| • New | • |
|-------|---|
|-------|---|

| Dashboard | |
|-----------|--|
| | |

Contacts

Campaigns

Automation

Reports

Properties

Events

[Context-sensitve action bar]

| | Last Name | First Name | Email | Phone | |
|---|-----------|------------|-----------------------------------|----------------|--|
| V | Taylor | Grant | gtaylor@smarttouchinteractive.com | (512) 736-9032 | |
| | White | Ron | ron.white@gmail.com | (512) 555-1111 | |



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

[Context-sensitve action bar]

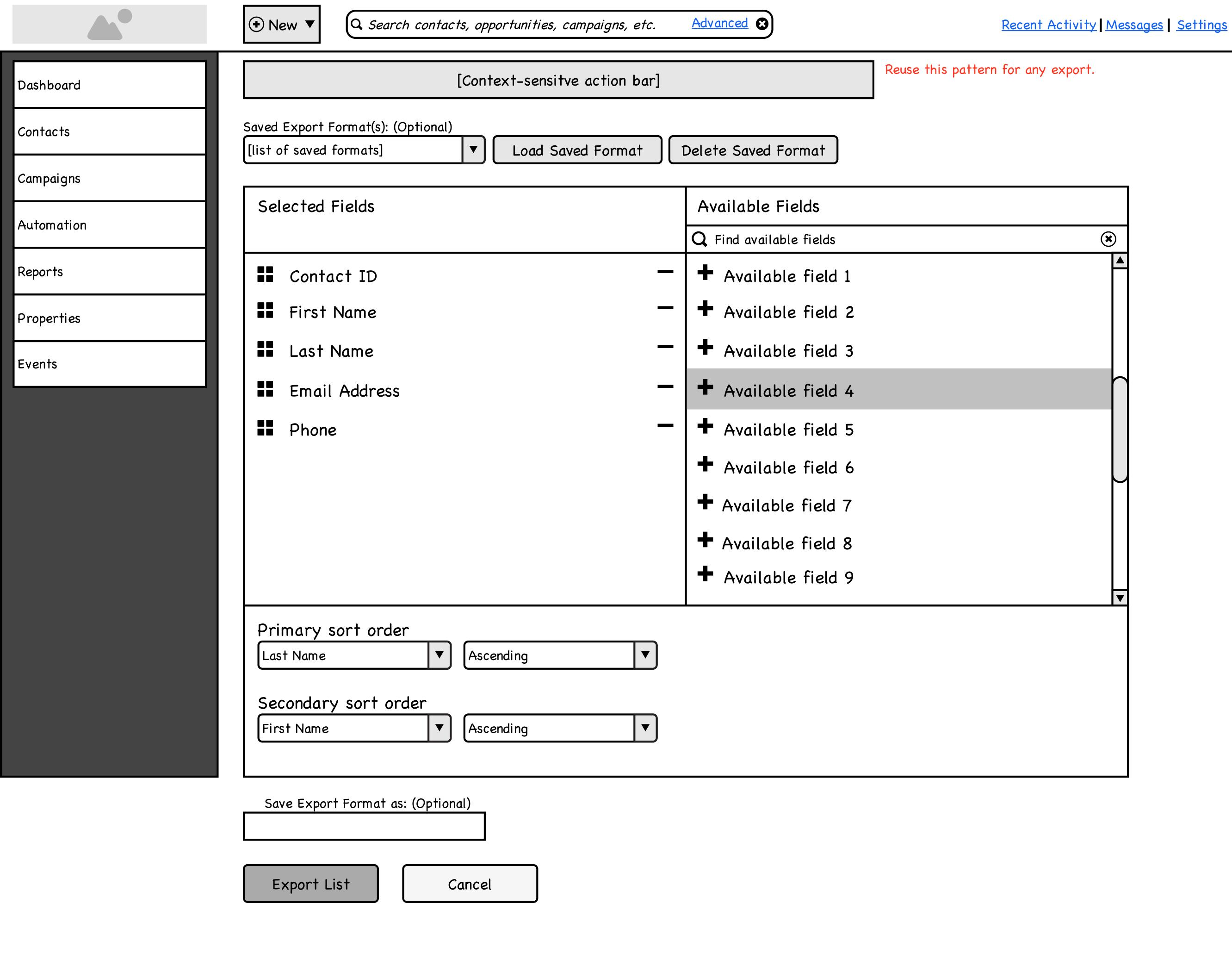
☑ Grant Taylor (512) 736-9032 (mobile) Customer gtaylor@smarttouchinteractive.com Contacted on Dec. 23 Product Manger

SmartTouch Interactive

Ron White (512) 555-1111 (home) Partner

ron.white@gmail.com Contacted on 1/3/2011





Timeline Filter #1

Showing all activities ▼ from all time ▼

Showing all <u>activities ▼ from all</u> time ▼

| <u>ac 11v</u> | <u>riiles 🔻 Itolii all</u> |
|--|----------------------------|
| > | All activities |
| S | Calls |
| S | Emails |
| ⟨ | Meetings |
| Image: Continuous properties of the continuous properties of | Notes |
| \ | Opportunities |
| N | Tours |
| S | Web Visits |

Showing all activities ▼ from <u>all time</u> ▼

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

| O | All time |
|----------|--------------|
| O | Last 30 days |
| O | Last 60 days |
| O | Last 90 days |
| 0 | Custom range |

Timeline Filter #1

Showing all Contacts and Companies \blacktriangledown

Showing all Contacts and Companies \blacktriangledown

| 9 |
|------------------------|
| Contacts and Companies |
| Contacts |
| Companies |
| Recently viewed |

Showing all activities ▼ from <u>all time</u>▼

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

| • • • • • | |
|-----------|--------------|
| ⊙ | All time |
| 0 | Last 30 days |
| 0 | Last 60 days |
| 0 | Last 90 days |
| 0 | Custom range |

Showing all activities ▼ from all time ▼

Dashboard

Contacts

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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.

