




 Add Account

Edit Account

Close Account

Delete Workflow

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

		Status	Subscription		Contacts	Emails	
<input checked="" type="checkbox"/>	Milestone Homes	Active	▼	Platinum	▼	12343	2434 
<input type="checkbox"/>	Michael Reilly	Draft	▼				
<input type="checkbox"/>	JJ Homes	Paused	▼	Silver	▼	1265	364
<input type="checkbox"/>	Silverton Custom Homes	Closed	▼	Silver	▼	453	54



Save Account

Create Account

- Dashboard
- Contacts
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Account Information

Primary Contact Information

First name

Grant

Last name

Taylor

Mailing

▼

Company

SmartTouch Interactive

Street

3509 San Benito Ct.
Line 2

Phone number

(512) 736-9032

Mobile

▼

Email address

gtaylor@smarttouchinteractive.com

City

Austin

State

TX

▼

Zip

78738

Website

SmartTouchInteractive.com

Country

United States

▼

Configuration

Apply configuration template: (Optional)

[saved configuration]

▼

Apply Configuration

Delete Configuration

▼ ON Contacts

- ON E-mailing
- ON Text messaging
- ON Tours
- ON Opportunities
- ON Documents

We need to determine the sub-features that can be activated within each module.

► ON Campaigns

► ON Automation

► ON Reports

► ON Properties

► ON Events

Save configuration as: (Optional)

Create Account

Cancel



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Configuration

▼ ☐ ON Contacts

▶ ☐ ON Campaigns

▶ ☐ ON Automation

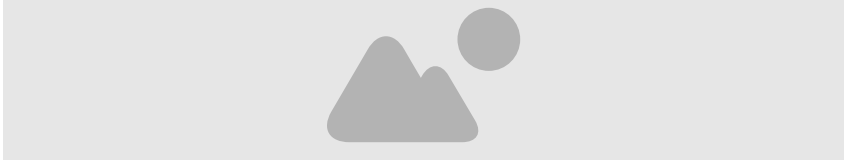
▶ ☐ ON Reports

▶ ☐ ON Properties

▶ ☐ ON Events

Create Account

Cancel



- Dashboard
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Settings

- Personal Settings
- Notifications
- Integrations
- Subscription

My Account

First name

Grant

Last name

Taylor

Address type

Mailing

Company

SmartTouch Interactive

Street

3509 San Benito Ct.
Line 2

Phone number

(512) 736-9032

Mobile

City

Austin

State

TX

Email address

gtaylor@smarttouchinteractive.com

Zip

78738

Website

SmartTouchInteractive.com

Country

United States

Localization

Date format

MM/DD/YYYY

Time zone

GMT -6:00 Central Time (US & Canada)

Currency format

\$ - USD

1,000.00

Default country

United States

Email Signature

[User's email addresses]

Rich-text toolbar

User's Name
M: User's Phone Number

Save Signature

Populate from User's Contact record



International spam law requires that all marketing emails include your physical mailing address and contact information. We'll automatically place this information into the footer of any template you use.

Default timezone Eastern

Default currency to USD but change it based on the country selected above or below.

Default country to US but change it based on the country selected.



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Settings

- Personal Settings
- Notifications
- Integrations
- Subscription

Notifications

ON

Daily Summary

Receive a summary of your daily activities along with engagement opportunities. [Learn more about the Daily Summary.](#)

ON

Alert Notifications

Receive an alert whenever a Contact engages with your email by clicking a link. [Learn more about Alert Notifications.](#)

- Alert method
- ☒ Email
- ☒ Text Message If text messaging is enabled

▼ Additional Settings

☒ Only notify me when Contacts have a minimum lead score of

100



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Settings


- Personal Settings
- Notifications
- Integrations
- Subscription

▼ Email & Calendars




Gmail

Connect



Google Calendar

Connect



Outlook (Exchange)

Connect


▼ Social Media



Facebook

Test connection

Disconnect



Twitter

Connect



LinkedIn

Connect

► Other Native Integrations

For more integrations, visit the [SmartTouch Marketplace](#)



- Dashboard
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Settings

- Personal Settings
- Notifications
- Integrations
- Subscription

Current Subscription: Gold

You're at 90% capacity for Contacts (900 of 1,000 contacts).

Do you want to change your subscription to manage more Contacts?

Upgrade & Do More

Platinum

Feature #1
Feature #2
Feature #3
Feature #4
Feature #5
Feature #6
Feature #7
Feature #8

Upgrade & Do More

Gold

Feature #1
Feature #2
Feature #3
Feature #4
Feature #5

Current Subscription

Silver

Feature #1
Feature #2
Feature #3

Downgrade & Do Less



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Settings

Tabs To Be Determined

Custom Fields

Contact Info [+ Add custom tab](#)

Section

[+ Add custom field](#)

[+ Add section](#)



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Settings

- Tabs
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Custom Fields

Contact Info

Section

Type of field



Dropdowns - Recommended for...

Dropdown

Field name

Contract Submitted

Dropdown values

[Sort A-->Z](#)

Yes

No

[+ Add another dropdown value](#)



☒ Use the first entry as the default value.

