



# Dashboard

Start searching for a specific lead source below and if you'd like to view more data, select the time period and campaign status.

Lead source

Share

Download PDF

Overview

User rankings

Inbound & Outbound

Inbound campaigns

Outbound campaigns

Change lead source:

All lead sources



Time period

Sep 1 - Sep 21, 2023

## Sales assisted by KAI

Sep 1 - Sep 21, 2023

123,456

Compared to the previous 21 days

+ 62.0%

## Total leads

Sep 1 - Sep 21, 2023

123.4m

Compared to the previous 21 days

- 3.9%

## Total calls

Sep 1 - Sep 21, 2023

85,358

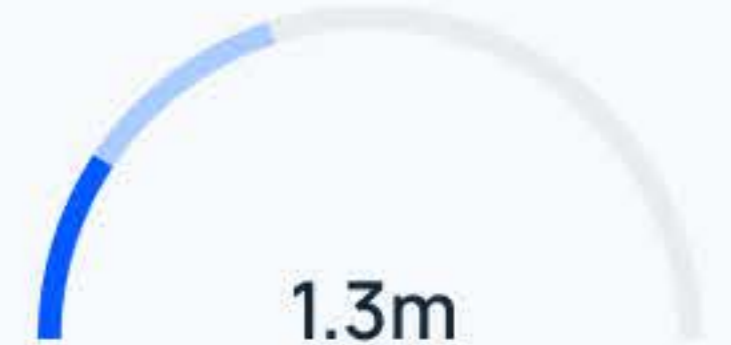
Positive

211,586

Negative

1m

No response



1.3m

Total calls

## User ranking

Name	Cars sold	Leads	Answered
Juliette Oconnell Campbell Koch	123	1,456	78%
Newton Melendez	123	456	39%
Dewit Morrison	123	456	12%
Reid Mccullough	1,239	456	97%
Derrick Spencer	123	456	83%

## User ranking accumulation

5,358

Cars sold

2,586

Leads

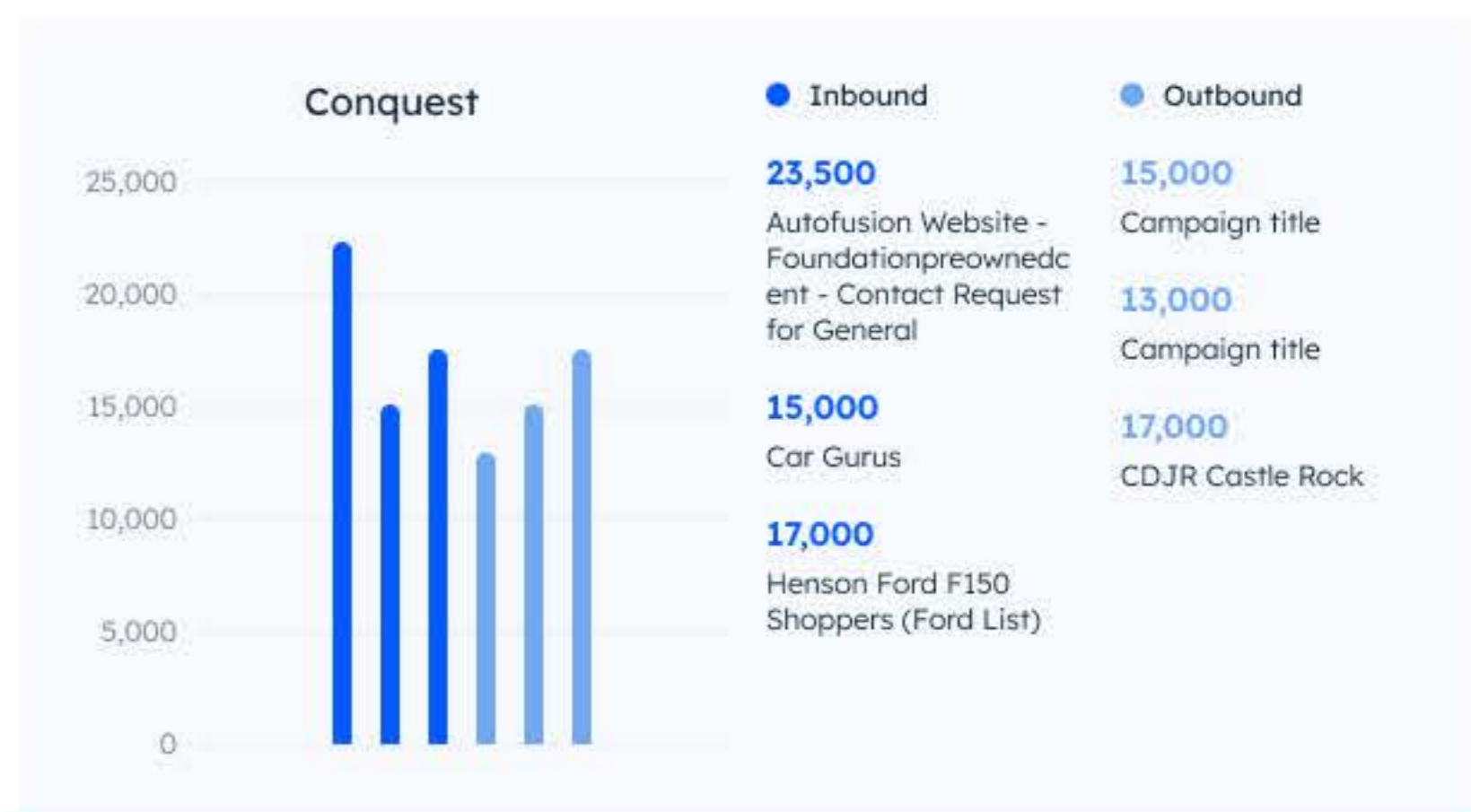
75%

Avg. % answered



Performance

Of the top 5 users



# Chat bubbles

A way for a messenger and a recipient to exchange messages. Often times, the exchange will be between a bot and a client.

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## Usage

Chat bubbles are used when ICOM clients are viewing bot conversations with specific leads. This exchange is often done with our AI, but can have manual input from the representatives when necessary.

## Behaviours & interactions

From the leads page, when clicking on “Bot conversation”, it should open a new tab which will include the history of the messages, and the timeline of events that we keep track of. Bot messages will appear on the left, and recipient messages will appear on the right.

Chat bubbles will span a fixed length.

- In desktop or larger, whether the navigation is visible or not, the chat bubbles will span 6 columns long.
- In mobile, the chat bubbles will span 6 of 8 columns to their respective side.

Generally, the container that holds both the sender & recipient should be centred

- When the navigation is not visible, the container that holds all chat bubbles will span 12 of 16 columns.
- When the navigation is visible, and the lead timeline is visible, the container that holds all the chat bubbles will span 10 of 16 columns.
- When the navigation is visible, and the lead timeline is not visible, the container that holds all chat bubbles will span 11 of 16 columns and be centred within the white space.

The reply area will span the width of the container that holds both the sender & recipient.

How the corner radii sharpens:

- When there is 1 message from either sender, sharpen the bottom left or right corner respectively.
- When there is 2 or more messages from either sender, the first and last messages should have sharp corners, and all messages in between will have all rounded corners.
- Developers: you can ask Evan for help on this.



Edit



< Back

With nav, with timeline



Dashboard

AI settings

Outbound

Leads ^

All clients

Service to sales

Sold

Calls

Manage users ^

Representatives

BDC

Client

Affiliate

Admin

Parent/current-page

a maximum width to prevent fatigue from reading long lines of text.

Icons in the top right are notifications & download conversation. There is no set function for notifications yet. Ask Reynolds/management what they think should appear in the notification drawer.

Short messages hug text

This is the colour for a message sent by a real person. Manual-input messages will be darker to bring more focus to what the representative has said. This colour combination passes WCAG contrast guidelines with an AA grade.

4:02 pm

Client name

This is the colour of a message sent by the recipient.

The entire chat container will take up 10 columns, where both the recipient and the sender will take up to 6 columns each.

4:02 pm



Reply



### SMS lead timeline

- Lead received by system  
Oct 26 at 9:48 am  
John Doe  
john\_doe\_sample@email.com  
+1 123 456 7890  
Interested in: Gladiator
- Lead started engaging  
Oct 26 at 9:48 am
- Appointment generated  
Oct 26 at 9:48 am  
John Doe made an appointment with Twilio Dealership.

# Drop downs - list of options

Used in tandem with drop downs to create variations.

Talk about technical details if necessary

## Usage

All drop downs have a list of options to choose from. It depends on the variations necessary for that particular drop down.

Our list of options contain a collection of [checkbox](#) elements.

## Anatomy

When using a checkbox without a label, the icon must have a hover state. View [checkbox](#) component for more information.

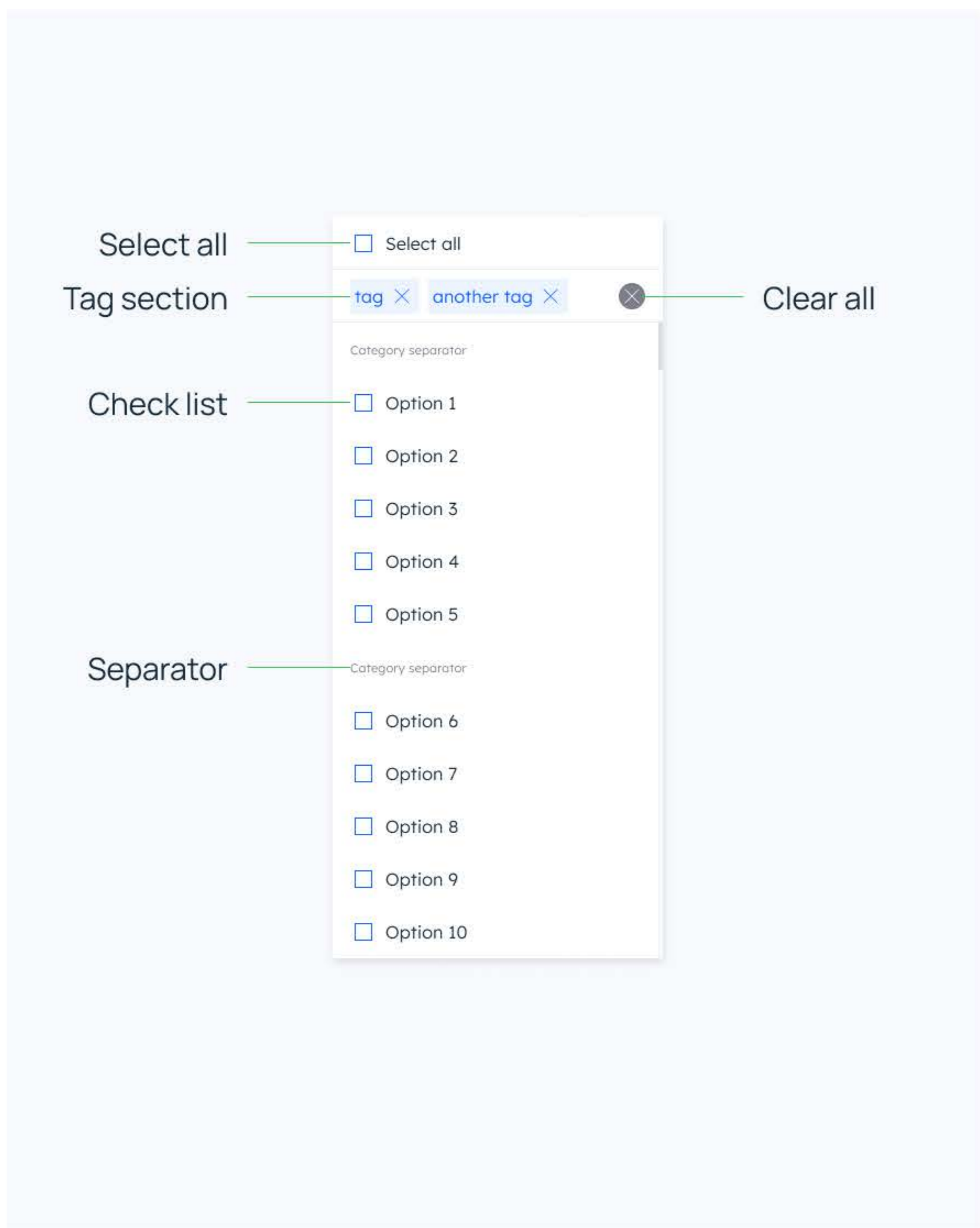
A check box with a label will have a defined hit box, in which its' width is automatically adjusted to suit the text.