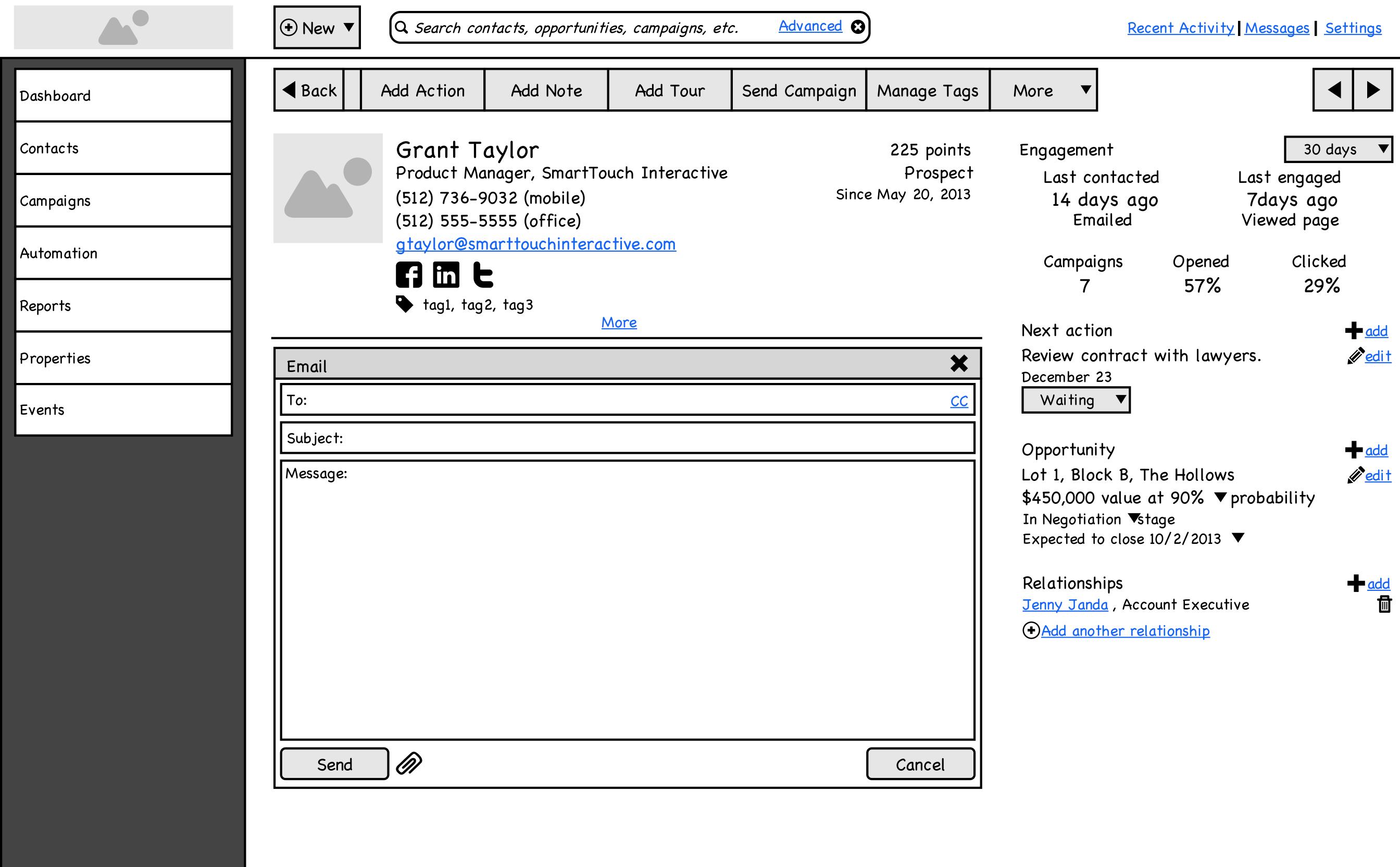


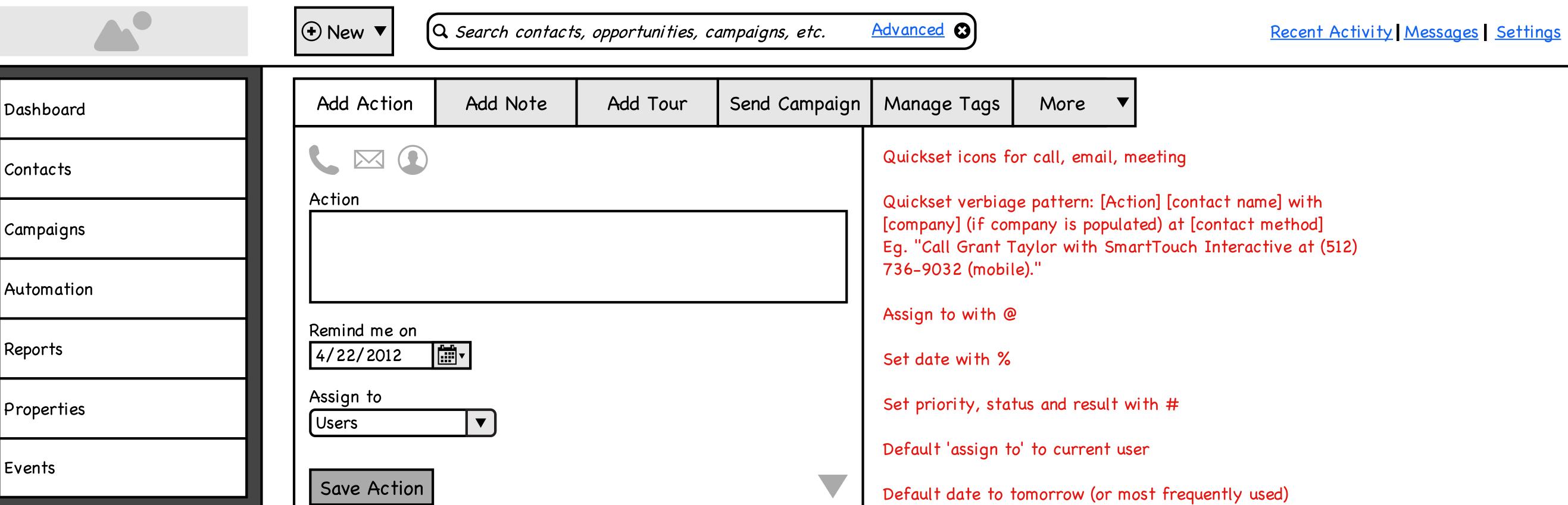
<u>+ add</u>

Relationships

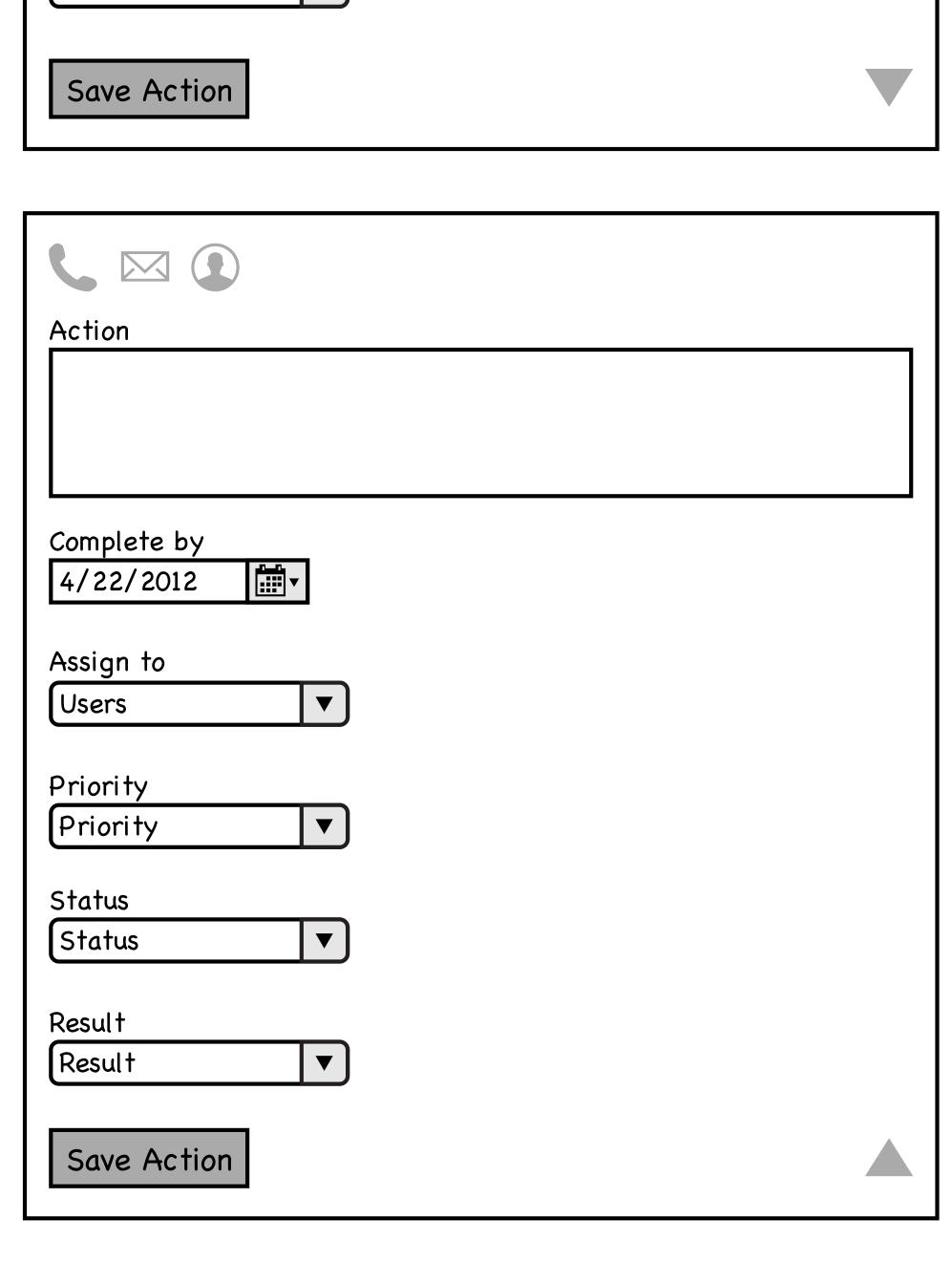
Jenny Janda, Account Executive

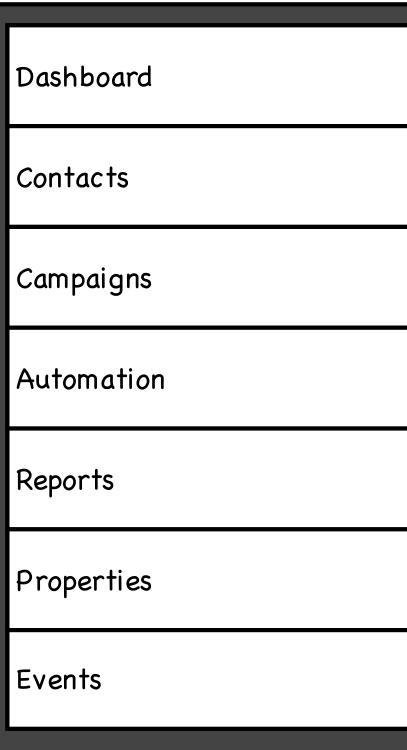
+ Add another relationship

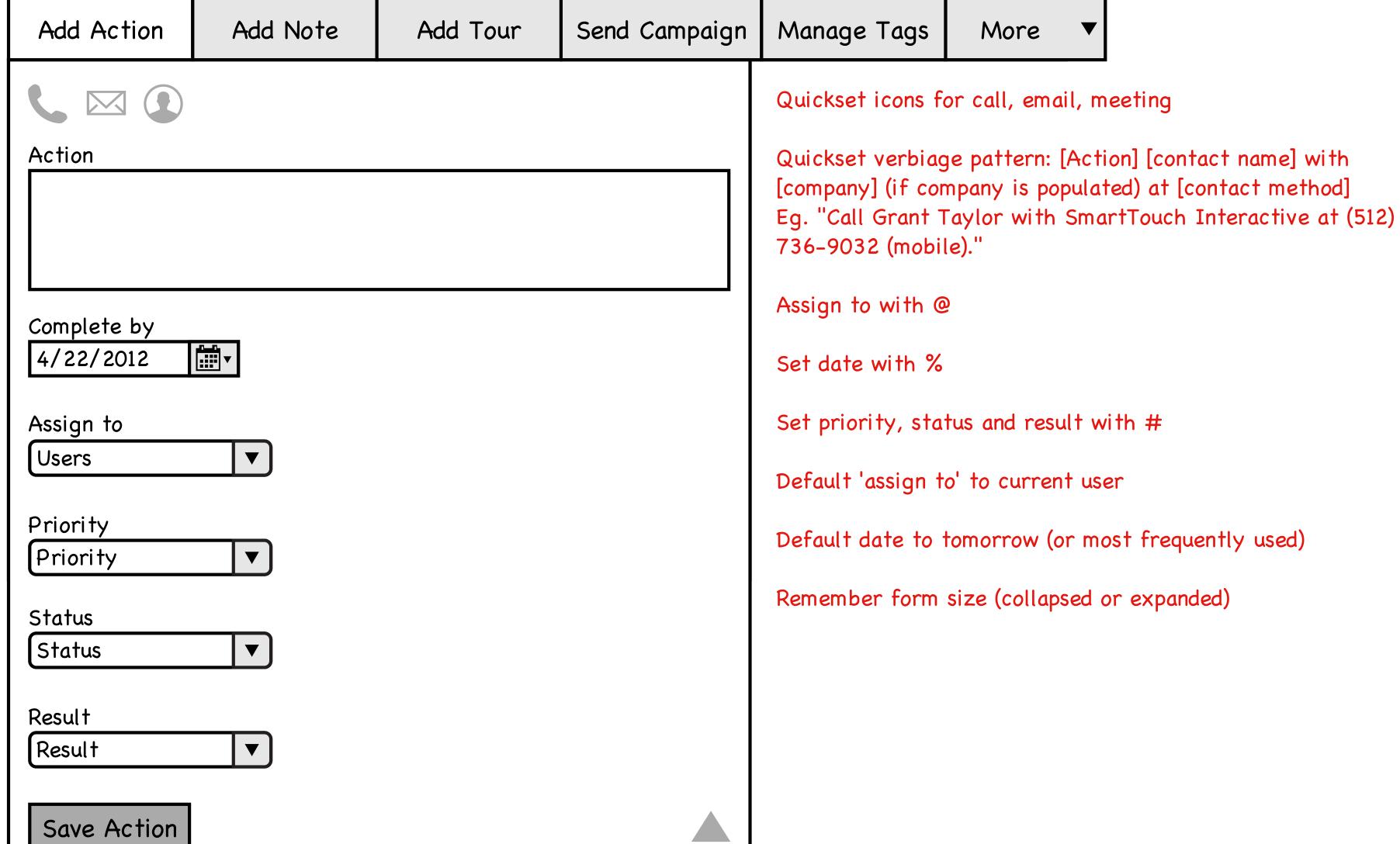




Remember form size (collapsed or expanded)







Advanced (3)

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

| Add Action | Add Note | Add Tour | Send Campaign | Manage Tags | More ▼ |
|------------|----------|----------|---------------|-------------------|---------------|
| Note | | | | Add people with | @ |
| | | | | Add tags with # | |
| | | | | Add deals or prop | perty with \$ |
| Save Note | | | | | |

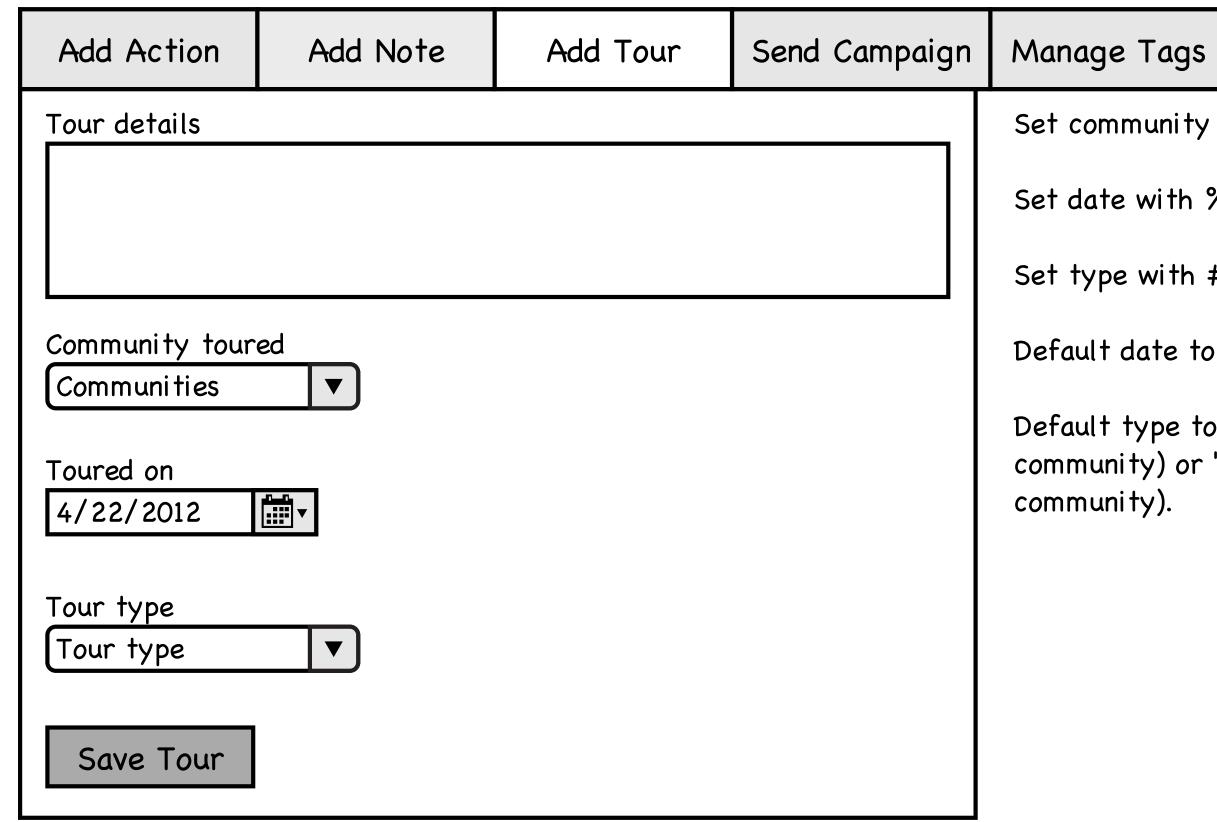
| Note | |
|-----------|--|
| | |
| | |
| | |
| People | |
| | |
| Tags | |
| | |
| Save Note | |





Advanced (2)

Dashboard Contacts Campaigns Automation Reports Properties **Events**



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).

More

Advanced (3)

| | | | , , , |
|------------|------------|--------------------|------------|
| Dashboard | Add Action | Add Note | Add 1 |
| Contacts | Displo | ay top-10 most pop | oular tags |
| Campaigns | | user to toggle to | ten most |
| Automation | Displa | ay tags as the use | r types |
| Reports | | | |
| Properties | | | |
| Events | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

| Add Tour | | Ser | nd Campaign | Manage Tags | More | • |
|----------|----|-------|-----------------|-------------|------|---|
| r tags | A | idd o | r remove tag(s) |): | | |
| most | ΙL | | | | | |
| | + | Popu | lar Recent | | | |
| pes | | | Popular tag # | # 1 | | |
| | | | Popular tag # | # 2 | | |
| | | | Popular tag # | # 3 | | |
| | | | Popular tag # | # 4 | | |
| | | | Popular tag # | # 5 | | |
| | | | Popular tag # | # 6 | | |
| | | | Popular tag # | # 7 | | |
| | | | Popular tag # | # 8 | | |
| | | | Popular tag # | # 9 | | |
| | | | Popular tag # | # 10 | | |

