



 New ▼

🔍 *Search contacts, opportunities, campaigns, etc.*

## Advanced



[Recent Activity](#) | [Messages](#) | [Settings](#)

## Dashboard

## Contacts

## Campaigns

## Automation

## Reports

## Properties

## Events

[Context-sensitive action bar]

	Last Name	First Name	Email	Phone
<input checked="" type="checkbox"/>	Taylor	Grant	gtaylor@smarttouchinteractive.com	(512) 736-9032
<input type="checkbox"/>	White	Ron	ron.white@gmail.com	(512) 555-1111





⊕ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

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

[Context-sensitive action bar]

<input checked="" type="checkbox"/>	<div>Grant Taylor</div> <div>Product Manger</div> <div>SmartTouch Interactive</div>	<div>(512) 736-9032 (mobile)</div> <div><a href="mailto:gtaylor@smarttouchinteractive.com">gtaylor@smarttouchinteractive.com</a></div>	<div>Customer</div> <div>Contacted on Dec. 23</div>	<div><div><div></div><div></div><div></div><div></div><div></div></div><div><div></div><div></div></div></div>
<input type="checkbox"/>	<div>Ron White</div> <div></div> <div></div>	<div>(512) 555-1111 (home)</div> <div><a href="mailto:ron.white@gmail.com">ron.white@gmail.com</a></div>	<div>Partner</div> <div>Contacted on 1/3/2011</div>	



+ New ▾

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

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

[Context-sensitive action bar]

Reuse this pattern for any export.

Saved Export Format(s): (Optional)

[list of saved formats] ▾

Load Saved Format

Delete Saved Format

Selected Fields		Available Fields	
		<span>🔍</span> Find available fields <span>✕</span>	
<div><div>☐☐</div>Contact ID</div>	<div>—</div>	<div><div><div><div>+</div></div></div>Available field 1</div>	
		<div><div><div><div>+</div></div></div>Available field 2</div>	
		<div><div><div><div>+</div></div></div>Available field 3</div>	
		<div><div><div><div>+</div></div></div>Available field 4</div>	
		<div><div><div><div>+</div></div></div>Available field 5</div>	
<div><div>☐☐</div>First Name</div>	<div>—</div>	<div><div><div><div>+</div></div></div>Available field 6</div>	
		<div><div><div><div>+</div></div></div>Available field 7</div>	
<div><div>☐☐</div>Last Name</div>	<div>—</div>	<div><div><div><div>+</div></div></div>Available field 8</div>	
		<div><div><div><div>+</div></div></div>Available field 9</div>	
<div><div>☐☐</div>Email Address</div>	<div>—</div>		
<div><div>☐☐</div>Phone</div>	<div>—</div>		

Primary sort order

Last Name ▾

Ascending ▾

Secondary sort order

First Name ▾

Ascending ▾

Save Export Format as: (Optional)

Export List

Cancel

# Timeline Filter #1

Showing all activities ▼ from all time ▼

Showing all activities ▼ from all time ▼

<input checked="" type="checkbox"/>	All activities
<input checked="" type="checkbox"/>	Calls
<input checked="" type="checkbox"/>	Emails
<input checked="" type="checkbox"/>	Meetings
<input checked="" type="checkbox"/>	Notes
<input checked="" type="checkbox"/>	Opportunities
<input checked="" type="checkbox"/>	Tours
<input checked="" type="checkbox"/>	Web Visits

Showing all activities ▼ from all time ▼

If 'Custom range' is selected,  
then display two date fields  
to accept a date range.

<input checked="" type="radio"/>	All time
<input type="radio"/>	Last 30 days
<input type="radio"/>	Last 60 days
<input type="radio"/>	Last 90 days
<input type="radio"/>	Custom range

# Timeline Filter #1

Showing all Contacts and Companies ▼

Showing all Contacts and Companies ▼

Contacts and Companies
Contacts
Companies
Recently viewed

Showing all activities ▼ from all time ▼

If 'Custom range' is selected, then display two date fields to accept a date range.

