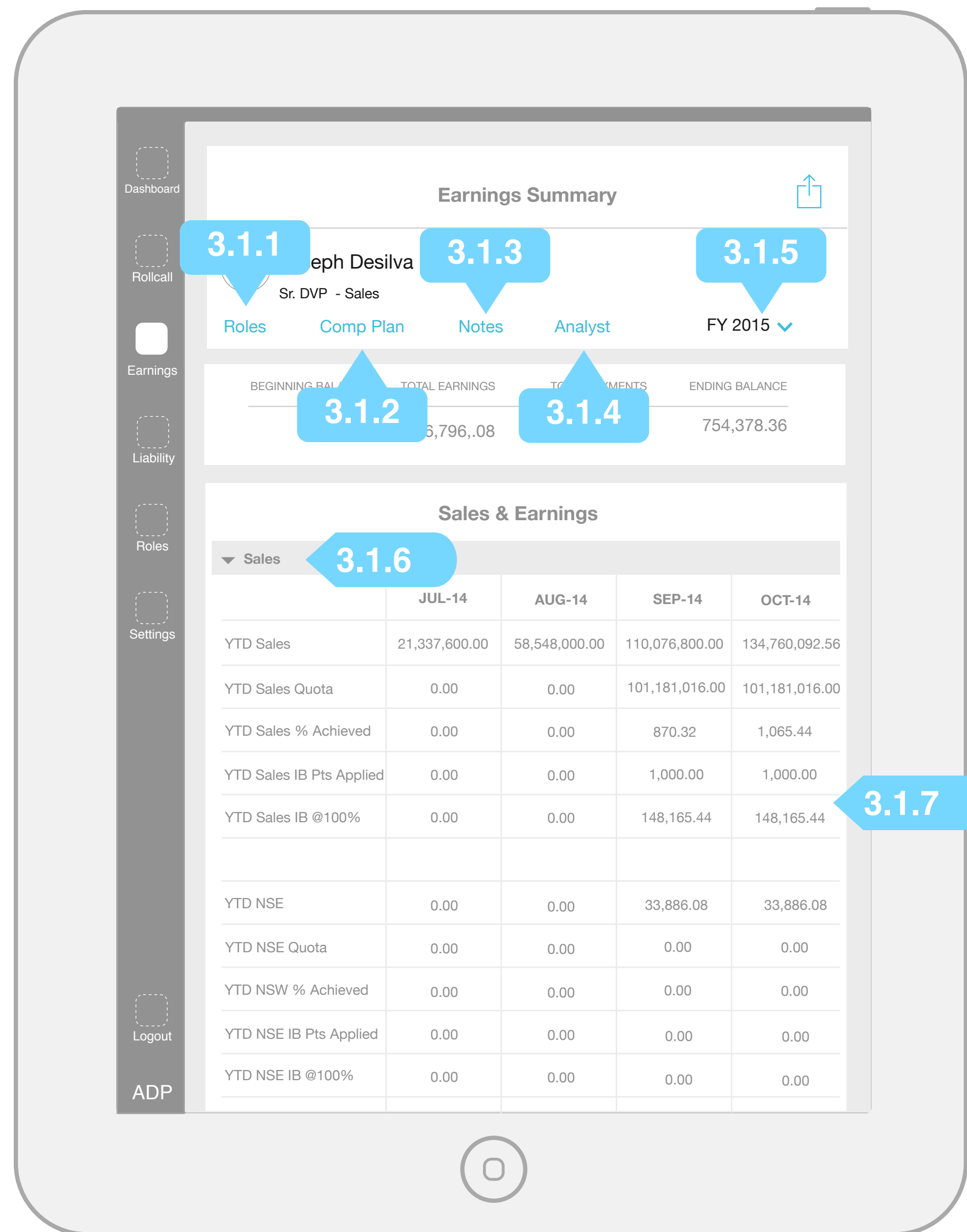
- Line highlighted in teal shows tally for figures in list
- This line is anchored to the bottom of the screen as users scroll down through list

3 - Earnings Summary

User Experience Wireframes

3.1 Earnings Summary

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Annotations

3.1.1 Roles

- Tap to go to [3.2 Roles](#)

3.1.2 Comp Plan

- Tap to go to [3.3 Comp Plan](#)

3.1.3 Notes

- Tap to go to [3.4 Notes](#)

3.1.4 Analyst

- Tap to go to [3.5 Analyst](#)

3.1.5 Year (FY)

- Tap to go to [3.6 FY](#)

3.1.6 Sales/Earnings Headers

- Tap to collapse or expand sections
- Carrot updates up or down

3.1.7 Sales Section

- Displays sales data in table format categorized by month/yr
- Total Quota and Total IB are available at the last column of the table

