



MICROSOFT CRM 3.0 UI STYLE GUIDE

August 12, 2005 | Revision 17

Microsoft®
CRM

CRM UI STYLE GUIDE

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Screen Regions by Name

The screenshot shows the Microsoft Business Solutions CRM interface in Microsoft Internet Explorer. The interface is divided into several regions, each highlighted with a red border and a number:

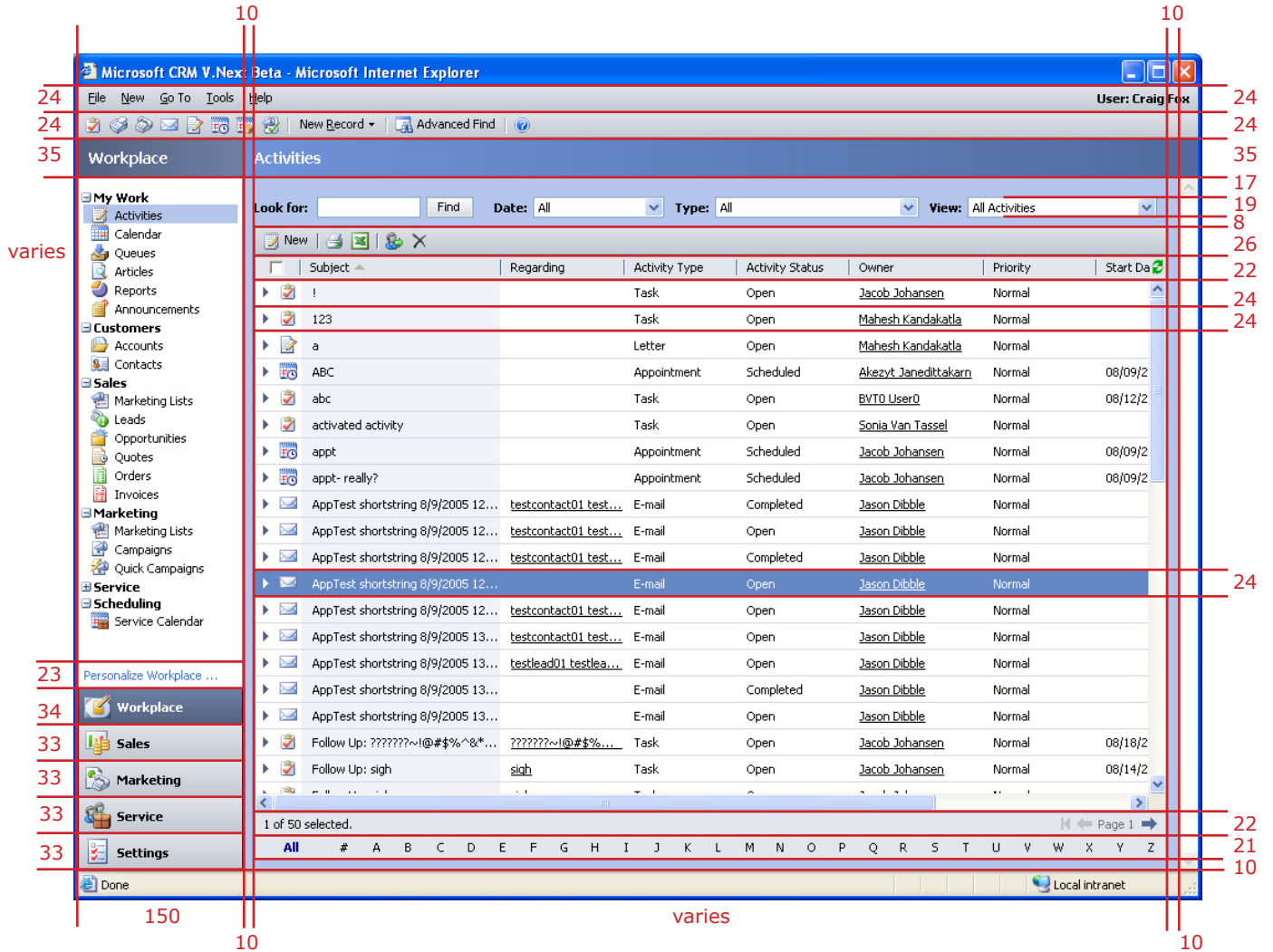
- 1:** Application Menu Bar (File, New, Go To, Tools, Help)
- 2:** Application Tool Bar (New Record, Advanced Find)
- 3:** Navigation Pane (My Work, Customers, Sales, Marketing, Service)
- 4:** Wunderbar (Workplace, Sales, Marketing, Service, Settings)
- 5:** Workspace (Activities)
- 6:** Grid Filter Options (Type, View, Filter By)
- 7:** Grid Toolbar (New, Reports, Assign, Merge, More)
- 8:** Grid (Table of activities)

Subject	Activity Type	Activity Status	Due Date
Appointment05-01-25 5.34.1.1946769489	Appointment	Open	01/25/2005
Appointment29475	Appointment	Open	02/24/2005
Appointment59069	Appointment	Open	02/04/2005
Appointment77728	Appointment	Open	02/24/2005
AppointmentActivity19139	Appointment	Open	01/25/2005
AppointmentActivity30169	Appointment	Open	02/04/2005
AppointmentActivity3018	Appointment	Open	02/04/2005
AppTest shortstring 1/25/2005 05:04:35 CRMTODAY	E-mail	Open	
AppTest shortstring 1/25/2005 05:05:33 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:08:24 CRMTODAY	E-mail	Open	
AppTest shortstring 1/25/2005 05:10:23 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:12:24 CRMTODAY	E-mail	Open	
AppTest shortstring 1/25/2005 05:13:59 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:16:01 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:16:01 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:16:01 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:16:01 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:16:01 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:16:01 CRMTODAY	E-mail	Completed	
AppTest shortstring 1/25/2005 05:17:25 CRMTODAY	E-mail	Completed	

1. Application Menu Bar
2. Application Tool Bar
3. Navigation Pane
4. Wunderbar
5. Workspace
6. Grid Filter Options
7. Grid Toolbar
8. Grid