When "Select all" exists, the tag section must also exist.  
The tag section may exist on its own without the "Select all"

Enter the dev playground to enable:

- Select all
- Tags
- Category separator
- Options 3-10

Select the item within the container to enable/disable checkbox options.



## Layout & spacing

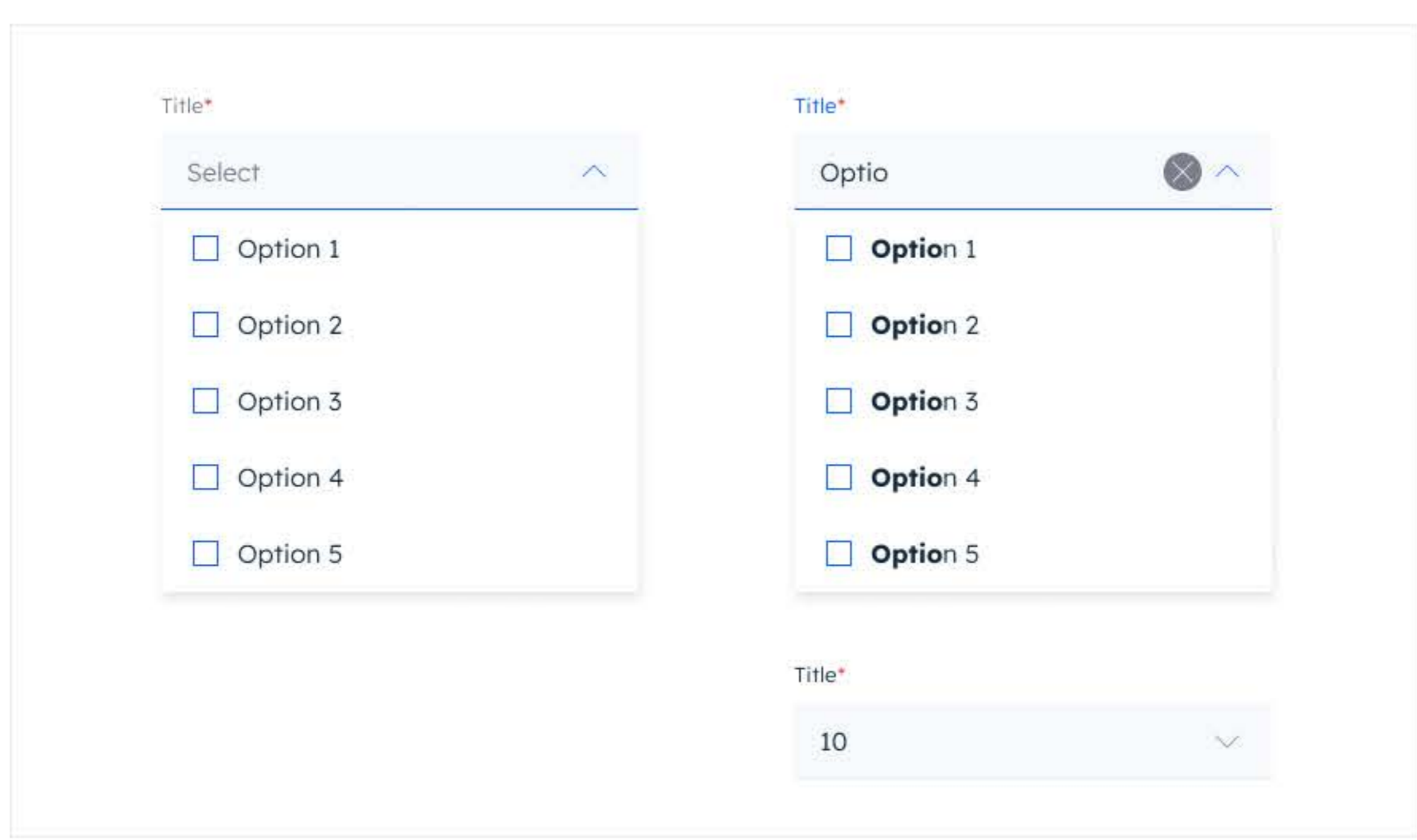
For individual items, refer to the [checkbox component](#)

- direction: vertical
- alignment: top left
- vertical resizing: hug
- horizontal resizing: fill

## Variations (same as drop down variations)

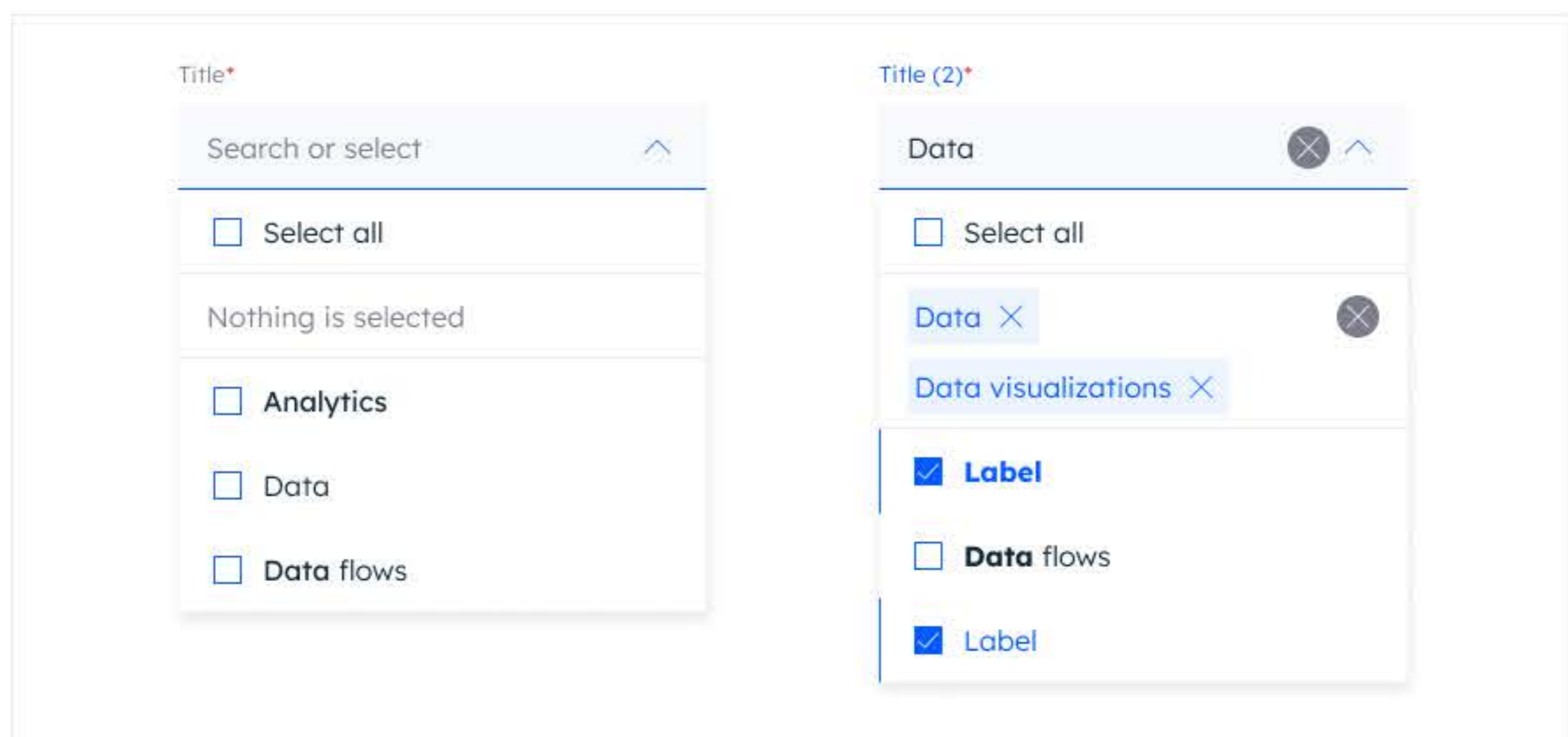
### Drop down

Allows the user to select one option from a list. Add scrollbar when necessary.



