Contacts Module

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# View List of Contacts

**Functional Description**

This view displays one or more Contacts in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Individual Contact** | | | |
| First Name | Link | Concatenate before Last Name  Link to Contact’s record |  |
| Last Name | Link | Concatenate after First Name  Link to Contact’s record |  |
| Company | Text |  |  |
| Phone Number | Link | Display primary Phone Number  Concatenate before Phone Number Type  Example: (512) 555-4444 (mobile)  Initiate call via Twilio Client |  |
| Phone Number Type | Text | Display Phone Number Type associated with the first Phone Number  Concatenate after Phone Number  Example: (512) 555-4444 (mobile) |  |
| Email Address | Link | Display primary Phone Number  Link to Email view |  |
| Contact Type | Text |  |  |
| Last Touched | Text |  |  |
| Last Touched Method | Text | Concatenate after Last Touched  Example: 12/02/2011 - Email |  |
| **Company Contact** | | | |
| Company | Text |  |  |
| Phone Number | Link | Display first Phone Number  Concatenate before Phone Number Type  Example: (512) 555-4444 (mobile)  Initiate call via Twilio Client |  |
| Phone Number Type | Text | Display Phone Number Type associated with the first Phone Number  Concatenate after Phone Number  Example: (512) 555-4444 (mobile) |  |
| Email Address | Link | Display first Phone Number  Link to Email view |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Showing all | Dropdown | Filters list of Contacts depending upon selection  Options include:   1. People and Companies 2. People 3. Companies 4. My Contacts 5. Recently viewed   If Opportunities = People, then default to People  If Opportunities = Companies, then default to Companies | When ‘My Contacts’ is selected, return a list of Contacts owned by the User. |
| Edit | Icon | Associated with a record |  |
| Delete | Icon | Associated with a record | Alert: “You’re about to delete 1 contact and their history. Are you sure you want to delete 1 contact?”  Buttons: “Delete Contact” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| [Add Contact](#_Add_or_Edit) | Link |  |
| [Add Company](#_Add_or_Edit_1) | Link | Accessed by a dropdown adjacent to Add Contact |
| [Add](#_Add_Reminder) Action | Link | If one or more records are selected |
| [Add Note](#_Add_Note) | Link | If one or more records are selected |
| [Add](#_Add_Meeting) Tour | Link | If active in setup and one or more records are selected |
| [Send Email](#_Send_Message_(Email)) | Link | If one or more records are selected |
| [Send Text](#_Send_Message_(SMS)) | Link | Accessed by a dropdown adjacent to Send Email  If one or more records are selected |
| [Add Tag](#_Add_Tag) | Link | If one or more records are selected |
| More | Dropdown | If one or more records are selected  Options include:   1. [Add Relationship](#_Add_Relationship) 2. Add Opportunity 3. [Copy Contact](#_Copy_Contact) (if only one record is selected) 4. [Export Contacts](#_Export_Contacts) 5. [Delete Contacts](#_Archive_Contacts) |