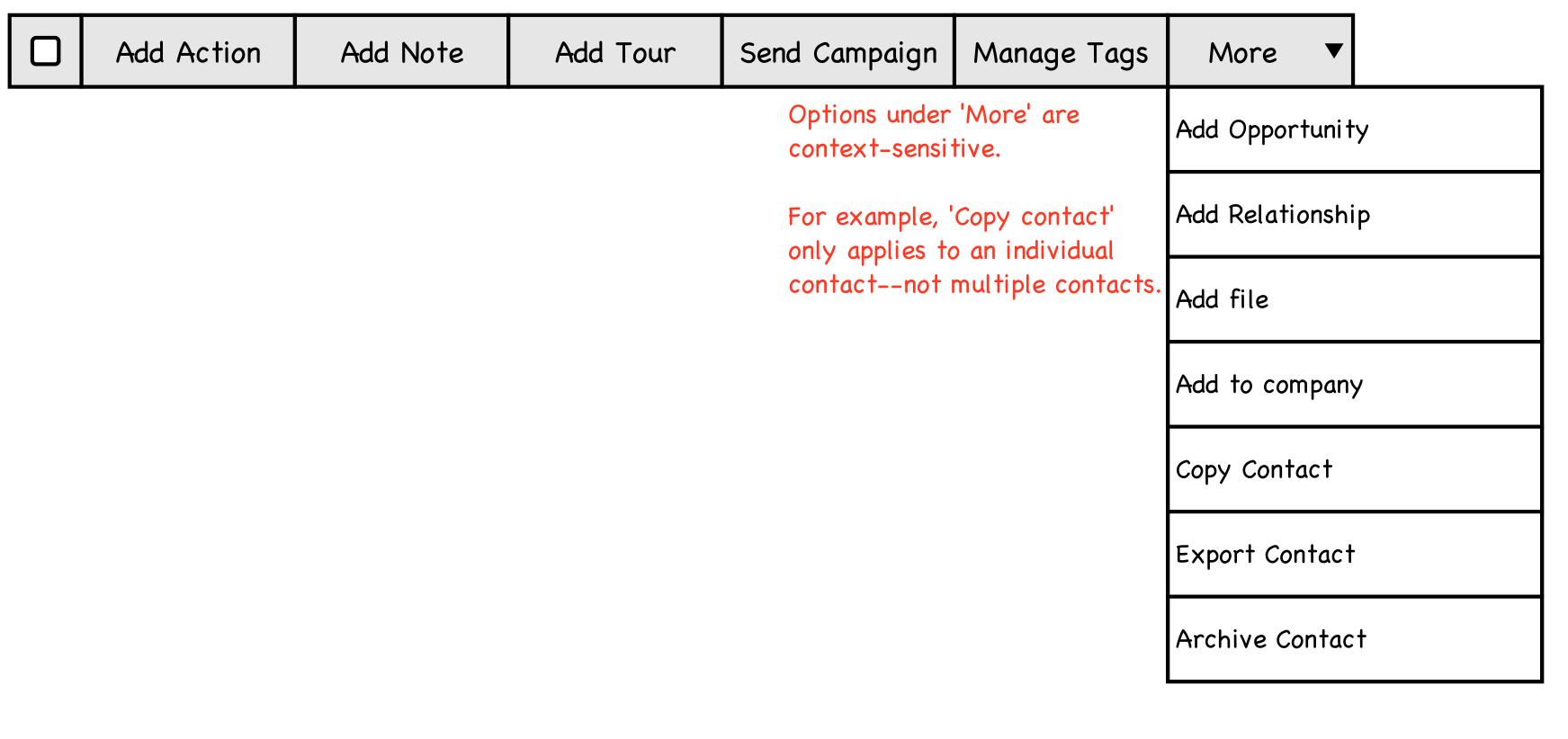
Filter list as user types

Offer option to create tag if there are no matches.

| Add or | remove tag(s): | × |
|----------|-----------------|---|
| Popula | r Recent | |
| | hot-lead | |
| | hot-prospect | |
| | hotel | |
| "hot" (c | create new tag) | |

Provide options when user selects one or more tags.

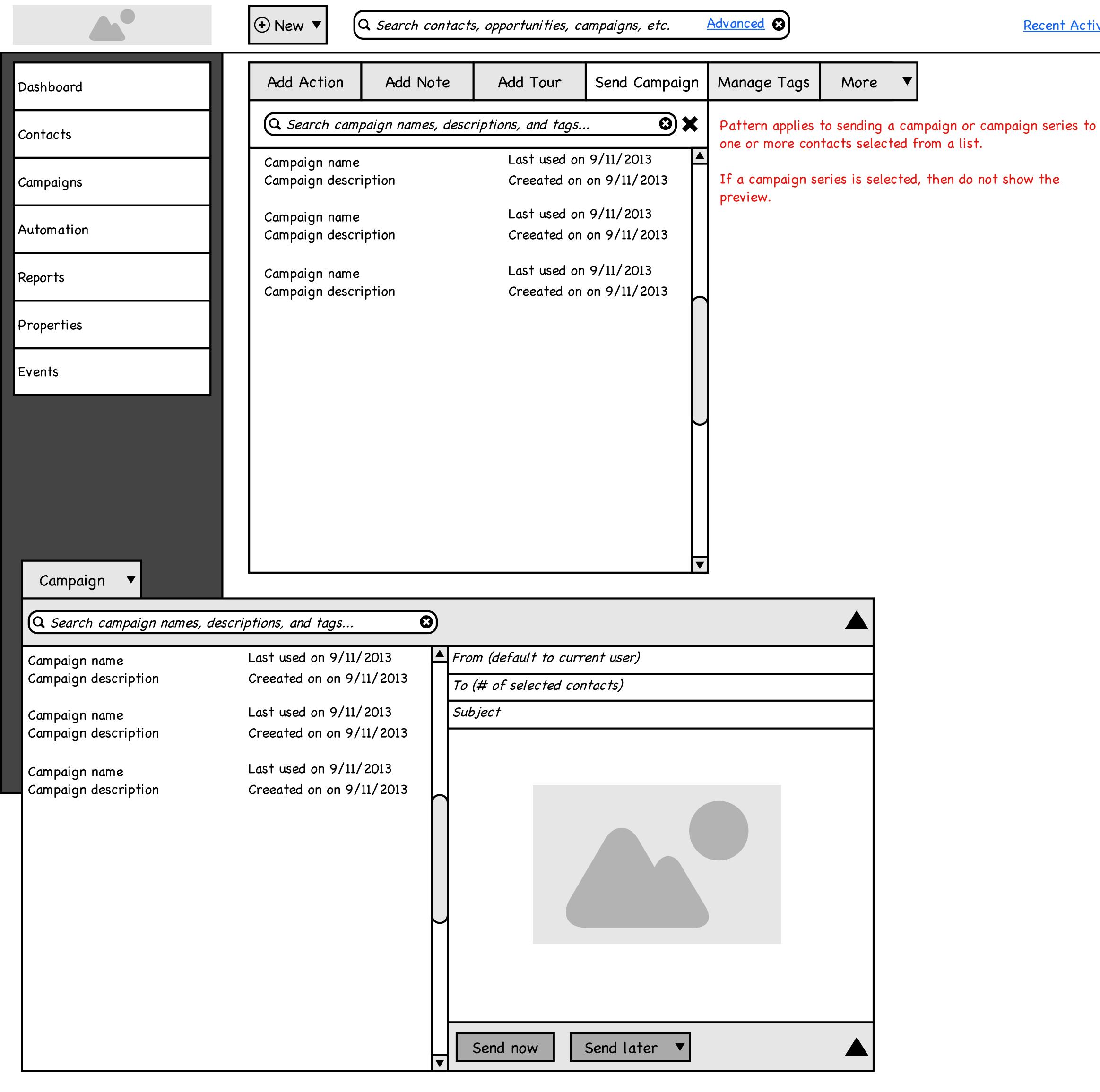
| Add or remove tag(s) | * |
|----------------------|------------|
| hot | |
| Popular Recent | |
| ☐ hot-lead | |
| ✓ hot-prospec | t |
| ☐ hotel | |
| Add tag | Remove tag |



