

SAC STATUS TAB

MONITORING THE STATUS OF YOUR SUBMITTED REQUESTS

VISUAL/WIREFRAME-1



ON-SCREEN – LOGOS/TITLES

Monitoring the Status of Your Submitted Requests

INTERACTION/DEVELOPMENT NOTES

Sequence: Animated Brand opening logos and titles. Specifications below in Media Notes
Full title narrated with voice over

MEDIA NOTES

After Effects Title Layer: 00 Logo + Title Full Overlay – Flat 98 BPM

Layers Enabled:

#	Layer Name
2	[Pre – Logo 1 Fade In 98 BPM]
5	Opening Title
6	White Outline
8	Title Panel (Expand layer) Only enable Advisor Services Slate Blue
9	Side Panel Mover
10	[Pre – BKND – White 1]
12	[Music – Original Audio 98 BPM]

IMAGES

- See Collection titled [Helen_SAC](#)
- 13_006_02_01_31_045_xtnd_V2

AUDIO

- Sonic Mnemonic in titles layer
- Thematic A, C or G 98BPM
- Music in intro and closing only
- Voice-over

OTHER

- Company Brand Titles After Effects File

NARRATION/SCRIPT

Monitoring the Status of Your Submitted Requests

How you can use SAC to track the status of the documents you submit for processing.

VISUAL/WIREFRAME-2



ON-SCREEN – TOPIC INTRODUCTION

Display learning objectives

INTERACTION/DEVELOPMENT NOTES

Sequence:

Transition in each item over time in sync with voice over*.

Music should continue to play

**Generate layout template that will be reused throughout future projects for these types of screens.*

MEDIA NOTES

IMAGES

- 13_006_02_01_13_071

AUDIO

- Voice-over
- Music

OTHER

- N/A

NARRATION/SCRIPT

After viewing this session you will know how to:

- Use SAC to monitor the progress of your work requests
- Respond to requests that are not in good order

VISUAL/WIREFRAME-3



ON-SCREEN

Logging into SAC and locating the Move Money Tab (can pull from previous MM dashboard tab).

INTERACTION/DEVELOPMENT NOTES

Flash the SAC.com log-in page and transition to the homepage. Animate inputting an approved mock client account number or name and display as image below.

Highlight the Accounts tab on the landing page- then transition to Accounts tab then then to the Activity sub tab.

Fully narrated with voice over and sonic brand music

MEDIA NOTES

Call out should be boxes in 2 ¼ weight line in Orange Hex f7a800 RGB: 247.168.0

IMAGES

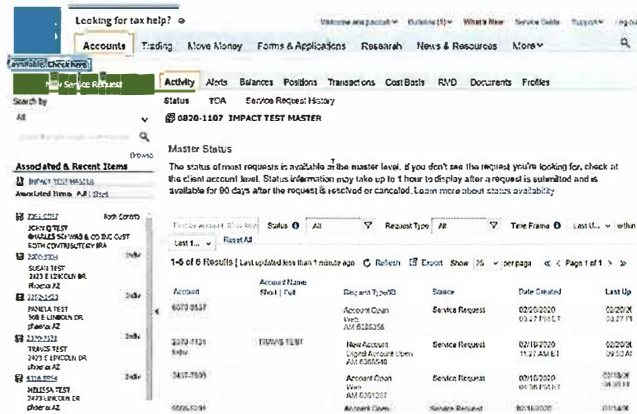
- JL_SAC Login Page
- JL_SAC landing page
- Screen shot of Status sub-tab.

AUDIO

- Voice-over

OTHER

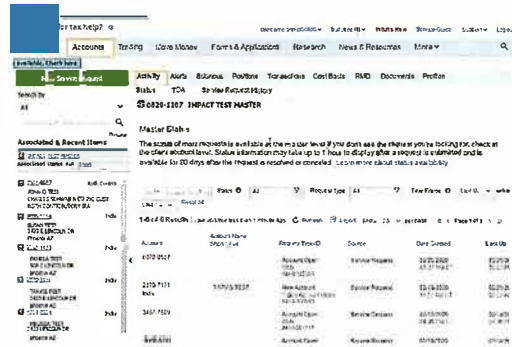
- N/A



NARRATION/SCRIPT

Having logged into SAC, you will navigate to the Activity tab in the Accounts landing page.

VISUAL/WIREFRAME-4



ON-SCREEN – STATUS SUB TAB

Details of the Status sub tab

INTERACTION/DEVELOPMENT NOTES

Sequence:

Show Status tab bring in smart square, transition words between statements listed below.