**Exceptions**

None

**Notes and Issues**

None

# View Contact (Individual)

**Functional Description**

View Contact allows the User to view an existing Contact’s information including: contact info; level of engagement; next action; associated contacts; a history of actions and updates; and associated files.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| **Contact Summary** | | | | |
| Profile Image | Image | Display image if linked.  Otherwise, display a gravatar. | |  |
| First Name | Text | |  |  |
| Last Name | Text | | Display on the same line as First Name |  |
| Title | Text | | Display before Company Name |  |
| Company Name | Text | | If Title is available, then add a comma after Title and display it on the same line. Example: ‘Manager, Dell Computers’ |  |
| Phone Number | Text | | If multiple phone numbers exist for the Contact, then display each phone number on a separate line.  List primary phone number first |  |
| Phone Number Type | Text | | Display adjacent to phone number. Example: (512) 555-1111 (mobile) |  |
| Email | Text | | If multiple emails exist for the Contact, then display each email address on a separate line.  List primary email first |  |
| Email Status | Icon | | Display icon adjacent to email.  Possible icons include:   1. Grey checkmark 2. Green checkmark 3. Yellow caution sign 4. Red ‘X’ 5. Red stop sign   Options for pop-over include:   1. Not Verified (grey checkmark) 2. Verified (green checkmark) 3. Soft-bounce (yellow caution sign) 4. Hard-bounce (red ‘X’) 5. Unsubscribed (red stop sign) |  |
| Social Media | Icon | | If multiple social media accounts are linked, then display each icon adjacent to each other. |  |
| Tag(s) | Textbox | | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| Contact Type | Text | |  |  |
| Last Touched | Text | | Date of last contact by user or system |  |
| Last Touched Method | Text or Icon | |  |  |
| Lead Source | Text | | Initial Lead Source |  |
| Lead Sources | Icon | | Display icon adjacent to the initial Lead Source if multiple lead sources are associated with the Contact. |  |
| **Engagement (Right Sidebar)** | | | | |
| Lead Score | Text | | Display if Contact Type = Lead or Prospect |  |
| Emails Sent | Text | | Count of emails sent |  |
| Emails Opened | Text | | Count of emails opened |  |
| Email Clicks | Text | | Count of links followed |  |
| Web Visits | Text | | Count of web visits |  |
| **Opportunity (Right Sidebar)**  **NOTE: If Opportunities is configured where Customers are primarily People** | | | | |
| Opportunity Name | Link | | Display 3-5 Opportunities (the number depends upon available space and/or what works well to balance the UI)  Order by Expected Close Date from newest to oldest  Link to Opportunity record in Opportunity Module |  |
| Value | Text | | Display as currency without decimals |  |
| Stage | Text | | Display as: In [Stage] stage |  |
| Expected Closing Date | Text | | Display as: Expected to close [Expected Close Date] |  |
| **Actions (Right Sidebar)** | | | | |
| Action | Text | | Display 3-5 Actions (the number depends upon available space and/or what works well to balance the UI) |  |
| Reminder | Text | | Display if reminder date if set |  |
| **Relationships (Right Sidebar)** | | | | |
| Contact | Link | | Link to Contact’s record |  |
| Relationship Type | Text | |  |  |
| **Timeline (Tab)** | | | | |
| Description of Activity | Text | | Description verbiage shall vary depending upon the activity that occurred  See ‘Appendix to Interface Specifications - Contact Module - Timeline Info.docx’ for more information |  |
| User | Text | |  |  |
| Activity | Text | | Verbiage depends upon the Description of Activity above, which is to be determined  See ‘Appendix to Interface Specifications - Contact Module - Timeline Info.docx’ for more information |  |
| Activity Date | Text | |  |  |
| **Contact Details (Tab)** | | | | |
| First Name | Text | |  |  |
| Last Name | Text | |  |  |
| Title | Text | |  |  |
| Company Name | Text | |  |  |
| Phone Number | Text | |  |  |
