

Custom Tagging

MICROINTERACTIONS

Microinteraction Details

TRIGGER:
The action or event that initiates a microinteraction

FEEDBACK:
What happens upon the user action or system event? What are we conveying to the user and how do we convey it?

RULES:
What can and cannot be done within this interaction?

Legend



Dashed container:
Microinteraction details

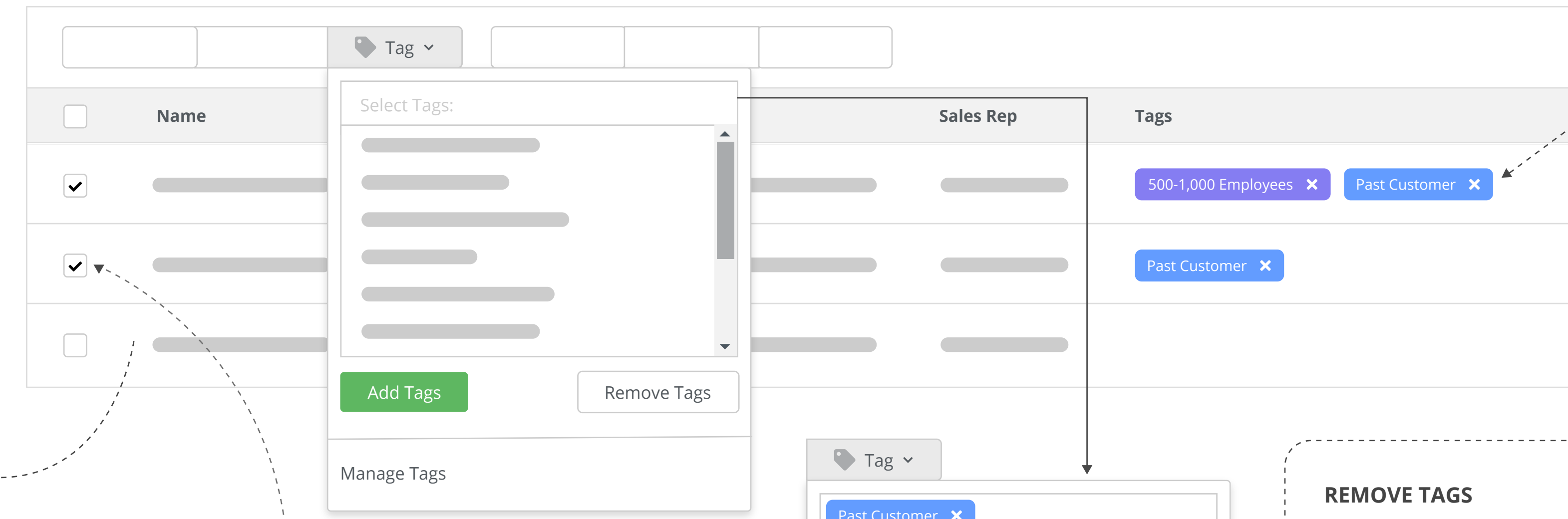
Dashed arrow:
Indicates which element the Microinteraction details box is explaining

SHOW QUICK VIEW

Trigger:
User clicks anywhere on the row relating to a specific contact, except for the row checkbox.

Feedback:
Contact Quick View slides in from right. Should take up 50% of screen for resolutions over 800px wide, 100%vh-40px for smaller screens.

TAG DISPLAY: CONTACTS



REMOVE TAGS

Trigger:
User clicks the "X" button on the right side of a tag.

Feedback:
Tag is removed from contact and no longer shows in current view.

MANAGE TAGS

Trigger:
User clicks the "Manage Tags" link.

Feedback:
User is taken to the "Tags and Labels" tab of the Account Settings screen.

SELECT CONTACTS TO TAG

Trigger:
User selects contact records to tag via checkbox then clicks the "Tag" button.

Feedback:
Tag button drops down a div where tags can be selected and managed. User can scroll through a list of existing tags. When a tag is clicked, it appears in the top "Select Tags" area of the div.

Rules:
"Tag" button is disabled until contact records are selected. Tags that already apply to all selected contacts will be pre-populated into the "select tags" area. Users can select from a list of existing tags, not create new ones. Maximum of 6 tags per contact, or 2 lines high, are displayed in this view. If tags will take up more than 2 display lines, hide them.