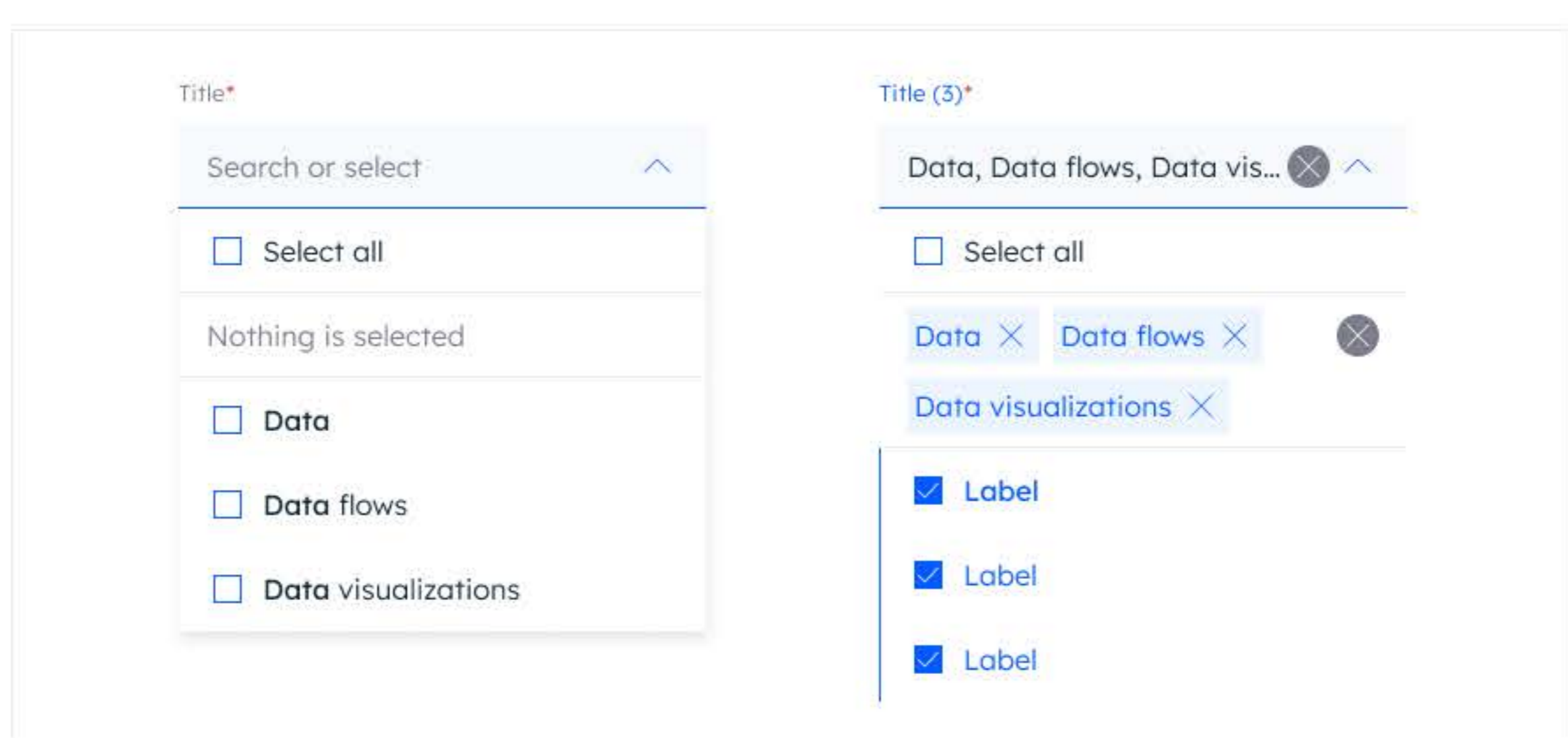
### Combo multi-select

Allows the user to make a selection from a list of suggested, likely, or desired values and filter. Add scroll bar when necessary.



### Multi-select

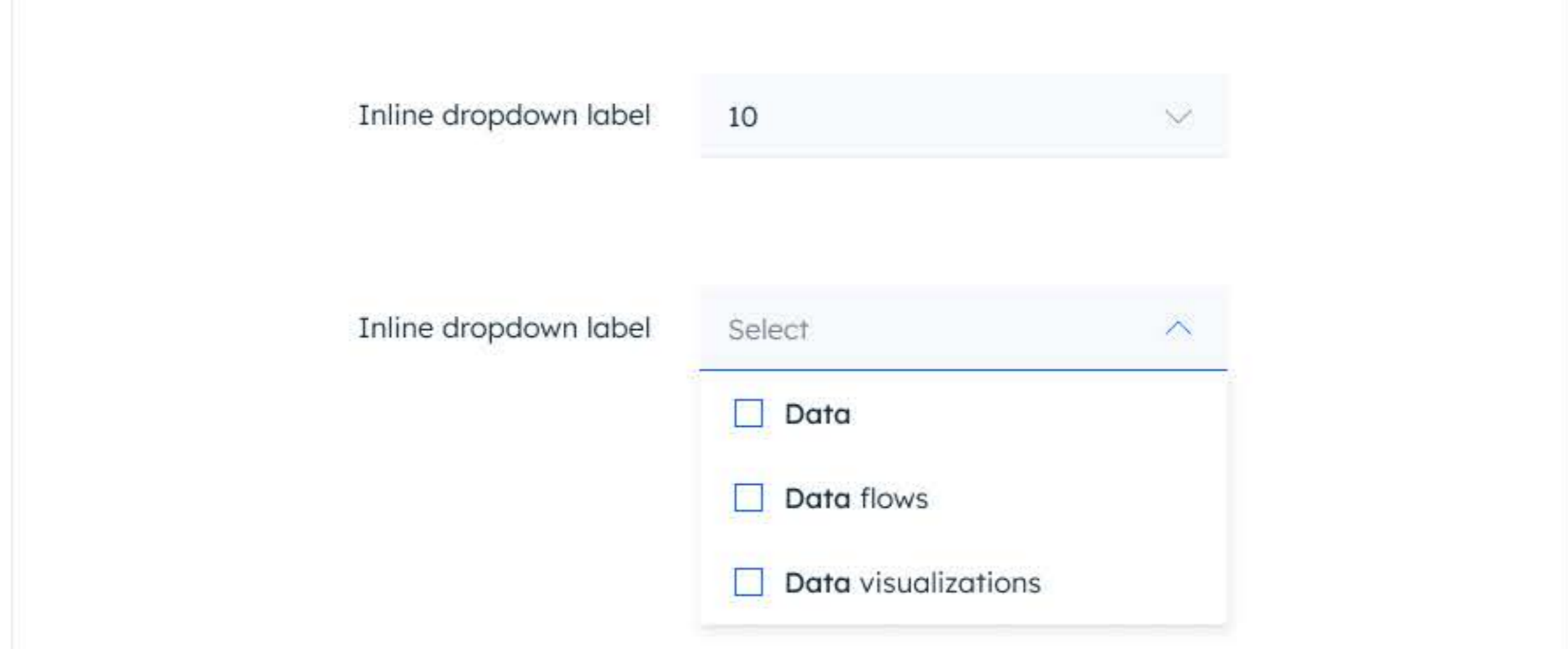
Allows the user to select multiple options from a defined list.



### Inline drop down

A variation of Selection. Text should be aligned and drop down has a fixed width. Elements that are removed:

- Title, as the inline text should describe the field
- Assistive text, as there should be enough context to understand what the selection is referring to.



# File uploader

Allows users to select one or more files to upload to a specific location.

Currently, the portal only supports .CSV

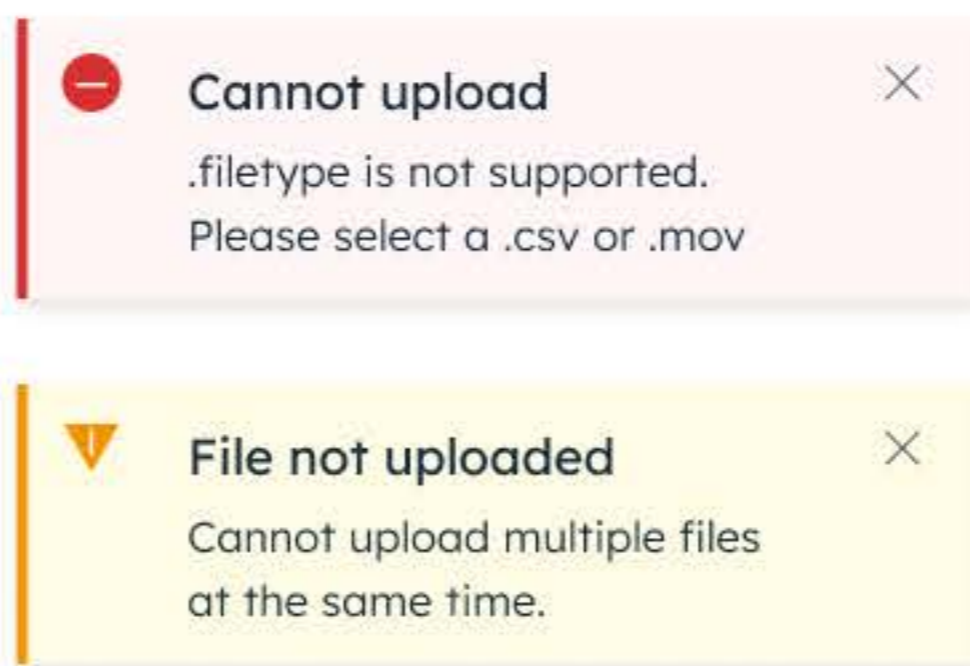
## Usage

We use a drag and drop file uploader in the portal. Users can upload files to the portal by dragging them from their computer documents and dropping them directly in a drop zone area. This also supports traditional file uploading by clicking the drop zone.

## Behaviours & interactions

View the components on the right.

- When hovering the drop zone, the area will turn grey. If clicked, it will open the device's file explorer.
- When hovering the drop zone with a file, the area will turn blue.
- When the file has been dropped or uploaded traditionally, a preview of the file icon will appear with the size of the file and a [progress bar](#). If the loading time is indefinite, use the indefinite progress bar.
- Currently, the CSV can only take 1 file at a time. When selecting multiple files, the most recently selected file will be uploaded.
- Files that have been successfully uploaded will appear below the drop zone.
- The file uploader is resilient to errors, as only certain file types are allowed to be uploaded. In the case that there is an error, use the toast [notification](#)



## Anatomy



A. Banner	Refer to the dialog component. This is a variant of the dialog banner.
B. Drop zone	The area that accepts files being dropped into the portal.
C. Icon preview	Filetype icon preview. If not possible, refer to the minimum viable product variation.
D. Cancel	To remove the file or disrupt the uploading process.
E. Progress bar	Refer to the <a href="#">progress bar</a> component. Shows the progression of the upload.
F. File size	Shows how much of the upload has been successfully received by the system.
G. Button 1	If in a modal, include Button 1 to close the modal.
H. Button 2	The button changes state depending on if there is a file or not. If the drag and drop is not a stand-alone modal, then buttons do not need to be included if there is enough context.
I. Assistive text	Provides additional context to the uploading container.

## Layout & spacing

The width of the window is the same as the dialog component: it takes up 10 of 16 columns of the screen.

- direction: vertical
- alignment: top left
- vertical resizing: hug
- horizontal resizing: fixed

# Search bars

**Search:** to locate objects within a large collection of items. it is usually used to quickly navigate to an object.

When displaying results, pressing a result, pressing ENTER, or clicking outside of the search area will dismiss the search function.

