

Campaign Dashboard Wireframes

Notes

Campaign Dashboard

User Action: User logs in to system

Behavior: Dashboard displays.

Users: Finance director, Executive staff, Compliance Officer

We can use just icons (Podio), icons with text (HighRise and Pipe Drive) or text (Mint). Just tell me which you prefer. Users WILL scroll over icons to find out what they do. If we use icons (with or without text), we can put them under the blue bar at the top as secondary navigation (Podio). If we use icons, please use the black roll-over balloons as shown (Podio).

Graphs – Rolling over a point on a graph will display a pop-up. Example – Company donating with donation amount. Clicking on company name will display the Contact screen with donation information.

User Action: User rolls over “Chart 1” gray text on dashboard.
Behavior: Edit and printer icons display for that chart

Monetary values listed vertically in graph or table are right-aligned.

How many charts do you want to display? My opinion: We could fit 6 – 8 graphs on dashboard.

What information do you want displayed in charts?

Payables? Receivables? Both?

Transactions for week? Month? Quarter? Budget by Campaigns? Donations? Monies Promised? Website stats?

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Search

+ Alert

Quick Actions

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- [Action 2](#)
- [Action 2](#)

Recent Activity

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- [Activity 2](#)
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Upcoming Events

- [Event 1](#)
- [Event 2](#)
- [Event 3](#)

Alerts & Notices

Chart 1

Accounts Payable and Receivable

Chart 2

1st Quarter Budget

Chart 3

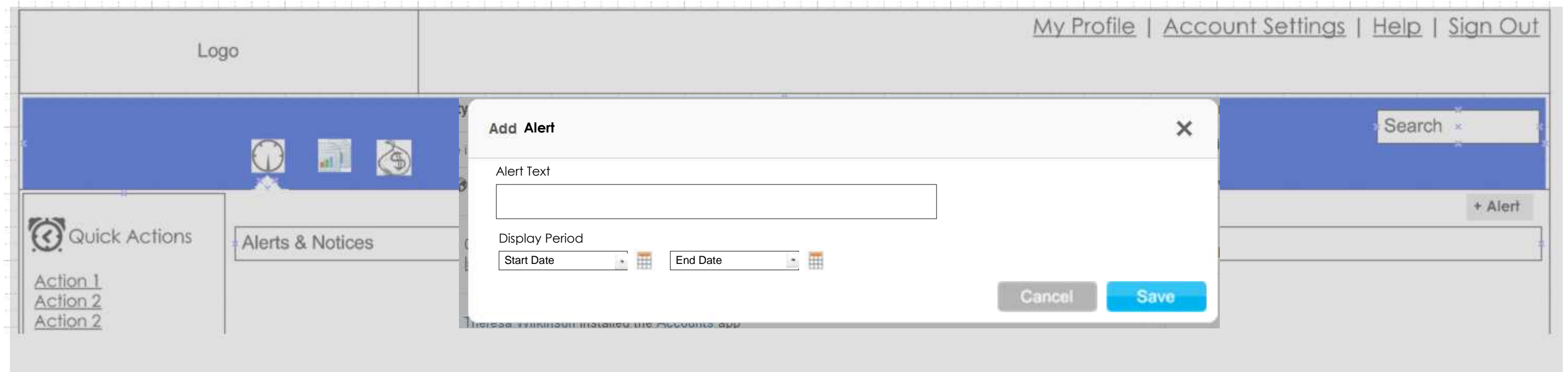
Monies Promised for 1st Quarter

Chart 4

Transactions for Week of 17 March 2012

Item	Campaign	Amount
Invitations	Obama Meet & Greet	\$500.00
Catering	Obama Meet & Greet	\$5,000.00
Email list	Save OH Squirrels	\$100.00
Database work	Save OH Squirrels	\$400.00
Mailer layout	Save Whales Mailer	\$1,000.00
Table & Chair rental	Save Wild Roses Luncheon	\$500.00
TOTAL		\$7,500.00