MANAGE TAGS

Trigger:
User clicks the "Manage Tags" link.

Feedback:
User is taken to the "Tags and Labels" tab of the Account Settings screen.

REMOVE TAGS

Trigger:
User clicks the "Remove Tags" button.

Feedback:
Tags are removed from selected contacts in the contact list view.

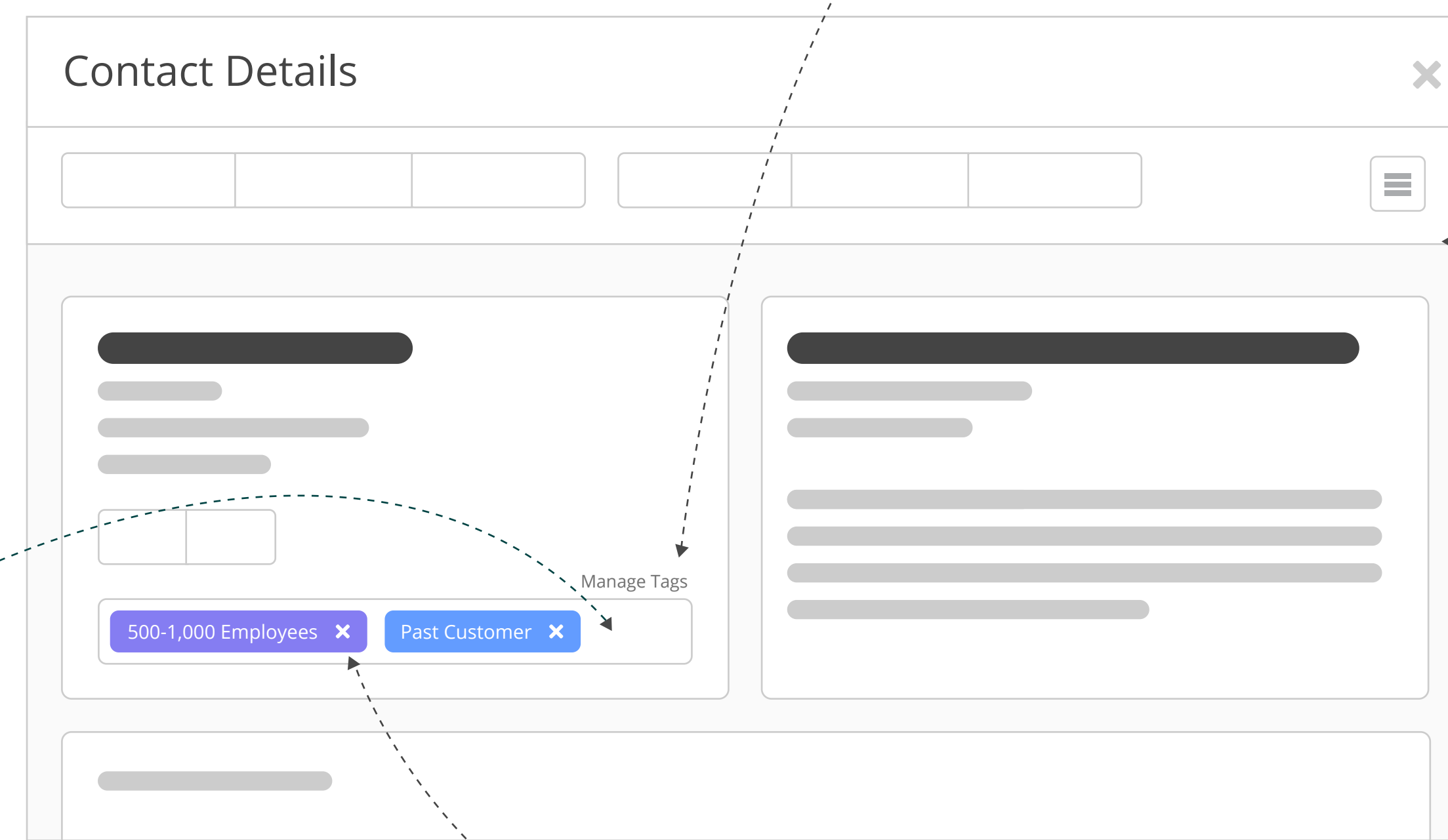
ADD TAGS

Trigger:
User clicks the "Add Tags" button.