**Functionality adjustment:**  
Do not use drop down feature until database is optimized. View change log from Oct 23, 2023.

## Usage

Search bars exist in close proximity to that of which the data it is searching, and is larger in size due to its usefulness when finding data within pages. Typically in the portal, we place the search bar on top of its respective data table.

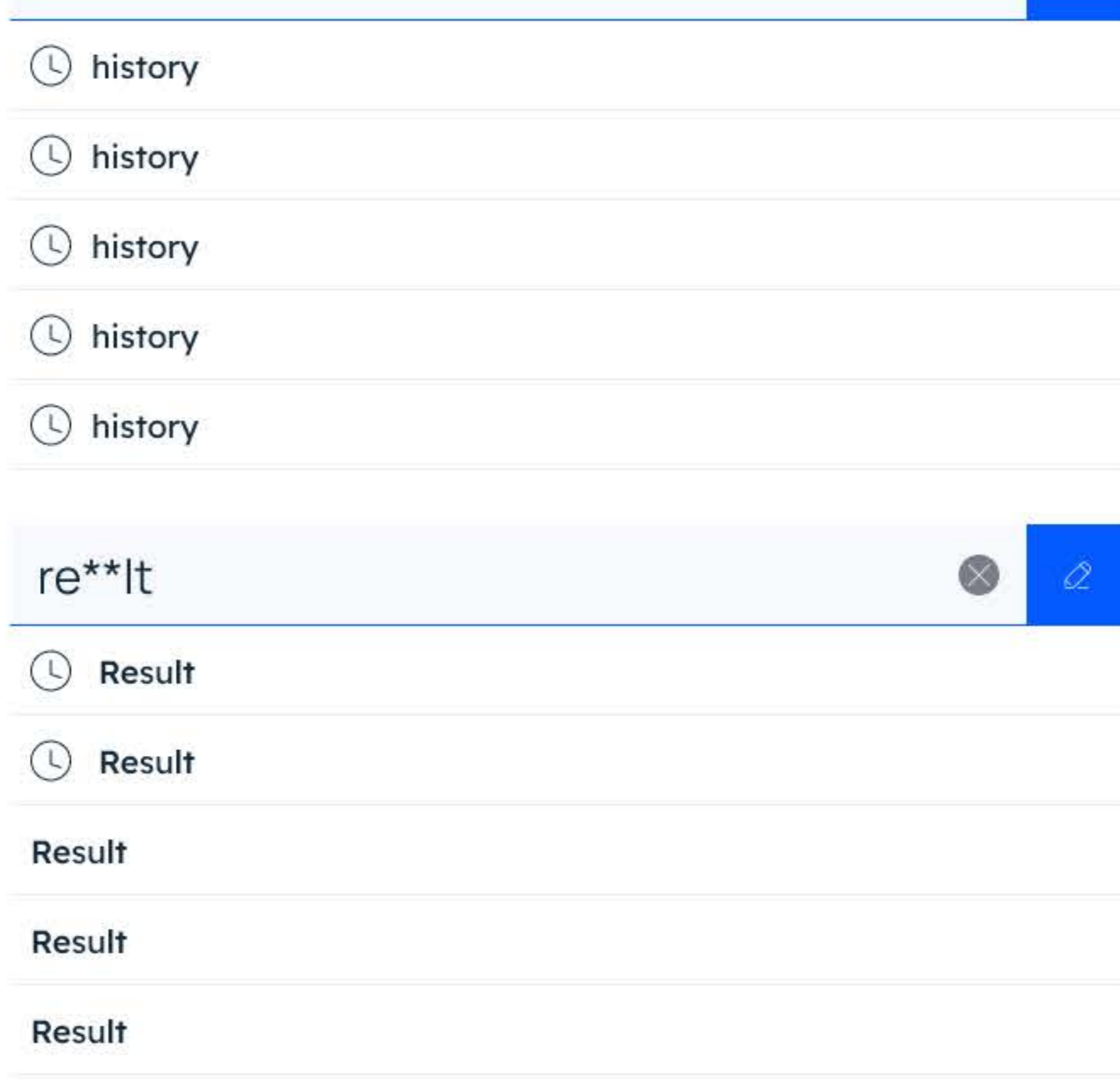
**Do not:**

- use a global or persistent search, as the results and design can confuse users quickly.

## History & results

When typing, the search bar should remember up to the last 5 items that were searched. These results can be all history, or mixed with results.

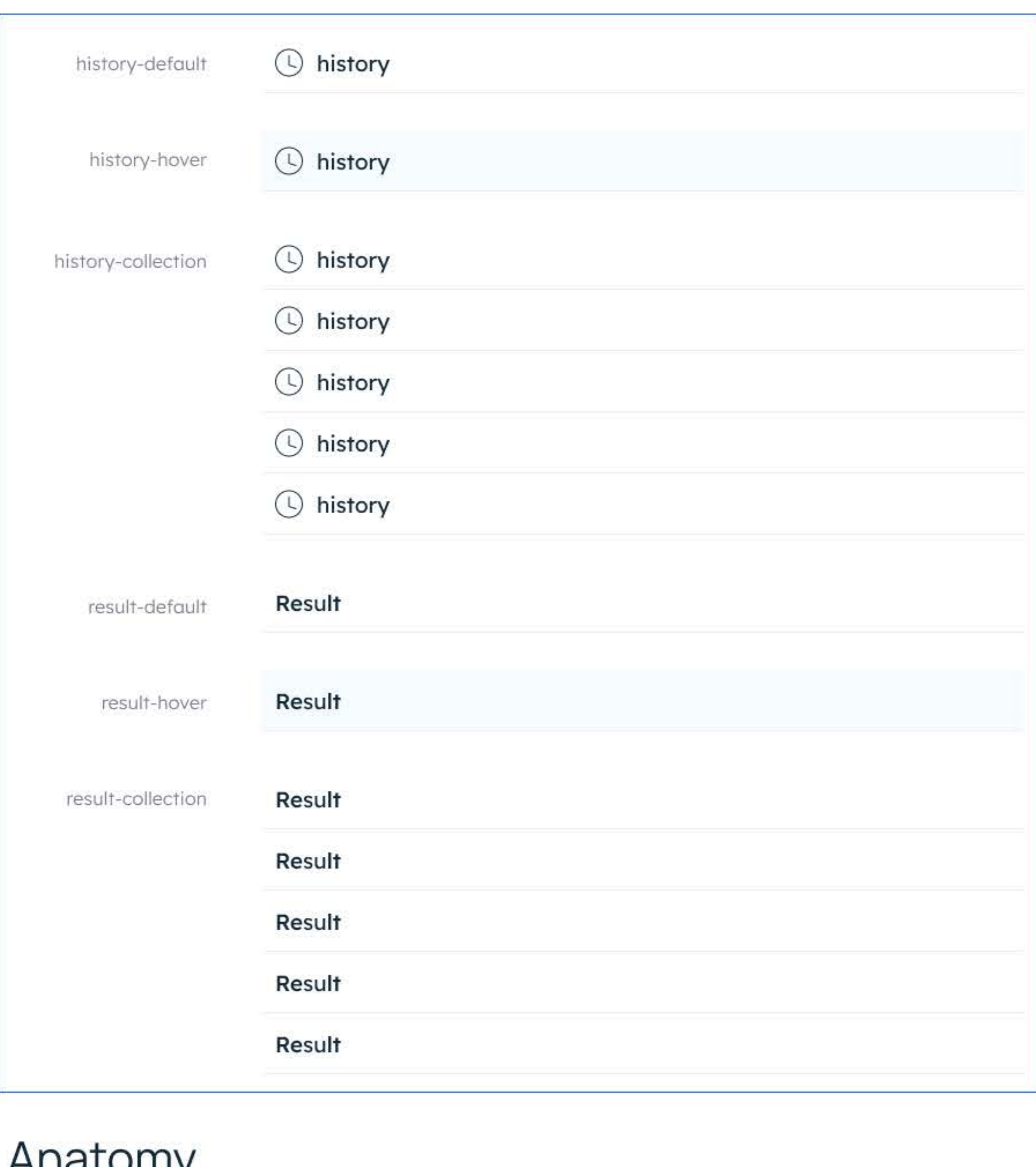
Prioritize showing history first, then show additional results beneath.



If there are no items from recent history, the selected state of the search bar will remain empty.



**Designers:** Any edits to the history & results should be made below.

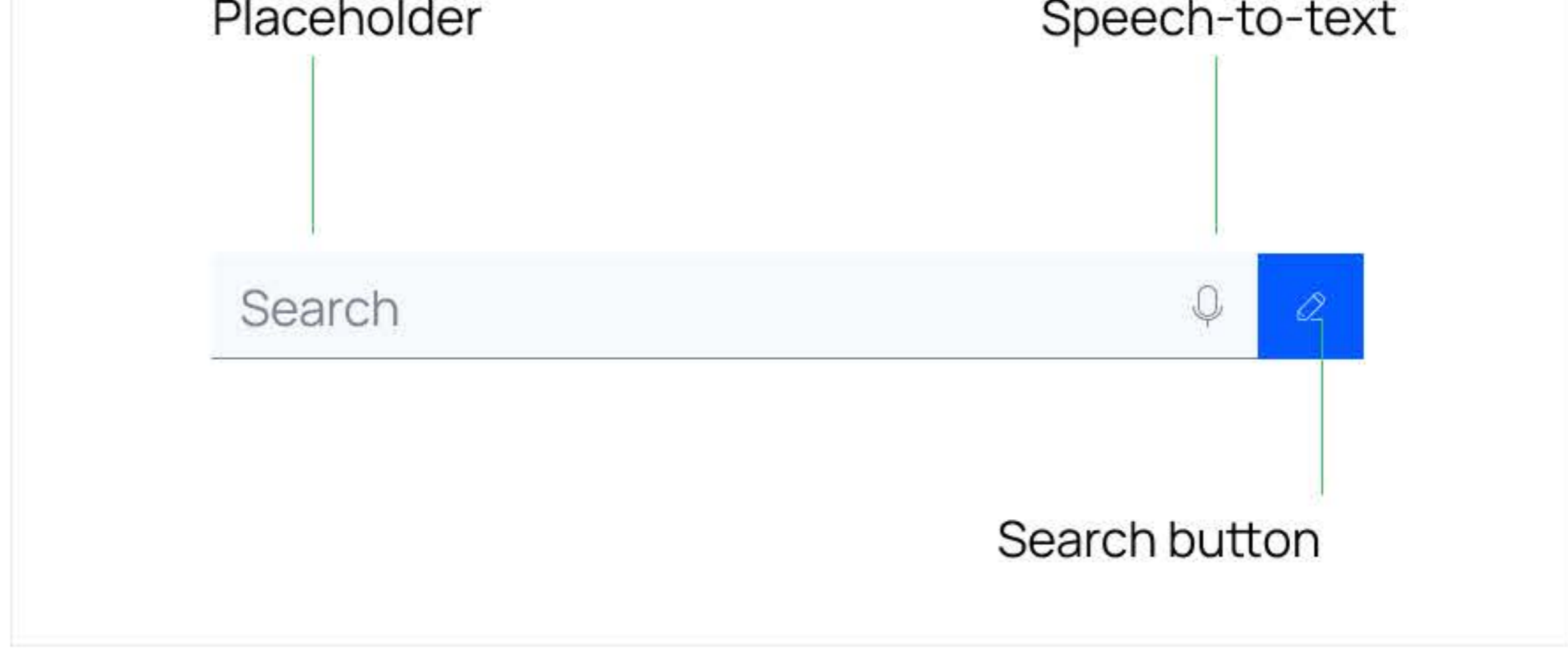


## Anatomy

Depending on the page, the placeholder text for the search bar should change according to what kinds of information the user is able to find.