3.1.8 Earnings Section

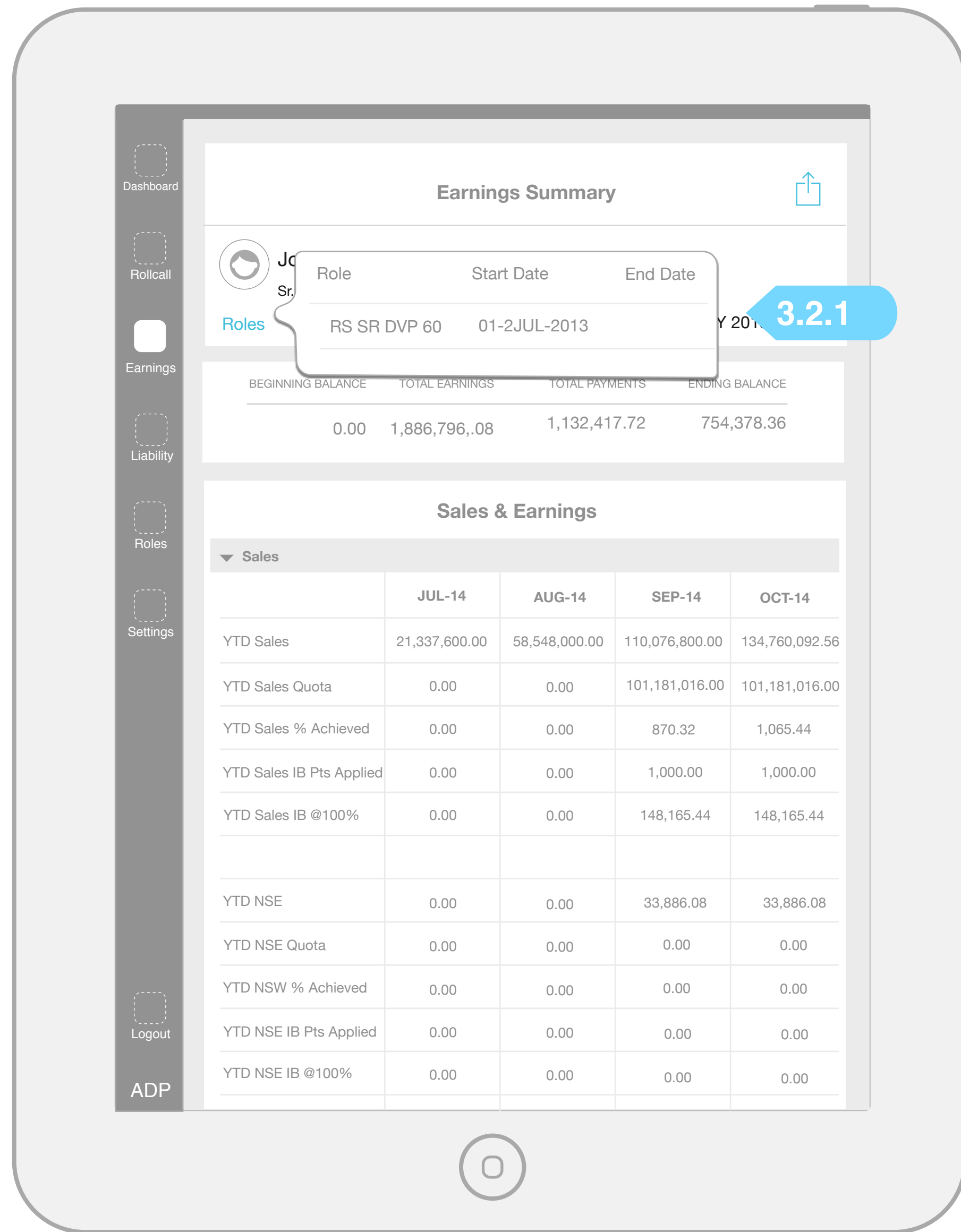
- Not shown in figure
- Displays sales data in table format categorized by month/yr
- The total is available at last column of the table

3.1.9 Scroll

- User can scroll left to right in Sales and Earnings views to see full table
- When scrolling up and down the Earnings Summary section and Sales header and then further down the Earnings header is anchored to top of Sales and Earnings section.

