Contacts Module

Table of Contents

1. [View List of Contacts 2](#_Toc376182225)
2. [View Contact (Individual) 4](#_Toc376182226)
3. [View Contact (Company) 11](#_Toc376182227)
4. [Add or Edit Contact (Individual) 15](#_Toc376182228)
5. [Add or Edit Contact (Company) 18](#_Toc376182229)
6. [Add Action 21](#_Toc376182230)
7. [Add Note 23](#_Toc376182231)
8. [Add Meeting 24](#_Toc376182232)
9. [Send Email 27](#_Toc376182233)
10. [Send Text 28](#_Toc376182234)
11. [Add Opportunity 29](#_Toc376182235)
12. [Add Relationship 30](#_Toc376182236)
13. [Add File 31](#_Toc376182237)
14. [Update Contact Fields 32](#_Toc376182238)
15. [Associate with a Company 33](#_Toc376182239)
16. [Copy Contact 33](#_Toc376182240)
17. [Export Contacts 34](#_Toc376182241)
18. [Delete Contacts 35](#_Toc376182242)

# 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 |  |
| Lifecycle | Text |  |  |
| Last Contacted | Text |  |  |
| Last Contact Method | Text | Concatenate after Last Contacted  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. Recently viewed |  |
| 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 Meeting](#_Add_Meeting) | 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 |
| More | Dropdown | If one or more records are selected  Options include:   1. [Add Opportunity](#_Add_Opportunity) 2. [Add Relationship](#_Add_Relationship) 3. [Add File](#_Add_File) 4. [Update Field](#_Update_Contact_Fields) 5. ~~Assign to Company~~ 6. [Copy Contact](#_Copy_Contact) (if only one record is selected) 7. [Export Contacts](#_Export_Contacts) 8. [Delete Contacts](#_Archive_Contacts) |

**Exceptions**

None

**Notes and Issues**

1. 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 opportunities; associated contacts; a history of actions and updates; associated properties; and associated files.

**Fields**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | | Type | | Additional Information | Validation |
| **Contact Summary** | | | | | |
| Profile Image | Image | | Display if image is linked.  Otherwise, display a placeholder. | |  |
| 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. |  |
| 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 |  |
| Lifecycle | | Text | |  |  |
| Last Contacted | | Text | | Date of last contact by user or system |  |
| Last Contact 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 Lifecycle = Subscriber, Lead, 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 |  |
| **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 |  |
| **Opportunity (Right Sidebar)** | | | | | |
| Opportunity Description | | Text | | Display 3-5 Opportunities (the number depends upon available space and/or what works well to balance the UI) |  |
| Value | | Text | |  |  |
| Probability | | Link | | Display on the same line as Value  Example: ‘$450,000 value at 90% probability’  User may change Probability without entering Edit mode |  |
| Stage | | Text | | User may change Stage without entering Edit mode |  |
| Expected Close | | Text | | User may change Expected Close without entering Edit mode |  |
| **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  Description verbiage to be determined |  |
| User | | Text | |  |  |
| Activity | | Text | | Verbiage depends upon the Description of Activity above, which is to be determined |  |
| 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 | |  |  |
| 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 | |  |  |
| SSN | | Text | |  |  |
| **Attachments (Tab)** | | | | | |
| File Type | | Icon | |  |  |
| File Name | | Link | |  |  |
| 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 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” |
| 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 Opportunity | Icon | Associated with Opportunity in the sidebar |  |
| Edit Opportunity | Icon | Associated with the opportunity in the sidebar |  |
| Delete Opportunity | Icon | Associated with the opportunity in the sidebar | Alert: “You’re about to delete this opportunity. Are you sure you want to delete?”  Buttons: “Delete Opportunity” and “Cancel” |
| Next Opportunity | Icon | If more Opportunities exist than can be displayed, then use a carousel to page through other Opportunities |  |
| Previous Opportunity | Icon | If more Opportunities exist than can be displayed, then use a carousel to page through other Opportunities |  |
| 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. Emails 4. Form Submissions 5. Meetings 6. Notes 7. Opportunities 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 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 Meeting | Link | If active in setup |
| Send Email | Link |  |
| Send Text | Link |  |
| More | Dropdown | Options include:   1. Add Opportunity 2. Add Relationship 3. Add File 4. Copy Contact 5. Export Contact 6. 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 opportunities; associated contacts; a history of actions and updates; associated properties; and associated files.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Contact Summary** | | | |
| Company Name | Text |  |  |
| 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. |  |
| 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 |  |
| **Actions (Right Sidebar) – Same as Contacts** | | | |
| **Opportunity (Right Sidebar) – Same as Contacts** | | | |
| **Relationships (Right Sidebar) – Same as Contacts** | | | |
| **Timeline (Tab) – Same as Contacts** | | | |
| **Contact Info (Tab)** | | | |
| Company Name | Text |  |  |
| Phone Number | Text |  |  |
| Phone Number Type | Text |  |  |
| Email\* | Text |  |  |
| 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 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 Opportunity | Icon | Associated with Opportunity in the sidebar |  |
| Edit Opportunity | Icon | Associated with the opportunity in the sidebar |  |
| Delete Opportunity | Icon | Associated with the opportunity in the sidebar | Alert: “You’re about to delete this opportunity. Are you sure you want to delete?”  Buttons: “Delete Opportunity” 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. Emails 4. Form Submissions 5. Meetings 6. Notes 7. Opportunities 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 Meeting | Link | If active in setup |
| Send Email | Link |  |
| Send Text | Link |  |
| More | Dropdown | Options include:   1. Add Opportunity 2. Add Relationship 3. Add File 4. Export Company 5. 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 |
| 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 | |  |
| SSN | Textbox | Change label to ‘SIN if localization/internationalization is set to Canada  Accept any valid format but store in preferred format  Format SSN = 123-45-6789  Format SSN = 123-456-789 | | Numeric with or without dashes  Accept any valid format  Valid SSN = 123-45-6789  Valid SIN = 123-456-789 |
| Lifecycle | Dropdown | Default options in this order:   1. Subscriber 2. Lead 3. Prospect 4. Customer 5. Partner | |  |
| Partner Type | Dropdown | Display if Lifecycle = Partner  Default options as configured in Settings. | |  |
| Lead Sources | Dropdown / Select List | 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. 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 |
| 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 | |  |  |
| Add reminder | Icon w/ Link | | Reveals reminder options consisting of reminder method dropdown and reminder timeframe dropdown |  |
| Reminder method | Dropdown | | Default options in this order:   1. Pop-up 2. Email 3. Both Pop-up & Email |  |
| 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 | | Displayed if ‘On a date’ is selected in ‘Send reminder’  Default to [now] | Required if ‘On a date’ is selected in ‘Send reminder’  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 |
| 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. |  |
| 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**

