Account Settings

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# Custom Fields List

**Functional Description**

This view allows an Admin to view existing custom fields.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Custom tab name | Link | May include multiple tabs |  |
| Section name | Text | May include multiple sections |  |
| Custom field name | Text | May include multiple fields |  |
| Custom field | Depends upon field | May include multiple fields |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add custom tab | Link | Hide option when User is configuring a custom field |  |
| Add custom field | Link | Hide option when User is configuring a custom field |  |
| Add section | Link | Hide option when User is configuring a custom field |  |
| Drag Handle | Icon | Applies to the following:   1. Custom tabs 2. Sections 3. Custom fields   Allows User to manually reorder the selected object |  |
| Delete | Icon | Applies to the following:   1. Custom tabs 2. Sections 3. Custom fields   Displayed in-line with the applicable object | Alert User that deleting a custom object will also delete it from Contacts and their history.  Message: “There are [ custom field is |
| Edit | Icon | Applies to custom fields, and displayed in-line with field |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Add Custom Fields

**Functional Description**

This view allows an Admin to add or edit custom fields.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Type of field\* | Dropdown | Options include:   1. Single-line text 2. Multi-line text 3. Number 4. Dropdown 5. Checkbox 6. Date |  |
| Field name\* | Textbox | Options include:   1. Active 2. Draft 3. Closed |  |
| Dropdown values | Textbox | Display if Type of field = Dropdown | Required if Type of field = Dropdown |
| Use the first entry as the default value | Checkbox | Display if Type of field = Dropdown  Single checkbox  If checked, set the first value as the default value for the dropdown | Required if Type of field = Dropdown |
| Checkbox values | Textbox | Display if Type of field = Checkbox  If not populated, then associate checkbox with the Field Name.  If populated, then the Field Name is a header and the checkbox values are options. |  |
| Preview field | Depends upon selection | Display preview of custom field as it is configured |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Sort A🡪Z | Link | Applies to Type of field = Dropdown or Checkbox  Reorders values in alphabetical order |  |
| Add another dropdown value | Link | Applies to Type of field = Dropdown  Adds another row containing a textbox for another dropdown value |  |
| Add another checkbox value | Link | Applies to Type of field = Checkbox  Adds another row containing a textbox for another dropdown value |  |
| Delete | Icon | Applies to Type of field = Dropdown or Checkbox  Removes row with textbox and value |  |
| Drag Handle | Icon | Applies to Type of field = Dropdown or Checkbox  Allows User to manually reorder values by dragging and dropping |  |
| Add Field | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Lead Score List

**Functional Description**

This view allows an Admin to view existing lead score rules.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Selection Checkbox] | Checkbox |  |  |
| Category | Text | Category determined by the condition selected when creating the rule. |  |
| Condition | Text | Textual description based on the condition selected and additional configuration (if any) |  |
| Points | Text |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon |  |  |
| Delete | Icon |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Create Rule | Button | Displays view from top navigation similar to adding an action, note, or meeting. |
| Change Score | Button | Displays view from top navigation similar to adding an action, note, or meeting.  Change score but do not affect existing records |
| Delete Rule | Button | Delete rule but do not affect existing records |