Add field

Cancel

Preview

Contract Submitted

Yes



- Single-line text
- Multi-line text
- Number
- Dropdown
- Checkbox
- Date



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Tabs To Be Determined

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Contact Info [+ Add custom tab](#)



Section

Contract Submitted

+

Yes

▼



[+ Add custom field](#)

[+ Add section](#)



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- Tabs
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Custom Fields

- Contact Info
- + Add custom tab

Section

Contract Submitted

+ Yes

▼

Contract Submitted

+ Yes

▼

+ Add custom field

+ Add section



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Settings

Tabs To Be Determined

Custom Fields

Contact Info Registration Info  

Section

+

Add custom field

+

[Add section](#)



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Tabs To Be Determined

Custom Fields

Contact Info Registration Info [+ Add custom tab](#)

Section

[+ Add custom field](#)

[+ Add section](#)



Change Score

Delete Condition

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Tabs To Be Determined

If a then adjust the lead score by points + Add rule

	Category	Condition	Points
<input type="checkbox"/>	Form	Submits a form	10
<input type="checkbox"/>	Web	Visits a website (http://www.visitedsite.com)	5
<input type="checkbox"/>	Web	Visits a web page (http://www.visitedsite.com/pricing)	15
<input type="checkbox"/>	Email	Opens an email	10

Refer to FSD for complete options

Lead score points may be positive or negative

Conditions may be dynamic and dependent on other fields. For example, if we allow a condition based on visiting a web page, then we need to also collect the page to be tracked.

Action Menu: Delete, Adjust score



Import Data

View Records

Rollback Import

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Tabs To Be Determined

Date	Type	Name	Records Updated	Records Added	Total Records
<input type="checkbox"/> 9/1/2013 2:00 PM	Contacts	contact-file3.csv	34	0	34
<input checked="" type="checkbox"/> 3/13/2013 11:13AM	Contacts	contact-file2.csv	130	100	230
<input type="checkbox"/> 1/22/2013 9:43AM	Contacts	contact-file1.csv	1243	0	1243



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Tabs To Be Determined

Upload data from a CSV file

Step 1 of X

Type of data to import

Contacts▼

 [Download a sample .csv file](#)

Select CSV file

Data to import:
Beta Contacts
Beta Companies
1.5 Property



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Tabs To Be Determined

Data to import:
Contacts
Companies
Property

Upload data from a CSV file

Step 1 of X

Type of data to import

Contacts

▼

 [Download a sample .csv file](#)

[file-to-import.csv](#)

Upload file

Cancel upload



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Tabs To Be Determined

Upload data from a CSV file

Step 2 of X

Your fields

First name

=

SmartTouch fields

First Name

▼

Last name

=

Last Name

▼

Email

=

Email

▼

Import contacts

Preview

Grant

Taylor

gtaylor@smarttouchinteractive.com





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Settings

Tabs To Be Determined

☐ Import View Records Reverse Import

	Date	Type	Created	Total Records
<input checked="" type="checkbox"/>	9/1/2013 2:00 PM	Contacts		34
<input type="checkbox"/>	3/13/2013 11:13AM	Contacts		230
<input type="checkbox"/>	1/22/2013 9:43AM	Contacts		1243

Rolling back an import deletes the records created from this import.

This may include contacts, companies, and tags.

Cancel Rollback Import & Delete Records

This functionality has the potential to be highly destructive, so I recommend that we implement a pattern similar to Mail chimp (see below)

Are you sure you want to delete this?

List Name	Subscribers
Renegade Craft Fair Newsletter List	30

All list settings plus subscribers and all associated data will be deleted as well.

Deleting a list also deletes all stats on unsubscribes, complaints, and bounces. If you re-import the list later with the same recipients, you will send to these people again, which can [can cause high abuse complaints that may result in an account suspension. about list management](#)

Type DELETE to confirm

DELETE

DeleteCancel

This pattern is available wherever tables may be customized AND the user has correct permissions.

Applies to Contacts,

Visible columns	Available columns
	<div>Find available columns</div>
<div><div>Contact ID</div><div>First Name</div><div>Last Name</div><div>Email Address</div><div>Phone</div></div>	<div><div>Available column 1</div><div>Available column 2</div><div>Available column 3</div><div>Available column 4</div><div>Available column 5</div><div>Available column 6</div><div>Available column 7</div><div>Available column 8</div><div>Available column 9</div></div>
<div>Primary sort order</div> <div><div>Last Name</div><div>Ascending</div></div> <div>Secondary sort order</div> <div><div>First Name</div><div>Ascending</div></div> <div><div>Save columns</div><div>Cancel</div><div>Save as default order</div></div>	

Default order is TBD

Include handle to drag-and-drop the sort order.

Include delete icon to remove field from the export list.

Available fields include an add icon to add to visible columns.

May want to allow drag-and-drop of fields from visible to available.

If user is Admin, then display option to set order as default for all users.



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[Favorites](#)

[Bookmark this page \(Ctrl + D\)](#)

Grant Taylor (Contact)

Robert Cowes (Contact)

123 Main Street (Prop)

Grand Opening (Campaign)

'Favorites' is intended to be an item located in the upper-right corner.