| Phone Number Type | Text | |  |  |
| Email | Link | |  |  |
| Primary | Icon | | Include star icon adjacent to email textbox.  Outlined star indicates unselected state  Solid star indicates selected state, which indicates that this email address is the primary email address. | Only one email address may be selected as the primary |
| Do not email | Checkbox | |  |  |
| Web & Social Link | Link | |  |  |
| Link Type | Text | |  |  |
| Address Type | Text | |  |  |
| Street 1 | Text | |  |  |
| Street 2 | Text | |  |  |
| City | Text | |  |  |
| State | Text | |  |  |
| Zip Code | Text | |  |  |
| Country | Text | |  |  |
| **Attachments (Tab)** | | | | |
| File Type | Icon | |  |  |
| File Name | Link | | Returns file to browser  Asks user to open or download |  |
| Date Added | Text | |  |  |
| User Name | Text | | Name of User that attached the file to the Contact |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit Contact | Icon |  |  |
| Engagement Time Period | Dropdown | Options include:   1. All 2. Last 30 days 3. Last 60 days 4. Last 90 days |  |
| Add Opportunity | Icon | Associated with Opportunities in the sidebar  Navigate User to New Opportunity view and prepopulate Buyer with the Contact’s name |  |
| Add Action | Icon | Associated with Actions in the sidebar |  |
| Action Status | Checkbox | User selects checkbox to identify the action as complete |  |
| Edit Action | Icon | Associated with the action in the sidebar and timeline |  |
| Delete Action | Icon | Associated with the action in the sidebar and timeline | Alert: “You’re about to delete this action. Are you sure you want to delete?”  Buttons: “Delete Action” and “Cancel” |
| Next Action | Icon | If more Actions exist than can be displayed, then use a carousel to page through other Actions |  |
| Previous Action | Icon | If more Actions exist than can be displayed, then use a carousel to page through other Actions |  |
| Add Relationship | Icon | Associated with Relationship in the sidebar |  |
| Edit Relationship | Icon | Associated with the relationship in the sidebar |  |
| Delete Relationship | Icon | Associated with the relationship in the sidebar | Alert: “You’re about to delete this relationship. Are you sure you want to delete?”  Buttons: “Delete Relationship” and “Cancel” |
| Attach from Dropbox | Button | Located in Attachments tab  Triggers Dropbox’s sharing plugin |  |
| Attach from Google Drive | Button | Located in Attachments tab  Triggers Google Drive’s sharing plugin |  |
| Showing all [timeline objects] | Dropdown with Checkbox | Display as: “Showing all [timeline objects]  User may select more than one option  Timeline objects include:   1. All 2. Actions 3. Attachments 4. Campaigns 5. Emails 6. Form Submissions 7. Meetings 8. Notes 9. Texts 10. Tours 11. Updates 12. Web visits |  |
| Timeline Period | Dropdown | Options include:   1. All 2. Last 30 days 3. Last 60 days 4. Last 90 days 5. Custom |  |
| Custom Time Period | Date Pickers | If Timeline Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Edit Note | Icon | Associated with the note in the Timeline tab |  |
| Delete Note | Icon | Associated with the note in the Timeline tab | Alert: “You’re about to delete this note. Are you sure you want to delete?”  Buttons: “Delete Note” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Contact | Link |  |
| Add Company | Link | Accessed by a dropdown adjacent to Add Contact |
| Add Action | Link |  |
| Add Note | Link |  |
| Add Tour | Link | If active in setup |
| Send Email | Link |  |
| Send Text | Link |  |
| More | Dropdown | Options include:   1. Add Relationship 2. Add Opportunity (If Opportunities is configured where Customers are primarily People) 3. Copy Contact 4. Export Contact 5. Delete Contact |
| Back to list | Link | If Contact was selected from a list, then provide option to go back to the list |
| Backwards | Icon | If Contact is part of a list, then provide option to view the previous Contact |
| Forwards | Icon | If Contact is part of a list, then provide option to view the next Contact |