page 1



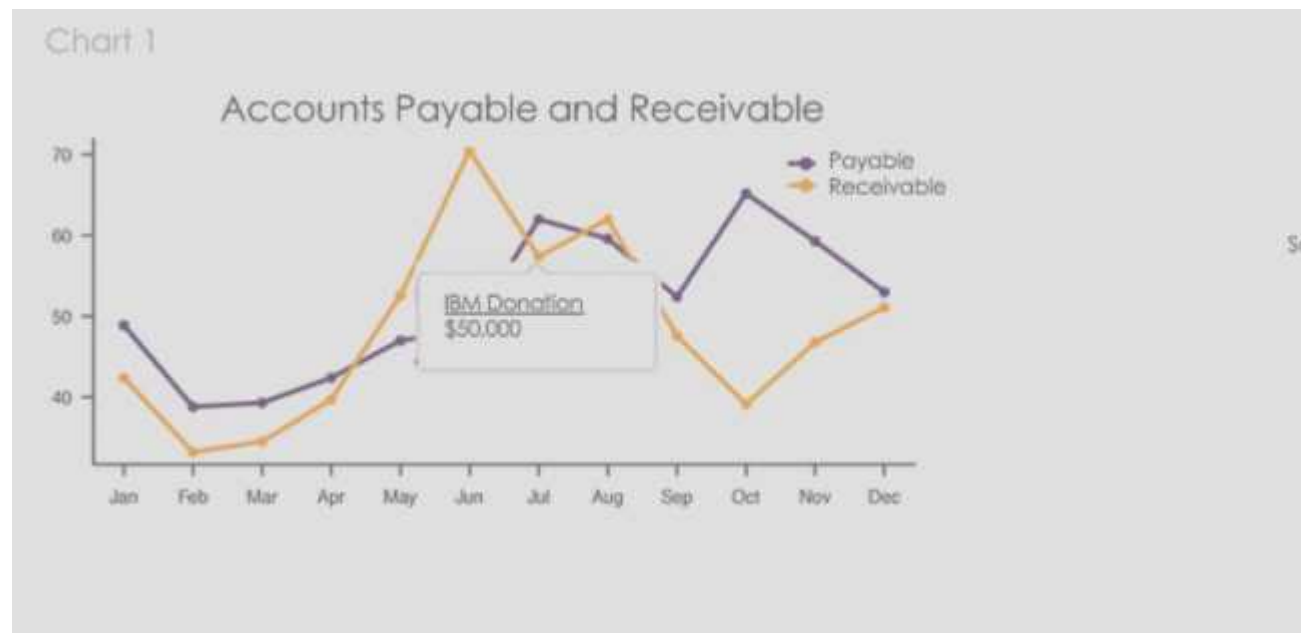
Notes

User Action: User clicks + Alert button on dashboard.

Behavior: Add Alert light box displays.

User can add text and select start and end dates for the alert into the light box.

A semi-transparent mask is applied to the screen and the light box displays on top of the mask. The mask is grayed out (65% black mask) but the information on the screen is still visible. It covers the entire screen. All buttons on the background screen must be disabled.