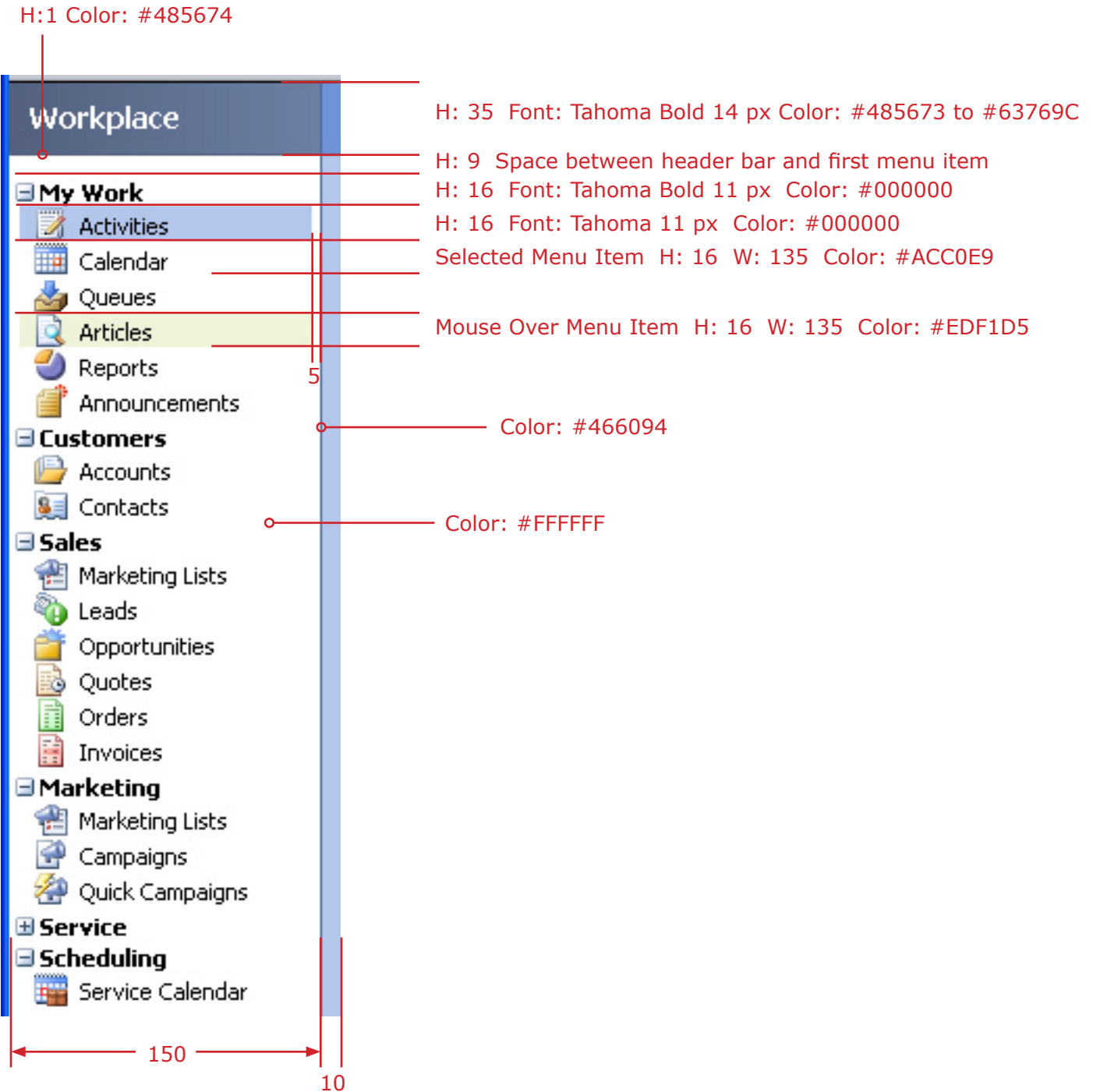
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Main Screen Dimensions



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Navigation Pane Specifications



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Wunderbar Specifications

H:1 Color: #C6CEDC

H:1 Color: #000000

The image shows a vertical navigation bar with five items. Each item has a small icon on the left and text on the right. Red lines connect the specifications to the corresponding elements in the UI.

Item	Icon	Text	Specifications
Personalize Workplace ...		Personalize Workplace ...	H: 23 Font: Tahoma 11 px Color: #3366CC
Workplace	Workplace icon	Workplace	H: 34 Font: Tahoma 11 px Bold Color: #FFFFFF Selected Button Gradient: #485673 to #63769C
Sales	Sales icon	Sales	H: 33 Font: Tahoma 11 px Bold Color: #000000 Button Gradient: #DCDFE5 to #BBC0CA
Marketing	Marketing icon	Marketing	
Service	Service icon	Service	H: 33 Font: Tahoma 11 px Bold Color: #000000 Button Gradient: #DCDFE5 to #BBC0CA
Settings	Settings icon	Settings	

5 24 6

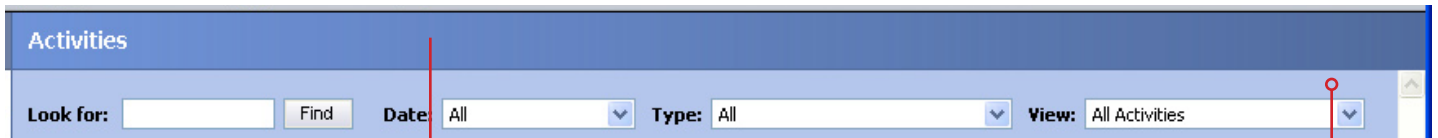
Wunderbar With Mouse Over States

The image shows the same vertical navigation bar as above, but with the 'Marketing' item highlighted in a light green color, indicating a mouse over state. Red lines connect the specifications to the corresponding elements in the UI.

Item	Icon	Text	Specifications
Personalize Workplace ...		Personalize Workplace ...	Mouse Over displays hyperlink underneath text
Workplace	Workplace icon	Workplace	
Sales	Sales icon	Sales	
Marketing	Marketing icon	Marketing	H: 33 Font: Tahoma 11 px Bold Color: #000000 Mouse Over Button Gradient: #EDF1D5 to #D4DD9C
Service	Service icon	Service	
Settings	Settings icon	Settings	