**Exceptions**

1. Although First Name, Last Name, and Email Address are all marked as required, only one of the three fields is required to create a new Contact.
2. If any address field (Street, City, State, or Zip) is populated, then the other fields are also required.

**Notes and Issues**

1. Timeline should use infinite scroll pattern to load additional results
2. If there are more tabs than can be displayed within the viewport, then add a carousel to the User can scroll forwards and backwards within the tabs

# View Contact (Company)

**Functional Description**

View Contact allows the User to view an existing Contact’s information including: contact info; level of engagement; next action; associated contacts; a history of actions and updates; and associated files.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Contact Summary** | | | |
| Company Name | Text |  |  |
| Employees | Link | Display as ‘[# of employees] People’  If # = 0, then do not display  If # = 1, then link to Contact record for the Contact  If # > 1, then link to Contact List filtered to display those Contacts |  |
| Phone Number | Text | If multiple phone numbers exist for the Contact, then display each phone number on a separate line.  List primary phone first |  |
| Phone Number Type | Text | Display adjacent to phone number. Example: (512) 555-1111 (mobile) |  |
| Email | Text | If multiple emails exist for the Contact, then display each email address on a separate line.  List primary email first |  |
| Email Status | Icon | Display icon adjacent to email.  Possible icons include:   1. Grey checkmark 2. Green checkmark 3. Yellow caution sign 4. Red ‘X’ 5. Red stop sign   Options for pop-over include:   1. Not Verified (grey checkmark) 2. Verified (green checkmark) 3. Soft-bounce (yellow caution sign) 4. Hard-bounce (red ‘X’) 5. Unsubscribed (red stop sign) |  |
| Social Media | Icon | If multiple social media accounts are linked, then display each icon adjacent to each other. |  |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| **Opportunity Summary (Right Sidebar)**  **NOTE: If Opportunities is configured where Customers are primarily Companies** | | | |
| Number of Won Opportunities | Link | Count the number of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| Value of Won Opportunities | Text | Sum the value of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| Number of Potential Opportunities | Link | Count the number of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| Value of Potential Opportunities | Text | Sum the value of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| **Opportunity (Right Sidebar)**  **NOTE: If Opportunities is configured where Customers are primarily Companies** | | | |
| Opportunity Name | Link | Display 3-5 Opportunities (the number depends upon available space and/or what works well to balance the UI)  Order by Expected Close Date from newest to oldest  Link to Opportunity record in Opportunity Module |  |
| Value | Text | Display as currency without decimals |  |
| Stage | Text | Display as: In [Stage] stage |  |
| Expected Closing Date | Text | Display as: Expected to close [Expected Close Date] |  |
| **Actions (Right Sidebar) – Same as Contacts** | | | |
| **People (Right Sidebar)** | | | |
| Contact | Link | Link to Contact’s record |  |
| Contact’s Title | Text |  |  |
| **Timeline (Tab) – Same as Contacts** | | | |
| **Contact Info (Tab)** | | | |
| Company Name | Text |  |  |
| Phone Number | Text |  |  |
| Phone Number Type | Text |  |  |
| Email\* | Text |  |  |
| Primary | Icon | Include star icon adjacent to email textbox.  Outlined star indicates unselected state  Solid star indicates selected state, which indicates that this email address is the primary email address. | Only one email address may be selected as the primary |
| Do not email | Checkbox |  |  |
| Web & Social Link | Text |  |  |
| Link Type | Text |  |  |
| Address Type | Text |  |  |
| Street 1 | Text |  |  |
| Street 2 | Text |  |  |
| City | Text |  |  |
| State | Text |  |  |
| Zip Code | Text |  |  |
| Country | Text |  |  |
| **Attachments (Tab)** **– Same as Contacts** | | | |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit Contact | Icon |  |  |
| Add Opportunity | Icon | Associated with Opportunities in the sidebar  Navigate User to New Opportunity view and prepopulate Company with the Contact’s name |  |
| Add Action | Icon | Associated with Actions in the sidebar |  |
| Action Status | Checkbox | User selects checkbox to identify the action as complete |  |
| Edit Action | Icon | Associated with the action in the sidebar |  |
| Delete Action | Icon | Associated with the action in the sidebar | Alert: “You’re about to delete this action. Are you sure you want to delete?”  Buttons: “Delete Action” and “Cancel” |
| Add Relationship | Icon | Associated with Relationship in the sidebar |  |
| Edit Relationship | Icon | Associated with the relationship in the sidebar |  |
| Delete Relationship | Icon | Associated with the relationship in the sidebar | Alert: “You’re about to delete this relationship. Are you sure you want to delete?”  Buttons: “Delete Relationship” and “Cancel” |
| Showing all [timeline objects] | Dropdown | Display as: “Showing all [timeline objects]  Timeline objects include:   1. All 2. Activities 3. Campaigns 4. Emails 5. Form Submissions 6. Meetings 7. Notes 8. Tours 9. Web visits |  |
| Timeline Period | Dropdown | Options include:   1. All 2. Last 30 days 3. Last 60 days 4. Last 90 days 5. Custom |  |
| Custom Time Period | Date Pickers | If Timeline Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Edit Note | Icon | Associated with the note in the Activity tab |  |
| Delete Note | Icon | Associated with the note in the Activity tab | Alert: “You’re about to delete this note. Are you sure you want to delete?”  Buttons: “Delete Note” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Contact | Link |  |
| Add Company | Link | Accessed by a dropdown adjacent to Add Contact |
| Add Action | Link |  |
| Add Note | Link |  |
| Add Tour | Link | If active in setup |
| Send Email | Link |  |
| Send Text | Link |  |
| More | Dropdown | Options include:   1. Add Relationship 2. Add Opportunity (If Opportunities is configured where Customers are primarily Companies) 3. Export Company 4. Archive Company |
| Back to list | Link | If Contact was selected from a list, then provide option to go back to the list |
| Backwards | Icon | If Contact is part of a list, then provide option to view the previous Contact |
| Forwards | Icon | If Contact is part of a list, then provide option to view the next Contact |

**Exceptions**

1. If any address field (Street, City, State, or Zip) is populated, then the other fields are also required.

**Notes and Issues**

1. If there are more tabs than can be displayed within the viewport, then add a carousel to the User can scroll forwards and backwards within the tabs

# Add or Edit Contact (Individual)

**Functional Description**

This view allows the User to record details about a Contact.

