SmartTouch Account Management

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# SmartTouch Account List

**Functional Description**

This view displays one or more SmartTouch customer accounts in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Account Name | Link |  |  |
| Status | Text with Dropdown | Options include:   1. Draft 2. Active 3. Paused 4. Closed |  |
| Subscription | Text |  |  |
| Contacts | Text | Display as number of Contacts, number of Contacts allowed, and allotment used (as a percent)  Example: 1,343 of 5,000 (27%) |  |
| Emails | Text | Display as number of emails sent last month, number of emails allowed per month, and allotment used (as a percent)  Example: 12,433 of 25,000 (50%) |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Showing | Dropdown | Filters list of Accounts depending upon selection  Options include:   1. All Accounts 2. Active Accounts 3. Draft Accounts 4. Paused Accounts 5. Closed Accounts |  |
| Edit | Icon | Associated with a record |  |
| Delete | Icon | Associated with a record  Archives Account | Alert: “You’re about to delete 1 account. Are you sure you want to delete 1 account?”  Buttons: “Delete Account” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Account | Link |  |
| Edit Account | Link | If one Account is selected |
| Copy Account | Link | If one Account is selected |
| Close Account | Link | If one or more Accounts are selected |
| Delete Account | Link | If one or more Accounts are selected |

**Exceptions**

None

**Notes and Issues**

None

# Add/Edit SmartTouch Account

**Functional Description**

This view allows the SmartTouch Administrator to create a new SmartTouch Account or edit an existing SmartTouch Account.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Account Name\* | Textbox |  |  |
| Status\* | Dropdown | Options include:   1. Inactive (default) 2. Active 3. Closed |  |
| **Primary Contact Information** | | | |
| First Name\* | Textbox |  |  |
| Last Name\* | Textbox |  |  |
| Company Name | Textbox |  |  |
| Phone Number | Textbox |  | Any valid phone number format  Numeric with or without parenthesis or dashes |
| Phone Number Type\* | Dropdown | Default options in this order:   1. Mobile 2. Work 3. Home |  |
| Email\* | Textbox |  | Conforms to valid email patterns |
| Website | Textbox |  | Conforms to valid URL patterns |
| Privacy Policy | Textbox | URL to page containing privacy policy | Conforms to valid URL patterns |
| Address Type\* | Dropdown | Default options in this order:   1. Home 2. Mailing 3. Work |  |
| Street\* | Textarea |  |  |
| City\* | Textbox | Change label to ‘Municipality’ if Country is set to Canada |  |
| State\* | Dropdown | Change label to ‘Province’ if Country is set to Canada |  |
| Zip Code\* | Textbox | Change label to ‘Postal Code’ if Country is set to Canada | Zip code (US) is numeric and conforms to known patterns  Postal code (Canadian) is alphanumeric and conforms to known patterns |
| Country | Dropdown | Default to United States |  |
| **Configuration** | | | |
| VMTA\* | Textbox |  |  |
| Contacts\* | Dropdown or Toggle |  |  |
| Tours\* | Dropdown or Toggle |  |  |
| Campaigns\* | Dropdown or Toggle |  |  |
| Forms\* | Dropdown or Toggle |  |  |
| Automation\* | Dropdown or Toggle |  |  |
| Opportunities\* | Dropdown or Toggle |  |  |
| Customers are primarily | Radio or Toggle | Options include:   * People (default) * Companies | Required if Opportunities is selected |
| Reports\* | Dropdown or Toggle |  |  |
| Integrations\* | Dropdown or Toggle | If active, then Users have access to the Integrations tab within Personal Settings |  |
| **Localization** | | | |
| Country\* | Dropdown | Default to Country selected in Primary Contact information |  |
| Date Format\* | Dropdown | Options include:   1. MM/DD/YYYY 2. MM-DD-YYYY 3. YYYY-MM-DD (default) 4. DD/MM/YYYY |  |
| Time Zone\* | Dropdown | Options include all time zones expressed as GMT with local options for US and Canada |  |
| Currency Format\*  (Symbol) | Dropdown | Options include:   1. $ - USD 2. $ - CAD 3. B/. - PAB |  |
| Currency Format\*  (Format) | Dropdown | Options include:   1. $X,XXX.XX 2. X XXX,XX $ 3. B/.X,XXX.XX |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Back to list | Link | Returns user to Accounts List |  |
| Create Account | Button | Applies to Add mode |  |
| Cancel | Button | Applies to Add mode |  |
| Save Account | Button | Applies to Edit mode |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Create Account | Link | Applies to Add mode  Send welcome email to Primary Contact |
| Save Account | Link | Applies to Edit mode |
| Close Account | Link | Applies to Edit mode |
| Delete Account | Link | Applies to Edit mode |

**Exceptions**

None

**Notes and Issues**

1. Once an account is created, a ST Admin may configure add Users by logging into the new account