Personal Settings

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# Personal Settings – Settings Tab

**Functional Description**

This view allows a User to configure personal settings.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Localization** | | | |
| Country | Dropdown | List of countries |  |
| Date Format\* | Dropdown | Options include:   1. MM/DD/YYYY 2. MM-DD-YYYY 3. YYYY-MM-DD (default) 4. DD/MM/YYYY |  |
| Time Zone\* | Dropdown | Options include all time zones expressed as GMT with local options for US and Canada |  |
| Currency Format\*  (Symbol) | Dropdown | Options include:   1. $ - USD 2. $ - CAD 3. B/. - PAB |  |
| Currency Format\*  (Format) | Dropdown | Options include:   1. $X,XXX.XX 2. X XXX,XX $ 3. B/.X,XXX.XX |  |
| **Email Signatures** | | | |
| Email Addresses | Dropdown | List of User’s verified email addresses  Selecting a value displays the associated signature in the Email Signature Text Area |  |
| Email Signature | Text Area | Text area with HTML editor |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Signature | Button | Enable if signature added or changed |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Settings | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Personal Settings – Notifications Tab

**Functional Description**

This view allows a User to configure notification settings.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Daily Summary** | | | |
| Daily Summary\* | Toggle |  |  |
| Alert Notifications\* | Toggle |  |  |
| Alert Method | Checkbox | Options include:   1. Email 2. Text Message | Required if Alert Notifications = Yes |
| Only notify me when Contacts have a minimum lead score of | Checkbox | Single checkbox |  |
| Lead Score | Textbox |  | Required if associated checkbox = Yes |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Learn more about the Daily Summary | Link | Implementation to be determined  May link to popup, tooltip, or knowledgebase |  |
| Learn more about Alert Notifications | Link | Implementation to be determined  May link to popup, tooltip, or knowledgebase |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Settings | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Personal Settings – Integrations Tab

**Functional Description**

This view allows a User to configure notification settings.

**Fields**

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

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Gmail | Button | Triggers authorization request to the User’s Gmail account |  |
| Google Calendar | Button | Triggers authorization request to the User’s Google Calendar |  |
| Outlook (Exchange) | Button | Triggers configuration to access the User’s Outlook Exchange account |  |
| Outlook 365 | Button | Triggers configuration to access the User’s Outlook 365 |  |
| Facebook | Button | Triggers authorization request to the User’s Facebook account |  |
| Twitter | Button | Triggers authorization request to the User’s Twitter account |  |

**Navigation Options**

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

**Exceptions**

None

**Notes and Issues**

None