3.2 Roles

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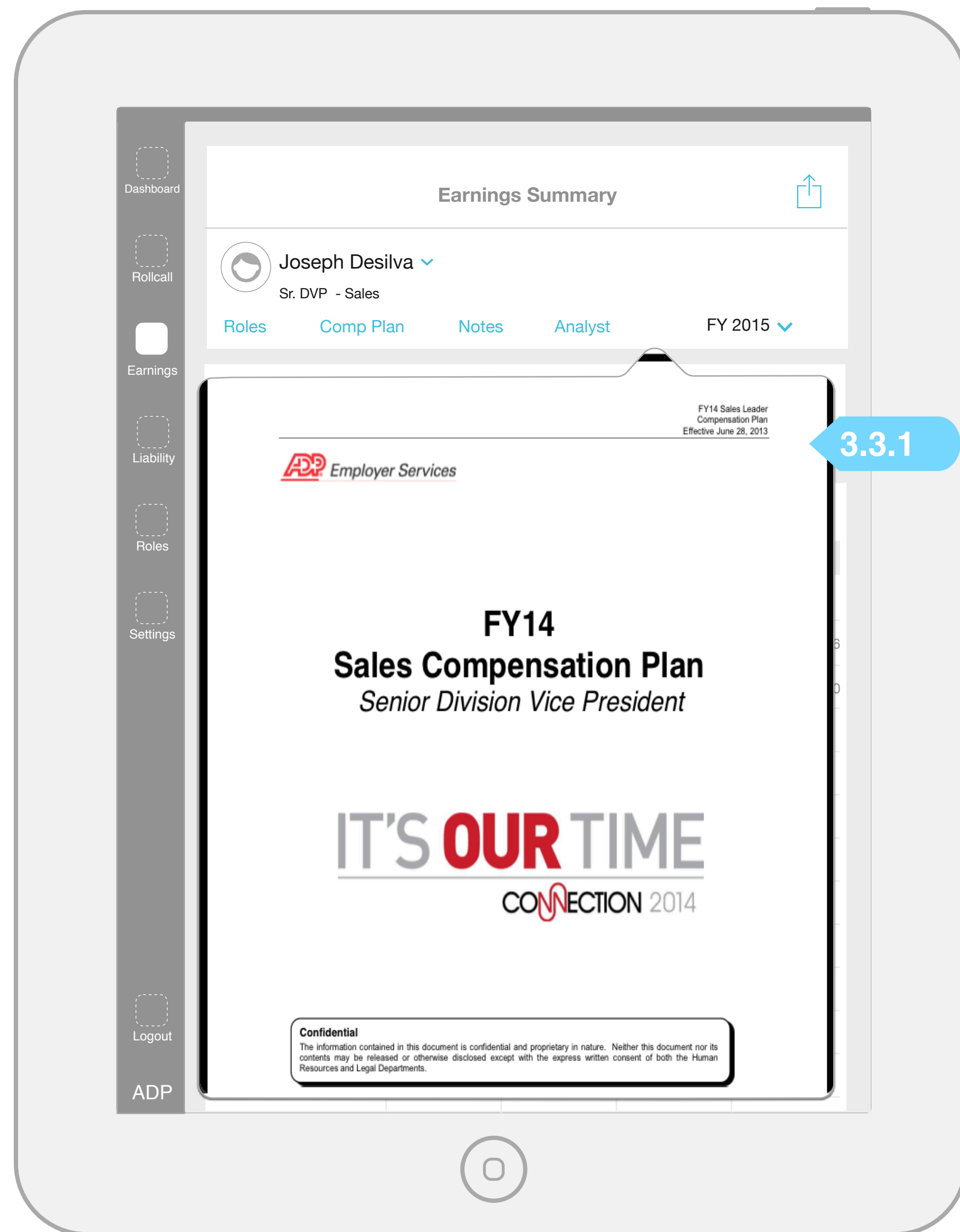
Annotations