Alternative view: Consider separating options into related groups

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





More

Dashboard

Contacts

Campaigns

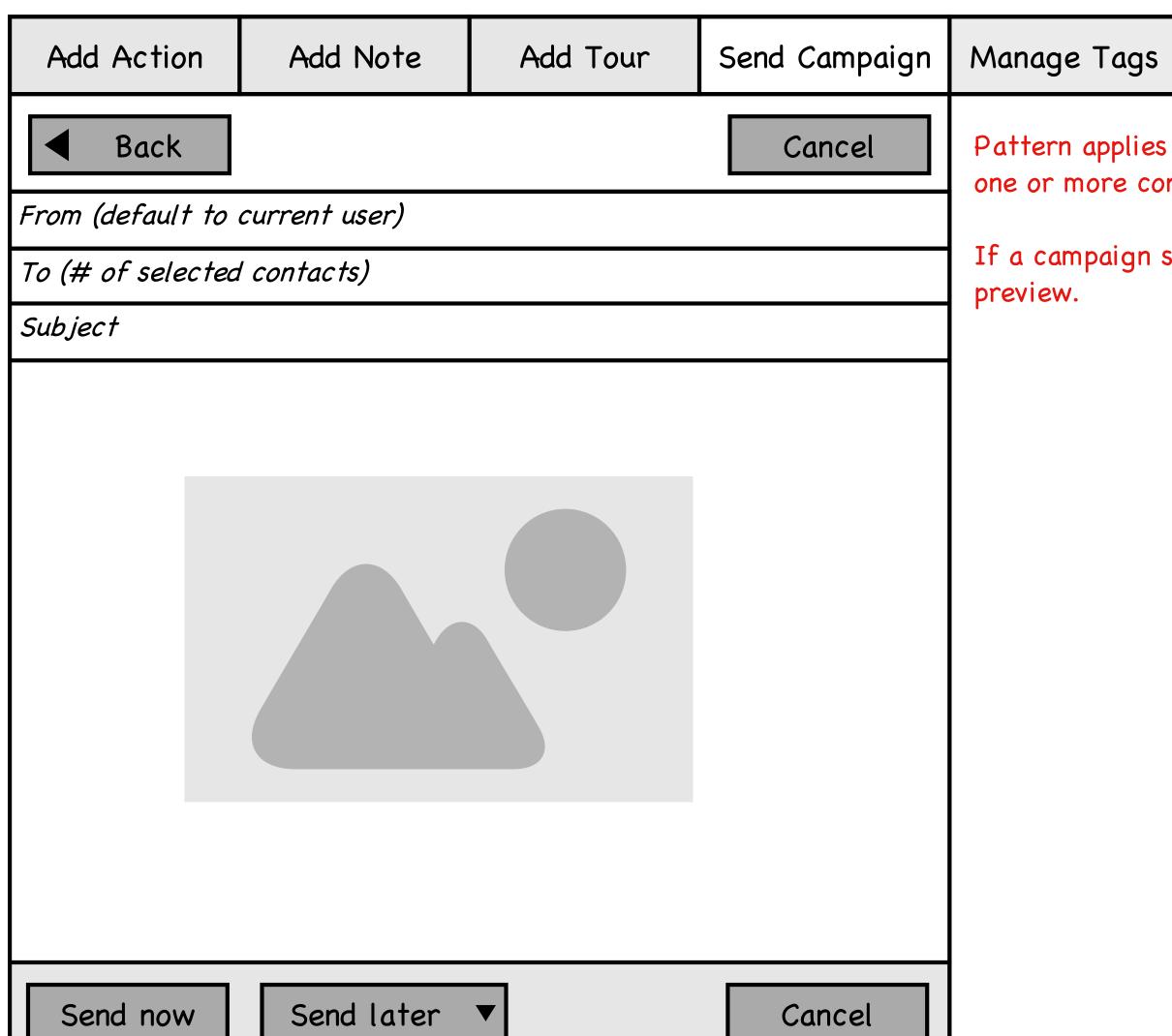
Automation

Reports

Properties

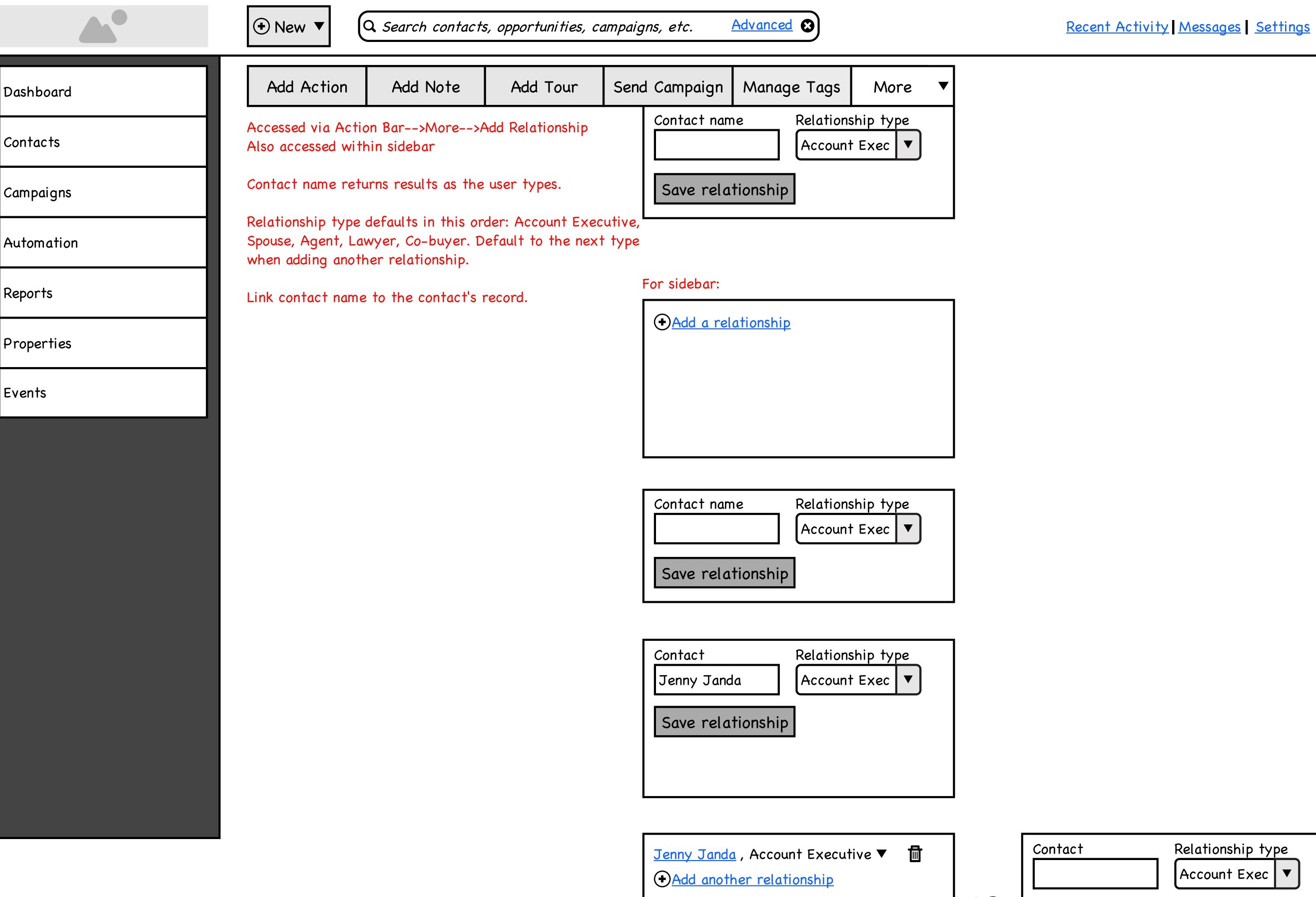
Events

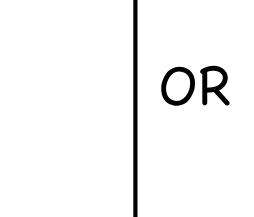
◆ New ▼

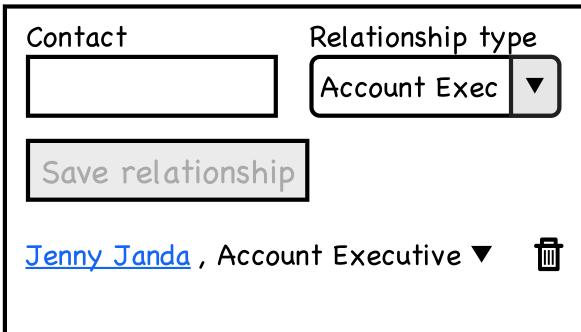


Pattern applies to sending a campaign or campaign series to one or more contacts selected from a list.

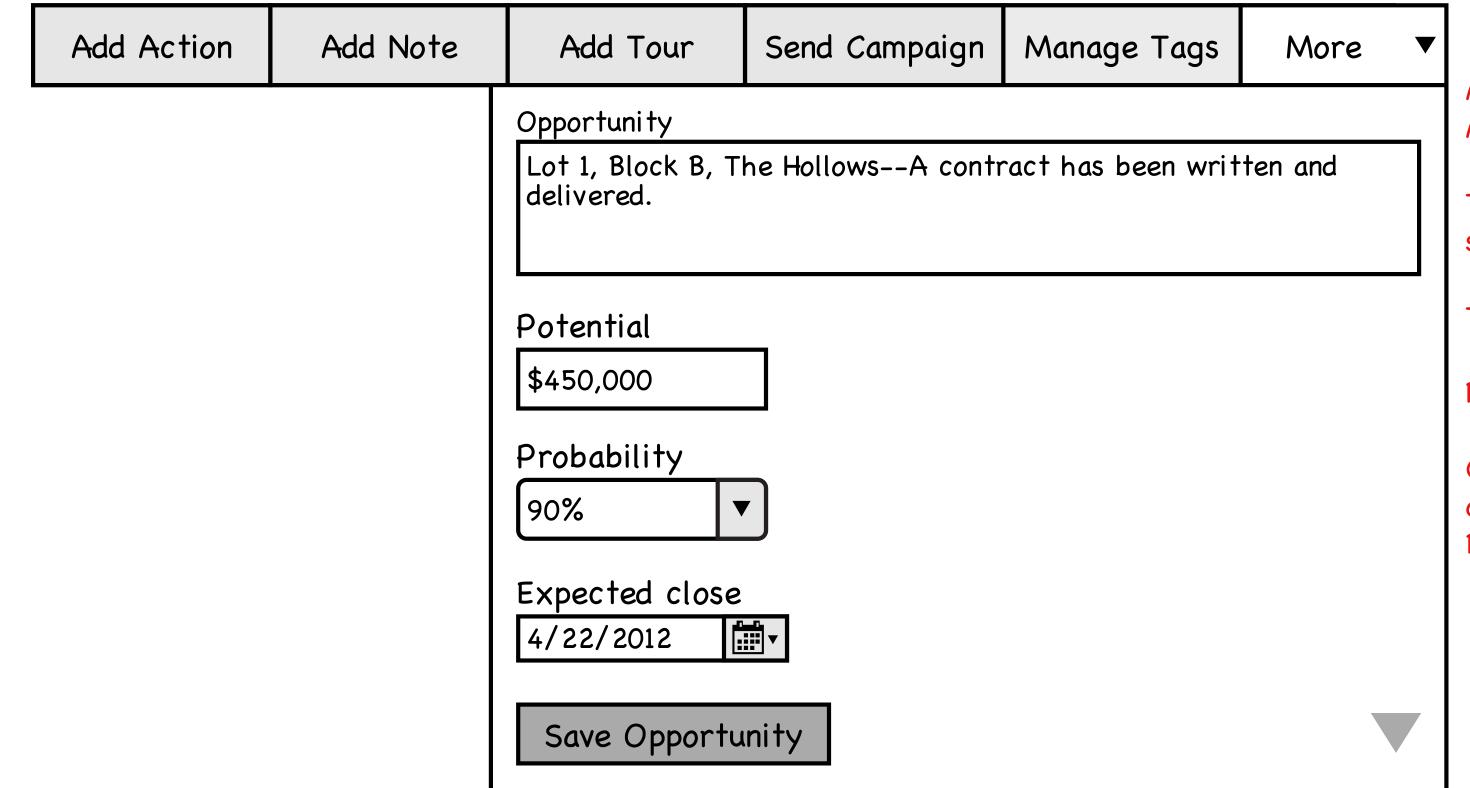
If a campaign series is selected, then do not show the preview.