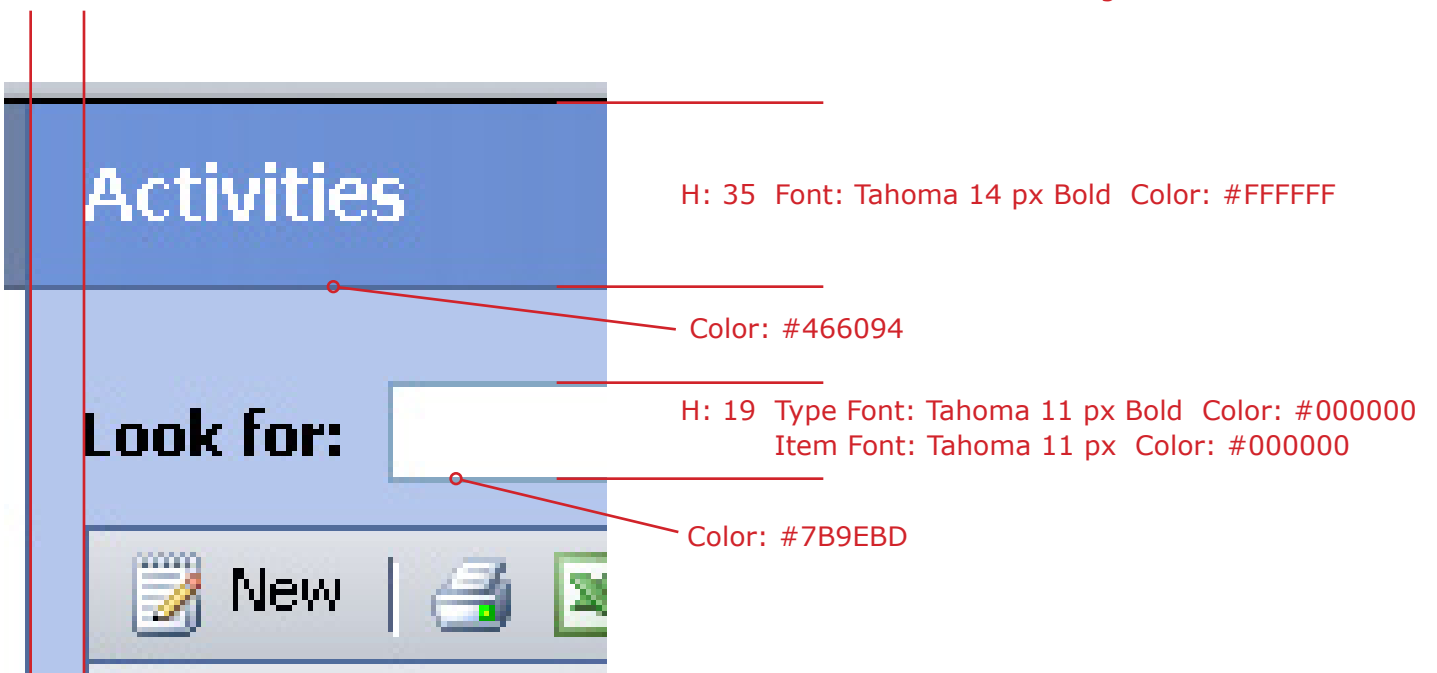
CRM UI STYLE GUIDE

Workspace Specifications



Header Gradient Color: #6489D4 to #466094

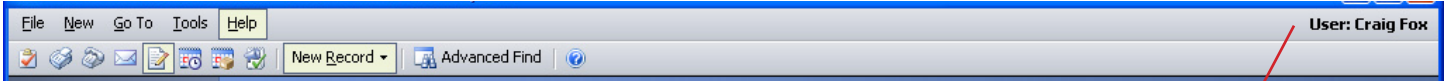
Background Color: #ACC0E9



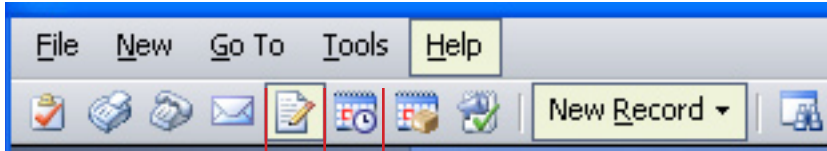
10

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App Toolbar Specifications



Font: Tahoma 11 px Bold Color: #000000



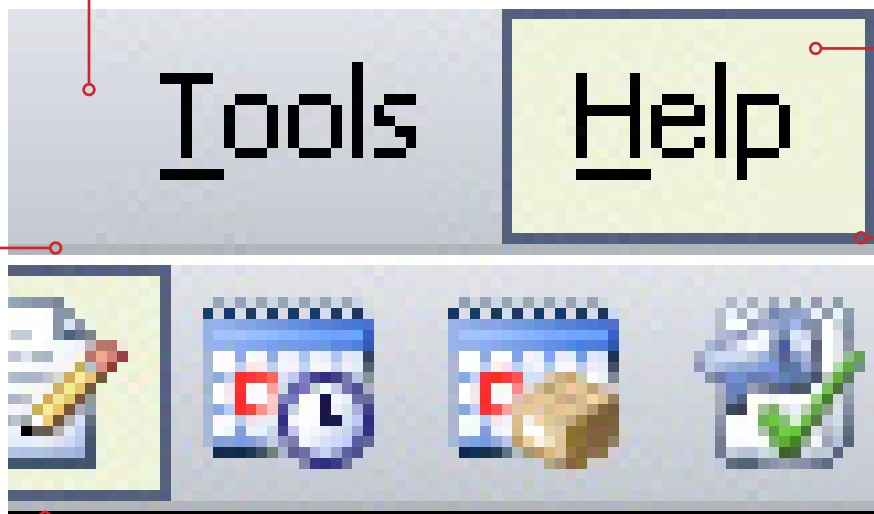