For example, on the leads page, the placeholder can say: "Search a name, client, source, and more"

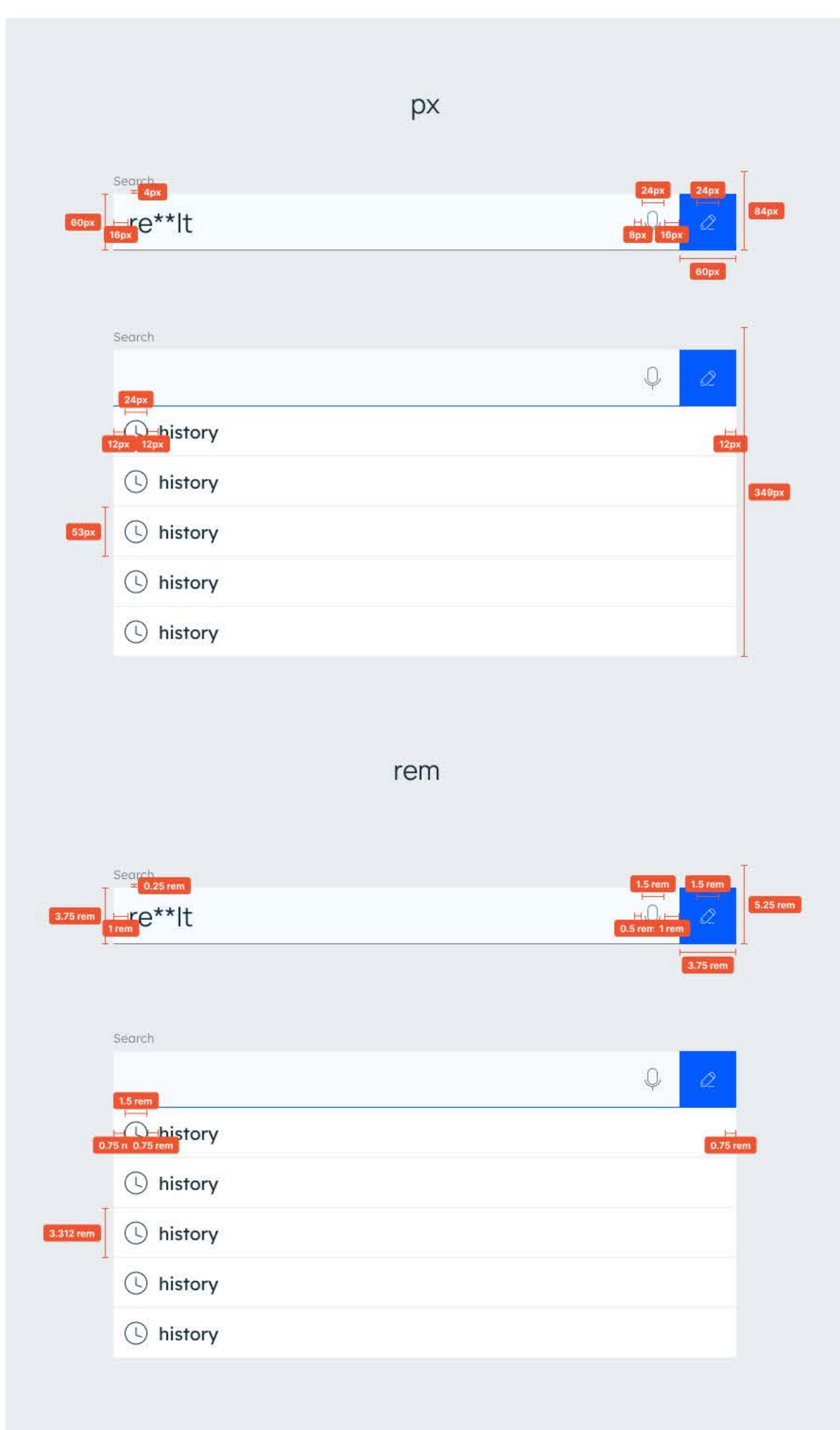
- Try to list 3 column names within the data table
- When there are more than 3 columns, add the phrase "and more"
- If the text spans more than the search area (for example, in mobile), use ellipses (text function built into Figma)



## Layout & spacing

The minimum size for the search bar is 450px (28.125rem)

- direction: horizontal
- alignment: left centre
- vertical resizing: fixed
- horizontal resizing: fill



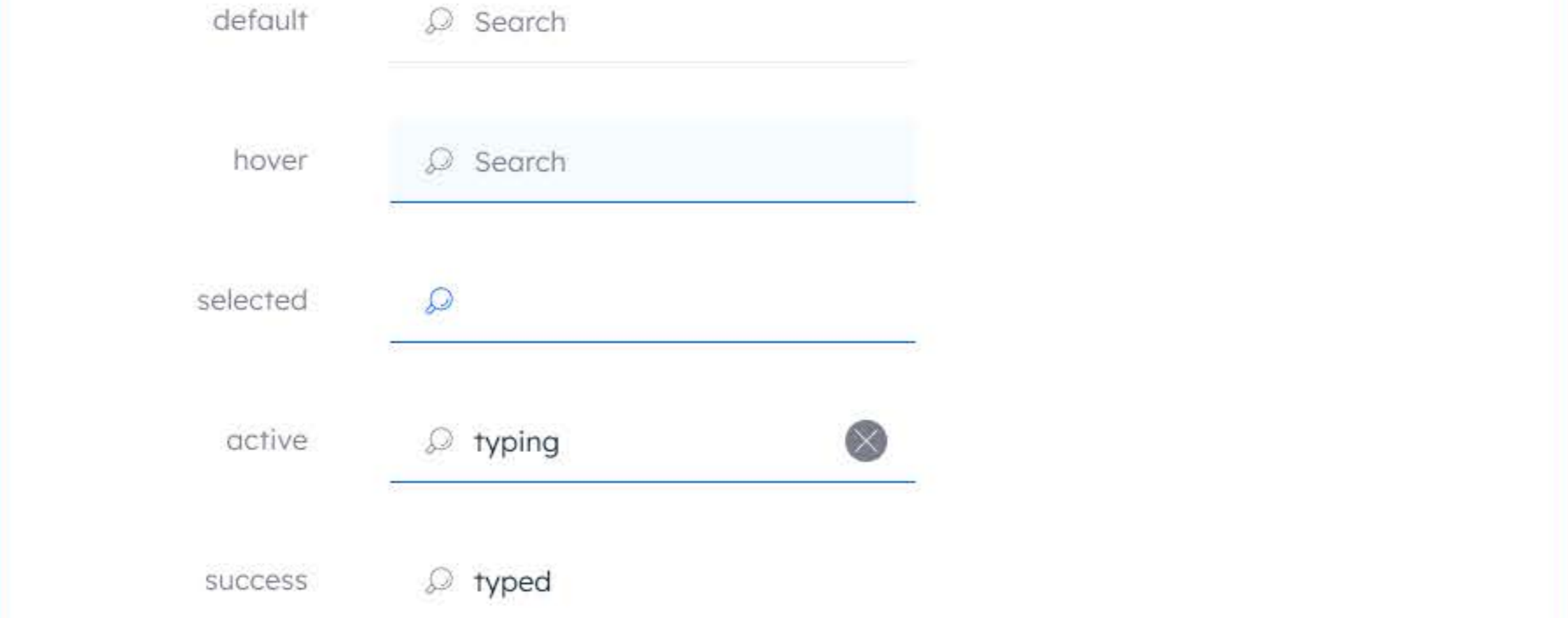
## Variations

### Minor search

Minor search can be used for a page when searching through items is not a priority within the page.

For example, minor search is used in:

- The [View As feature \(view Top Navigation\)](#), there will be an option to search for users within the list.
- The [Notifications page](#), where users may search for names, emails, phone numbers, of a client's interest.



While typing into the search, the number of options within the [list of options](#) should decrease.

# Navigation elements

Items that are inside the Sidebar navigation component. Nav elements indicate the states of the items, while the Nav components accounts for the margin of the navigation Within the 3 columns.

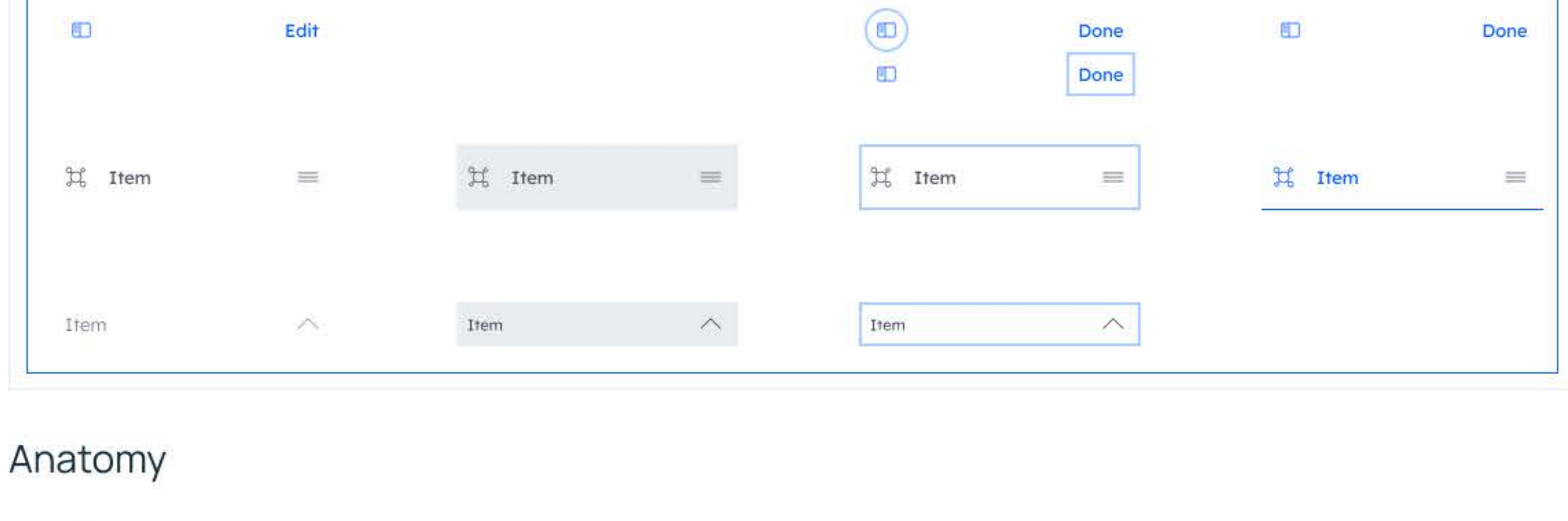
To edit each item, edit their default, hover, focus, and active state. To edit each section, edit the components with the background in them.