The view is substantially similar to the Contact Tab detailed in [View Contact](#_View_Contact).

**Fields**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | | Validation |
| Profile Image | Textbox | |  | | URL format  HTTP response code = 200 |
| First Name | Textbox | |  | | Check for duplicate Contacts using a combination of First Name, Last Name, Company Name, and/or Email Address |
| Last Name | Textbox | |  | | Check for duplicate Contacts using a combination of First Name, Last Name, Company Name, and/or Email Address |
| Title | Textbox | |  | |  |
| Company Name | Textbox | | Live search field of existing companies | | Check for duplicate Contacts |
| 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. | | User may select the same type for multiple phone numbers |
| Email | Textbox | |  | | Conforms to valid email patterns  Check for duplicate Contacts using a combination of First Name, Last Name, Company Name, and/or Email Address |
| Primary | | Icon | | Include star icon adjacent to email textbox.  Outlined star indicates unselected state  Solid star indicates selected state, which indicates that this email address is the primary email address. | Only one email address may be selected as the primary |
| Do not email | Checkbox | |  | |  |
| 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. | | User may select the same type for multiple links |
| Address Type | Dropdown | | Default options in this order:   1. Home 2. Mailing 3. Work | | User may select the same type for multiple addresses |
| Street 1 | Textbox | | |  |  |
| Street 2 | Textbox | |  | |  |
| 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 | |  |
| Contact Type | Dropdown | | Default options in this order:   1. Lead 2. Prospect 3. Customer 4. Partner | |  |
| ~~Status~~ | ~~Dropdown~~ | | ~~Display if Lifecycle = Subscriber, Lead, or Customer~~  ~~Default options as configured in Settings.~~ | |  |
| Partner Type | Dropdown | | Display if Contact Type = Partner  Default options as configured in Settings. | |  |
| Lead Sources | Dropdown / Select List | | Display if Contact Type <> Partner  Default options as configured in Settings  Programmatically set Lead Sources and allow user to select one or more options | |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add another phone number | Link | Displays another Phone Number and Phone Number Type fields |  |
| Primary phone indicator | Icon | Icon adjacent to each phone number  When selected, change icon to indicate that the phone number is the primary phone number | Only one phone number may be selected as the primary number |
| Delete Phone Number | Icon |  |  |
| Add another email address | Link | Displays another Email Address field |  |
| Primary email indicator | Icon | Icon adjacent to each email  When selected, change icon to indicate that the email is the primary email | Only one email may be selected as the primary email |
| Delete Email Address | Icon |  |  |
| Add another link | Link | Displays another Web/Social Link and Link Type field |  |
| Delete Web/Social Link | Icon |  |  |
| Add another address | Link | Displays another Address form |  |
| Delete Address | Icon |  |  |
| Save Contact | Button |  | Perform validation  Display [View Contact](#_View_Contact) after saving |
| Cancel | Button |  | Return to previous view |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Contact | Link |  |
| Delete Contact | Link |  |

**Exceptions**

1. First Name AND Last Name are required OR Email Address is required
2. If any address field (Street, City, State, or Zip) is populated, then the other fields are also required.

**Notes and Issues**

None

# Add or Edit Contact (Company)

**Functional Description**

This view allows the User to record details about a Contact.

The view is substantially similar to the Contact Tab detailed in [View Contact](#_View_Contact).