Add Chart

Chart Type

Information Displayed

Display Period

Start Date

End Date

Reorder Chart

Cancel
Save

+ Chart

BUDGET
\$3,000
\$5,000
\$7,000
\$500
\$25,000
\$500
\$15,000

Notes

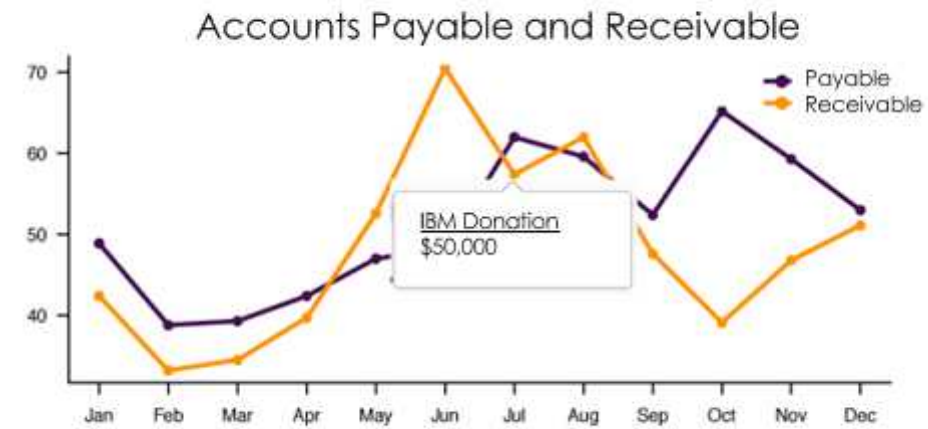
User Action: User clicks + Chart button on the dashboard
Behavior: The Add Chart modal window displays.

User can select a different chart to display in the Information Displayed pull-down, User can change the chart location on the screen by using the Reorder Chart field. Values for this field are Not Applicable (Null), Chart 1- Chart 8.

FIELDS ON CHARTS may vary. If they do, I will create a wireframe for each chart type.

A semi transparent mask is applied to the screen and the light box displays on top of the mask. The mask is grayed out (65% black mask) but the information on the screen is still visible. It covers the entire screen. All buttons on the background screen must be disabled.

Chart 1  



Notes

User Action: User rolls over "Chart 1" gray text on dashboard.

Behavior: Edit and printer icons display for that chart



If the user needs to select multiple campaigns to display on a chart, please use scrollable checkboxes.

FIELDS ON CHARTS may vary. If they do, I will create a wireframe for each chart type.

Edit Chart X

Chart Type

Information Displayed

Campaigns

- Save Coconuts Email
- Save Whales Illustrated mailer
- Save Penguins Email
- Save Dolphins Luncheon
- Obama Meet & Greet
- Save Wild Roses Luncheon

Display Period

Start Date

End Date

Reorder Chart

Cancel Save



Edit Chart X

Chart Type

Information Displayed

Display Period

Start Date

End Date

Reorder Chart

Cancel Save



Notes

User Action: User clicks Edit icon

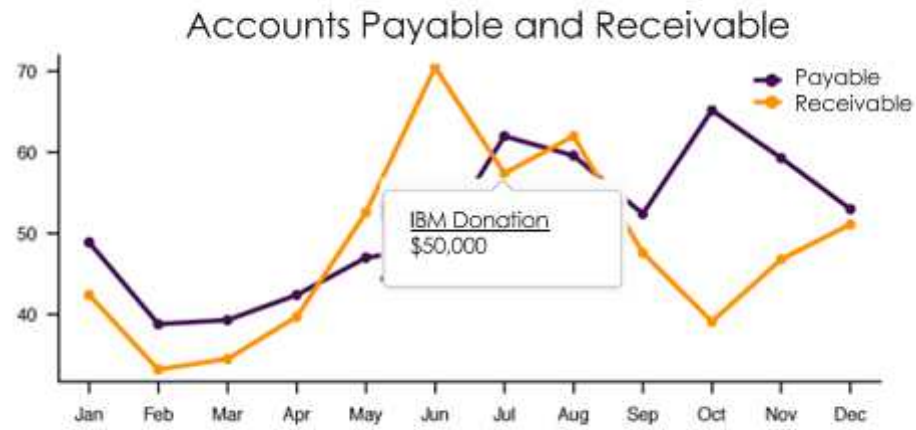
Behavior: Edit Chart light box displays allowing user to update the chart.

User can select a different chart to display in the Information Displayed pull-down, User can change the chart location on the screen by using the Reorder Chart field. Values for this field are Not Applicable (Null), Chart 1- Chart 8.

FIELDS ON CHARTS may vary. If they do, I will create a wireframe for each chart type.