H: 24 Font: Tahoma 11 px Color: #000000

H: 24 Font: Tahoma 11 px Color: #000000

23 23



Color: #DCDFE5 to #BDC2CB



Color: #A8AEB5

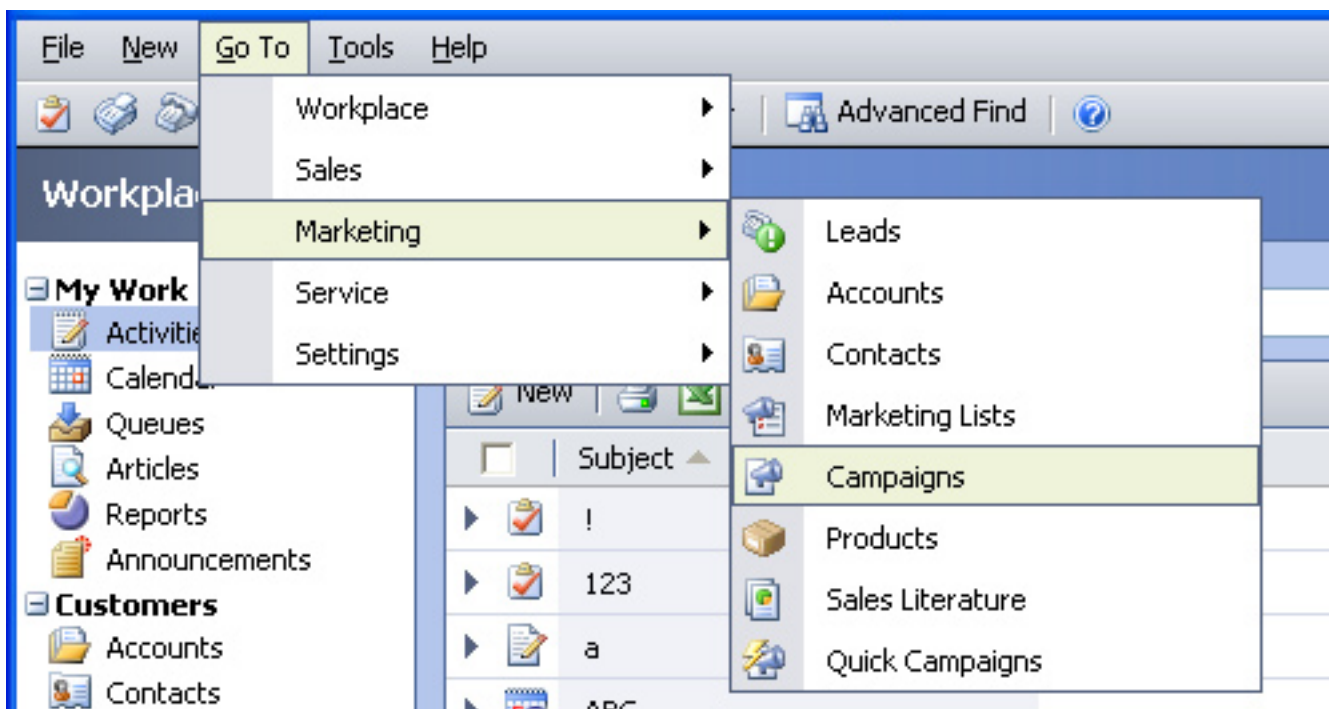
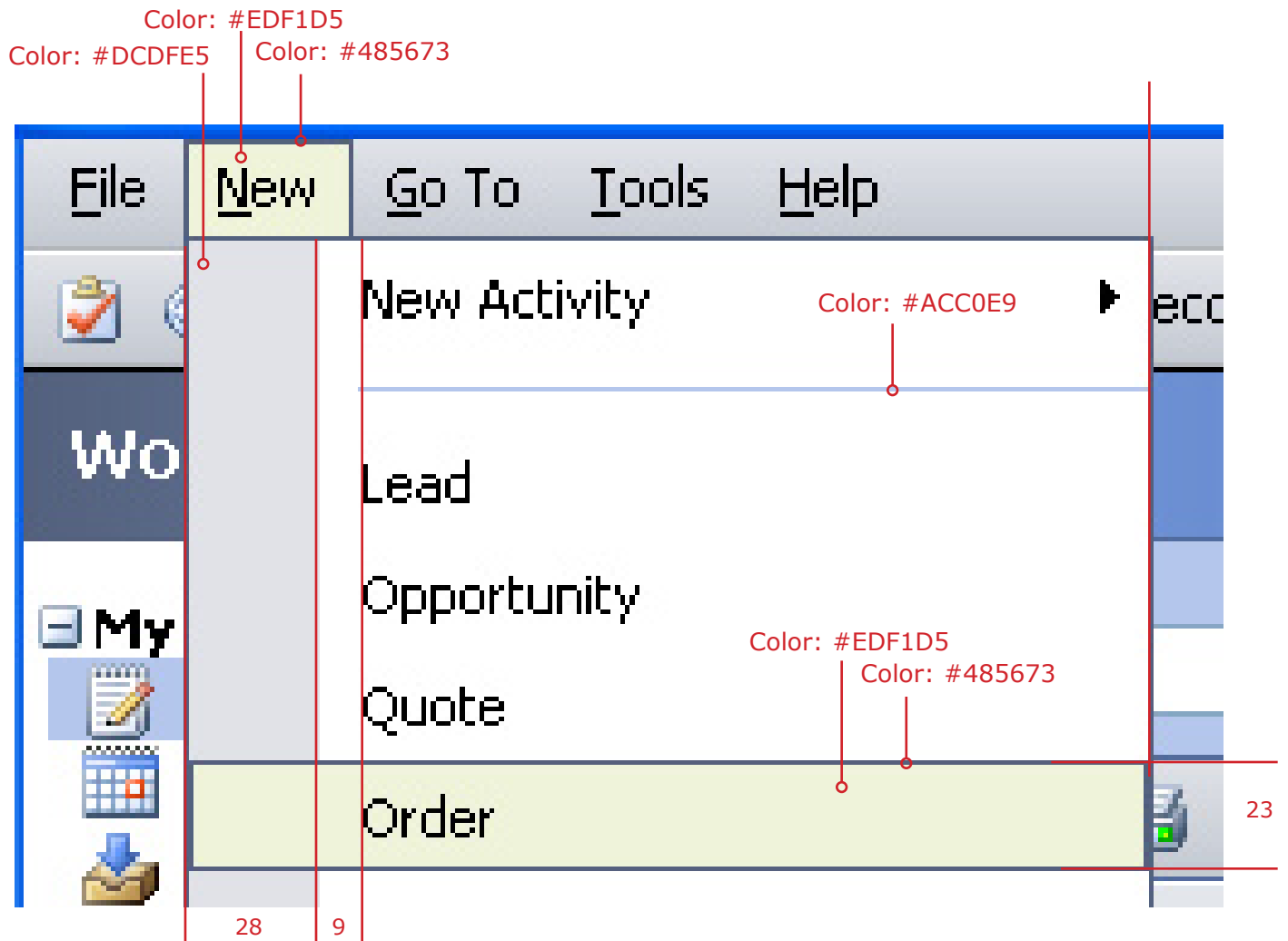
Color: #EDF1D5

Color: #485673

Color: #000000

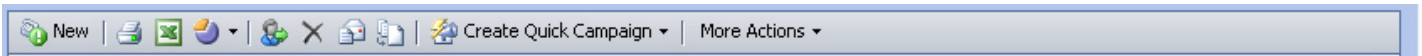
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App Toolbar Drop Down Menu Specifications