Feedback:
Tags are applied to, and show up beside, selected contacts in the contact list view. Tags dropdown div disappears.

Rules:
Once a user has selected the tags they want, clicking "Add Tags" will apply those tags to the selected contacts.

TAG DISPLAY: CONTACT DETAILS QUICK VIEW



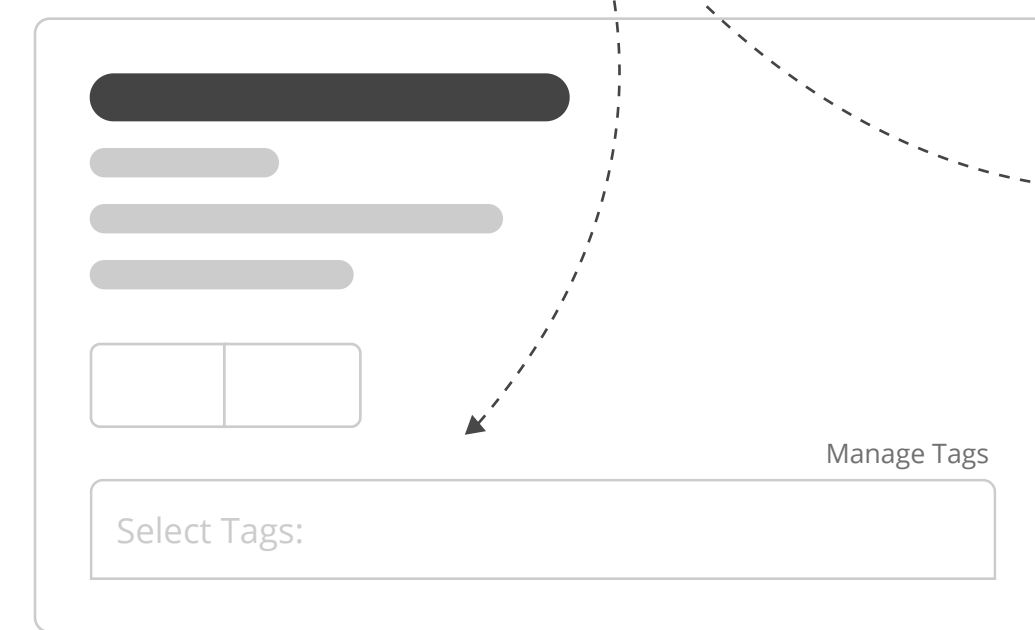
ADD TAGS

Trigger:
User clicks the whitespace around existing tags.

Feedback:
Dropdown div showing existing tags is displayed.

Rules:
When a user clicks on a tag, it is added to the existing list of tags on the right-hand side. The dropdown div stays open until the user clicks on another part of the screen to make adding multiple tags easier.

Other States:
If the customer doesn't have any tags to start with, display "Select Tags" text in its place.



REMOVE TAGS

Trigger:
User clicks the "X" button on the right side of a tag.

Feedback:
Tag is removed from contact and no longer shows in current view.