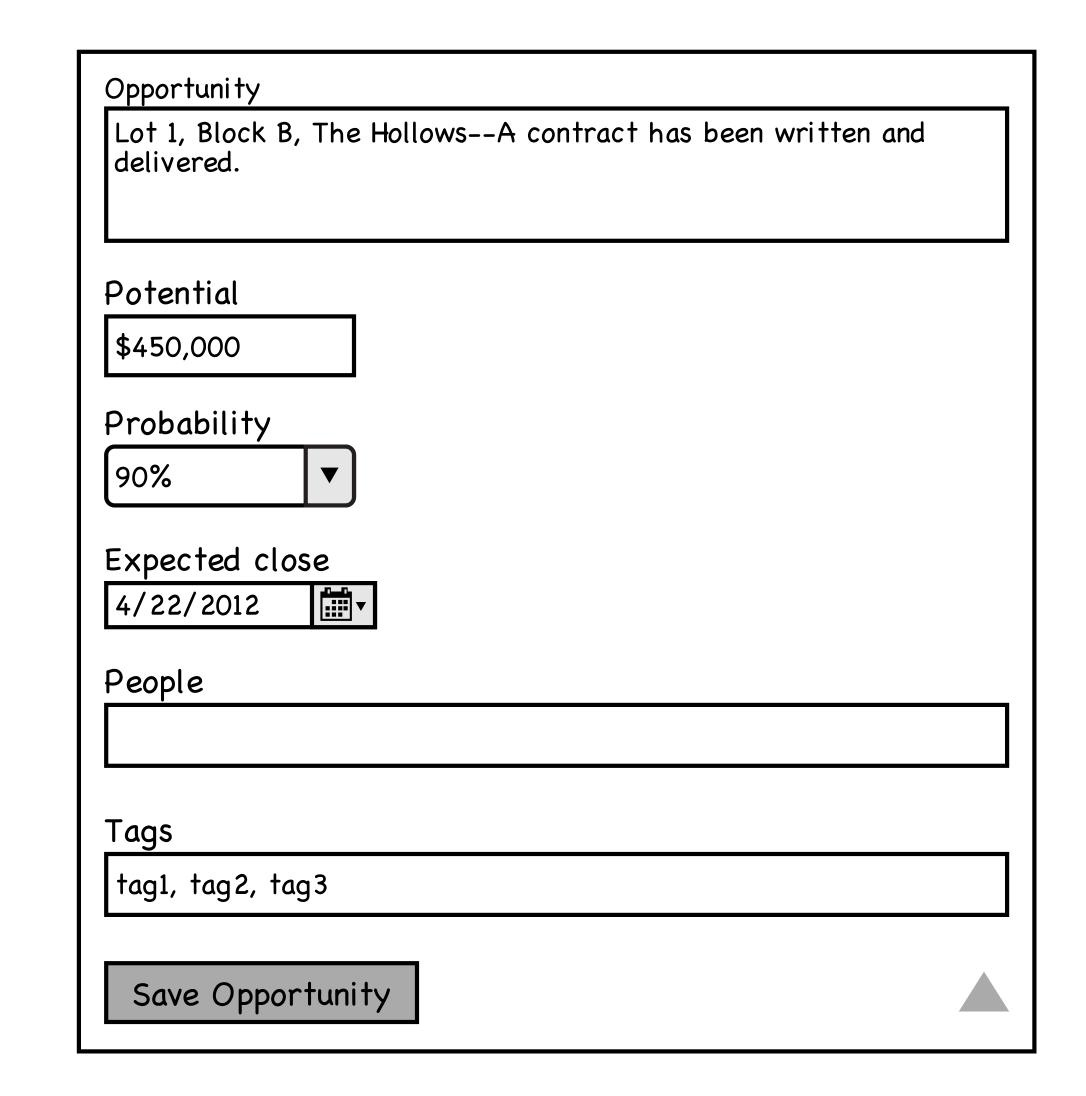
Accessed via Action Bar-->More-->Add Opportunity
Also accessed within sidebar

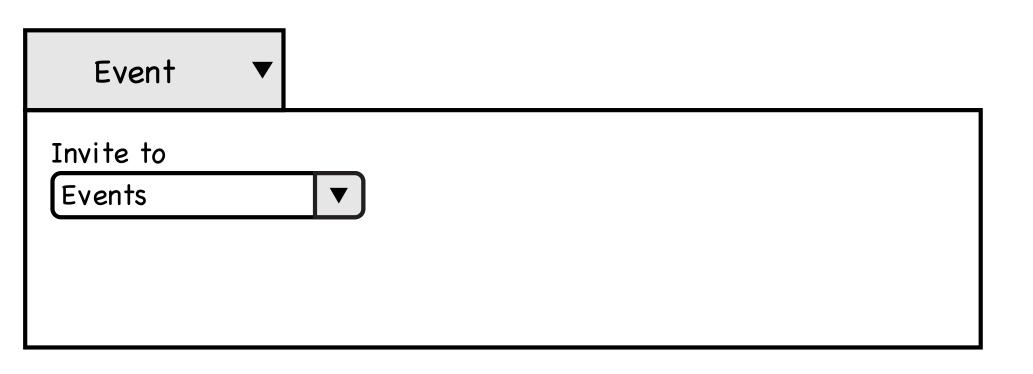
Tag properties in with \$ (or may want to use something else)

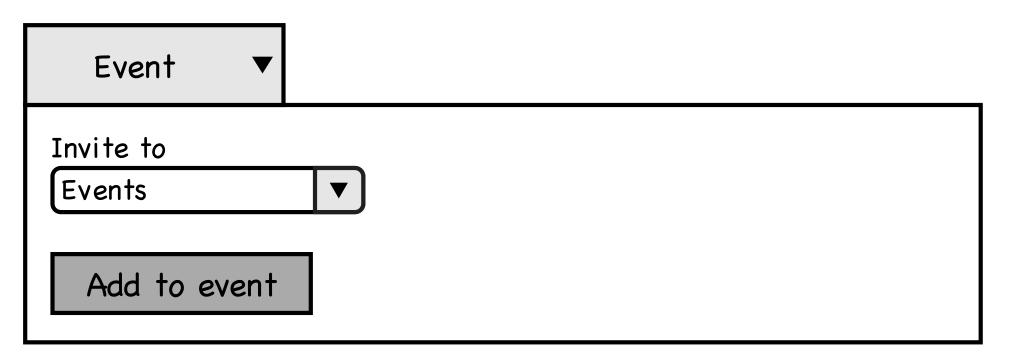
Tag people in notes with @

Remember form size (collapsed or expanded)

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



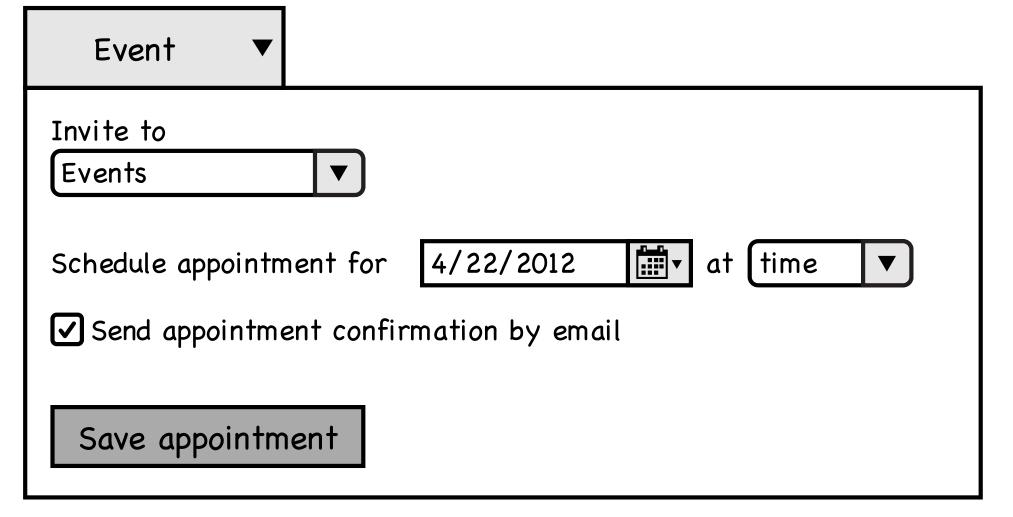




If invitations have not been sent, then provide option to 'Add to event'



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



Files

+Add a file from: <u>Library | Dropbox</u>

File library • Upload Documents Images **(3)** Q Search file names and tags 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.