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Company Name\* | Textbox | Live search field of existing companies | | Check for duplicate Contacts |
| 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. | | User may select the same type for multiple phone numbers |
| Email | Textbox |  | | Conforms to valid email patterns  Check for duplicate Contacts using a combination of Company Name, and/or Email Address |
| Primary | Icon | | Include star icon adjacent to email textbox.  Outlined star indicates unselected state  Solid star indicates selected state, which indicates that this email address is the primary email address. | Only one email address may be selected as the primary |
| Do not email | Checkbox |  | |  |
| 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. | | User may select the same type for multiple links |
| Address Type | Dropdown | Default options in this order:   1. Physical 2. Mailing 3. Billing | | User may select the same type for multiple addresse |
| Street 1 | Textbox | |  |  |
| Street 2 | Textbox |  | |  |
| 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 |
| Add another phone number | Link | Displays another Phone Number and Phone Number Type fields |  |
| Primary phone indicator | Icon | Icon adjacent to each phone number  When selected, change icon to indicate that the phone number is the primary phone number | Only one phone number may be selected as the primary number |
| Delete Phone Number | Icon |  |  |
| Add another email address | Link | Displays another Email Address field |  |
| Primary email indicator | Icon | Icon adjacent to each email  When selected, change icon to indicate that the email is the primary email | Only one email may be selected as the primary email |
| Delete Email Address | Icon |  |  |
| Add another link | Link | Displays another Web/Social Link and Link Type field |  |
| Delete Web/Social Link | Icon |  |  |
| Add another address | Link | Displays another Address form |  |
| Delete Address | Icon |  |  |
| Save Company | Button |  | Perform validation  Display [View Contact](#_View_Contact) after saving |
| Cancel | Button |  | Return to previous view |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Company | Link |  |
| Delete Company | Link |  |

**Exceptions**

1. If any address field (Street, City, State, or Zip) is populated, then the other fields are also required.

**Notes and Issues**

None

# Add Action

**Functional Description**

This view allows the User to record an action.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Action\* | Textarea | |  |  |
| Reminder method | Multi-select | | Default options in this order:   1. Email 2. Pop-up 3. Text to [User’s mobile number] |  |
| Reminder timeframe | Dropdown | | Default options in this order:   1. Today 2. Tomorrow (default) 3. 2 days 4. Next week 5. On a date   If ‘On a date’ is selected, then display date and time fields |  |
| Date | Date | | Displayed if ‘On a date’ is selected in ‘Send reminder’ | Required if ‘On a date’ is selected in ‘Send reminder’ |
| Time | Textbox | | Default to the next quarter-hour  Example: If current time is 5:21, then default to 5:30. | Required if reminder is set  Numeric  Valid time format |
| People | Textbox | Display below the fold as additional options  If viewing Contact Detail, then include Contact by default  Use live search pattern to select Contacts as the User types | |  |
| Tags | Textbox | Display below the fold as additional options  Use live search pattern to select Tags as the User types | |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add reminder | Icon w/ Link | Reveals reminder options consisting of reminder method dropdown and reminder timeframe dropdown |  |
| Tag Help | Icon | Right-justified icon in the Tag textbox  When selected, display a list of Tags that impact lead scores when added to Actions.  [See example below.](#TagHelp1) |  |
| Save Action | Button |  | Validate fields  Close view |
| Save & Mark Complete | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

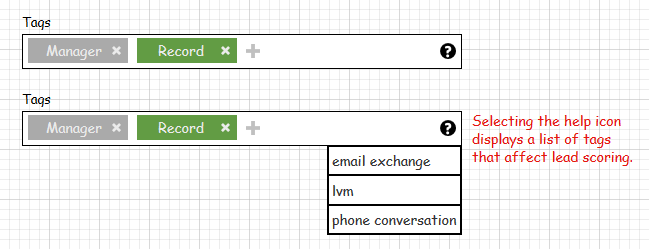
Not applicable

**Exceptions**

1. Date and Time are required if ‘Specific date & time’ is selected in ‘Complete by’
2. Email Address is required if ‘Send by Email’ is selected and the User has more than one email address
3. Phone Number is required if ‘Send by Text’ is selected and the User has more than one phone number

**Notes and Issues**

1. Example of Tag Help:



# Add Note

**Functional Description**

This view allows the User to record a note.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Note\* | Textarea |  |  |
| People\* | Textbox | Display below the fold as additional options  If viewing Contact Detail, then include Contact by default  Use live search pattern to select Contacts as the User types |  |
| Tags | Textbox | Display below the fold as additional options  Use live search pattern to select Tags as the User types |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Tag Help | Icon | | Right-justified icon in the Tag textbox  When selected, display a list of Tags that impact lead scores when added to Notes.  [See example below.](#TagHelp2) |  |
| Save Note | Button |  | | Validate fields  Close view |
| Cancel | Button |  | |  |