MEDIA NOTES

•

IMAGES

- Screen shot of Status sub-tab
- ICN-Time-Allotted.eps (flipped)
- ICN-Workflow
- ICN-Alarm.eps
- ICN-Planning_2clr.eps (overlay "90")

AUDIO

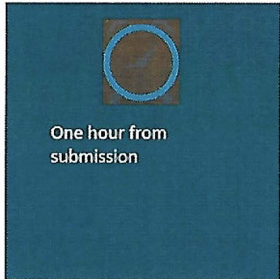
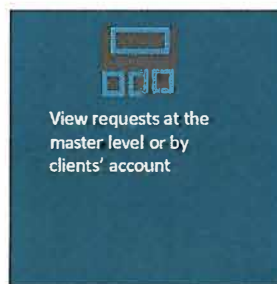
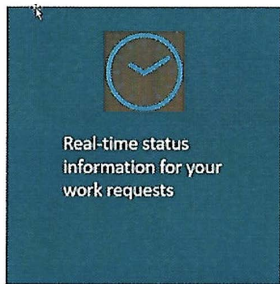
- Voice-over

OTHER

- N/A

NARRATION/SCRIPT

- The Status tab displays real-time status information for your work requests
- You can view most requests at the master or by individual account level
- Requests will display within one hour of submission and are available for 90 days after completion



VISUAL/WIREFRAME-5

ON-SCREEN – STAU SUB TAB

Layout of page

INTERACTION/DEVELOPMENT NOTES

Sequence:

Show Status gray highlight the various sections of the page per the bullet points below.

MEDIA NOTES

-

IMAGES

- Screen shot of Status sub-tab
-

AUDIO

- Voice-over

OTHER

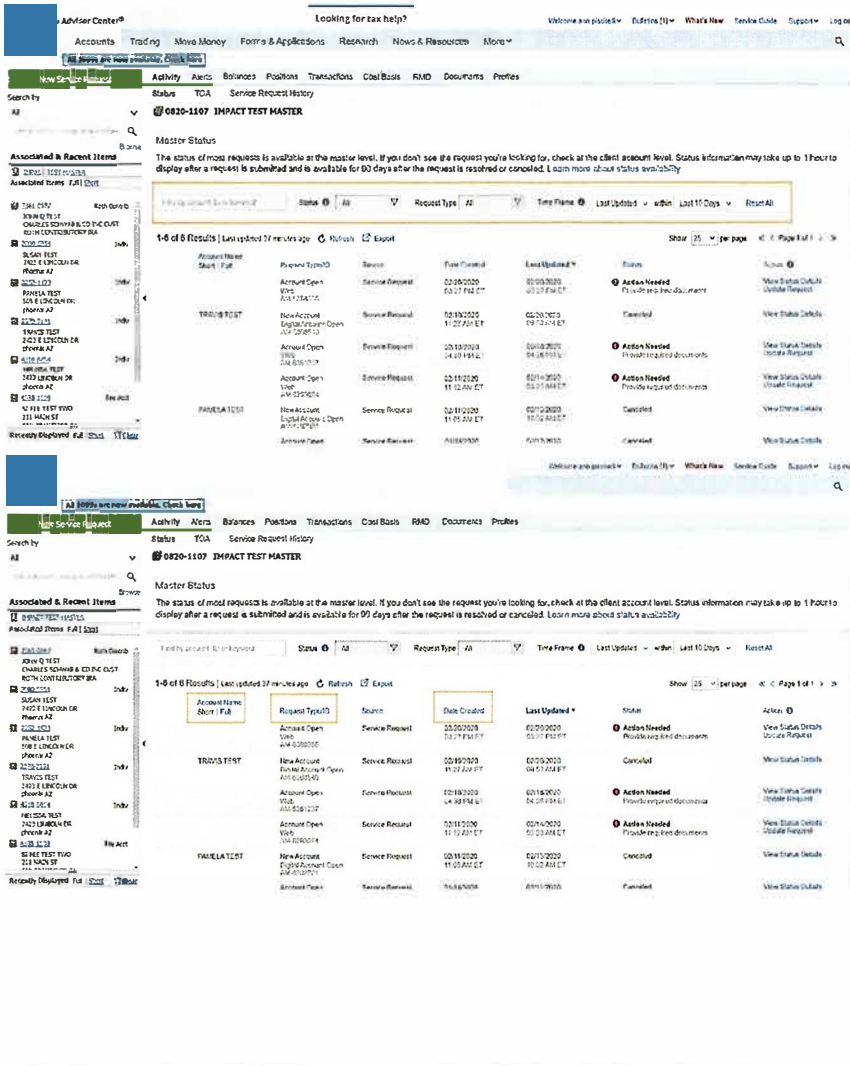
- N/A

NARRATION/SCRIPT

Use the responsive search box to locate a specific account, or you can narrow your results using the filter feature.