<input checked="" type="radio"/>	All time
<input type="radio"/>	Last 30 days
<input type="radio"/>	Last 60 days
<input type="radio"/>	Last 90 days
<input type="radio"/>	Custom range



+ New ▼

Q Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

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

◀ Back

Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More ▼

◀ ▶



**Grant Taylor**  
Product Manager, SmartTouch Interactive  
(512) 736-9032 (mobile)  
(512) 555-5555 (office)  
[gtaylor@smarttouchinteractive.com](mailto:gtaylor@smarttouchinteractive.com)



📌 tag1, tag2, tag3

[More](#)

225 points  
Prospect  
Since May 20, 2013

Engagement 

30 days ▼

Last contacted  
14 days ago  
Emailed

Last engaged  
7days ago  
Viewed page

Campaigns  
7

Opened  
57%

Clicked  
29%

Next action 

+ [add](#)

Review contract with lawyers. 

✎ [edit](#)

December 23 

Waiting ▼

Opportunity 

+ [add](#)

Lot 1, Block B, The Hollows 

✎ [edit](#)

\$450,000 value at 90% ▼ probability

In Negotiation ▼stage

Expected to close 10/2/2013 ▼

Relationships 

+ [add](#)

[Jenny Janda](#) , Account Executive 

🗑

+ [Add another relationship](#)

Showing all activities ▼ from all time ▼

Action Item created today by Donna Ream.  
Review contract with lawyers. 2 days (12/2/2013)

Opportunity updated yesterday by Donna Ream.  
Lot 1, Block B, The Hollows - \$450,000  
**Probability** increased from 75% to 90%

Opportunity created on 10/12/2013 by Donna Ream.  
Lot 1, Block B, The Hollows - \$450,000

Contact created on 10/1/2013 by Donna Ream.



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc.

[Advanced](#) ✕

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Dashboard

Contacts

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Back

Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More ▼



Grant Taylor

Product Manager, SmartTouch Interactive

(512) 736-9032 (mobile)

(512) 555-5555 (office)

[gtaylor@smarttouchinteractive.com](mailto:gtaylor@smarttouchinteractive.com)



🏷 tag1, tag2, tag3

[More](#)

225 points

Prospect

Since May 20, 2013

Engagement

Last contacted

14 days ago

Emailed

Last engaged

7days ago

Viewed page

Campaigns

7

Opened

57%

Clicked

29%

30 days ▼

Next action

Review contract with lawyers.

December 23

Waiting ▼

+ [add](#)

✎ [edit](#)

Opportunity

Lot 1, Block B, The Hollows

\$450,000 value at 90% ▼ probability

In Negotiation ▼stage

Expected to close 10/2/2013 ▼

+ [add](#)

✎ [edit](#)

Relationships

[Jenny Janda](#) , Account Executive

+ [Add another relationship](#)

+ [add](#)



Email



To:

[CC](#)

Subject:

Message:

Send



Cancel



New ▼

Search contacts, opportunities, campaigns, etc. [Advanced](#)

- Dashboard
- Contacts
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- Properties
- Events

- Add Action
- Add Note
- Add Tour
- Send Campaign
- Manage Tags
- More ▼



Action

Remind me on

4/22/2012

Assign to

Users ▼

Save Action



Quickset icons for call, email, meeting

Quickset verbiage pattern: [Action] [contact name] with [company] (if company is populated) at [contact method]  
Eg. "Call Grant Taylor with SmartTouch Interactive at (512) 736-9032 (mobile)."

Assign to with @

Set date with %

Set priority, status and result with #

Default 'assign to' to current user

Default date to tomorrow (or most frequently used)

Remember form size (collapsed or expanded)



Action

Complete by

4/22/2012

Assign to

Users ▼

Priority

Priority ▼

Status

Status ▼

Result

Result ▼

Save Action







New ▼

Search contacts, opportunities, campaigns, etc. [Advanced](#)

[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
- Contacts
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- Add Action
- Add Note
- Add Tour
- Send Campaign
- Manage Tags
- More ▼



Action

Complete by

4/22/2012

Assign to

Users ▼

Priority

Priority ▼

Status

Status ▼

Result

Result ▼

Save Action



Quickset icons for call, email, meeting

Quickset verbiage pattern: [Action] [contact name] with [company] (if company is populated) at [contact method]  
Eg. "Call Grant Taylor with SmartTouch Interactive at (512) 736-9032 (mobile)."