A semi transparent mask is applied to the screen and the light box displays on top of the mask. The mask is grayed out (65% black mask) but the information on the screen is still visible. It covers the entire screen. All buttons on the background screen must be disabled.

Chart 1  



Notes

User Action: User rolls over "Chart 1" gray text on dashboard.
Behavior: Edit and printer icons display for that chart.

The screenshot shows a dashboard with a chart titled "Accounts Payable and Receivable" and a "Print" dialog box overlaid on top. The chart shows monthly data for Payable and Receivable, with a callout for "IBM Donation \$50,000" in June. The print dialog box is for an Epson Stylus Photo R.320 (M) printer, showing options for page range, copies, and collation. In the background, another chart titled "1st Quarter Budget" is visible, showing budget bars for January, February, and March.

Notes

User Action: User clicks Printer icon.
Behavior: Printer dialog box displays.

A semi-transparent mask is applied to the screen and the light box displays on top of the mask. The mask is grayed out (65% black mask) but the information on the screen is still visible. It covers the entire screen. All buttons on the background screen must be disabled.

Notes

View Contacts

User Action: User clicks Contacts icon
Behavior: View Contacts screen displays

Users: All

Logo

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Search within results

[+ Filter](#)

Campaign

- Save Coconuts Email
- Save Whales Illustrated Mailer
- Save Penguins Email
- Save Dolphins Luncheon
- Obama Meet & Greet Hilliard, OH

[View more](#) | [View fewer](#)

Donation Amt

- \$10,000
- \$20,000
- \$30,000
- \$40,000
- \$50,000

[View more](#) | [View fewer](#)

Postal Code

- 44107
- 44114
- 44103
- 44127
- 44106

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Activity

Refine

Refine

Basic Search abc

Category 1

Category 2

Category 3

Category 4

[Search](#)

[Print List](#)
[+ Contact](#)
Sort By Recent Contact

Results: 50 Go to page: 1 of 10 | Next >

Name	Postal Code	Category	Primary Contact	Last Note	Edit Date	
ABC Company	43026	Company	614-555-1234	03/12/12	02/11/12	Edit Delete
Alberts, John	45612	Individual	John@company.com	03/03/12	01/05/12	Edit Delete
Alberta, Amy	44114	Individual	Amy@company.com	11/03/11	09/15/10	Edit Delete
Alexander, Joe	46103	Individual	740-555-6789	03/03/12	01/05/12	Edit Delete

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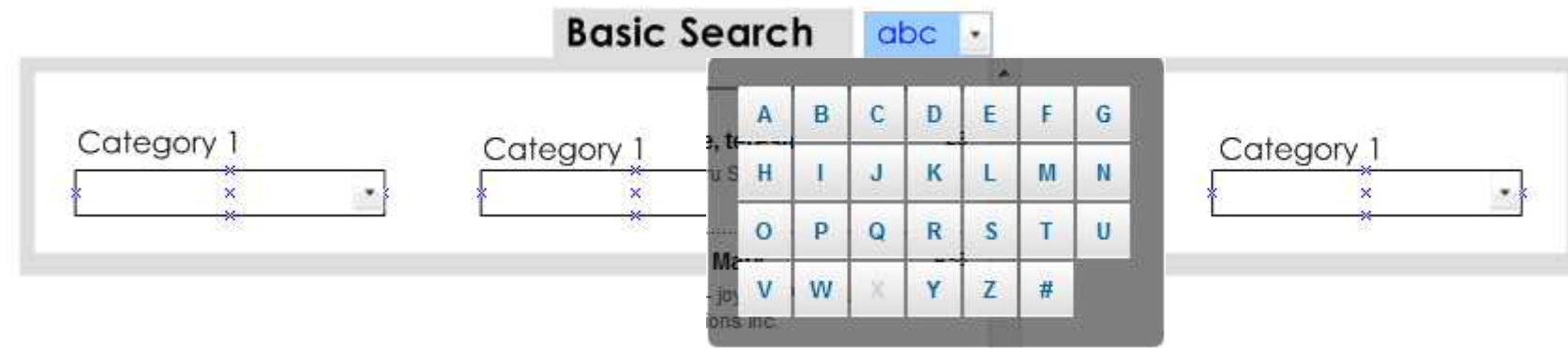
Notes

User Action: Use clicks arrow in alphabetical box

Behavior: Small letter light box displays.