**Navigation Options**

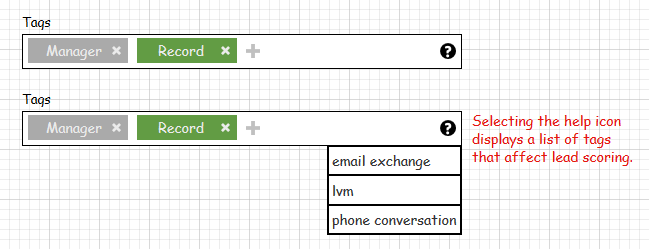
Not applicable

**Exceptions**

None

**Notes and Issues**

1. Example of Tag Help:



# Add Tour

**Functional Description**

This view allows the User to record a tour.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Details | Textarea |  | |  |
| Community\* | Dropbox | If Tours is active in Account Management  Default options per Account setup  **NOTE: Although Community is an attribute of a meeting, future versions of ST will use Community with Inventory and possibly as a hierarchy for users and teams.** | |  |
| Tour Date\* | Date | Default to today | |  |
| Tour Type\* | Dropdown | If Tours is active in Account Management  Default options include:   1. First 2. Be-back 3. Agent   If no other record exists for the community, then default to ‘First'  If a record does exists for the community, then default to ‘Be-back’  If Contact is an Agent, then default to ‘Agent’ | |  |
| Reminder method | Multi-select | | Default options in this order:   1. Email 2. Pop-up 3. Text to [User’s mobile number] |  |
| Reminder timeframe | Dropdown | | Default options in this order:   1. Day of 2. 1 day before 3. 2 days before 4. On a date   If ‘On a date’ is selected, then display date and time fields |  |
| Date | Date | | Displayed if ‘On a date’ is selected in ‘Send reminder’ | Required if ‘On a date’ is selected in ‘Send reminder’ |
| Time | Textbox | | Default to the next quarter-hour  Example: If current time is 5:21, then default to 5:30. | Required if reminder is set  Numeric  Valid time format |
| People\* | Textbox | Display below the fold as additional options  If viewing Contact Detail, then include Contact by default  Use live search pattern to select Contacts as the User types | |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Tour | Button |  | Validate fields  Close view |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

1. If date are in the past, then ‘Result’ is required

**Notes and Issues**

None

# Send Email

**Functional Description**

This view allows the User to message a Contact via email, SMS, and/or social media.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| To\* | Textbox | Include Contact by default  Use live search pattern to select Contacts as the User types |  |
| CC | Textbox | Hidden until selected  Use live search pattern to select Contacts as the User types |  |
| BCC | Textbox | Hidden until CC field is selected  Use live search pattern to select Contacts as the User types |  |
| From\* | Text or Dropdown | If the User has one verified email addresses, then display as text using this format: User’s Name (email) Example: Grant Taylor (grant@domain.com)  If the User has more than one verified email address, then display From as a dropdown containing a list of verified email addresses. |  |
| Subject | Textbox |  |  |
| Message\* | Textarea | Include User’s signature |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Rich-text Editor | Toolbar |  |  |
| Attach file | Text with Icons | Include icons for Dropbox and Google Drive  Link to Dropbox and Google Drive file plugins |  |
| Send me a copy | Checkbox | If selected, send the User a copy of the email |  |
| Send Email | Button |  | Validate fields  Close view |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Send Text

**Functional Description**

This view allows the User to message a Contact via email, SMS, and/or social media.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| To\* | Textbox | | Include Contact’s mobile phone by default  Use live search pattern to select Contacts as the User types  List of matching Contacts includes the first name, last name, phone number, and phone number type  Example: John Smith (512) 555-1111 (mobile) |  |
| From\* | Text or Dropdown | If the User has one verified mobile phone number, then display as text.  If the User has more than one verified mobile phone numbers, then display From as a dropdown containing a list of verified mobile phone numbers | |  |
| Message\* | Textarea | |  |  |
| Character Count | Text | | Count characters of Message as the User types | Maximum of 160 characters  Prevent user from typing more than 160 characters |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Send Text | Button |  | Validate fields  Close view |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Add Tag