Assign to with @

Set date with %

Set priority, status and result with #

Default 'assign to' to current user

Default date to tomorrow (or most frequently used)

Remember form size (collapsed or expanded)



⊕ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

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

Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More ▼

Note

Save Note

▼

Add people with @

Add tags with #

Add deals or property with \$

Note

People

Tags

Save Note

▲



New ▼

Search contacts, opportunities, campaigns, etc. [Advanced](#)

[Recent Activity](#) | [Messages](#) | [Settings](#)

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

Add Action	Add Note	Add Tour	Send Campaign	Manage Tags	More ▼
------------	----------	----------	---------------	-------------	--------

Tour details

Community toured

Communities ▼

Toured on

4/22/2012

Tour type

Tour type ▼

Save Tour

Set community with @

Set date with %

Set type with #

Default date to today

Default type to 'first' (if no other record exists for the community) or 'be-back' (if a record exists for the community).



Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More ▼

Options under 'More' are context-sensitive.

For example, 'Copy contact' only applies to an individual contact--not multiple contacts.

Add Opportunity

Add Relationship

Add file

Add to company

Copy Contact

Export Contact

Archive Contact

Alternative view: Consider separating options into related groups

Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

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

- Add Action
- Add Note
- Add Tour
- Send Campaign
- Manage Tags
- More ▼

🔍 Search campaign names, descriptions, and tags... ✕

Campaign name	Last used on 9/11/2013
Campaign description	Created on on 9/11/2013
Campaign name	Last used on 9/11/2013
Campaign description	Created on on 9/11/2013
Campaign name	Last used on 9/11/2013
Campaign description	Created on on 9/11/2013

Pattern applies to sending a campaign or campaign series to one or more contacts selected from a list.

If a campaign series is selected, then do not show the preview.

Campaign ▼

🔍 Search campaign names, descriptions, and tags... ✕

Campaign name	Last used on 9/11/2013
Campaign description	Created on on 9/11/2013
Campaign name	Last used on 9/11/2013
Campaign description	Created on on 9/11/2013
Campaign name	Last used on 9/11/2013
Campaign description	Created on on 9/11/2013

From (default to current user)

To (# of selected contacts)

Subject



Send now Send later ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

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Dashboard

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Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More ▼

◀ Back

Cancel

From (default to current user)

To (# of selected contacts)

Subject



Send now

Send later ▼

Cancel

Pattern applies to sending a campaign or campaign series to one or more contacts selected from a list.

If a campaign series is selected, then do not show the preview.





 New ▼

🔍 *Search contacts, opportunities, campaigns, etc.* [Advanced](#) ✕

## Advanced



[Recent Activity](#) | [Messages](#) | [Settings](#)

Dashboard

## Contacts

Campaigns
-----------

Automation

## Reports

## Properties

## Events

Add Action

Add Note

Add Tour

Send Campaign

## Manage Tags

More ▼



Accessed via Action Bar-->More-->Add Relationship  
Also accessed within sidebar

Contact name returns results as the user types.

Relationship type defaults in this order: Account Executive, Spouse, Agent, Lawyer, Co-buyer. Default to the next type when adding another relationship.

Link contact name to the contact's record.

Contact name

Account Exec



Save relationship

For sidebar:

+

--

Account Exec



Save relationship

Jenny Janda

Account Exec



Save relationship

Jenny Janda

▼

⊕

OR

--

Account Exec



Save relationship

Jenny Janda

e ▼







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

Add Action

Add Note

Add Tour

Send Campaign

Manage Tags

More

Opportunity

Lot 1, Block B, The Hollows--A contract has been written and delivered.

Potential

\$450,000

Probability

90%

Expected close

4/22/2012

Save Opportunity

Accessed via Action Bar-->More-->Add Opportunity  
Also accessed within sidebar

Tag properties in with \$ (or may want to use something else)

Tag people in notes with @

Remember form size (collapsed or expanded)

Consider adding relationship functionality if opportunities need to accommodate more complex B2B opportunities.

Opportunity

Lot 1, Block B, The Hollows--A contract has been written and delivered.