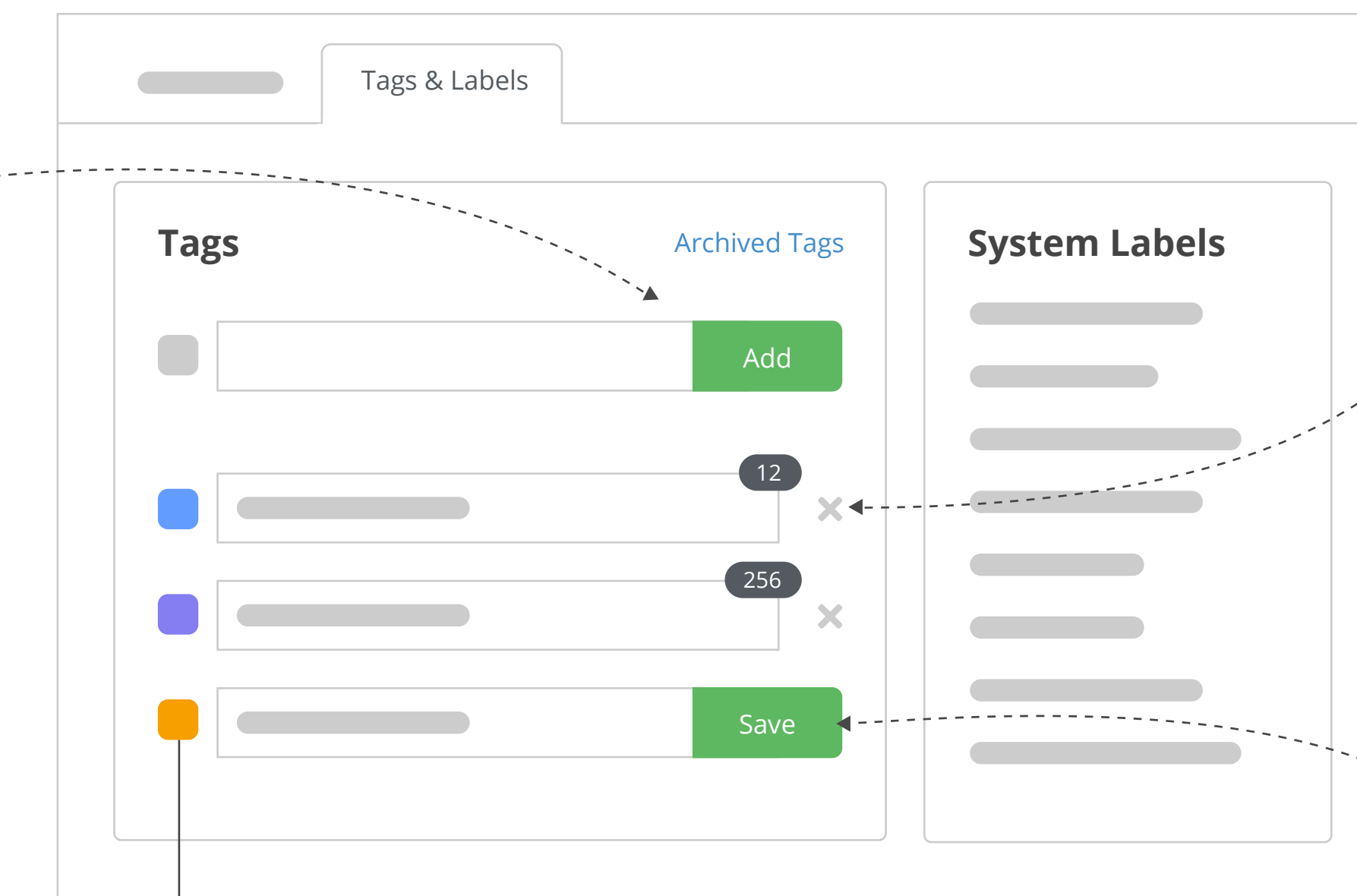
ADD TAG

Trigger:
User types in tag name and clicks the "Add" button.

Feedback:
Clicking "Add" adds a new tag to the list below the "Add" area. An alert displays indicating the tag has been added.

Rules:
If no color is selected, tag will be set with the default gray. You can't create a tag with the same name as a System Label or another tag. Tags are listed in alphabetical order. The top right number indicates how many contacts currently have that tag applied (tag count).

TAG ADMIN: ACCOUNT SETTINGS



ARCHIVE A TAG

Trigger:
User clicks the "X" icon to the right of a tag.

Feedback:
The specified tag is immediately removed from the tag list. An alert displays indicating the tag has been archived, and provides a link to the Archived Tags view.

"International" has been archived. See Archived Tags

EDIT TAGS

Trigger:
User clicks on the text input box to change the tag name.

Feedback:
"Save" button appears, top right number (tag count) is hidden for this tag.