The results are listed in an expanded view by :

- Account Name
- Request type
- Creation date



VISUAL/WIRE FRAME-6

ON-SCREEN – STATUS SUB TAB

Status and Action sections

INTERACTION/DEVELOPMENT NOTES

Sequence:

Show Status gray highlight the various sections of the page per the bullet points below.

MEDIA NOTES

-

IMAGES

AUDIO

OTHER

- Screen shot of Status sub-tab
- Screen capture

- Voice-over

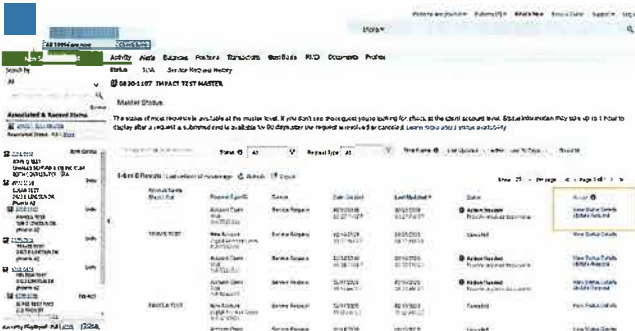
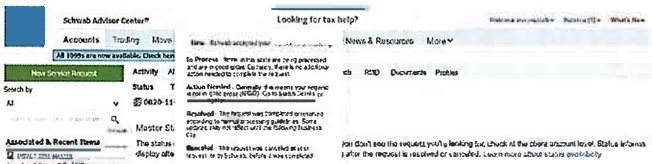
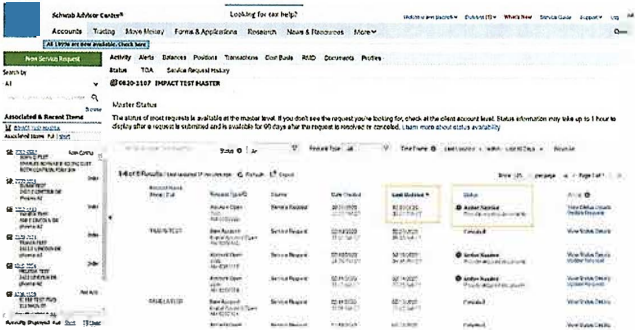
- N/A

NARRATION/SCRIPT

The request will also display

- The date and time the request was last updated
- The status. For a list of descriptions of the status click on the Smarttip icon
- Any action needed from you

Note to Designer: The Smarttip icon is located in the Filter section.



VISUAL/WIREFRAME-7

The screenshot shows a web application interface for a "Schwab Advisor Center". The main content area displays a table of requests with columns for Account Name, Request Type, Source, Date Created, Last Updated, and Status. A "Status Details" modal window is open, showing information for request 9956-5291, including account type (Account Open Web) and current status (Action Needed: Provide required documents).

Account Name	Request Type	Source	Date Created	Last Updated	Status	Action
Account Open Web	Service Request	Service Request	02/10/2020 02:27:53 ET	02/14/2020 03:23:21 ET	Action Needed	View Status Details
Service Request	Service Request	Service Request	02/10/2020 09:27:27 ET	02/10/2020 09:27:27 ET	Cancelled	View Status Details
Account Open Web	Service Request	Service Request	02/10/2020 04:38:54 ET	02/10/2020 04:38:54 ET	Action Needed	View Status Details
Account Open Web	Service Request	Service Request	02/11/2020 11:12:20 ET	02/14/2020 02:53:34 ET	Action Needed	View Status Details
Service Request	Service Request	Service Request	02/11/2020 10:54:21 ET	02/11/2020 10:54:21 ET	Cancelled	View Status Details
Service Request	Service Request	Service Request	02/10/2020 09:18:05 ET	02/10/2020 09:18:05 ET	Cancelled	View Status Details

ON-SCREEN – STATUS SUB TAB

Action required details

INTERACTION/DEVELOPMENT NOTES

Sequence:

Show Status gray highlight the various sections of the page per the bullet points below.