**Exceptions**

None

**Notes and Issues**

None

# Add Lead Score Rule

**Functional Description**

This view allows an Admin to create a new lead score rule.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Condition Description | Text | “If [Condition Dropbox], then adjust the lead score by [Lead Score Textbox] points” |  |
| Condition\* | Dropdown | Options include:   1. A Contact opens an email 2. A Contact clicks a link 3. A Contact submits a form 4. A Contact visits a web site 5. A Contact visits a web page 6. An Action includes the tag 7. A Note includes the tag 8. The Lead Source is 9. The tour type is |  |
| Web Site | Textbox | Display if Condition equals ‘A Contact visits a web site’ | Require if Condition equals ‘A Contact visits a web site’ |
| Web Page | Textbox | Display if Condition equals ‘A Contact visits a web page’ | Require if Condition equals ‘A Contact visits a web page’ |
| Tag | Textbox | Display if Condition equals:   1. An Action includes the tag; OR 2. A Note includes the tag   Use live-search pattern to return tags as the User types | Require if Condition equals:   1. An Action includes the tag; OR 2. A Note includes the tag |
| Lead Source | Dropdown | Display if Condition equals ‘The Lead Source is’  Options as configured in Account Settings | Require if Condition equals ‘The Lead Source is’ |
| Tour Type | Dropdown | Display if Condition equals ‘The tour type is’  Options as configured in Account Settings | Require if Condition equals ‘The tour type is’ |
| Lead Score\* | Textbox | May be positive or negative | Numeric |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Rule | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Create Rule | Button | Displays view from top navigation similar to adding an action, note, or meeting. |
| Change Score | Button | Displays view from top navigation similar to adding an action, note, or meeting.  Change score but do not affect existing records |
| Delete Rule | Button | Delete rule but do not affect existing records |

**Exceptions**

None

**Notes and Issues**

None

# Import Data List

**Functional Description**

This view allows an Admin to view previous imports.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Selection Checkbox] | Checkbox |  |  |
| Import Date & Time | Text | Import date & timestamp |  |
| Type | Text |  |  |
| Filename | Text |  |  |
| Records Updated | Text |  |  |
| Records Created | Text |  |  |
| Total Records | Text |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| None |  |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Import Data | Button |  |
| View Data | Button |  |

**Exceptions**

None

**Notes and Issues**

None

# Import Data – Step 1 – Select File & Upload

**Functional Description**

This view allows an Admin to select a file to import.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Type of data to import\* | Dropdown | Options include:   1. People & Companies |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Download a sample CSV file | Link | Download a template that includes columns with sample data |  |
| Download a sample Excel file | Link | Download a template that includes columns with sample data |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Select File | Button | Available in top-nav and in the main view  Opens native file browser |

**Exceptions**

None

**Notes and Issues**

None

# Import Data – Step 2 – Import

**Functional Description**

This view allows an Admin to upload a file to import.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Column Name] | Text | Display column names from the CSV or Excel file. |  |
| [SmartTouch Fields]\* | Dropdown | Attempt to match fields in the CSV or Excel file to existing SmartTouch fields.  If no match is found, then default to a blank value  Also include an option ‘Do not import’ |  |
| Preview | Text | Display data from the CSV or Excel file |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Move back in recordset | Icon |  |  |
| Move forward in recordset | Icon |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Import Contacts | Button | Begin processing file  Return user to Import Data List, which includes the imported file  Trigger alert that the file is processing  Message: “Your file is being imported right now. We’ll let you know when it completes, or check this page again in a moment” |

**Exceptions**

None

**Notes and Issues**

None

# Tag List

**Functional Description**

This view allows an Admin to view existing Tags

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Selection Checkbox] | Checkbox |  |  |
| Tag | Text or Textbox | Text in View mode  Textbox in Edit mode |  |
| Items Tagged | Text | Count of records tagged with the particular tag |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon | Displayed in-line  Replaces tag with a textbox to modify the value |  |
| Save | Icon | Displayed in-line when in Edit mode  Saves the new tag and replaces the textbox with text |  |
| Merge | Icon | Displayed in-line  Replaces tag as described in Tag List – Merge Tags |  |
| Delete | Icon | Displayed in-line | Alert user that tag is or is not in use  Message: |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Edit Tag | Button | Replaces tag with a textbox to modify the value |
| Merge Tag | Button | Replaces tag as described in Tag List – Merge Tags |
| Delete Tag | Button |  |

**Exceptions**

None

**Notes and Issues**

None

# Tag List - Merge Tags

**Functional Description**

This view allows an Admin to merge two existing Tags into one Tag. This functionality occurs within one row of the Tag List