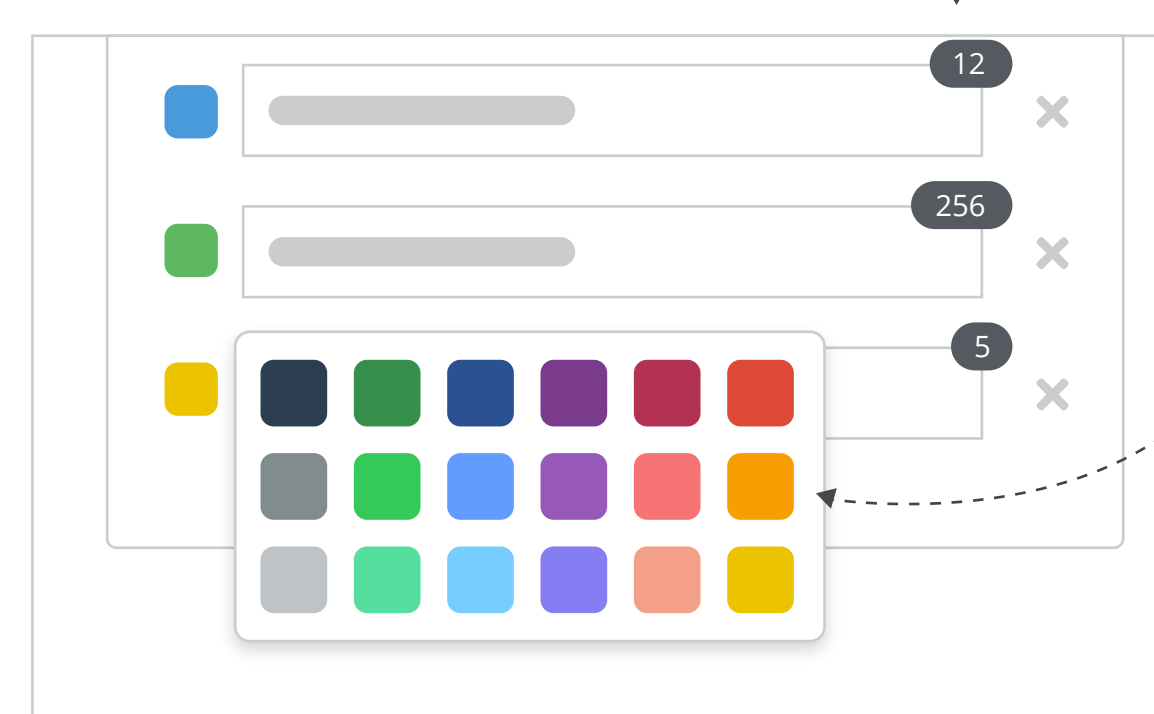
Rules:
You can't edit a tag to have the same name as a System Label or another tag. If you click "Save" the "Save" button disappears and the updated tag text is displayed.