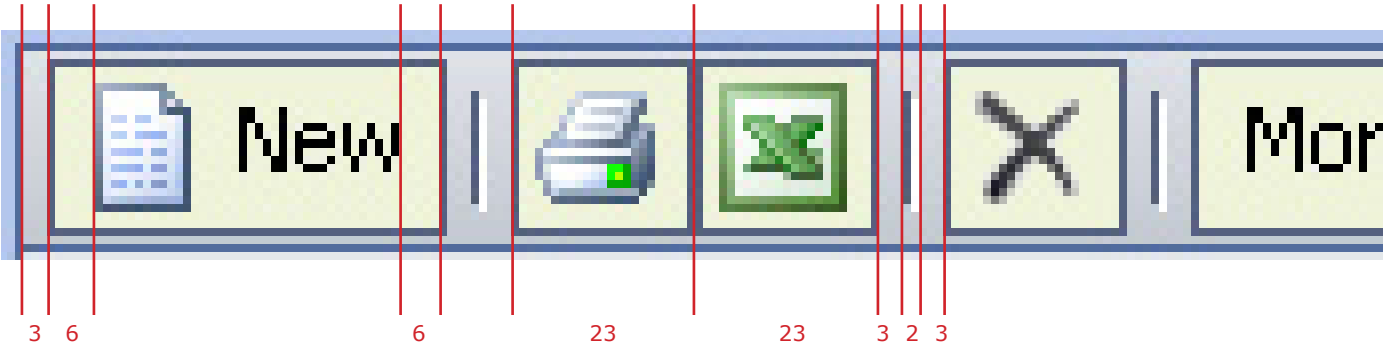


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Grid Toolbar Specifications

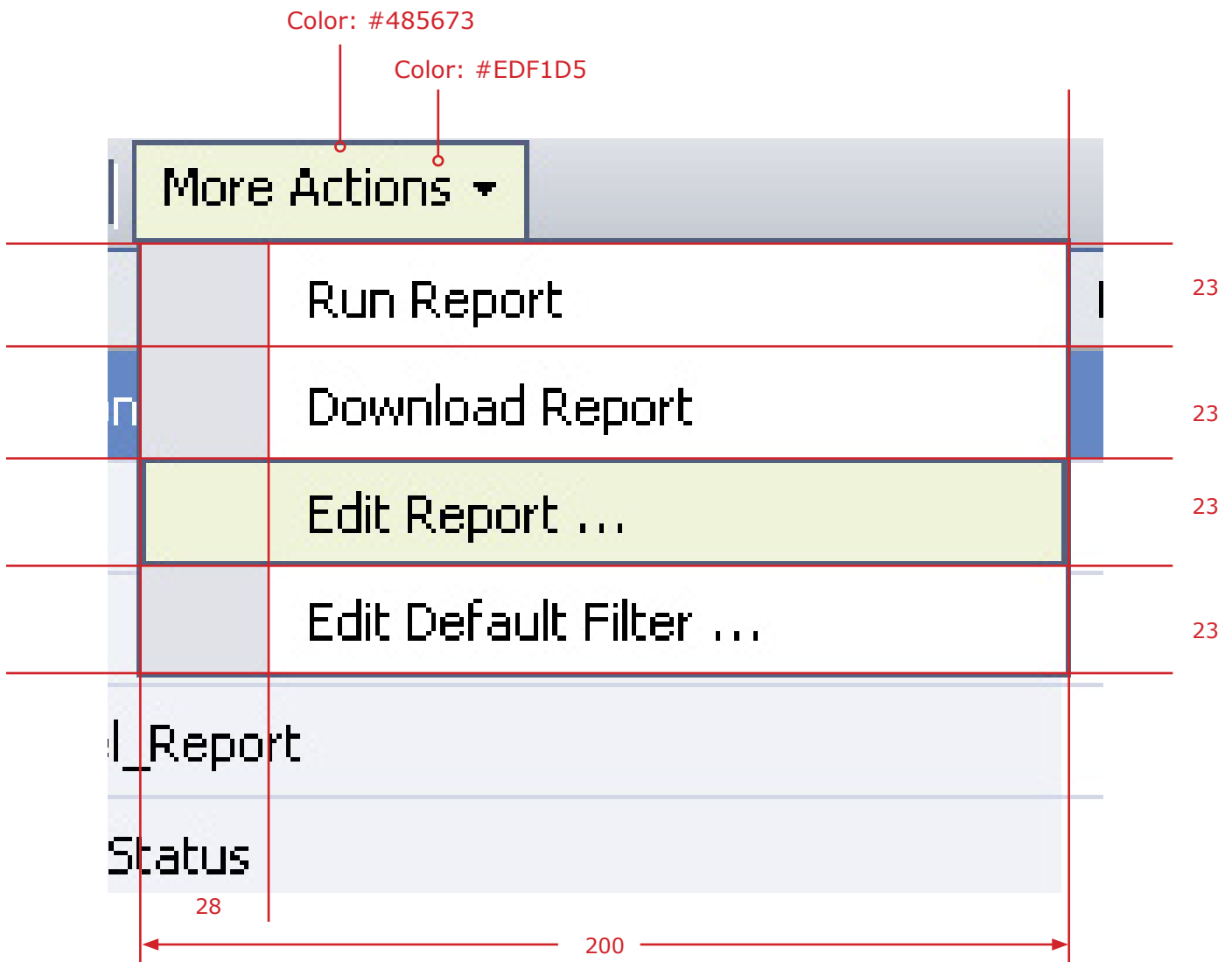


Grid Actions Toolbar Gradient: #DCDFE5 to #BCC2CB

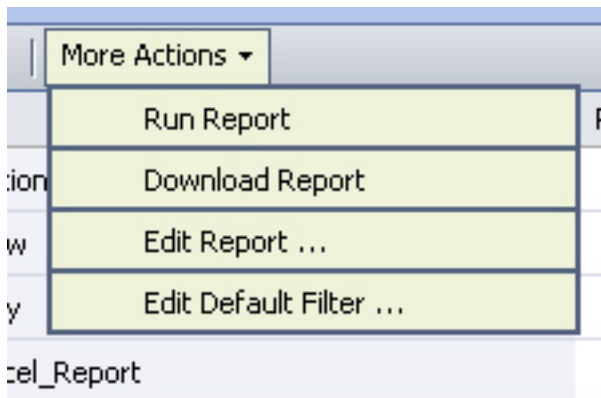


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Grid Toolbar Drop Down Menu Specifications

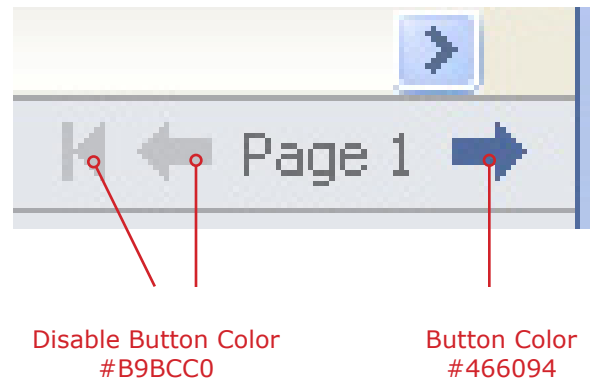
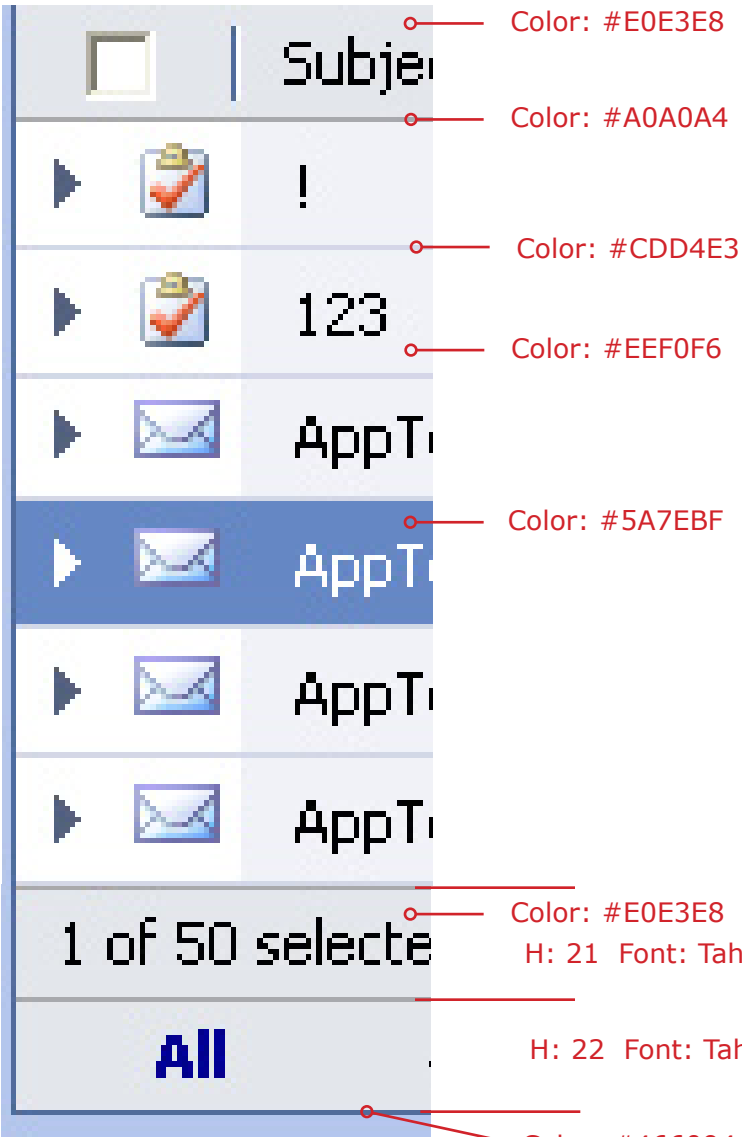
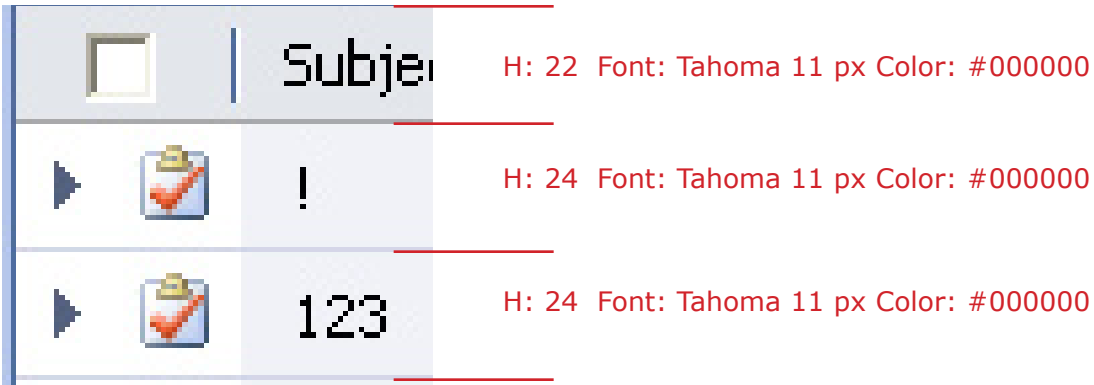