MEDIA NOTES

IMAGES

- Screen shot of Status sub-tab
- Screen capture

AUDIO

- Voice-over

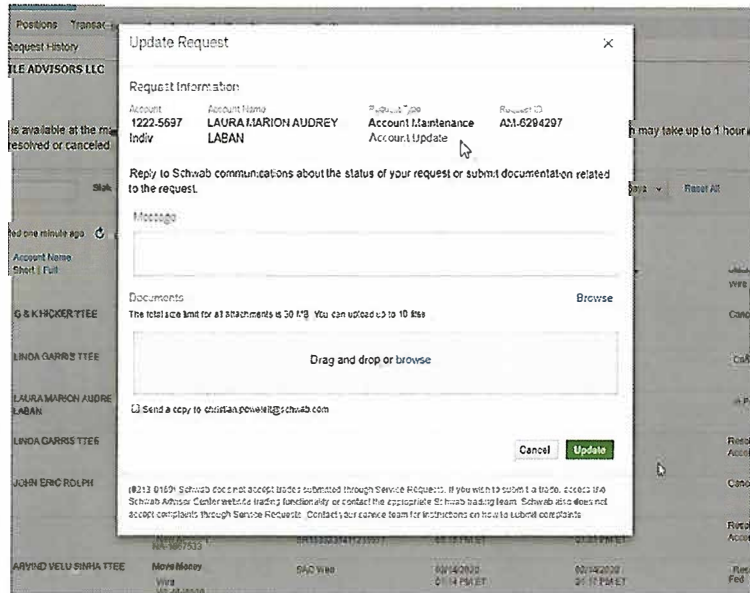
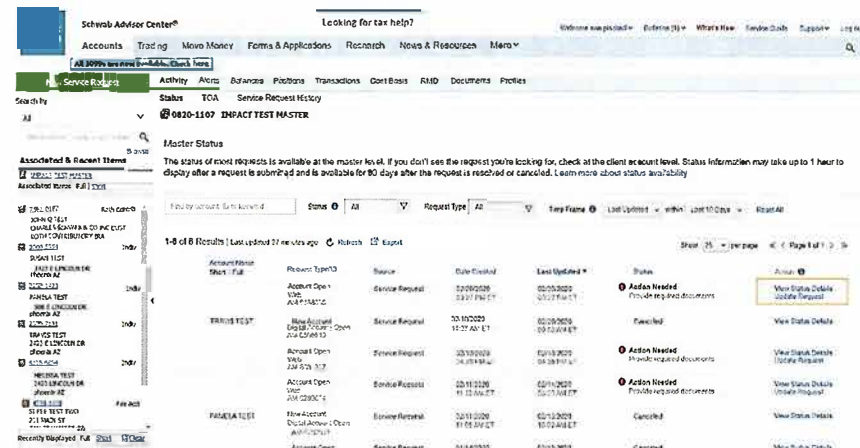
OTHER

- N/A

NARRATION/SCRIPT

To see the details of the action needed click on "View Status Details"

VISUAL/WIREFRAME-8



ON-SCREEN – STATUS SUB TAB

Update request sequence

INTERACTION/DEVELOPMENT NOTES

Sequence:

Show Status gray highlight the various sections of the page per the bullet points below.

MEDIA NOTES

-

IMAGES

- Screen shot of Status sub-tab
- Screen capture
- Second image is of a live account and will **not** be the actual image used in the video

AUDIO

- Voice-over

OTHER

- N/A

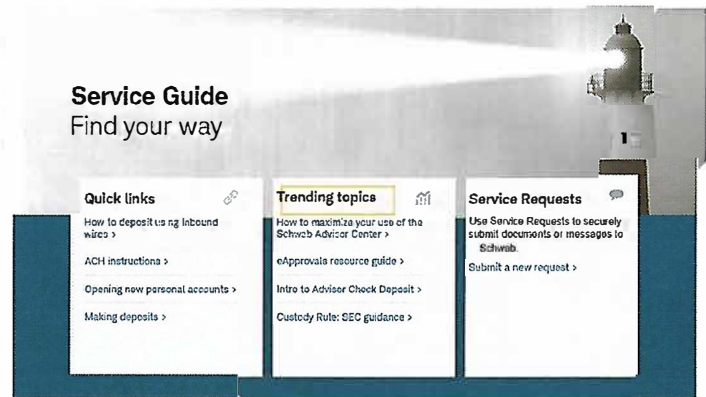
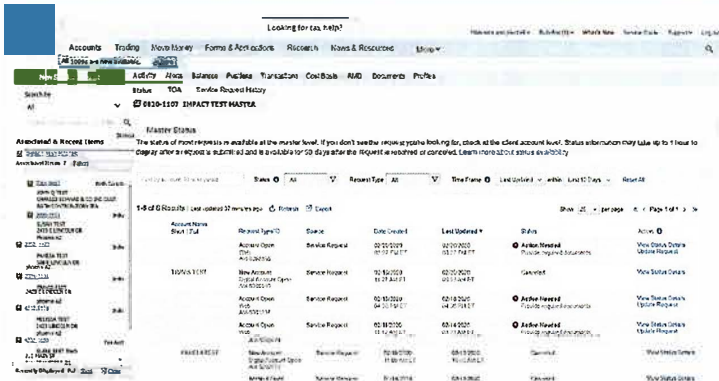
NARRATION/SCRIPT

You can respond to the action needed by clicking “Update Request”. Here you can send a message or submit documentation related to the request.

