Personal Settings

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# Personal Settings – Contact Info

**Functional Description**

This view allows a User to update their contact information.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Contact Information** | | | |
| 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 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 |  |
| Delete Phone Number | Icon | |  |  |
| Add another email address | Link | | Displays another Email Address field |  |
| 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 | |  |  |

**Navigation Options**

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

**Exceptions**

None

**Notes and Issues**

None

# Personal Settings – Settings Tab

**Functional Description**

This view allows a User to configure personal settings.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Pagination** | | | |
| Items per Page | Dropdown | Options include:   1. 10 2. 25 3. 50 4. 100 5. 250 |  |
| **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 |  |
| **Change Password** | | | |
| Current Password | Textbox | Mask entry as the user types | Validate password on change focus |
| New Password | Textbox | Mask entry as the user types |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Add another phone number | Link | | Displays another Phone Number and Phone Number Type fields |  |
| Delete Phone Number | Icon | |  |  |
| Add another email address | Link | | Displays another Email Address field |  |
| 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 Signature | Button | Enable if signature added or changed | |  |
| Save Password | Button | Enabled if Current Password is valid  Updates the User’s password | |  |

**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

# Daily Summary

**Functional Description**

This functionality describes components of the welcome email sent to new Users.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| User’s First Name | Text |  |  |
| User’s Last Name | Text |  |  |
| User’s Email Address | Text |  |  |
| Copy | Text | Copy TBD |  |
| Reminder | Text |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Login Link | Link | Link to login page for the account  Selecting the link confirms the User’s email address and prompts them for a password |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None