## Nav elements

Designers: Change individual items in here.

This section is more for developers to understand the states of each item. Please pay close attention to icon & font colours when switching between states. This should apply to the [Sidebar Navigation in the Patterns page](#) (the navigation prototype does not reflect certain colours or behavioural properties).

## Behaviour & interaction



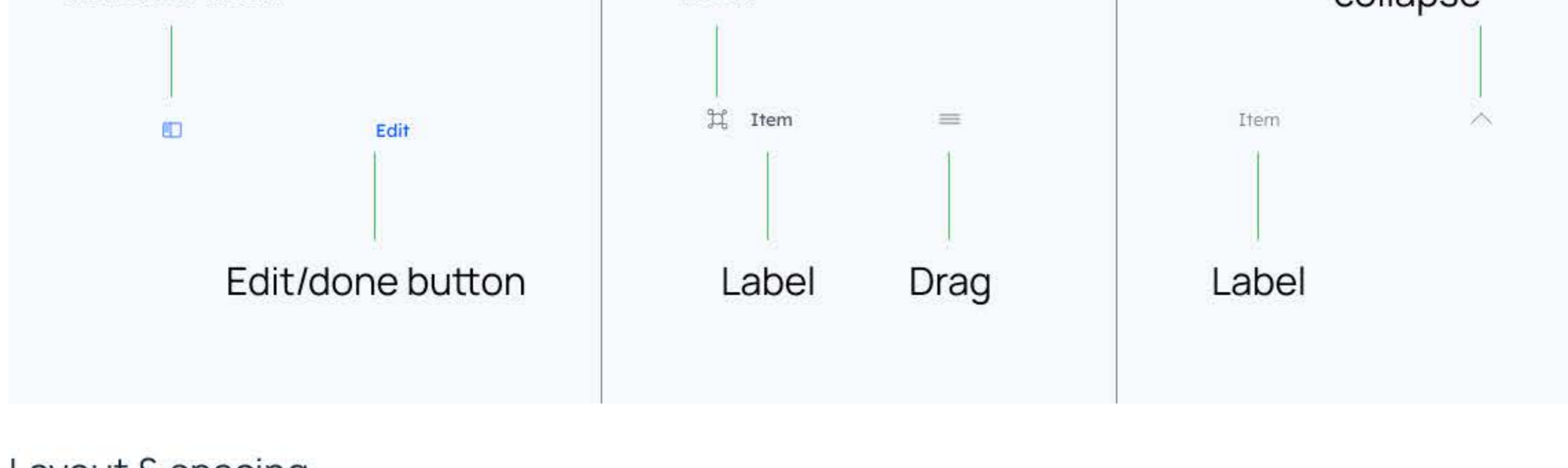
## Anatomy

The nav is composed of 3 different elements:

- header
- items
- sections

The header is always present in the side navigation, at the top. It consists of:

- a sidebar icon, which will collapse or expand the nav from the side
- an edit button, which will allow the re-organization of items or sections. Refer to [Sidebar navigation: edit mode](#) for more details.

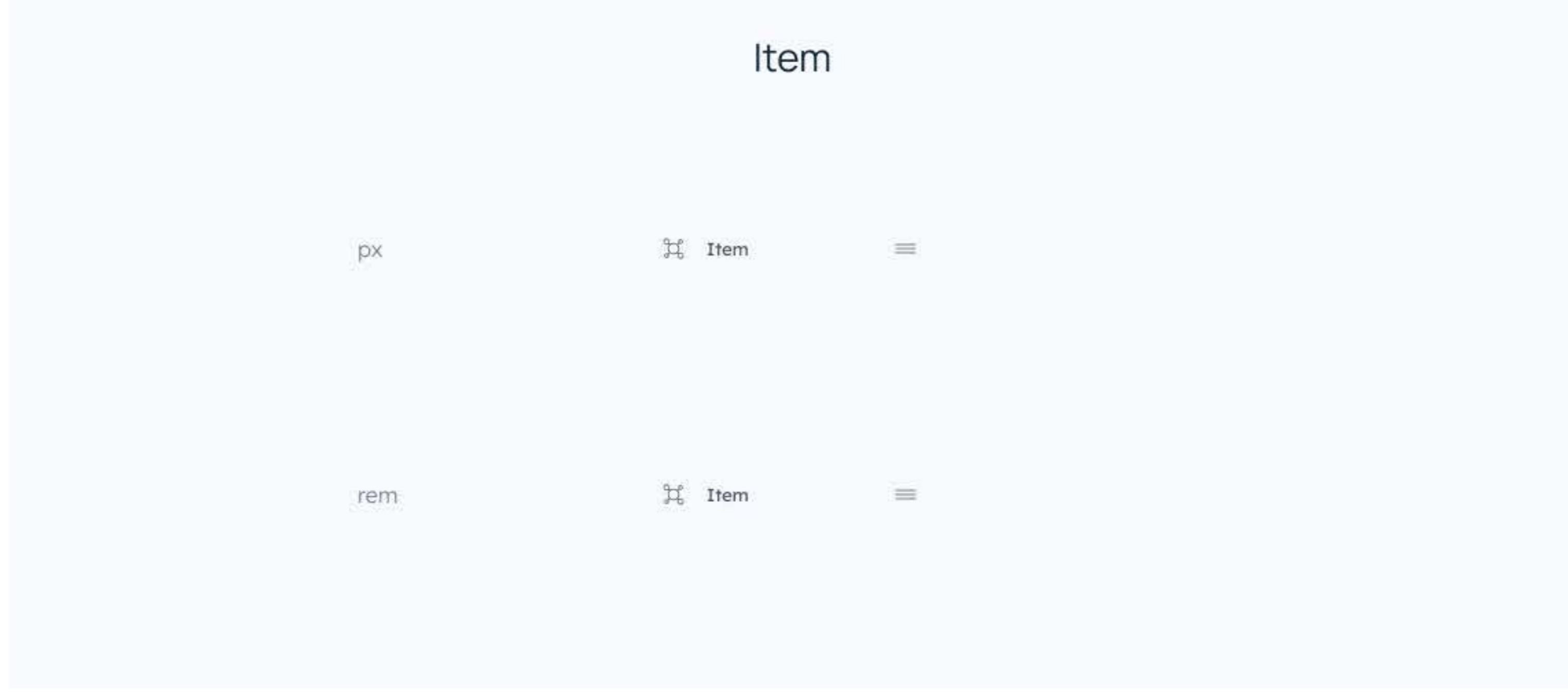
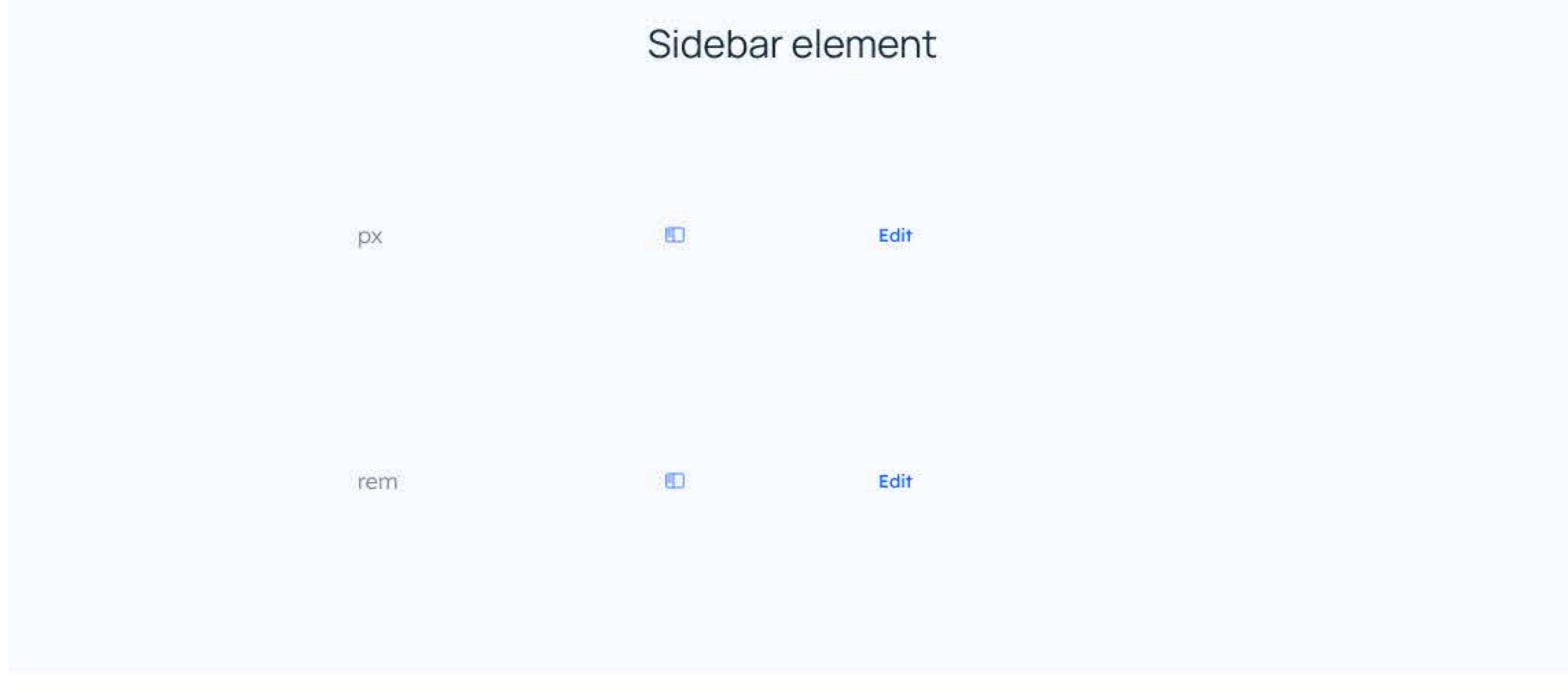


## Layout & spacing

The Nav elements are items that are slotted into Nav components.