3.2.1 Roles Modal

- Displays role, start date, and end date
- Tap outside modal to close

3.3 Comp Plan

ADP Sales Performance App for iPad.graffle



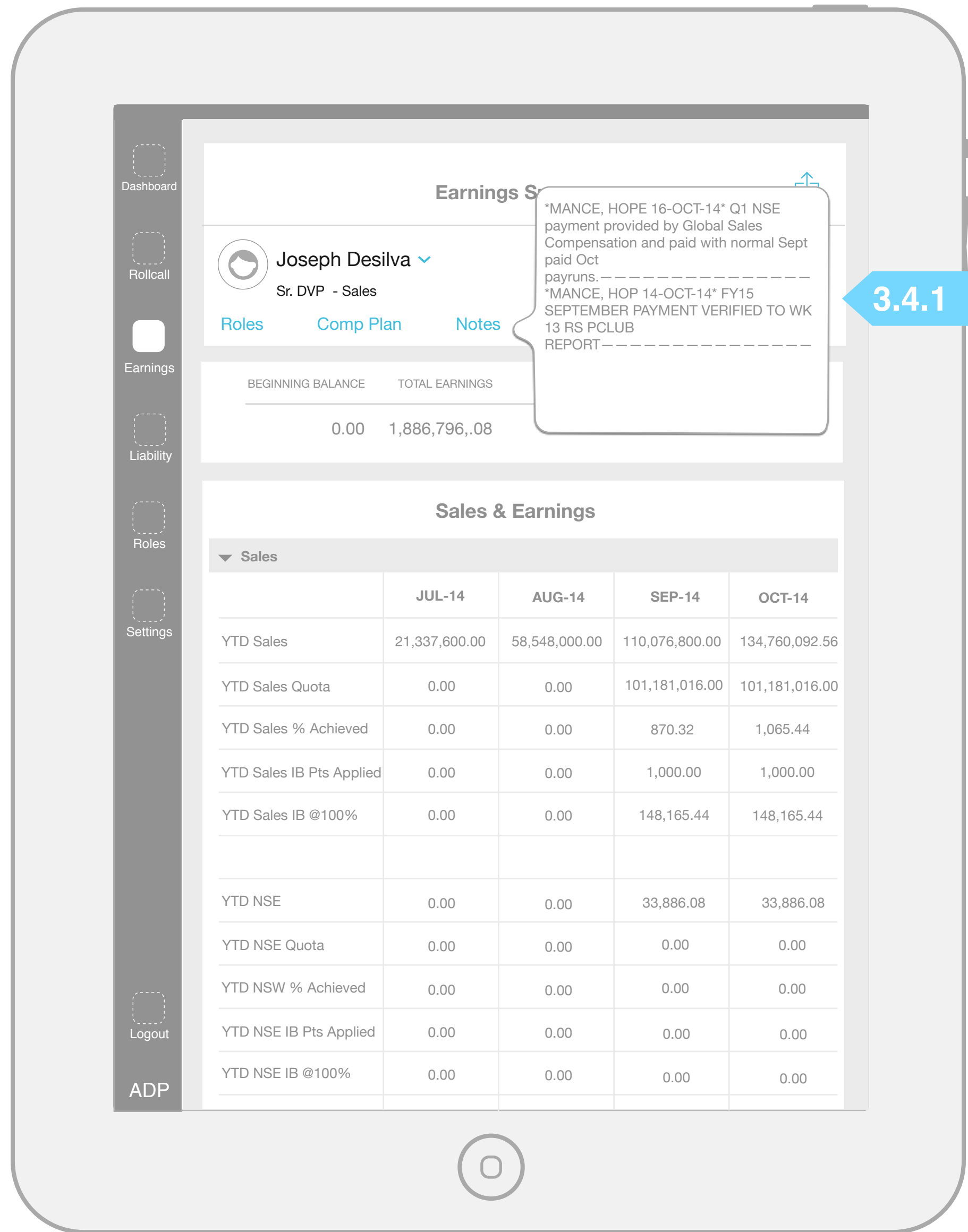
Annotations

3.3.1 Comp Plan Modal

- Displays members compensation plan in PDF format
- Tap outside modal to close
- User can scroll within modal to view more pages
- Page number indicator appears on scroll updating as user views additional pages
- Number indicator fades after a period of time

3.4 Notes

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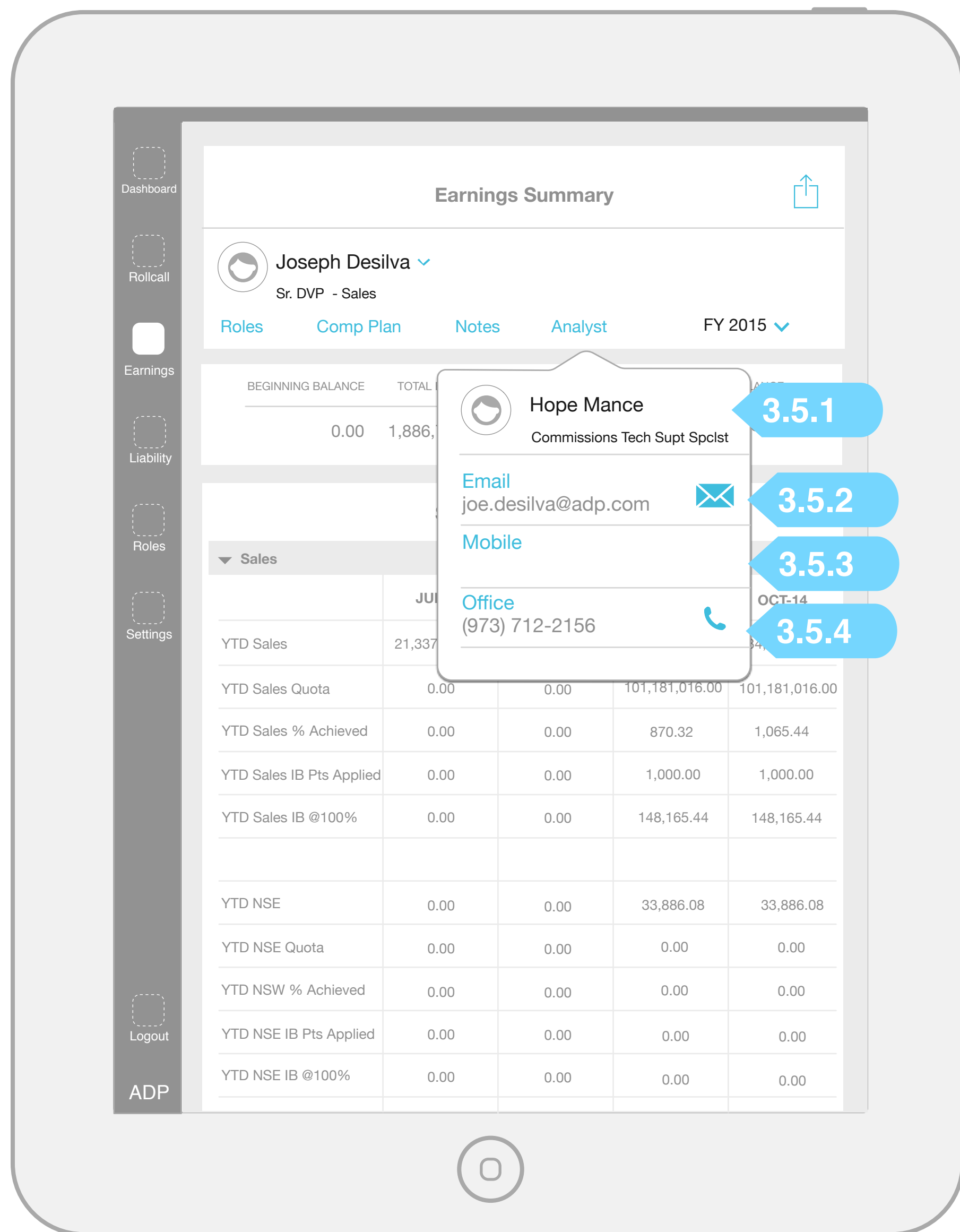
Annotations

3.4.1 Notes modal

- Tap outside modal to close
- Displays text notes about Team Member

3.5 Analyst

ADP Sales Performance App for iPad.graffle



Annotations

3.5.1 Analyst Basic Info Header

- Displays user profile image, name, roll and department of Analyst
- Tap outside modal to close

3.5.2 Email

- Displays analysts' email address
- Tap email icon to open native email client with screenshot of current view loaded