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Selection Checkbox] | Checkbox | Inactive |  |
| Existing Tag | Text & Icon | Displayed as: “Merge [tag] with” |  |
| New Tag | Textbox | Use live-search pattern to return tags as the User types |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Merge | Button | Displayed in-line  Triggers Tag List – Merge Confirmation |  |
| Cancel | Button | Displayed in-line |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Tag List - Merge Confirmation

**Functional Description**

This view allows an Admin to merge two existing Tags into one Tag. This functionality occurs within one row of the Tag List

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Selection Checkbox] | Checkbox | Inactive |  |
| Message | Text | Display as: [# of items tagged] items will be changed from [Existing Tag] to [New Tag]. This action cannot be undone. |  |
| Existing Tag | Text or Icon |  |  |
| New Tag | Textbox | Use live-search pattern to return tags as the User types |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Continue Merging | Button | Displayed in-line below Message |  |
| Cancel | Button | Displayed in-line below Message |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Dropdown Fields List

**Functional Description**

This view allows an Admin to view existing dropdown fields and manage their values.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Field | Link |  |  |
| Field Values | Text | List of field values in order  Display as: Value 1, Value 2, Value 3  If space does not allow for all values on one line, then append an ellipsis (three periods …) |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon | Displayed in-line with field |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Edit Dropdown Field Values

**Functional Description**

This view allows an Admin to add or edit values in dropdown fields.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Order | Text | Number representing the number and order of values |  |
| Dropdown values\* | Textbox | Replace text values in table with a textbox for each value displayed in a list. |  |
| Default value | Checkbox | Single checkbox  If checked, set the first value as the default value for the dropdown |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Sort A🡪Z | Link | Reorders values in alphabetical order |  |
| Add another dropdown value | Link | Adds another row containing a textbox for another dropdown value |  |
| Delete | Icon | Removes row with textbox and value |  |
| Drag Handle | Icon | Allows User to manually reorder values by dragging and dropping |  |
| Save Values | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

1. If Dropdown field = Lead Source, then also display dropdown for Lead Source Category

**Notes and Issues**

None

# Users List

**Functional Description**

This view displays one or more Users in tabular form, and allows an Admin to change Statuses and Roles within the view.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record |  |
| Email | Link |  |  |
| Status | Dropdown | Options include:   1. Active 2. Inactive |  |
| Role | Dropdown | Options include:   1. Marketing 2. Sales 3. Read Only 4. Marketing Administrator 5. Sales Administrator 6. Account Administrator |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Showing all | Dropdown | Filters list of Users depending upon selection of Status and Role  Display as “Showing all [Status] [Role]” |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add User | Link |  |
| Edit User | Link |  |
| Change Status | Link |  |
| Change Role | Link |  |
| Resend Invite | Link | Resend invitation email if status = Inactive and user has not selected confirmation link |

**Exceptions**

None

**Notes and Issues**

None

# Add User

**Functional Description**

This view allows an Admin to add a User.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| First Name\* | Textbox |  |  |
| Last Name\* | Textbox |  |  |
| Email\* | Textbox | Include note that invitation will be sent to this email. | Conforms to valid email patterns |
| Role\* | Dropdown | Options include:   1. Marketing 2. Sales 3. Read Only 4. Marketing Administrator 5. Sales Administrator 6. Account Administrator |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add User | Button | Add User as configured  Send new User a welcome email |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Edit User