Potential

\$450,000

Probability

90%

Expected close

4/22/2012

People

Tags

tag1, tag2, tag3

Save Opportunity

Event ▼

Invite to

Events ▼

Event ▼

Invite to

Events ▼

Add to event

If invitations have not been sent, then provide option to 'Add to event'

Event ▼

Invite to

Events ▼

Invitations to [event name] have already been sent.

Do you want to send an invitation now or schedule an appointment?

Schedule appointment

Send invitation

If invitations have already been sent, then provide options to 'Send invitation' or 'Schedule appointment'


Event ▼

Invite to

Events ▼

Schedule appointment for

4/22/2012

 ▼

 at

time ▼

☒ Send appointment confirmation by email

Save appointment

Files

+Add a file from: [Library](#) | [Dropbox](#)

File library

Documents

Images

+ Upload

Q Search file names and tags

X

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

Filename

▲

▼

Add 1 file

Cancel

File library shown here. Dropbox implementation via Dropbox Chooser

Support Office, Open Office, and image files

Allow multi-select

Upon selection, change label of 'Add' button to include the number of file(s) selected.

...



⊕ New ▾

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

Q

Gran

✕

All

Actions

Campaigns

Companies

Contacts

Deals

Events

Files

Notes

Properties

✓

Call Grant Taylor on 9/22/2013

✉

Rockport Grand Opening

🏠

Grand Openings, Inc.

👤

Grant Taylor

💰

123 Grandview Drive

📅

Attend Rockport's Grand Opening

📄

Attendance for Grand Opening event

✎

Grant Taylor visited the model home today

📍

123 Grandview Drive

Determine whether results are sorted by best match or grouped by commonality (all companies then all contacts)



⊕ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕


[Recent Activity](#) | [Messages](#) | [Settings](#)

- Dashboard
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Find contacts ▼ that match all ▼ of the following criteria: Selecting advanced search option slides down applicable list or is a new view before searching.

Lead score ▼ is greater than ▼ 125 [add](#) | [remove](#)

Company name ▼ contains ▼ Google [add](#) | [remove](#)

Last contacted ▼ is older than ▼ 4/22/2012  ▼ [add](#) | [remove](#)

Find Contacts

☐

[Action bar for Contact List]

<input checked="" type="checkbox"/>	<div>Grant Taylor</div> <div>Product Manger</div> <div>SmartTouch Interactive</div>	<div>(512) 736-9032 (mobile)</div> <div><a href="mailto:gtaylor@smarttouchinteractive.com">gtaylor@smarttouchinteractive.com</a></div>	<div>Customer</div> <div>Contacted on Dec. 23</div> <div><a href="#">Quick action</a> ▼</div>
<input type="checkbox"/>	<div>Ron White</div> <div></div> <div></div>	<div>(512) 555-1111 (home)</div> <div><a href="mailto:ron.white@gmail.com">ron.white@gmail.com</a></div>	<div>Partner</div> <div>Contacted on 1/3/2011</div> <div><a href="#">Quick action</a> ▼</div>

Find 

contacts

 that match 

all

 of the following criteria:

Lead score

is greater than

125

[add](#) | [remove](#)

Company name

contains

Google

[add](#) | [remove](#)

Last contacted

is older than

4/22/2012

[add](#) | [remove](#)

Find Contacts

Find:  
contacts  
companies  
inventory

For match combobox:  
All = And statement  
Any = Or statement

- Text options:

contains

does not contain

is

is not

is empty

is not empty
- Combo box, text options:

is

is not

is empty (if option)

is not empty (if option)
- Number options:

is equal to

is not equal to

is greater than

is greater than or equal to

is less than

is less than or equal to
- Date options:

is in the last (days, weeks, months)

is within (range)

is on or before

is on or after

Find 

contacts

 that match 

all

 of the following criteria:

is greater than

125

[add](#) | [remove](#)

Q Search

Account Executive

Address 2

Address/Street

City

Community Toured

Company

Contact Type

Contract Price

Country

County

han

[add](#) | [remove](#)

Google

[add](#) | [remove](#)

4/22/2012

[add](#) | [remove](#)

Filter available fields from  
search field



New

Search *contacts, opportunities, campaigns, etc.* [Advanced](#)

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[Context-sensitive action bar]

Export fields

- Contact ID
- First Name
- Last Name
- Email Address
- Phone

Available fields

- Find available fields
- Available field 1

Available field 2

Available field 3

Available field 4

Available field 5

Available field 6

Available field 7

Available field 8

Available field 9

Primary sort order

Last Name

Ascending

Secondary sort order

First Name

Ascending

Export Contacts

Cancel

Export fields may include "standard" fields (TBD)

Export fields shall include all search fields.