Grid Toolbar. Shown With All Mouse Over States Active At Once



CRM UI STYLE GUIDE

Grid Specifications



CRM UI STYLE GUIDE

All Toolbars with Mouse Over States

The screenshot displays the Microsoft CRM V.Next Beta interface within a Microsoft Internet Explorer browser window. The browser title bar reads "Microsoft CRM V.Next Beta - Microsoft Internet Explorer". The browser's menu bar includes "File", "New", "Go To", "Tools", and "Help". Below the menu bar is a toolbar with several icons: a checkmark, a printer, a mail icon, a document with a pencil, a calendar, a clock, a magnifying glass, and a question mark. To the right of these icons are two buttons: "New Record" with a dropdown arrow and "Advanced Find" with a magnifying glass icon.

The main interface is divided into two panes: "Workplace" on the left and "Activities" on the right. The "Workplace" pane contains a tree view with the following categories and items:

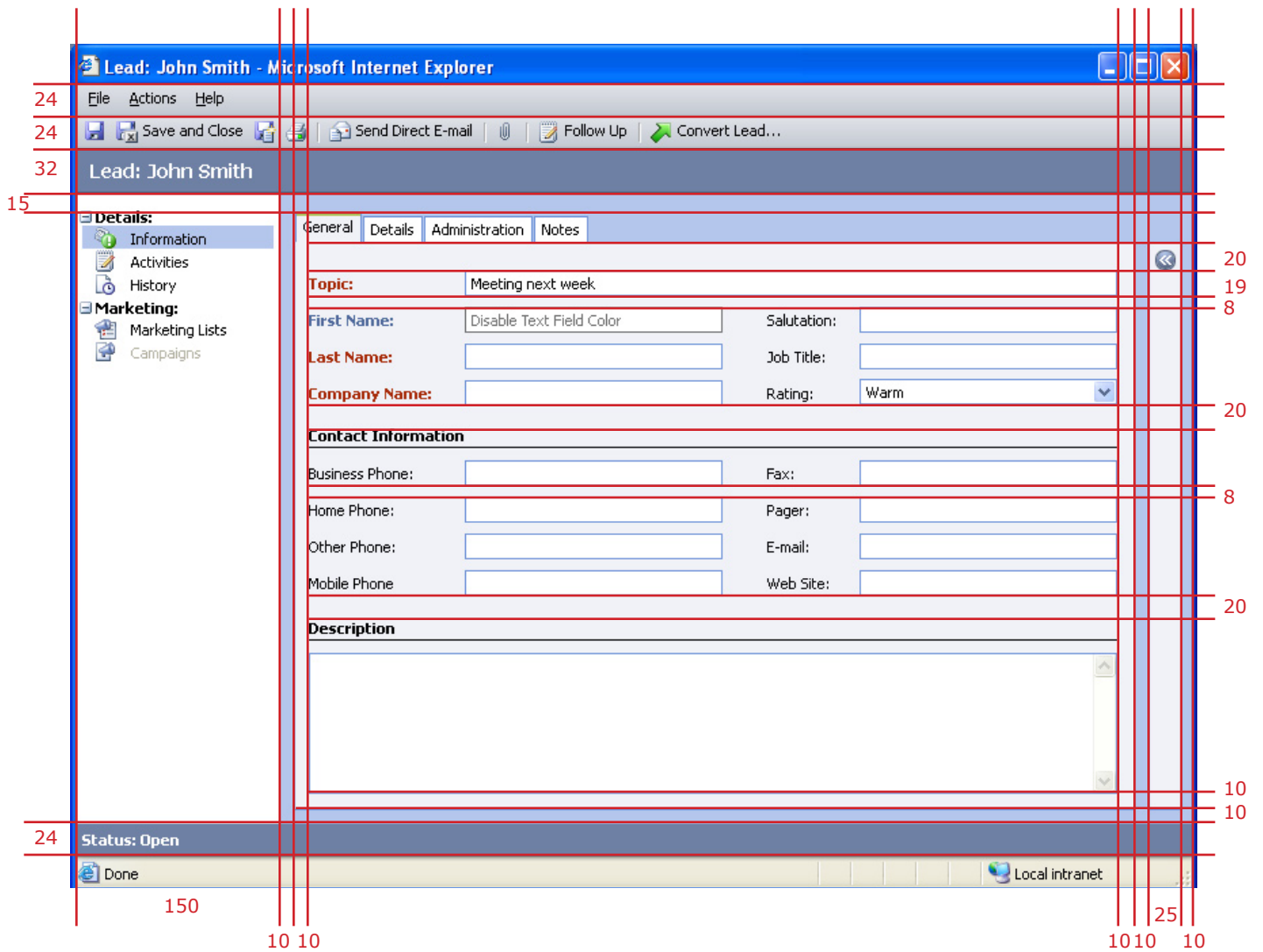
- My Work**
 - Activities
 - Calendar
 - Queues
 - Articles
 - Reports
 - Announcements
- Customers**
 - Accounts
 - Contacts
- Sales**
 - Marketing Lists
 - Leads
 - Opportunities
 - Quotes
 - Orders
 - Invoices
- Marketing**
 - Marketing Lists
 - Campaigns
 - Quick Campaigns
- Service**
- Scheduling**
 - Service Calendar

The "Activities" pane features a search bar with "Look for:" and "Date: All" (with a dropdown arrow). Below the search bar is a toolbar with "New", a printer icon, a green checkmark icon, and a close icon. The main area of the "Activities" pane is a table with the following columns: "Subject", "Regarding", and "Activity". The table contains 15 rows of activity records. The 10th row is highlighted in blue.