**Functional Description**

This view allows an Admin to edit a User.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Status | Radio Buttons | Options include:   1. Active 2. Inactive |  |
| Role\* | Dropdown | Options include:   1. Marketing 2. Sales 3. Read Only 4. Marketing Administrator 5. Sales Administrator 6. Account Administrator |  |
| First Name\* | Textbox |  |  |
| Last Name\* | Textbox |  |  |
| Title | Textbox |  |  |
| Company Name | Textbox | Live search field of existing companies |  |
| 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   When adding multiple phone numbers, default to the next type when another phone number is added. |  |
| Email\* | Textbox |  | Conforms to valid email patterns |
| Web & Social Link | Textbox |  | Conforms to valid URL patterns |
| Link Type | Dropdown | Default options in this order:   1. Website 2. LinkedIn 3. Facebook 4. Twitter 5. Google+ 6. Blog 7. Skype?   When adding multiple links, default to the next type when another phone number is added. |  |
| Address Type | Dropdown | Default options in this order:   1. Home 2. Mailing 3. Work |  |
| Street | Textarea |  |  |
| City | Textbox | Change label to ‘Municipality’ if localization/internationalization is set to Canada |  |
| State | Dropdown | Change label to ‘Province’ if localization/internationalization is set to Canada  Default to Client’s state |  |
| Zip Code | Textbox | Change label to ‘Postal Code’ if localization/internationalization 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 Country set in localization/internationalization options |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save User | Button | Save User as configured |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Change Status

**Functional Description**

This view allows an Admin to change the Status of one or more Users.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Status | Radio Buttons | Options include:   1. Active 2. Inactive |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Update Status | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Change Role

**Functional Description**

This view allows an Admin to change the Status of one or more Users.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Role | Dropdown | Options include:   1. Marketing 2. Sales 3. Read Only 4. Marketing Administrator 5. Sales Administrator 6. Account Administrator |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Update Role | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| None |  |  |

**Exceptions**

None

**Notes and Issues**

1. Accounts must have at least one Account Administrator
2. Do not allow all Account Administrators to be changed to other Roles

# Lead Adapter List

**Functional Description**

This view allows an Admin to view configured Lead Adapters.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Lead Adapter | Text |  |  |
| Status | Text | Metadata regarding operational status of Lead Adapter  Options include:   1. Normal 2. Warning |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon |  |  |
| View | Icon |  |  |
| Delete | Icon |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Lead Adapter | Button |  |

**Exceptions**

None

**Notes and Issues**

None

# Edit Lead Adapter

**Functional Description**

This view allows an Admin to edit a Lead Adapter.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Lead Adapter | Text |  |  |
| Builder Number | Textbox | Allow multiple numbers separated by commas |  |
| **FTP Information** | | | |
| Host | Textbox |  | Valid URL |
| Username | Textbox |  |  |
| Password | Textbox |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Lead Adapter | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Lead Adapter |  |  |

**Exceptions**

None

**Notes and Issues**

None

# View Lead Adapter

**Functional Description**

This view allows an Admin to view history of Lead Adapters.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Lead Adapter | Text |  |  |
| **History** | | | |
| Date | Text |  |  |
| Filename | Text |  |  |
| Imported | Link | Number of Contacts imported and/or updated  Link to Contact list |  |
| Failed | Link | Number of Contacts that failed  Link to list of errors |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Back to list | Link |  |  |
| Imported | Link | Link to Contact list |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Lead Adapter | Button |  |

**Exceptions**

None

**Notes and Issues**

None

# Add Lead Adapter

**Functional Description**

This view allows an Admin to add a Lead Adapter.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Lead Adapters** | | | |
| Lead Adapter | Dropbox | Options include:   1. BDX 2. NHG 3. Hot On Homes 4. PROPLeads 5. Zillow 6. New Home Feed 7. Private Communities 8. IDX 9. Condo 10. Buzz Buzz Homes |  |
| Builder Number | Textbox | Allow multiple numbers separated by commas |  |
| **FTP Information** | | | |
| Host | Textbox |  | Valid URL |
| Username | Textbox |  |  |
| Password | Textbox | Mask on save |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Lead Adapter | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Lead Adapter |  |  |

**Exceptions**

1. If Dropdown field = Lead Source, then also display dropdown for Lead Source Category

**Notes and Issues**

None