3.5.3 Mobile

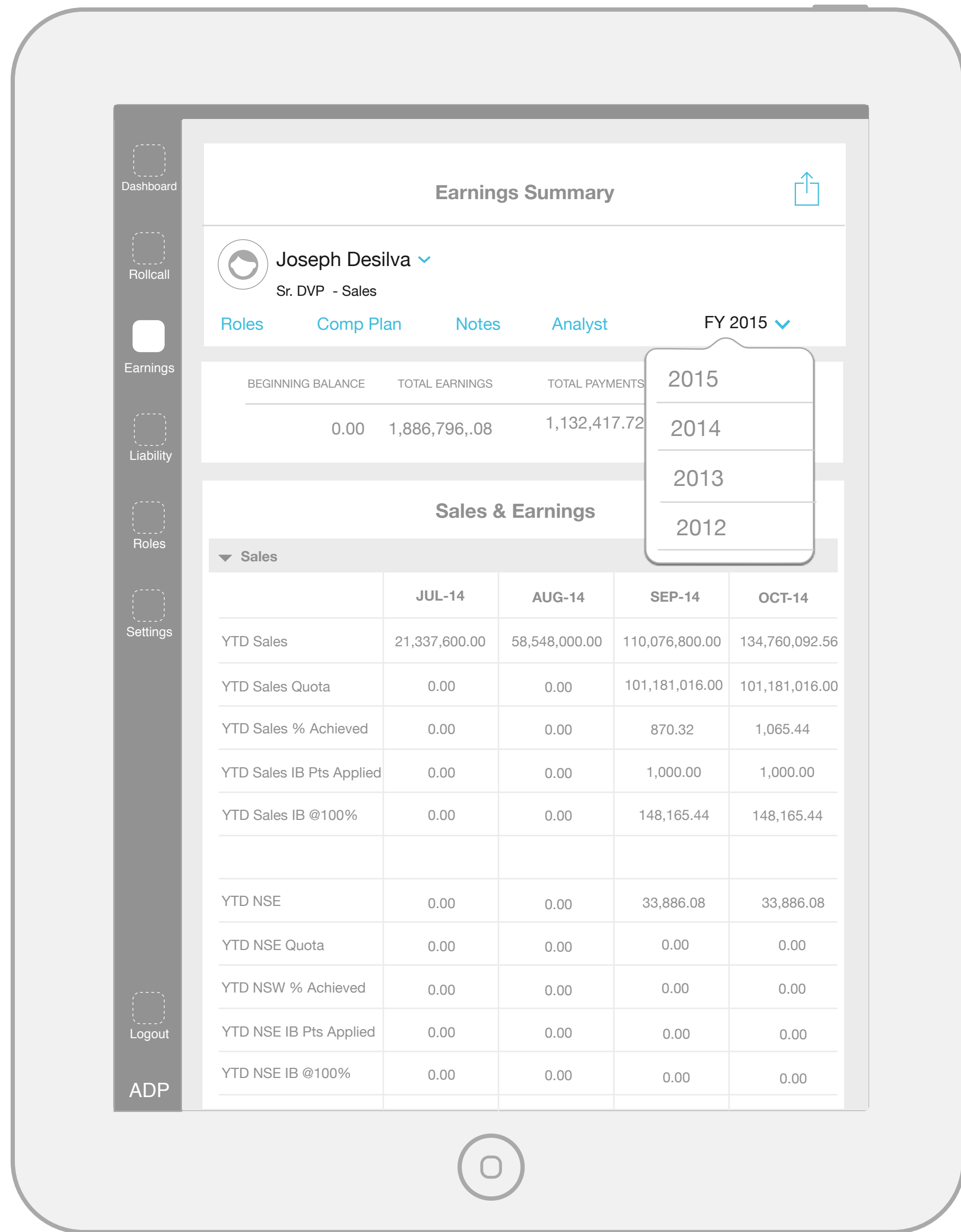
- Not shown in figure
- Displays user's mobile number
- Tap to open native message client with phone number loaded into to field
- Tap phone icon to open native calling app modal prompting user to either call the mobile number or cancel.

3.5.4 Office

- Displays user's office number
- Tap phone icon to open native calling app modal prompting user to either call the office number or cancel.