The exact order is TBD.

Trap 'Ctrl + D' to create a favorite



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Tabs To Be Determined

Records to check

- ☒ Check all contacts
- ☐ Check all contacts that haven't been checked

Check for duplicates

Cancel



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Tabs To Be Determined

Records to check



250 of 1000 contacts checked

Check for duplicates

Cancel



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Settings

Tabs To Be Determined

Results

		Older Contact			Newer Contact			
	ID	First Name	Last Name	Email	ID	First Name	Last Name	Email
<input checked="" type="checkbox"/>	101	Taylor	Grant	gtaylor@smarttouchinteractive.com	551	Taylor	Grant	gtaylor@smarttouchinteractive.com
<input type="checkbox"/>	323	White	Ron	ron.white@gmail.com	598	White	Ron	ron.white@gmail.com



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Results

		Older Contact				Newer Contact			
	ID	First Name	Last Name	Email	ID	First Name	Last Name	Email	
Option	101	Taylor	Grant	gtaylor@smarttouchinteractive.com	551	Taylor	Grant	gtaylor@smarttouchinteractive.com	
Option	323	White	Ron	ron.white@gmail.com	598	White	Ron	ron.white@gmail.com	

Need to include an option to manually merge records.

We may also want to allow users to mark a contact as 'not a duplicate' without having to access the merge view.

Suggest adding these links in one column: 'Merge | Not Duplicates'



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TabsToBeDetermined

Merge Contact Fields

Field	Older Contact	Selection	Newer Contact	Merged Contact
First name	Grant	<div><div></div><div></div></div>	Grant	Grant
Last name	Taylor	<div><div></div><div></div></div>	Taylor	Taylor
Email	gtaylor@smarttouchinteractive.com	<div><div></div><div></div></div>	grant@foliozoom.com	grant@foliozoom.com
Phone number	(512) 736-9032	<div><div></div><div></div></div>	(512) 263-0001	(512) 263-0001
Street	3117 Lomita Drive	<div><div></div><div></div></div>	3117 Lomita Drive	3117 Lomita Drive
City & State	Austin TX	<div><div></div><div></div></div>	Austin TX	Austin TX
Zip	78738	<div><div></div><div></div></div>	78738	78738
Country	US	<div><div></div><div></div></div>	US	US

Merge & return to listMark as not duplicatesCancel & return to list

Default merge value to fields with values.

If both contact records have value for the same field, then default to the newer record.

Identify a value for the merge record by selecting the left or right arrows between the records (this keeps mouse movements to a minimum).

We may want to split the merged preview from the table to make it easier to read (see below)

Field	Older Contact	Selection	Newer Contact
First name	Grant	<div><div></div><div></div></div>	Grant
Last name	Taylor	<div><div></div><div></div></div>	Taylor
Email	gtaylor@smarttouchinteractive.com	<div><div></div><div></div></div>	grant@foliozoom.com
Phone number	(512) 736-9032	<div><div></div><div></div></div>	(512) 263-0001
Street	3117 Lomita Drive	<div><div></div><div></div></div>	3117 Lomita Drive
City & State	Austin TX	<div><div></div><div></div></div>	Austin TX
Zip	78738	<div><div></div><div></div></div>	78738
Country	US	<div><div></div><div></div></div>	US

Merge & return to listMark as not duplicatesCancel & return to list

Merged Contact

Grant
Taylor
grant@foliozoom.com
(512) 263-0001
3117 Lomita Drive
Austin, TX
78738
US



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Tabs To Be Determined

Users

☐

Add User

Change Status

Change Role

if selected

if selected

	ID	First Name	Last Name	Email	Status	Role
<input type="checkbox"/>	323	White	Ron	ron.white@gmail.com	Active ▼	Sales User ▼
<input checked="" type="checkbox"/>	101	Taylor	Grant	gtaylor@smarttouchinteractive.com	Active ▼	Administrator ▼

Allow users change status and role from the table.



Add Tag

Merge Tag

Delete Tag

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Tag		Tagged Items	
<input type="checkbox"/>	follow-up	23	
<input checked="" type="checkbox"/>	moving soon	12	Merge 
<input type="checkbox"/>	rockport vip	353	



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Tag		Tagged Items	
<input type="checkbox"/>	follow-up	23	
Merge <div> moving soon</div>		into <div>moving</div>	<div>Merge</div> Or <div>Cancel</div>
<input type="checkbox"/>	rockport vip	353	



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Tag		Tagged Items	
<input type="checkbox"/>	follow-up	23	
12 items will be changed from <div> moving soon</div> to <div> moving This action cannot be undone.</div>			
<div>Continue Merging</div>		Or	<div>Cancel</div>



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Users

☐

Add User

Change Status

Change Role

if selected

if selected

	ID	First Name	Last Name	Email	Status	Role
<input type="checkbox"/>	323	White	Ron	ron.white@gmail.com	Active ▼	Sales User ▼
<input checked="" type="checkbox"/>	101	Taylor	Grant	gtaylor@smarttouchinteractive.com	Active ▼	Administrator ▼

Allow users change status and role from the table.