Click “update”

Your reply will be added to the original request and the status will update within the hour.

VISUAL/WIREFRAME-9



ON-SCREEN – STATUS SUB TAB

TOA tab

INTERACTION/DEVELOPMENT NOTES

Sequence:

Show Status gray highlight the various sections of the page. Transition to SG image to match VO.

MEDIA NOTES

-

IMAGES

- SG homepage image

AUDIO

- Voice-over

OTHER

- N/A

NARRATION/SCRIPT

SAC also provides views on status information for incoming Transfer of Accounts (TOA), new accounts, and Trade-Aways. Visit the Service Guide for additional details.

Summarize what has been covered in this video

INTERACTION/DEVELOPMENT NOTES

The sequence is the same in the previous MM videos

Full transition from prior screen

Sequence:

Transition in picture one and fade/transition into second photo.

Fully narrated with voice over and sonic brand music

MEDIA NOTES

Call out should be boxes in 2 ¼ weight line in Orange Hex f7a800 RGB: 247.168.0

IMAGES

- 13_006_02_01_12_008
(need to edit compute screen image)
- 13_006_02_01_13_045

AUDIO

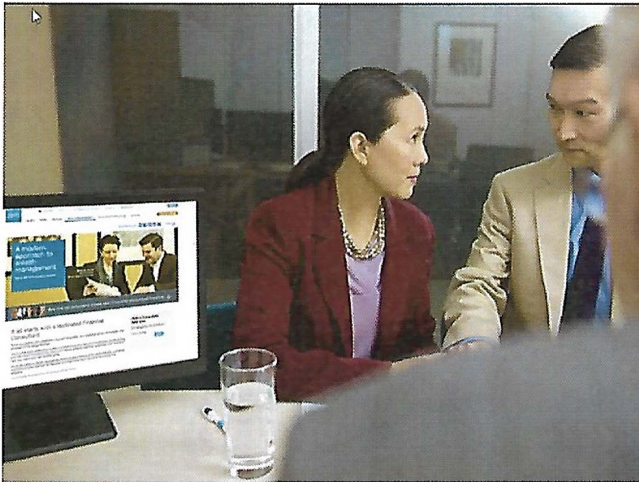
- Voiceover
- Music

OTHER

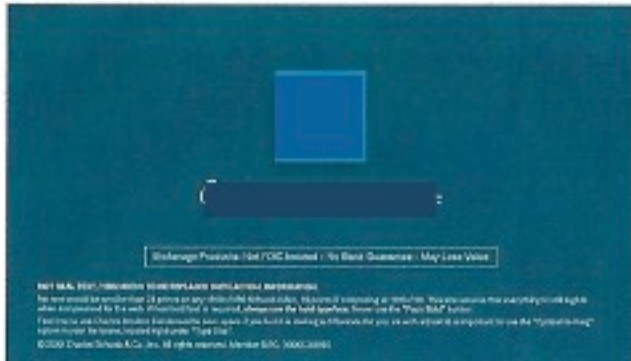
- N/A

NARRATION/SCRIPT

SAC's Status page allows you to view real-time status information for many of your submitted requests. It also allows you to respond and update the requests that need further action. This feature provides you with the same up-to-date information your service team relies on when you contact them with questions.



VISUAL/WIREFRAME-11



ON-SCREEN – END LOGO/DISCLOSURE

End Title and Disclosure screen

INTERACTION/DEVELOPMENT NOTES

Full transition from prior screen
Thematic music fade out

Sequence:

Animated end title and disclosure*. Specifications below in Media Notes

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MEDIA NOTES

After Effects End Frames Layer: 98 End Frame + Disclosure – All Layers Enabled:

#	Layer Name
2	Text Layer
9	[Pre – Not Not May]
12	[Advisor Services – High]

IMAGES

- Logo- own tomorrow.

AUDIO

- Thematic music fade-out

OTHER

- Brand Titles After Effects File

NARRATION/SCRIPT

None