3.6 FY

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Annotations

3.6.1 FY Modal

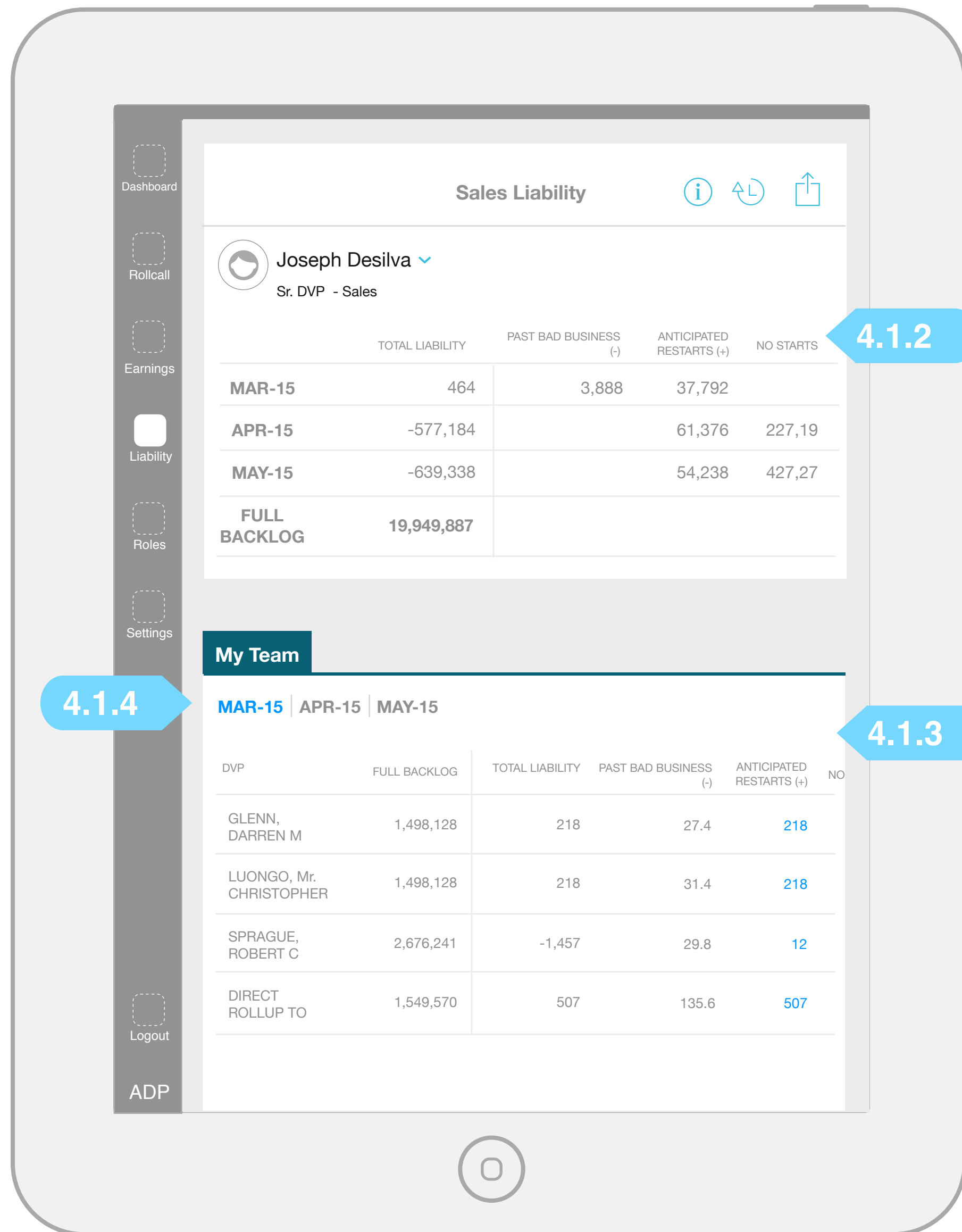
- Displays list of years to filter data by
- Loader appears and Sales & Earnings data reloads displaying for selected year
- Tap outside modal to close
- User can scroll within modal

4 - Liability

User Experience Wireframes

4.1 Liability

ADP Sales Performance App for iPad.graffle



4.1.1

Full Backlog : Entire backlog (sold and no start status).

Past Bad Business : Business coded as bad, should have already come down and will come down this month.

Anticipated restarts : No started business that will restart this month (based on planned/esitmed start date in OTC).

No starts : Scheduled to come down this month and will restart in a future month or has an ESD prior today's date or has a blank ESD.

Bad Business : Business coded as bad business (known as Flex10 or 12/12/1950).**

Audits : To be adjusted this month.

Total Liability : Net liability to add or subtract to gross sales.

At Risk & Restart : Will TNS this month but has an estimated start date prior to month end. Please review. Will be liability if the start date pushes.*

Anticipated Starts : Reflects potential liability if the business doesn't start on the estimated start date (has as estimated start date prior to the no start date in the same month).

* At Risk business should be forecasted as part of this month's liability but will restart later in the month as part of the anticipated restarts.
 ** When estimated start date is updated as 12/12/1950 by the first fiscal Friday of the month, business will come down the next fiscal month.
 If the estimated start date is updated after the first fiscal Friday of the month, the business will come down the following fiscal month.

Annotations

4.1.1 Info modal

- Displays text notes about Sales Liability view
- Tap outside modal to close

4.1.2 Sales Liability section

- Displays table graph of data
- Users can scroll left/right to view full table
- Time frame and total liability column anchor to left on scroll

4.1.3 My Team section

- Displays table graph of data
- Users can scroll left/right or up/down to view full table
- Time frame and total liability column anchor to left on scroll

4.1.4 Month filter

- Tap to display data for month
- Current month's data displays with different fields than future two months