**Functional Description**

This view allows the User to add one or more tags to a list of Contacts.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add tag(s)\* | Textbox | Use live search pattern to select Tag as the User types |  |
| [Popular Tags] | Checkbox | If ‘Popular’ link is selected, which it is by default  List of top-ten most popular tags |  |
| [Recent Tags] | Checkbox | If ‘Recent’ link is selected, which it is by default  List of ten most recently-used tags |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add Tag | Button | Disabled by default  Enable when tag is entered or selected |  |
| Cancel | Button |  |  |

**Navigation Options**

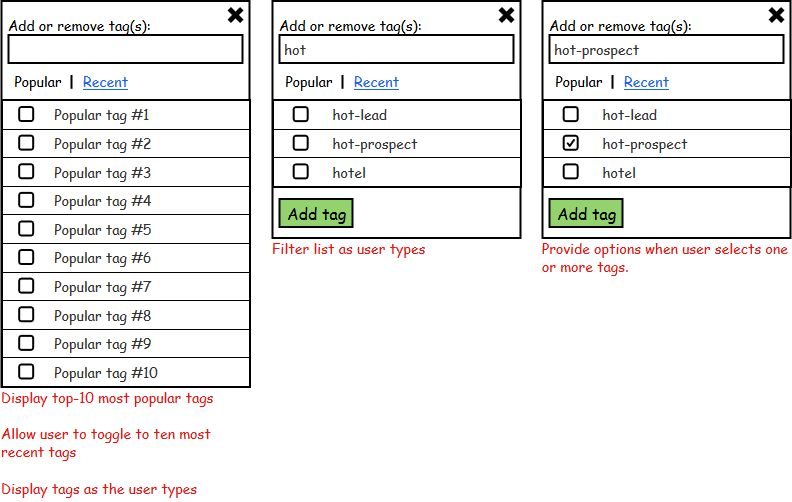
Not applicable

**Exceptions**

None

**Notes and Issues**

Sample UI



# Add Relationship

**Functional Description**

This view allows the User to associate Contacts with each other and define their relationship.

This view only applies to People Contacts.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Contact\* | Textbox | Use live search pattern to select Contacts as the User types |  |
| Relationship\* | Dropdown | Default options include in this order:   1. ~~Account Executive~~ 2. Spouse 3. Agent 4. Lawyer 5. ~~Co-buyer~~   Default to the next type when adding another relationship |  |
| Add or replace Account Executive? | Dropdown | Reveal if the User selects ‘Account Executive’ from the Relationship type field.  Default options include in this order:   1. [blank] 2. Add Account Executive 3. Replace existing Account Executive |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Relationship | Button |  | Validate fields  Close view |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

1. ‘Add or replace Account Executive?’ is required if the User selects ‘Account Executive’ from the Relationship type field.

**Notes and Issues**

None

# Copy Contact

**Functional Description**

The view for this functionality is the same as ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’.

The description below notes the fields that should be copied from the selected Contact record and used to create a new Contact record as described in ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’.

**Fields**

All populated fields from selected Contact.

**Actions or Controls**

See ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’.

**Navigation Options**

See ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’.

**Exceptions**

See ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’.

**Notes and Issues**

None

# Export Contacts

**Functional Description**

This view allows the User to select Contact fields for exporting as well as an export file format.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Fields\* | Listbox with checkbox | By default, pre-select all fields included in ‘[View List of Contacts](#_View_List_of)’. |  |
| Selected Fields\* | Textbox | Display selected fields similar to tags  Allow User to change order by dragging and dropping  Allow User to remove field |  |
| Find available fields | Searchbox | Use livesearch pattern to filter the list of available fields |  |
| Sort by | Dropdown | Includes a list of all Selected Fields |  |
| Sort Order | Dropdown | Default options include in this order:   1. A 🡪 Z 2. Z 🡪 A |  |
| Export As | Dropdown | Default options include in this order:   1. CSV 2. Excel |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Export Contacts | Button |  | Validate fields  Close view  Return file to browser |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Delete Contacts

**Functional Description**

This view allows the User to delete one or more Contacts.

**Fields**

Not applicable

**Actions or Controls**

Not applicable

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

1. Upon selecting the menu item ‘Delete Contacts’, delete contacts and return a message to the user stating: “[count of Contacts deleted] contacts have been deleted.”
2. A User may not delete their own record