Dashboard

Contacts

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Q Gran ◆ New ▼ *

> All Actions Campaigns Companies Contacts **Events** Files Properties Deals Notes

✓ 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

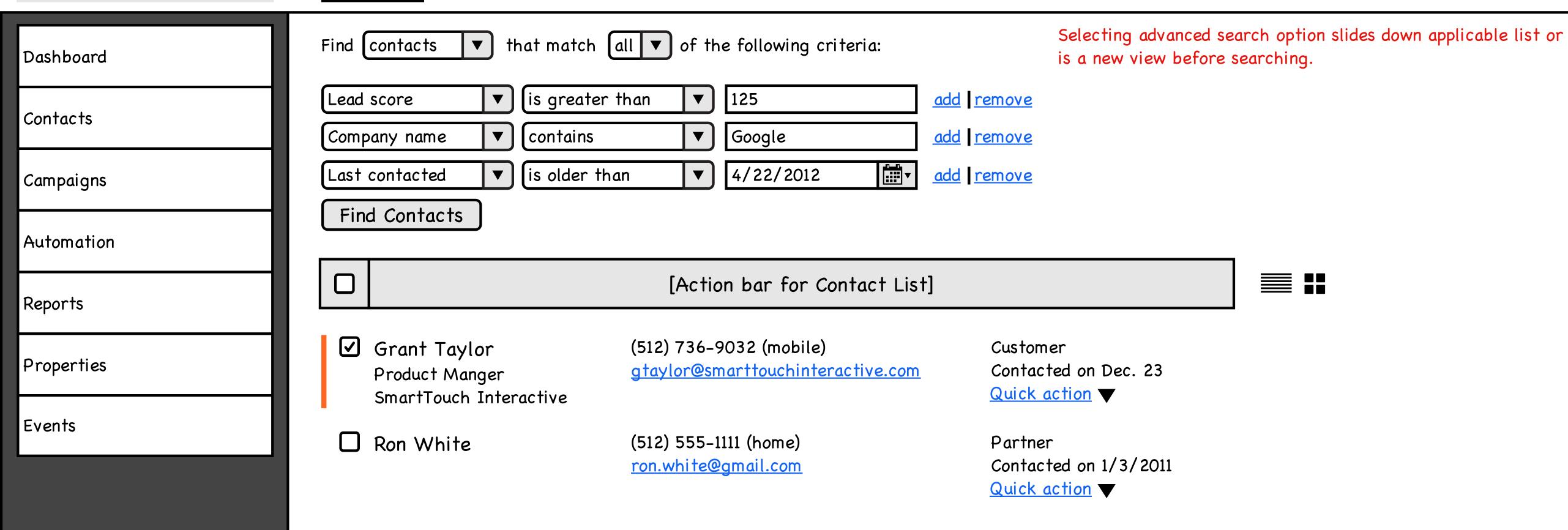
Grant Taylor visited the model home today

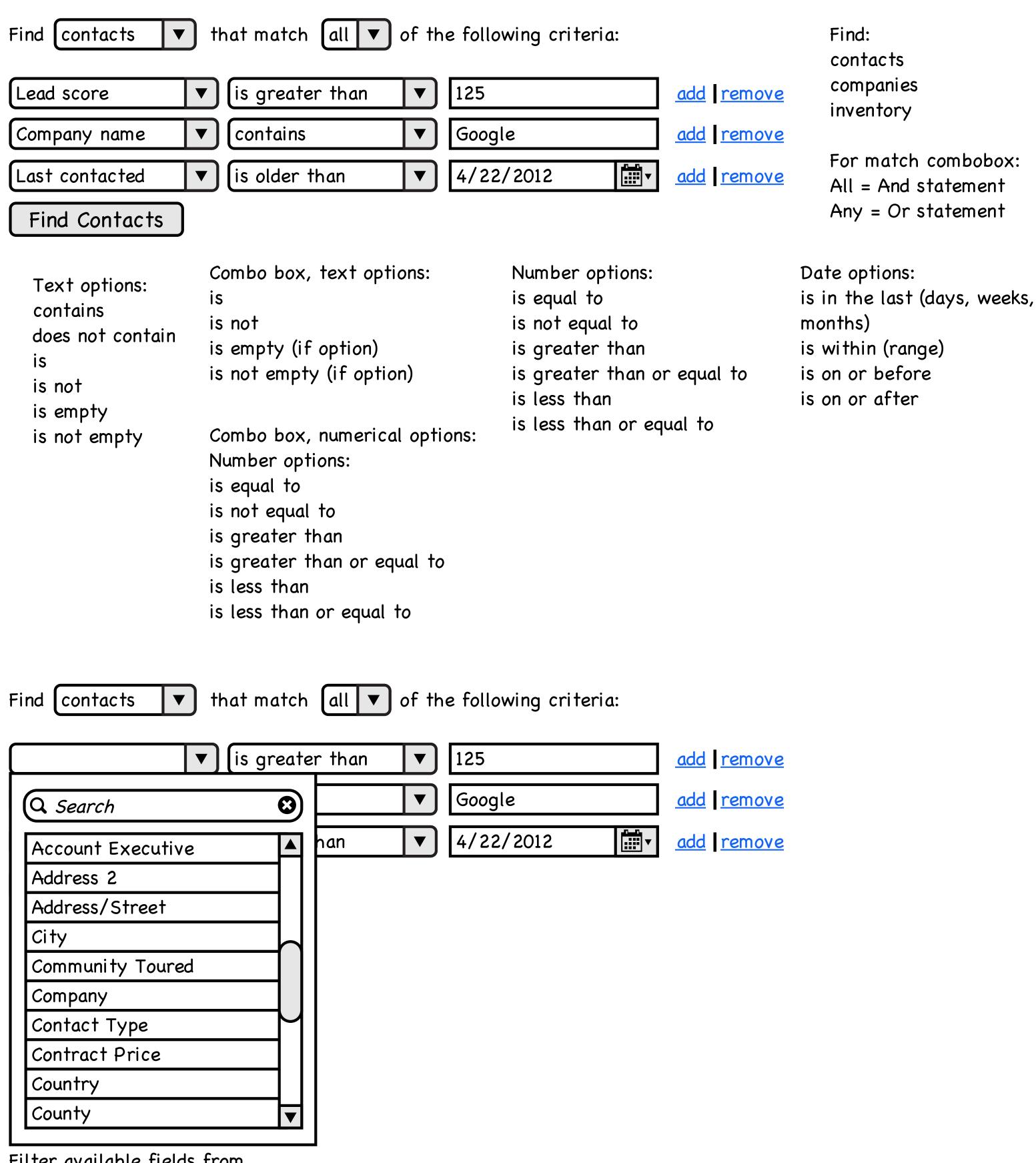
9 123 Grandview Drive

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



Advanced (3)