This action is used on LinkedIn.

A semi transparent mask is applied behind the light box and it displays on top of the mask. The mask is grayed out (65% black mask) but the information on the screen is still visible.



Search within results

+ Filter

Campaign

- Save Coconuts Email
- Save Whales Illustrated Mailer
- Save Penguins Email
- Save Dolphins Luncheon
- Obama Meet & Greet Hilliard, OH

View more | View fewer

Donation Amt

- \$10,000
- \$20,000
- \$30,000
- \$40,000
- \$50,000

Notes

User Action: Use clicks + Chat the dashboard

Behavior: The Add Chart mode displays.

U

Add Filter or Advanced Search

Find contacts with...

All of these words Type the important criteria: companies < \$50,000

Cancel Save

arch abc

Category 1 Category 1

Search

Print List + Contact Sort By Recent Contact

Go to page: 1 of 10 | Next >

ntact	Last Note	Edit Date	
34	03/12/12	02/11/12	Edit Delete
pany.com	03/03/12	01/05/12	Edit Delete
pany.com	11/03/11	09/15/10	Edit Delete
39	03/03/12	01/05/12	Edit Delete

Go to page: 1 of 10 | Next >



Basic Search abc

Category 1 Category 1 Category 1 Category 1

Search

Print List + Contact Sort By Recent Contact

Results: 50

Go to page: 1 of 10 | Next >

Name	Postal Code	Category	Primary Contact	Last Note	Edit Date
ABC Company					Edit Delete
Alberts, John					Edit Delete
Alberta, Amy					Edit Delete
Alexander, Joe					Edit Delete

Delete Contact

Are you sure you want to delete ABC Company?

Cancel OK

Search within results

+ Filter

Campaign

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View more | View fewer

Donation Amt

- \$10,000
- \$20,000
- \$30,000
- \$40,000
- \$50,000

Notes

User Action: User clicks Delete icon for a contact

Behavior: Delete message displays asking user if they are sure if they want to delete contact

Clicking OK deletes the contact from the list.

Clicking Cancel returns user to Contact list with contact unchanged.

Campaign Dashboard Wireframes

Notes

Contacts

User Action: User clicks Contacts icon
Behavior: Contacts screen displays

Users: All

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Search

John Doe

Gender:	Male	Birth date:	05/25/79
Anniversary:		Telephone: (Primary)	(614) 555-1234
Email: (Primary)	johndoa12@columbus rr.com		
Address: (Primary)	55657 White Oak Lane Columbus, OH 43215		

Household

Donations

Financial

Campaigns

Involvement

page 10

Notes

User Action: Use clicks + Contact button
Behavior: Add Contact light box displays allowing user to add a contact.

+ Address will add additional address fields for additional homes.

+ Email will add an additional email field

+ Telephone will add an additional telephone fields

+ Email will add an additional website field

+ Family Member will add an additional fields to add another

Add Contact X

Personal Details

Prefix Mr.	First Name
Middle	Last Name
Suffix	Gender
Month Day Year	

Contact Details

Primary Street Address + Address	Address 2/Apt./Suite:
City	State
ZIP / Postal Code	Primary Email + Email
Primary telephone number + Telephone Example: 123-456-7890	Website Http:// + Website
Facebook ID	
Twitter ID	
Google+ ID	

Household Details

Name + Family Member	Age
Relationship	Do they live at the same address? Yes

Employment Details

Occupation IT	Employer
City	State
Assistant's Name	Assistant's Email
Assistant's telephone number Example: 123-456-7890	

Cancel Save