Menu

Table of Contents

1. [Menu 2](#_Toc377320771)
2. [Add 2](#_Toc377320772)
3. [Recent Activity 3](#_Toc377320773)
4. [Notifications 4](#_Toc377320774)
5. [Settings 4](#_Toc377320775)

# Menu

**Functional Description**

This view displays persistent navigation options in the upper-right corner of the User’s viewport.

**Fields**

None

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add | Link |  |
| Recent Activity | Link |  |
| Notifications | Link |  |
| Settings | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Add

**Functional Description**

This option allows a User to quickly add selected objects regardless of their current module.

**Fields**

None

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Person | Link |  |
| Add Company | Link |  |
| Add Action | Link |  |
| Add Note | Link |  |
| Add Tour | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Recent Activity

**Functional Description**

This option allows a User to quickly access the last 10 recently-viewed records and/or searches.

**Fields**

None

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| [Object Icon & Name] | Link | Recent activities include:   1. Contacts 2. Campaigns 3. Forms 4. Landing Pages 5. Reports 6. Searches 7. Workflows |

**Exceptions**

None

**Notes and Issues**

None

# Notifications

**Functional Description**

This option displays system notifications and links to records where appropriate.

**Fields**

None

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| [Object Icon & Name] | Link | Notifications include:   1. Newly-assigned Contacts 2. New actions or notes that tag the current User 3. System notifications |
| Unread Notifications | Icon | Numerical icon indicating the number of unread notifications |

**Exceptions**

None

**Notes and Issues**

None

# Settings

**Functional Description**

This option allows the User to navigate to personal settings, app settings (if Admin), and access help/resources.

**Fields**

None

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Personal Settings | Link |  |
| Account Settings | Link | If User is an Admin or ST Admin |
| Manage SmartTouch | Link | If User is a ST Admin |
| Resources | Link | Link to knowledgebase |
| Help | Link | Link to support site |
| Logout | Link |  |

**Exceptions**

None

**Notes and Issues**

None