None

# Add Note

**Functional Description**

This view allows the User to record a note.

Actions are typically tasks to be completed in the future. However, the User can log history by adding an action and selecting a result.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Note\* | Textarea | Allow user to set:   * ‘People’ with @ * ‘Tags’ with # * ‘Opportunities’ or ‘Property’ $ |  |
| 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. |  |
| Save Note | Button |  | | Validate fields  Close view |
| Cancel | Button |  | |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Add Meeting

**Functional Description**

This view allows the User to record an action to meet a contact.

Actions are typically tasks to be completed in the future. However, the User can log history by adding an action and selecting a result.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Title\* | Textarea |  | |  |
| Tour | Checkbox or Toggle | If Tours is active in Account Management  Not selected by default | |  |
| Location | Textbox | If Tour is selected, then replace Location with Community | |  |
| Community\* | Dropbox | If Tours is active in Account Management  If Tour is selected, then replace Location with Community  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 Type\* | Dropdown | If Tours is active in Account Management  If Tour is selected, then reveal Tour Type  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’ | |  |
| From Date\* | Date | Default to today | |  |
| From Time\* | Textbox | Default to the next half hour | |  |
| To Date\* | Date | Default to today | |  |
| To Time\* | Textbox | Default to From Time plus 1 hour | |  |
| Details | Textarea | Allow user to set:   * ‘Community toured’ with @ * ‘Toured on’ with % * ‘Tour type’ with # | |  |
| Attendees\* | Textbox | Display below the fold as additional options  Include Contact and User by default  Use live search pattern to select Contacts as the User types | |  |
| Add reminder | Icon w/ Link | | Reveals reminder options consisting of reminder method dropdown and reminder timeframe dropdown |  |
| Reminder method | Dropdown | | Default options in this order:   1. Pop-up 2. Email 3. Both Pop-up & Email |  |
| Reminder timeframe | Dropdown | | Default options in this order:   1. At time of event 2. 5 minutes before 3. 10 minutes before 4. 15 minutes before 5. 30 minutes before 6. 1 hour before 7. 2 hours before 8. 1 day before 9. 2 days before 10. 1 week before |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Meeting | Button | If Tour is selected, then change label to ‘Save Tour’ | 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\* | Dropdown | If the If the User has more than one verified email addresses, 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 | Include insert Campaign as an option in the toolbar |  |
| Attach file | Icon |  |  |
| 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\* | Dropdown | If the 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 |  |

**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 Opportunity

**Functional Description**

This view allows the User to add the details about an Opportunity.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Opportunity\* | Textarea |  |  |
| Potential\* | Textbox |  | Numeric with or without currency symbol |
| Probability\* | Dropdown | Default options include:   * 10% * 20% * 30% * 40% * 50% * 60% * 70% * 80% * 90% |  |
| Expected close | Date |  |  |
| Stage\* | Dropdown | Default options as configured in Account setup |  |
| People\* | Textbox | Display below the fold as additional options  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 |
| Save Opportunity | Button |  | Validate fields  Close view |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Add Relationship

**Functional Description**

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

**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

# Add File

**Functional Description**

This view allows the User to upload or associate a file link with a Contacts.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| File Name\* | Textbox or  Drag-Drop container |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Upload File | Button |  | Validate field |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Update Contact Fields

**Functional Description**

This view allows the User to select a Contact field, select/enter a value, and apply the update to one or more Contacts at one time.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Contact Field\* | Dropdown | Options include a list of all standard and custom contact fields.  Standard fields are noted in ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’ and ‘[Add or Edit Contact (Company)](#_Add_or_Edit_1)’ |  |
| Value\* | Depends upon Contact Field | The type of control depends upon the selected Contact Field. | Validation depends upon the selected Contact Field.  Refer to validation noted in ‘[Add or Edit Contact (Individual)](#_Add_or_Edit)’ and ‘[Add or Edit Contact (Company)](#_Add_or_Edit_1)’ |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Update Contacts | Button |  | Validate fields  Close view |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

None

# Associate with a Company

# 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