USER SPECS

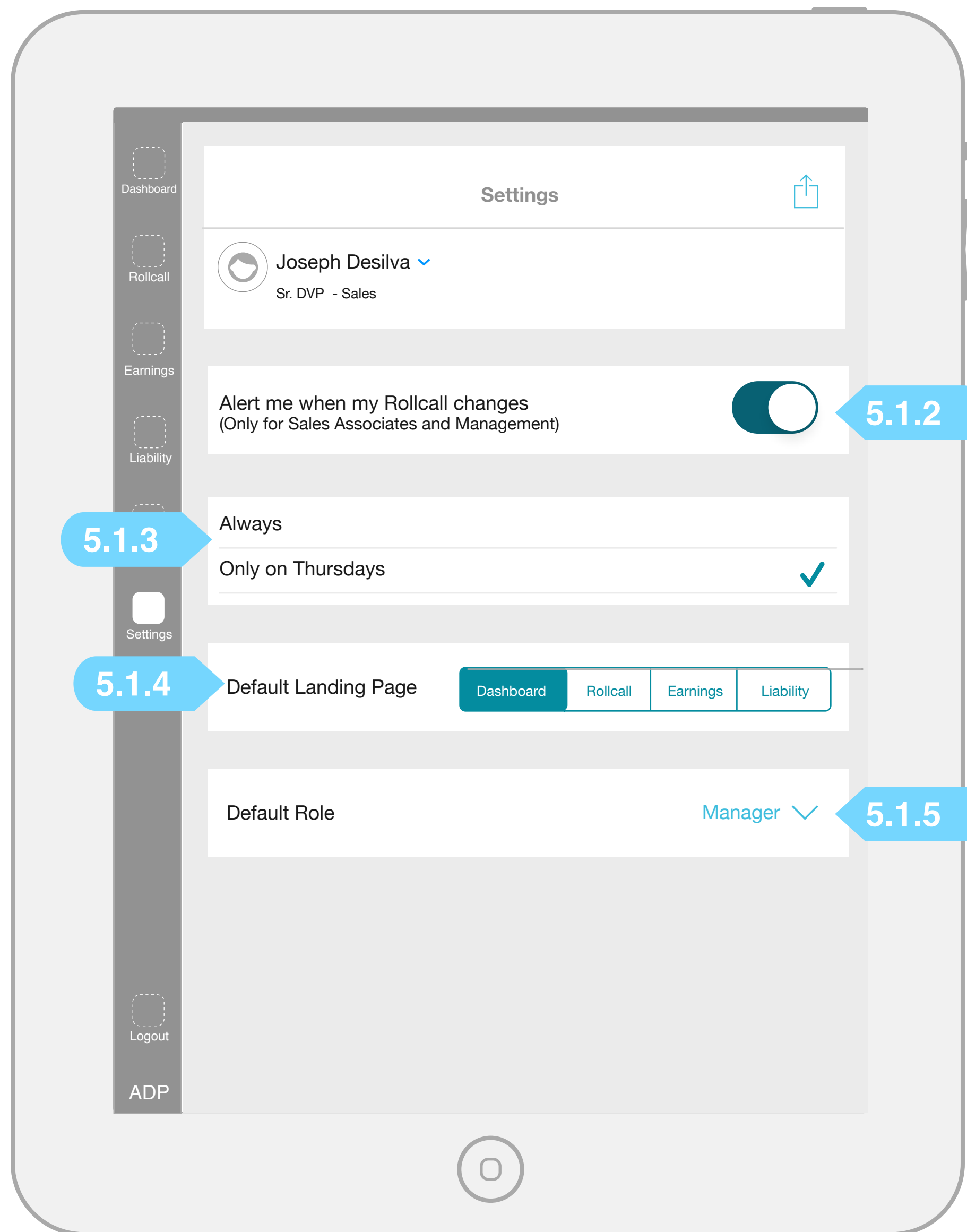
Sales Person tab (not shown in figure only available to Desilva)

5 - Settings

User Experience Wireframes

5.1 Settings

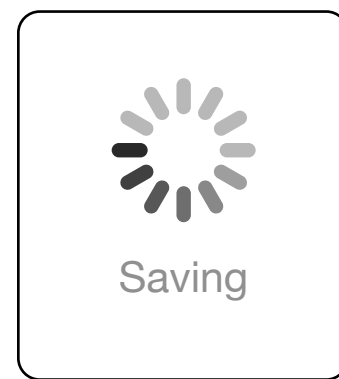
ADP Sales Performance App for iPad.graffle



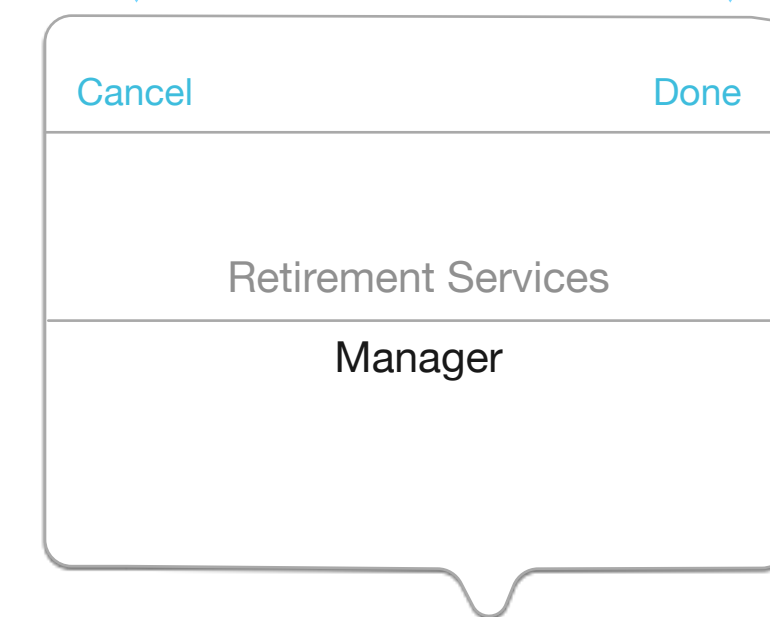
Notifications for Sales Beacon are currently turned off in your iPad settings. Please go to Settings > Notifications > Sales Beacon and turn it on so that you can receive notifications.