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 export fields.

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

Export format shall be CSV





New

Search contacts, opportunities, campaigns, etc. [Advanced](#)

[Recent Activity](#) | [Messages](#) | [Settings](#)

Dashboard

Contacts

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[Context-sensitive action bar]

Export fields		Available fields	
		Find available fields	
	Contact ID		Available field 1
	First Name		Available field 2
	Last Name		Available field 3
	Email Address		Available field 4
	Phone		Available field 5

Primary sort order

Last Name

Ascending

Secondary sort order

First Name

Ascending

Export format

Microsoft Excel

Export Contacts

Cancel

- Export fields may include "standard" fields (TBD)
- Export fields shall include all search fields.
- 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 export fields.
- May want to allow drag-and-drop of fields from available to export.
- Export format shall be CSV



Add to Company ▼

Company name

Popular | [Recent](#)

☐

Company #1

☐

Company #2

☐

Company #3

☐

Company #4

☐

Company #5

☐

Company #6

☐

Company #7

☐

Company #8

☐

Company #9

☐

Company #10

Display top-10 most popular companies

Allow user to toggle to ten most recent companies

Display company names as the user types

Add to Company ▼

Company name

Smart

Popular | [Recent](#)

☐

Smart Cars Inc.

☐

Smarter Marketing LLC

☐

SmartTouch Interactive

Filter list as user types

Offer option to create tag if there are no matches.

Add to Company ▼

Company name

Smart

Popular | [Recent](#)

☐

Smart Cars Inc.

☐

Smarter Marketing LLC

☒

SmartTouch Interactive

Add contacts to company

Provide option when user selects company

Add relationship ▼

Contact

Jenny Janda

Relationship type

Account Exec ▼

Save relationship



General

First name

Grant

Last name

Taylor

Job title

Product Manager

Company

SmartTouch Interactive

Phone

Phone number

(512) 736-9032

Mobile

⊕

Add another phone number

Email

Email address

gtaylor@smarttouchinteractive.com

⊕

Add another email address

Web & Social

Link

facebook.com

Facebook

⊕

Add another link

Address

Address type

Home

Street

3509 San Benito Ct.  
Line 2

City

Austin

State

TX

Zip

78738

Country

United States

⊕

Add another address

Additional Info

SSN

111-11-1111

Lead Details

Lead type

Lead

Lead status

Active

Lead source

Web

Lead date

4/22/2012

Tags

tag1, tag2, tag3

If custom fields and 1-click preferences exists, then display tabs.

Tabs should be styled as flat design.

Suggest Company based on email address' domain

Default phone number type in this order; Mobile, Work; Home.  
Default to the next type when another phone number is added.

Link options in this order: Website; LinkedIn; Facebook; Twitter; Google+; Blog; Skype? Default to the next type when another link is added.

Select link type based on URL

General

Company name

SmartTouch Interactive

Phone

Phone number

(512) 736-9032

Mobile

+ [Add another phone number](#)

Email

Email address

gtaylor@smarttouchinteractive.com

+ [Add another email address](#)

Web & Social

Link

facebook.com

Facebook

+ [Add another link](#)

Address

Address type

Physical

Street

3509 San Benito Ct.  
Line 2

City

Austin

State

TX

Zip

78738

Country

United States

+ [Add another address](#)

Additional Info

SIC

111-11-1111

If custom fields and 1-click preferences exists, then display tabs.

Tabs should be styled as flat design.

Suggest Company based on email address' domain

Default phone number type in this order; Work; Mobile; Home. Default to the next type when another phone number is added.

Default address types in this order: Mailing; Billing. Default to the next type when another phone number is added.

Link options in this order: Website; LinkedIn; Facebook; Twitter; Google+; Blog; Skype? Default to the next type when another link is added.

Select link type based on URL