Filter available fields from search field

Advanced &

Dashboard

Contacts

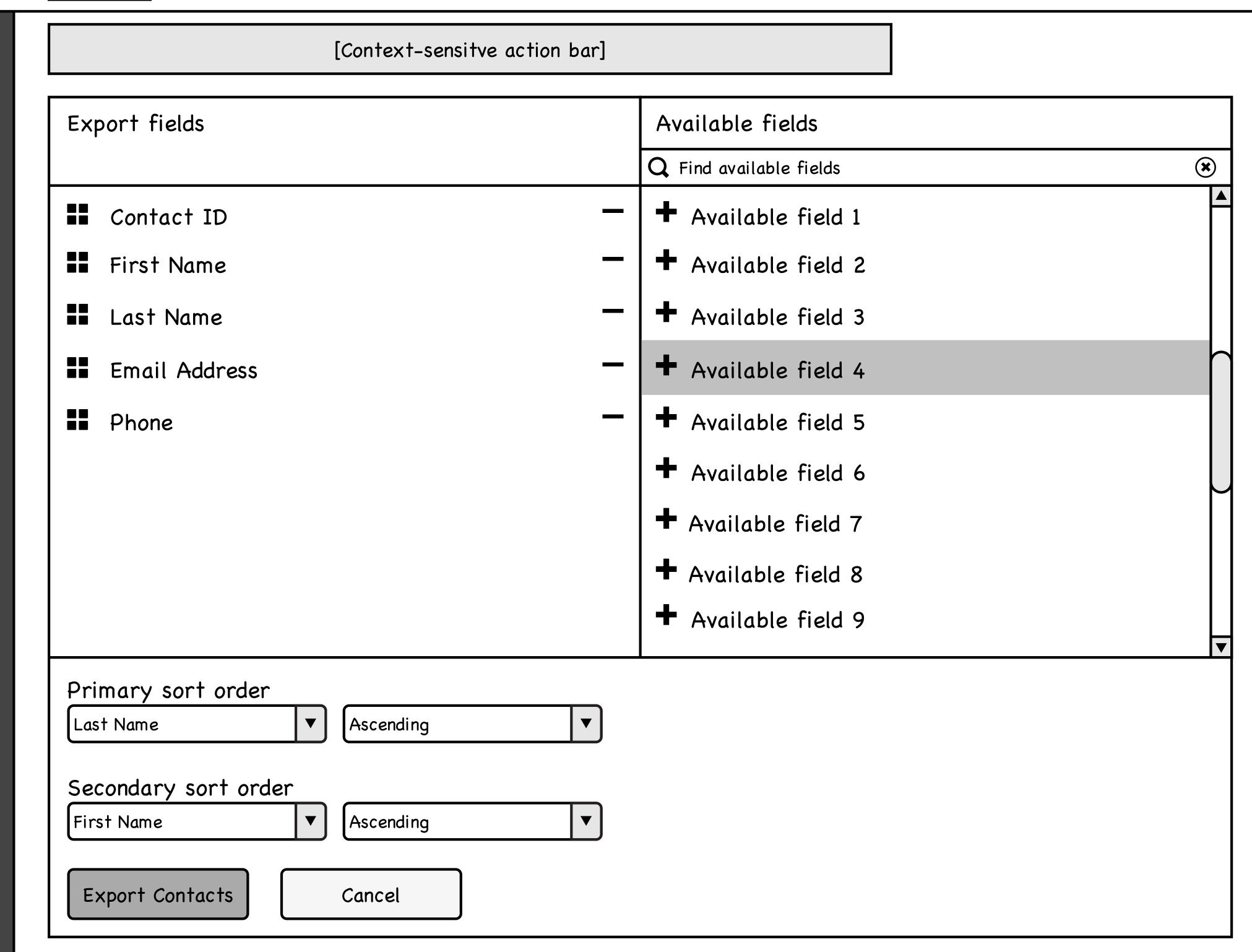
Campaigns

Automation

Reports

Properties

Events



Export fields may include "standard" fields (TBD)

Export fields shall include all search fields.

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

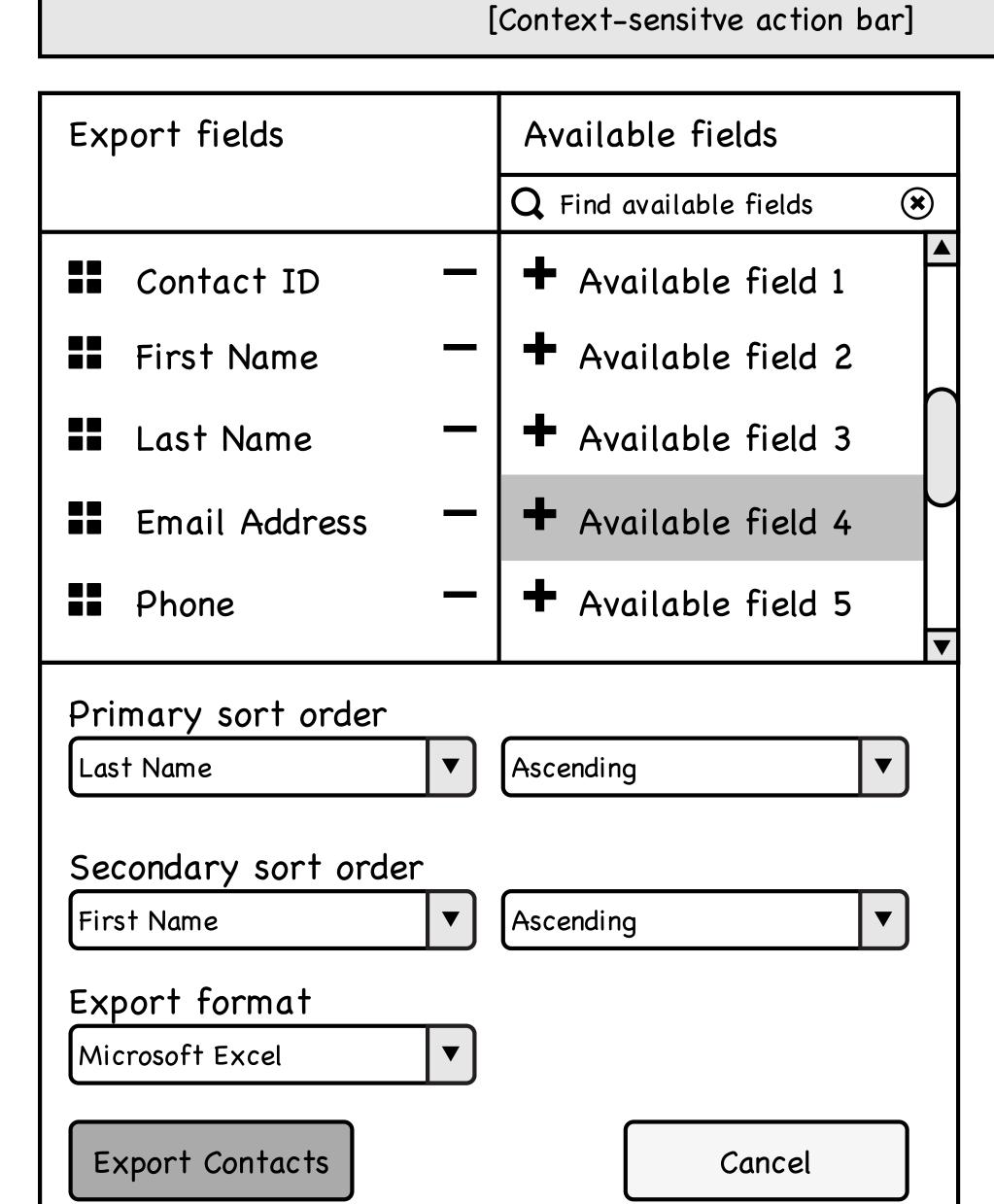
Include delete icon to remove field from the export list.

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





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 ▼ | |
|--------|--------------|---|
| Compai | ny name | * |
| | | |
| Popul | ar 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

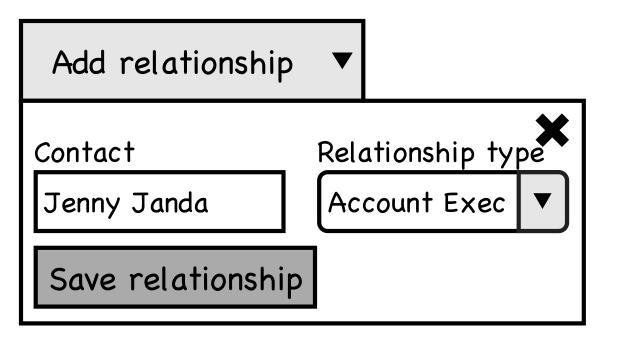
Allow user to toggle to ten most recent companies

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. |

Provide option when user selects company

| Add to Company ▼ | |
|--------------------------|----------|
| Company name | × |
| Smart | |
| Popular Recent | |
| ☐ Smart Cars Inc. | |
| ☐ Smarter Marketing LLC | |
| ✓ SmartTouch Interactive | |
| Add contacts to company | <i>y</i> |



General First name Last name Grant 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 State City lacktriangleTX Austin Zip 78738 Country United States + Add another address

Additional Info

SSN

111-11-1111

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.

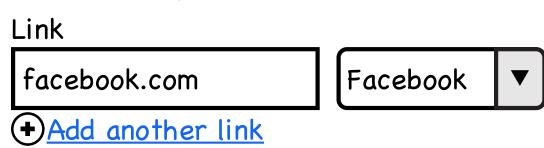
Select link type based on URL

General Company name SmartTouch Interactive Phone Phone number Mobile (512) 736-9032 + Add another phone number

Email

Email address gtaylor@smarttouchinteractive.com + Add another email address

Web & Social



Address Address type

Physical

Street

| 3509 San Benito Ct. Line 2 | |
|-------------------------------|--|
| | |

| City | State | |
|---------|-------|---|
| Austin | TX | ▼ |
| Zip | | |
| 78738 | | |
| Country | | |

+ Add another address

Additional Info

United States

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