CHANGE TAG COLOR

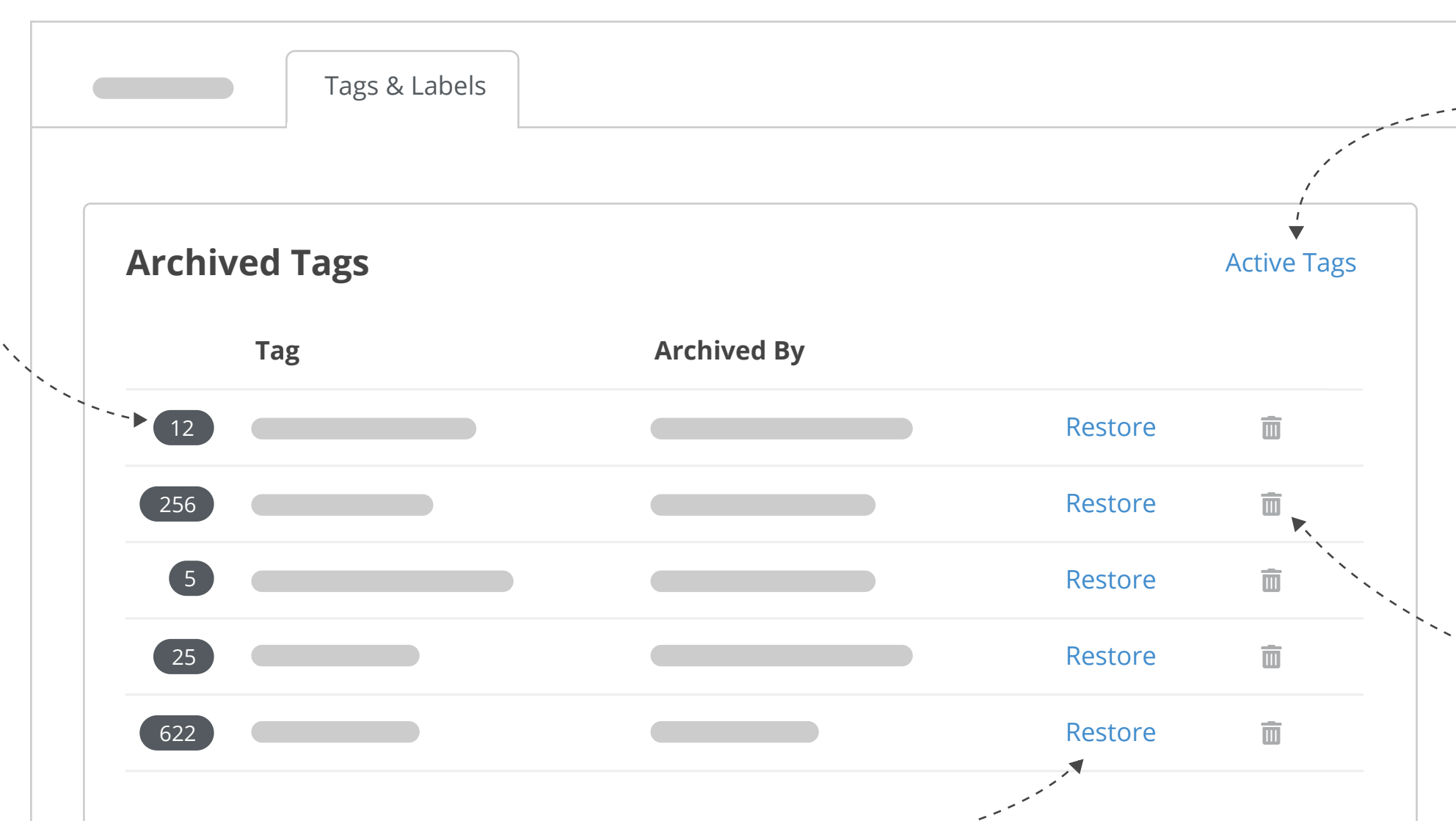
Trigger:
User clicks the color beside a tag name.

Feedback:
Swatch box shows up.

Rules:
Swatch box shows until either: 1) a color is selected (at which point the swatch box disappears and the tag color shows new selection) or 2) The user clicks elsewhere on the screen (at which point the swatch box disappears without the tag color changing).



TAG ADMIN: ACCOUNT SETTINGS: ARCHIVED TAGS VIEW



TAG COUNT

Trigger:
N/A

Rules:
Number in gray oval shows how many records have this tag applied to them.

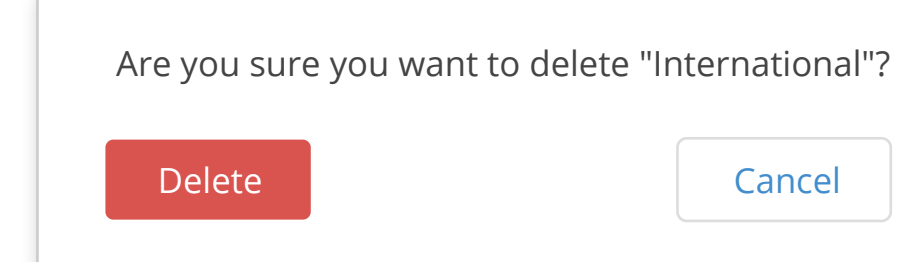
RESTORE A TAG

Trigger:
Click the "Restore" link.

Feedback:
The row relating to the "Restore" link is removed from this list instantly.

Rules:
An alert displays to let the user know the tag has been restored to Active status. There is a link to direct users back to the Active Tags view in the alert.

"International" has been restored. See Active Tags



"International" has been deleted

ACTIVE TAGS

Trigger:
Click the "Active Tags" link.

Feedback:
User is shown the Active Tags view. Archived Tags is hidden.

DELETE A TAG

Trigger:
Click the trash icon.

Feedback:
The row relating to the "Restore" link is removed from this list instantly.

Rules:
A confirmation alert displays. If the user chooses Delete, the tag will be permanently deleted and associations with contacts removed. If they choose to Cancel, nothing happens with the tag.