

# Project Nomad - Wireframes

## Document Information

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Project : Project Nomad

Document : Module 2 - Onboarding

Version : V1.0

Status : Work in Progress

## Version History

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Name	Version	Date	Details
Wes Roach	V1.0	9 Mar 2011	Initiate draft (WIP)
Wes Roach	V2.0	13 Mar 2011	Updated User Settings & Page titles

## Create Users and Accounts

P9.0

1 Create User

2 Create Account

3 Review

4 Confirm

Create User

\* indicates a mandatory field

Title	<input type="text"/>	
Given name	<input type="text"/>	
Family name	<input type="text"/>	
Date of Birth	<input type="text"/>	
Gender	<input type="text"/>	

Please supply at least one contact phone number

Mobile phone	<input type="text"/>	
Home phone	<input type="text"/>	
Email	<input type="text"/>	
Preferred contact method	<input type="text"/>	
Unit or Apartment number	<input type="text"/>	
Street address	<input type="text"/>	
City/Suburb	<input type="text"/>	
State	<input type="text"/>	
Postcode	<input type="text"/>	
Question	<input type="text"/>	
Answer	<input type="text"/>	

Strong

Enter campaign code:

Cancel **Next**

Privacy Policy

Supply your mobile number to access SMS security.

Outline rules for strong passwords

Campaign will need to be linked to a CMS campaign table listing price discounts and access to services. Display access under 'Special Offers' on Ref:P11.0

The email address will be the username

On selection moves to change of address letters Ref: P10.0

## Preformat Change of Address

P10.0

Change of Address Letter.pdf – Adobe Reader

File Edit View Document Tools Window Help

< Company Name >  
Attn: < name/title >  
< Building no./name >  
< Street name & number >  
< City / suburb > < State > < Postcode >

Dear Sir / Madam,

**Re: Change of Address**

< Content: advise change of address

From: \_\_\_\_\_

To: \_\_\_\_\_

Effective from < date >

Sincerely yours,

< applicant name >

Need to consider multiple names or supplier accounts in different names

1 Create Address 2 Add Another 3 Review 4 Confirm

Change of Address Letter

\* indicates a mandatory field

Company name

Attn: (name)

Unit or Apartment number

Street address

City/Suburb

State

Postcode

Only add country if not Australia

Country

Privacy Policy

Supply your mobile number to access SMS security.

Cancel

Add Another Supplier

Create Letter(s)

Save letters to document vault

Need to consider clients with multiple 'accounts' with suppliers – How do we capture this?

**User Settings**

P11.0

**ACCOUNT STATUS:**

Member / Client

**Personal Details**

All details listed in P9.0  
This is the only box  
available to 'Members'

**Delivery Method**

- Email
- SMS

Must check Email  
SMS is optional

**Default Forwarding Instructions**

No forwarding

Global setting

Edit instructions

Launches lightbox Ref P18.0

**Reset Password**

- Enter Old Password
- Enter New Password
- Enter SMS Code (if reqd)

\* If SMS security enabled a  
code will be sent to the  
user and needs to be  
entered

**SMS Security**

Enabled?



Allows 2 factor  
authentication

**Default Archive Instructions**

No Archive

Edit instructions

Global setting

Launches lightbox Ref P17.0

**Mail Opening Options**

- Open All Mail
- Open Window mail only



Must ONLY click one,  
cannot choose both

**Payment Method**

Bank Account:



- Name
- Address
- BSB
- Account Number

Edit instructions

Must ONLY click one,  
cannot choose both

Credit Card



- Name
- Card Number
- Expiry Date

Edit instructions

**SPECIAL OFFERS**

Subscribed:

&lt;offer name&gt;

&lt;expiry&gt;

Open

&lt;offer name&gt;

&lt;accept&gt;

Lists any campaigns  
currently subscribed? To  
and also new offers

**Grant View Only Access**

P12.0

**Grant View Only Access**[< click to add New User >](#)

Given name

Family name

Mobile phone

Email

Date created

Last activity

Status

Enabled?



Allows a user to enable a  
third party 'view only'  
access

**Preview Page**

P13.0

**Preview Page**

**Name**

**Edit**

**Submit**

This page enables the user to check the details and edit any errors before submitting the account to be opened

**Send Welcome Pack**

P14.0

**Online Pop-up advising user of:**

User and Login details (username)

Old address &amp; new address

SMS security enabled

Open all mail or advise before open option

Confirm default payment option

No links or attachments

How to advise password?

Need to be able to print or save as .pdf

Retain welcome pack in document vault

Default Forwarding instructions

Default Archive instructions