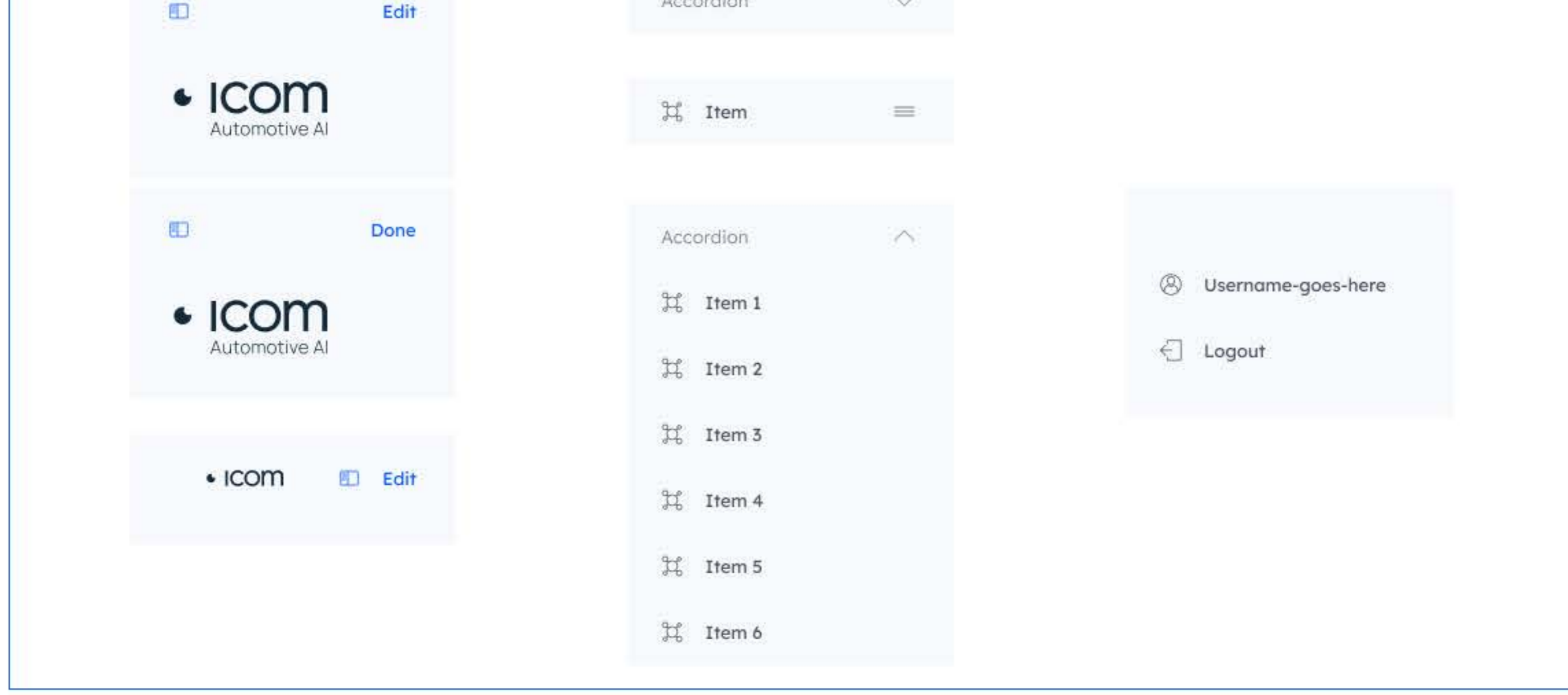
For all nav elements:

- direction: horizontal
- alignment: left centre
- vertical resizing: fixed
- horizontal resizing: fixed



## Nav components

These are the elements used to create the sidebar navigation.



## Anatomy

The header will have a large logo when the navigation is scrolled to the top. When scrolling down, the logo will shrink to be inline with the header. See [Sidebar navigation: scrolling](#) for more details.

The accordion sections off a number of items and can be expanded or collapsed, depending on the user's preference.

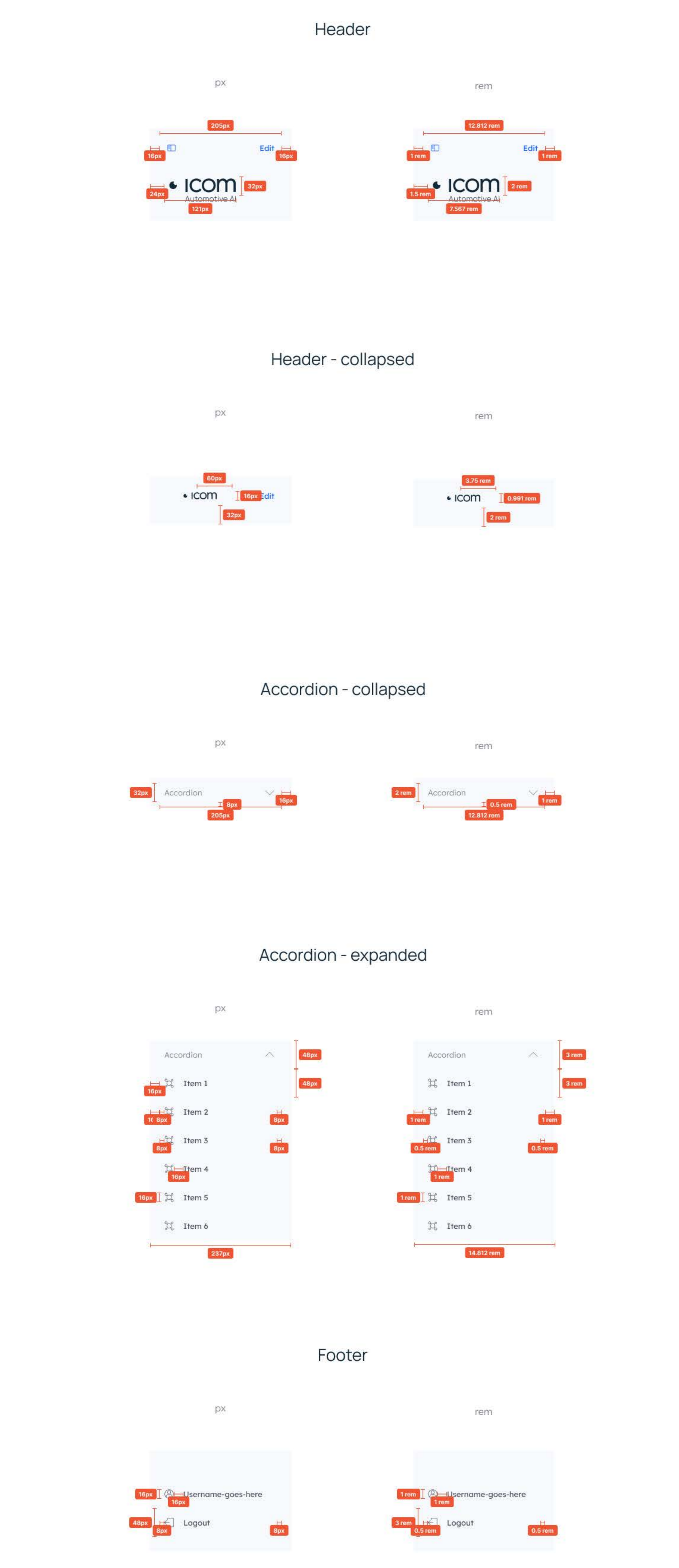
The footer has the space above the username set to fill, but has a minimum amount of space between the last item in the navigation and the footer. See layout & spacing below.

## Layout & spacing

The side navigation bar is a fixed width. All Nav elements fit into the sidebar component, and are slightly smaller in width compared the component.

For all nav components:

- direction: vertical
- alignment: left top
- vertical resizing: fill (100% of monitor height)
- horizontal resizing: fixed



# Sidebar navigation

Main navigation. Takes into account the margin, spacing, and fits in 3 columns.

Talk about technical details if necessary

## Sidebar navigation

The sidebar is the primary navigation across all pages. By default (user has not done anything in edit mode) the first ordered item on the dashboard will be the user's "home" page (the first page that is open when they visit the portal).

When applicable, the scroll bar should exist separately from the current page the user is on.

- The username and the log-out option should always be visible
- Refer to the Reynolds & Reynolds file, but keep the spacing of ICOM

Desktop, will have navigation open upon each visit.

- By default, tablet and mobile will hide the sidebar.

The sidebar will slide in/out from the left side of the screen. This will push content back and forth. Refer to breakpoint in designs.