OK

5.1.1



0.1.1



0.1.1

5.1.6

Annotations

5.1.1 Notifications Modal

- Tap okay to close modal
- Modal appearance persists until user adjusts notification settings

5.1.2 Rollcall changes toggle

- Tap green area or slide to turn toggle to off position
- On is selected as default

5.1.3 Frequency

- Options are "Always" or "Only on Thursdays"
- Only one option can be selected at a time
- Tap in deselected area to change options
- Saving loader appears and fades, check mark then appears in selected option cell

5.1.4 Default Landing page

- Options are "Dashboard", "Rollcall", "Earnings", and "Liability"
- Only one option can be selected at a time
- Options appear as tabs and the selected default landing page is highlighted
- Tap deselected tab to change option
- Saving loader appears and fades, selected tab is highlighted

5.1.5 Default Role

- Tap to display Role pop over modal

5.1.6 Default Modal

- User can scroll within modal and select from list of options

5.1.7 Cancel

- Tap to close modal and keep current Role settings

5.1.8 Done

- Tap to close modal and save new Role settings

USER SPECS

Devito and Rigy do not have access to the following:

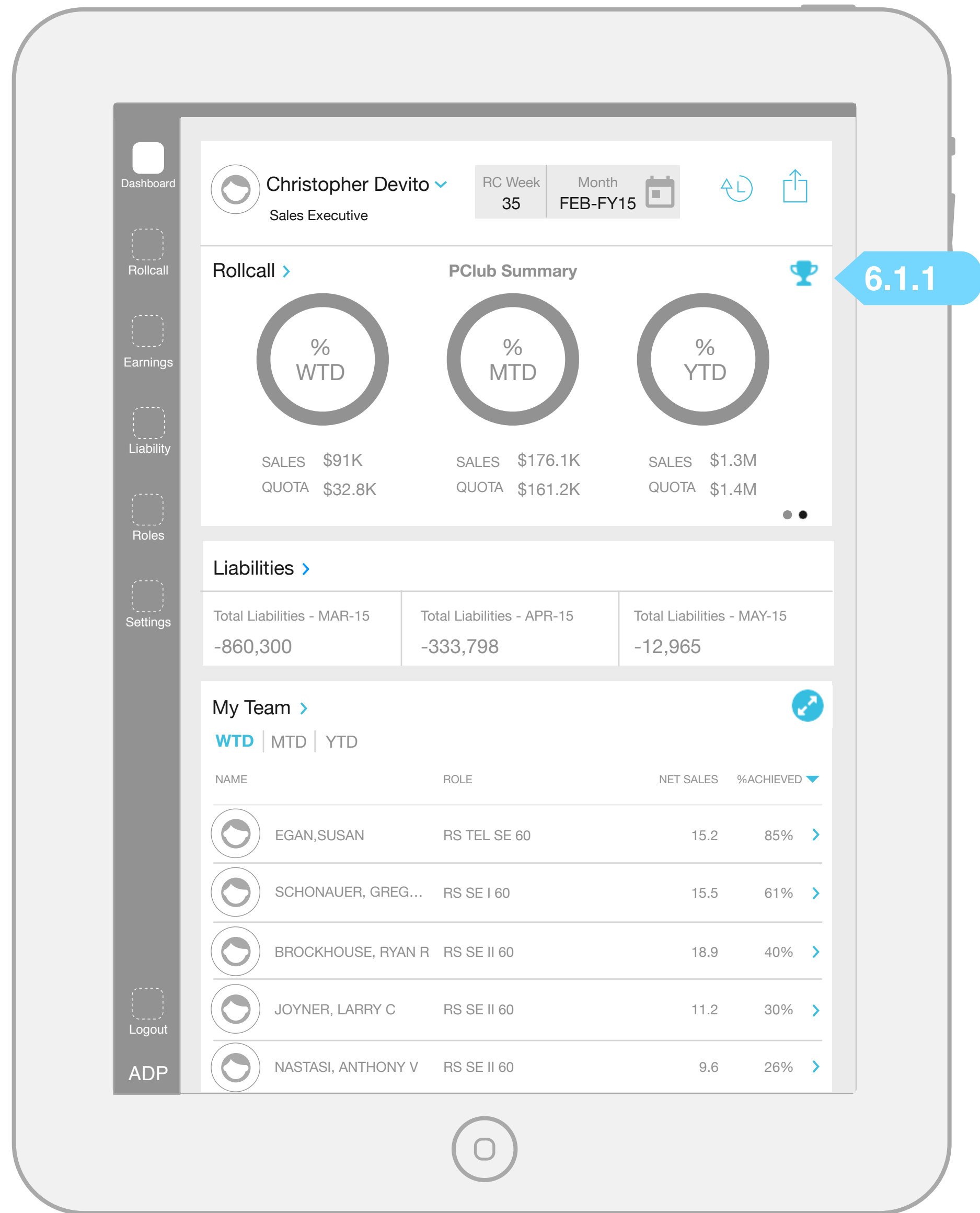
- Frequency
- Default role popover

6 - PClub Summary

User Experience Wireframes

6.1 PClub Summary

ADP Sales Performance App for iPad.graffle



Annotations

6.1.1 PClub Trophy icon

- Tap to display PClub summary view
- Active state displays

USER SPECS

- Desilva does not see this PClub icon or view