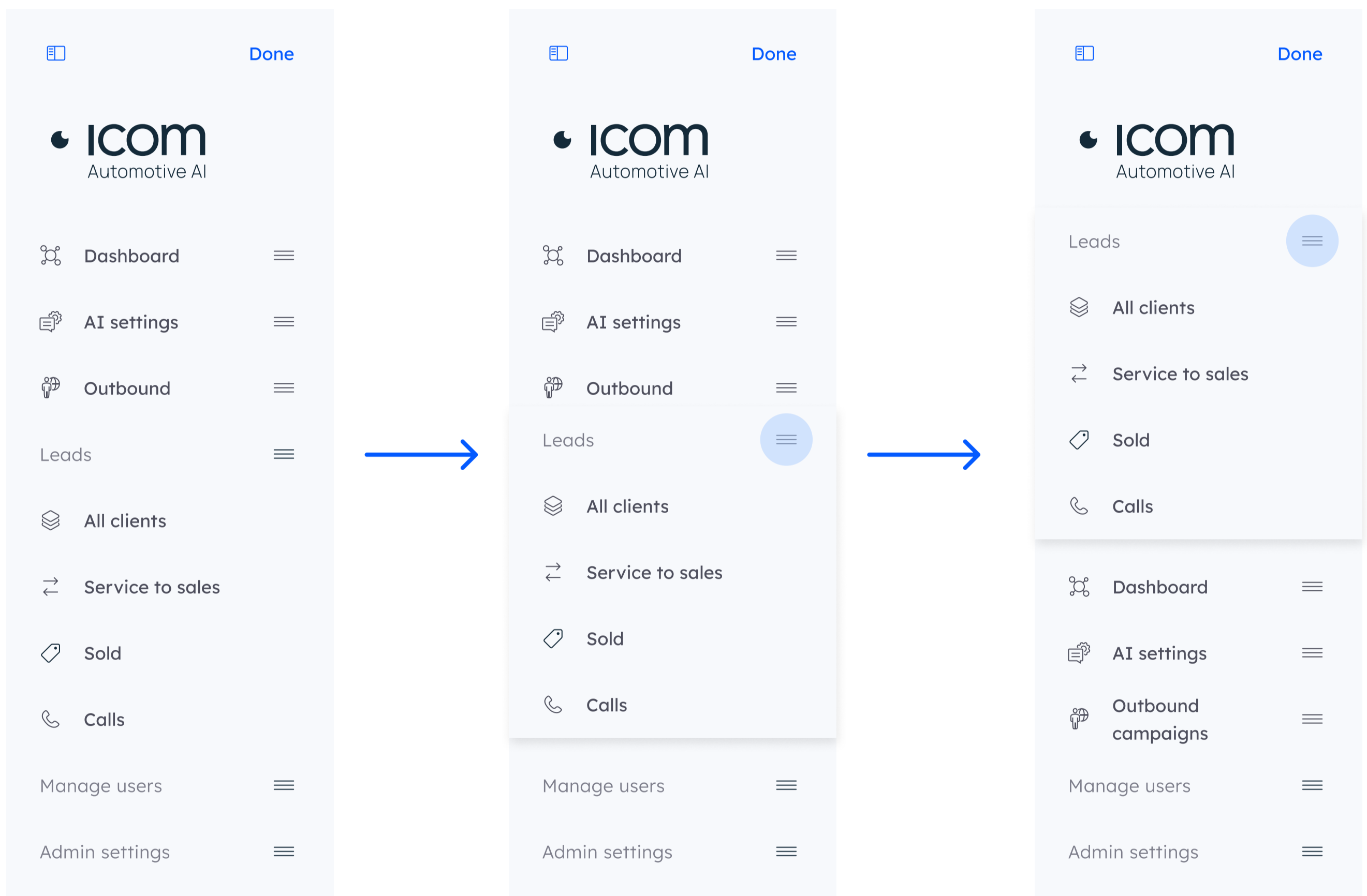
## Edit mode

In edit mode, primary items can be re-arranged, but secondary items cannot. To clarify, items within a section cannot be re-arranged. However, the section itself can be moved up or down.

The animation should push items above or below the section that is being held.

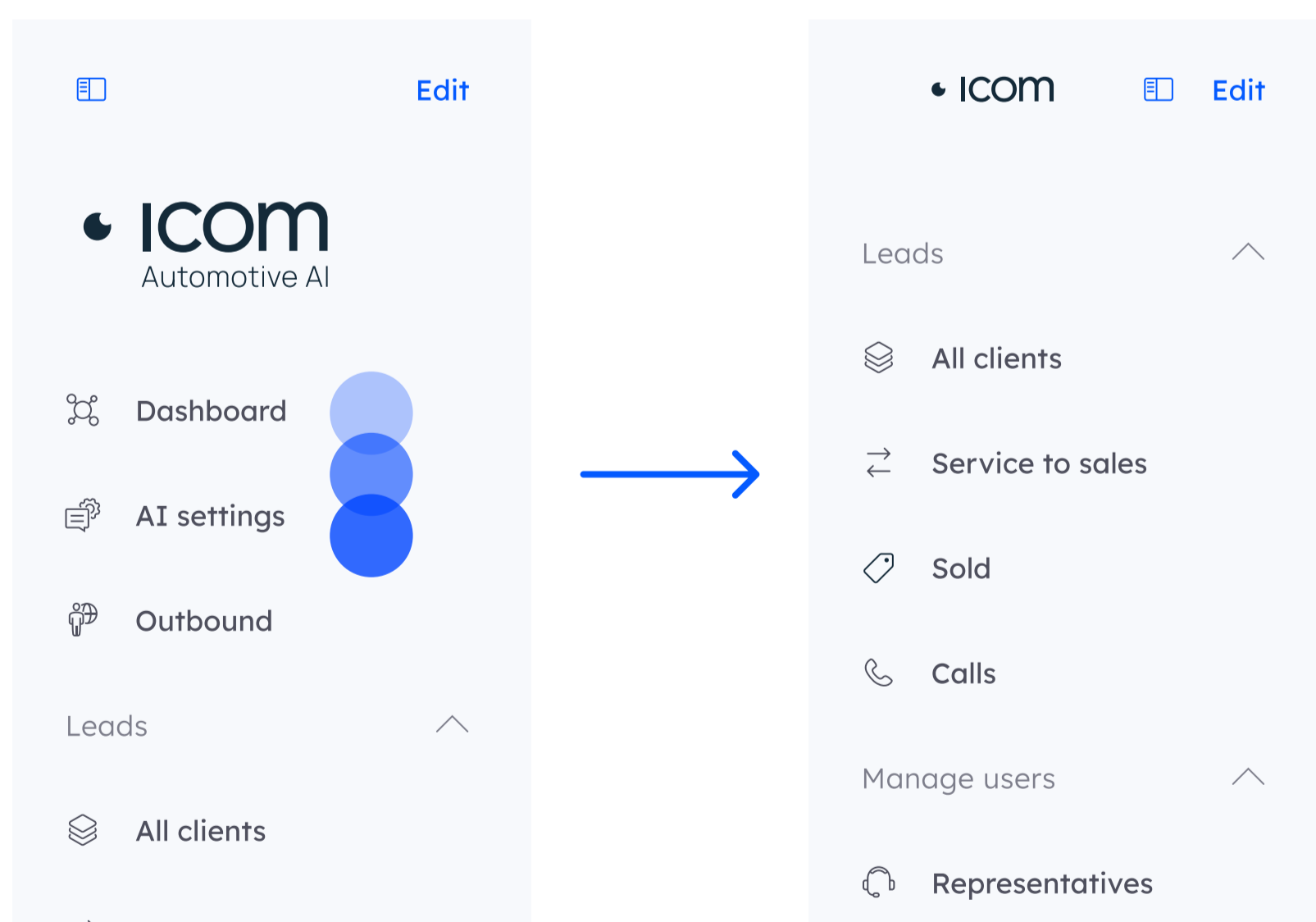
Items cannot be deleted, only re-organized.

to be created: Upon clicking "Done", there should be a pop-over modal to help the user recognize that their changes have been saved.



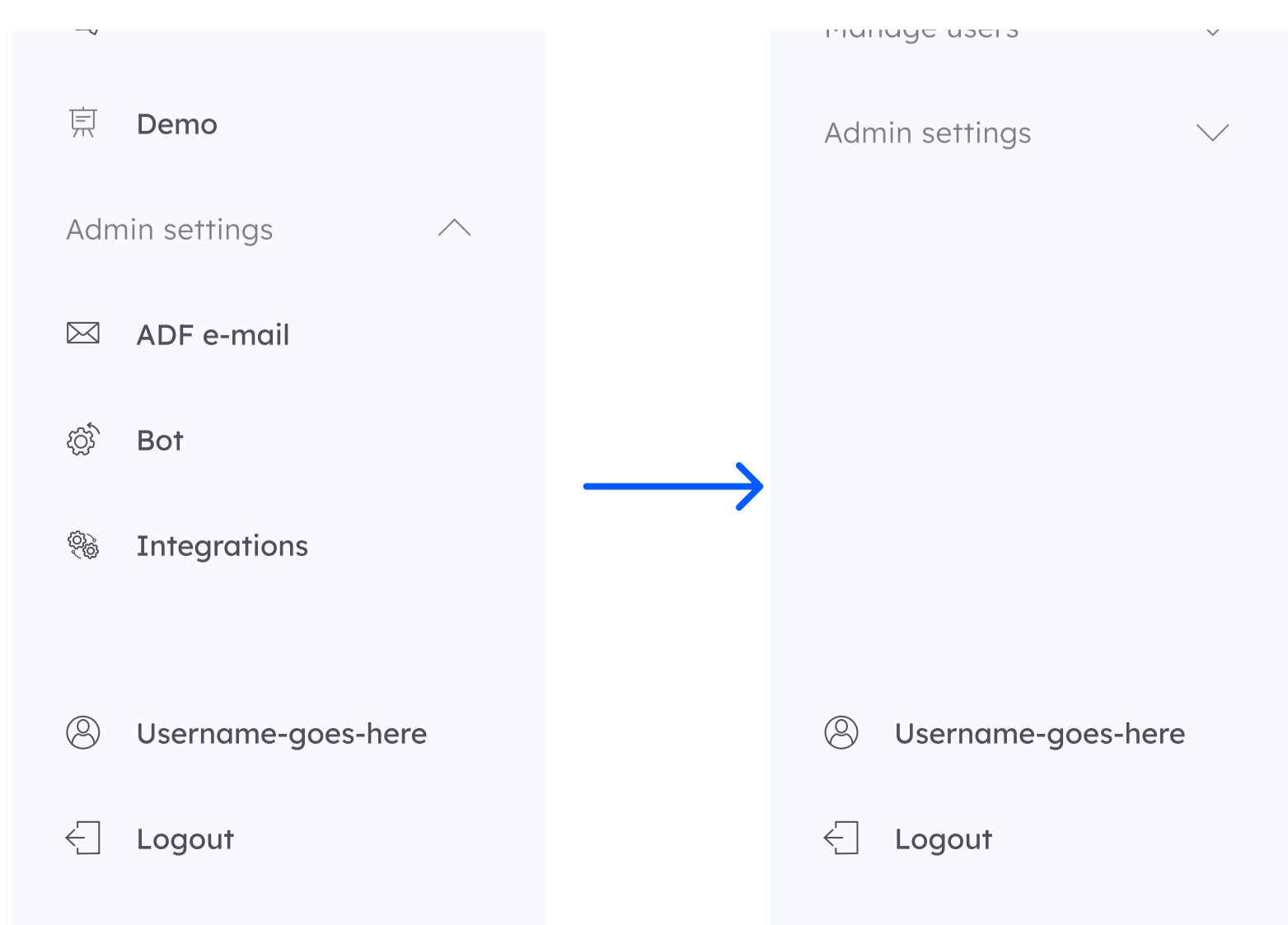
## Scrolling


The sidebar can be scrolled vertically and spans the height of the screen. This scroll bar should exist separately from the page's content if the list of the navigation destination is longer than the height of the area between the header and the footer. When the user scrolls down, the logo scrolls in-line with the sidebar icon and stays fixed.

























When the navigation items are longer than the height of the screen, the space between the last navigation item and the user profile is pre-determined.


When the navigation items are all collapsed, the space between the last navigation item and the user profile is set to: fill.




























 Edit


 ICOM  
Automotive AI


-  Dashboard
-  AI settings
-  Outbound
- Leads 
-  All clients
-  Service to sales
-  Sold
-  Calls
- Manage users 
-  Representatives
-  BDC
-  Client
-  Affiliate
-  Admin
-  Demo
- Admin settings 
-  ADF e-mail
-  Bot
-  Integrations
-  Username-goes-here
-  Logout













 Done


 ICOM  
Automotive AI


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 ICOM  
Automotive AI

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