	Subject	Regarding	Activity
▶	!		Task
▶	123		Task
▶	a		Letter
▶	ABC		Appoin
▶	abc		Task
▶	activated activity		Task
▶	appt		Appoin
▶	appt- really?		Appoin
▶	AppTest shortstring 8/9/2005 12...	testcontact01 test...	E-mail
▶	AppTest shortstring 8/9/2005 12...	testcontact01 test...	E-mail
▶	AppTest shortstring 8/9/2005 12...	testcontact01 test...	E-mail
▶	AppTest shortstring 8/9/2005 12...		E-mail
▶	AppTest shortstring 8/9/2005 12...	testcontact01 test...	E-mail
▶	AppTest shortstring 8/9/2005 13...	testcontact01 test...	E-mail

CRM UI STYLE GUIDE

Form Dimensions



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Form Colors and Type

Color: #DCDFE5 to #BDC2CB

Color: #A8AEB5

Color: #63769B

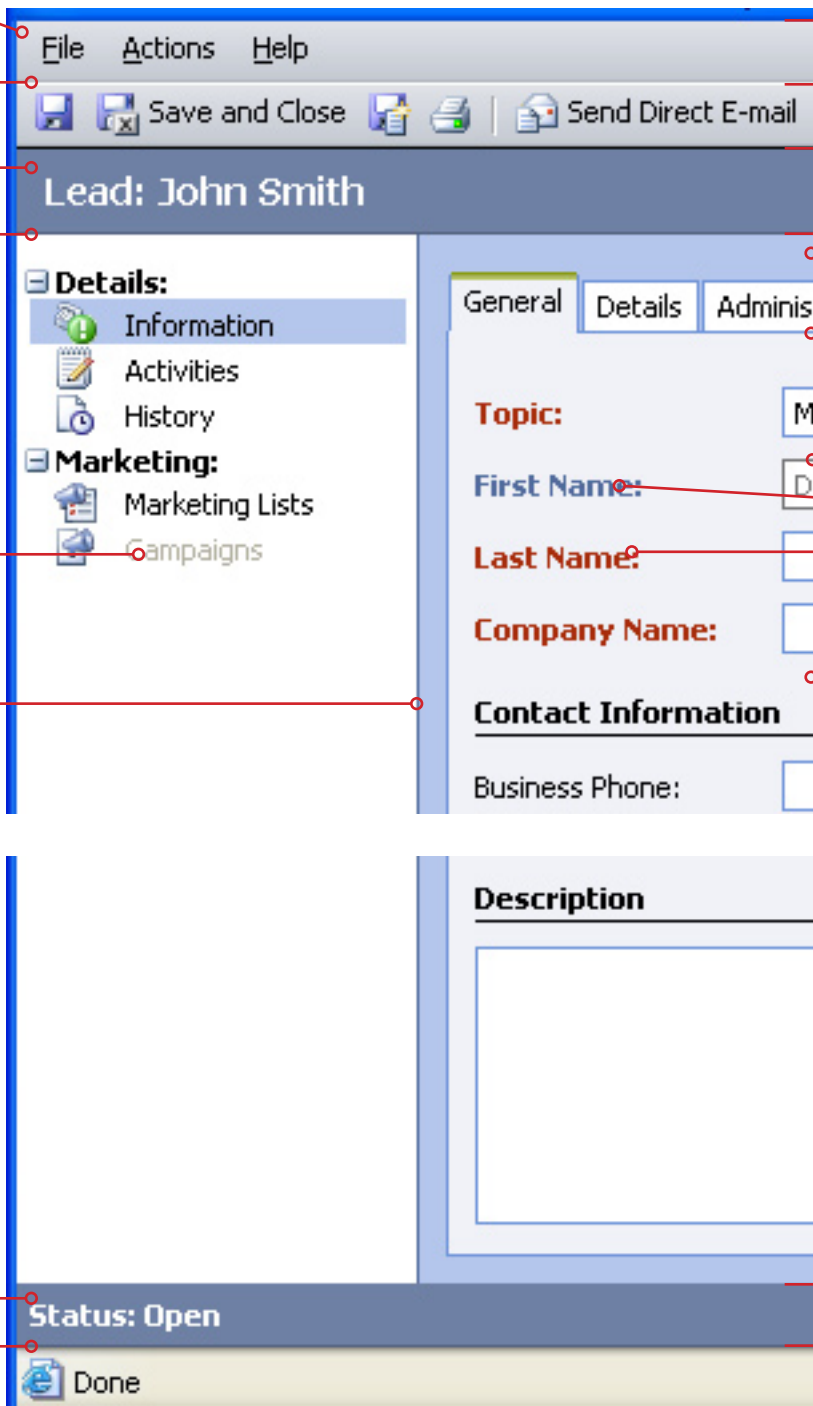
Color: #485673

Color: #ACA899

Color: #466094

Color: #63769B

Color: #485673



H: 24 Font: Tahoma 11 px
Color: #000000

H: 24 Font: Tahoma 11 px
Color: #000000

H: 32 Font: Tahoma 14 px
Bold Color: #FFFFFF

Color: #ACC0E9

Color: #6489D4

Color: #808080

Color: #466094

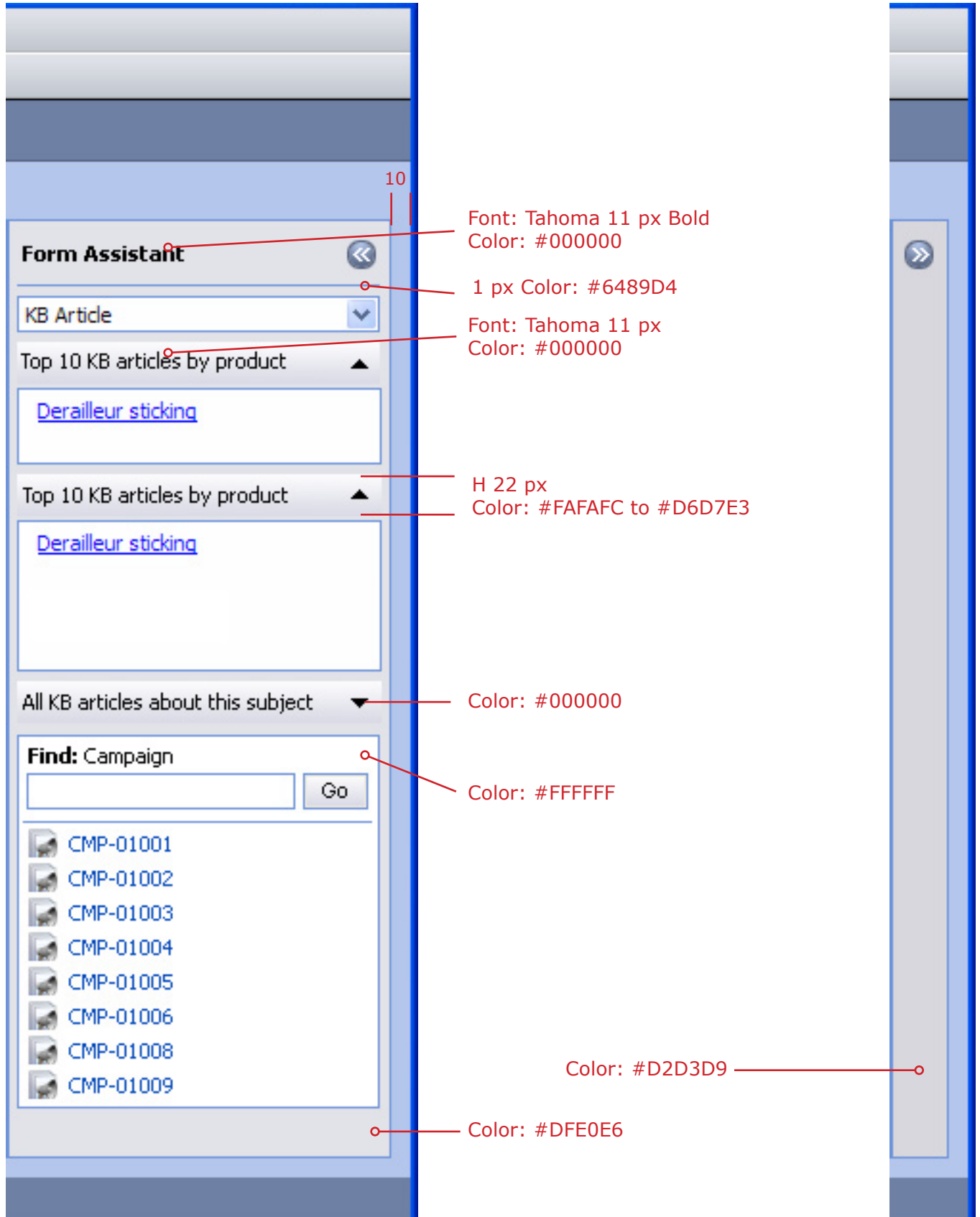
Color: #9F2409

Color: #EEF0F6

H: 24 Font: Tahoma 11 px
Bold Color: #FFFFFF

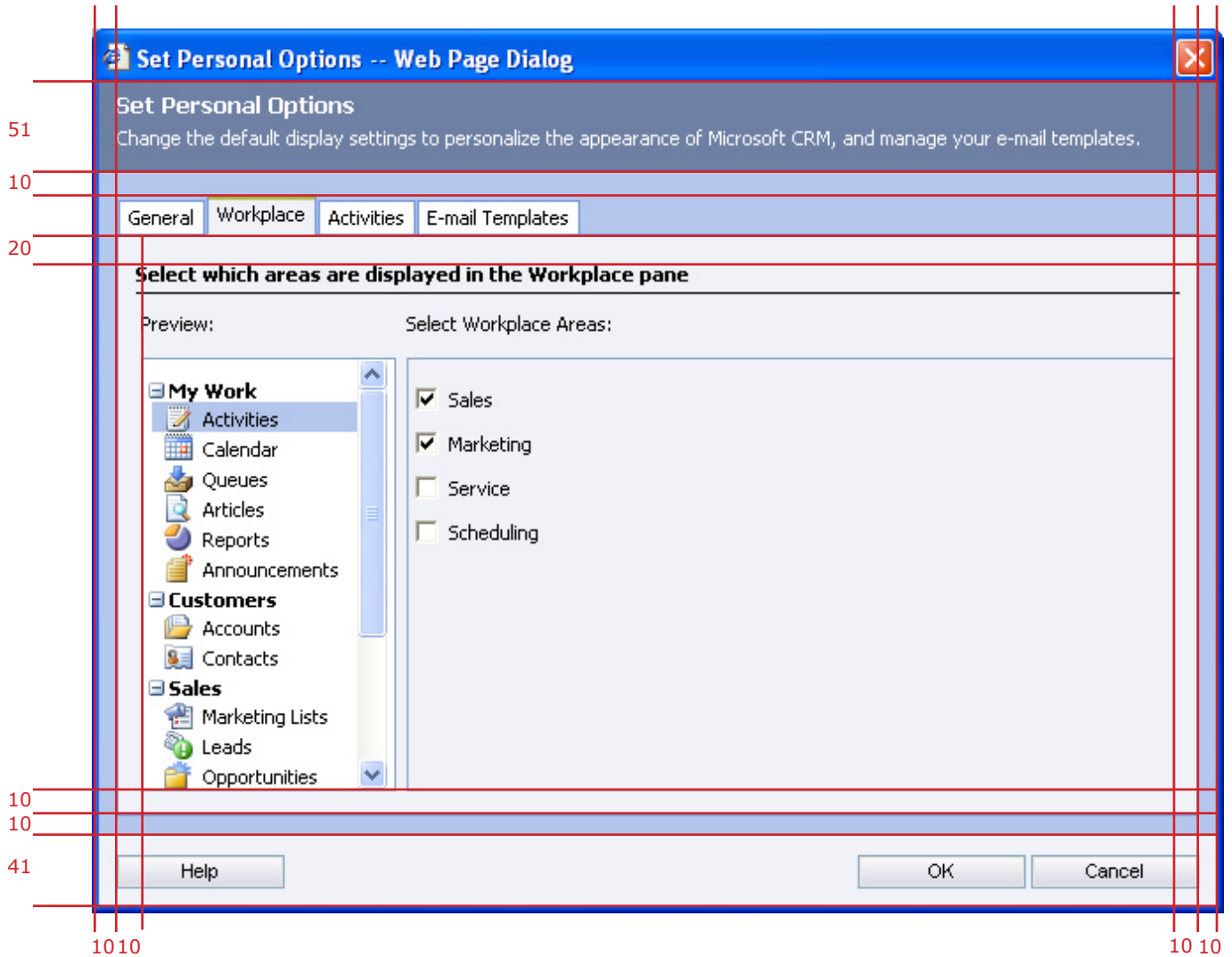
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Form Assistant



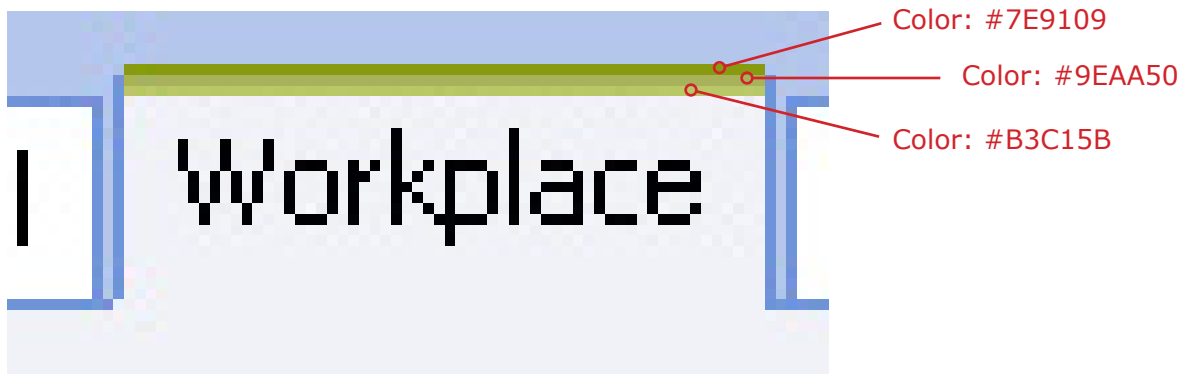
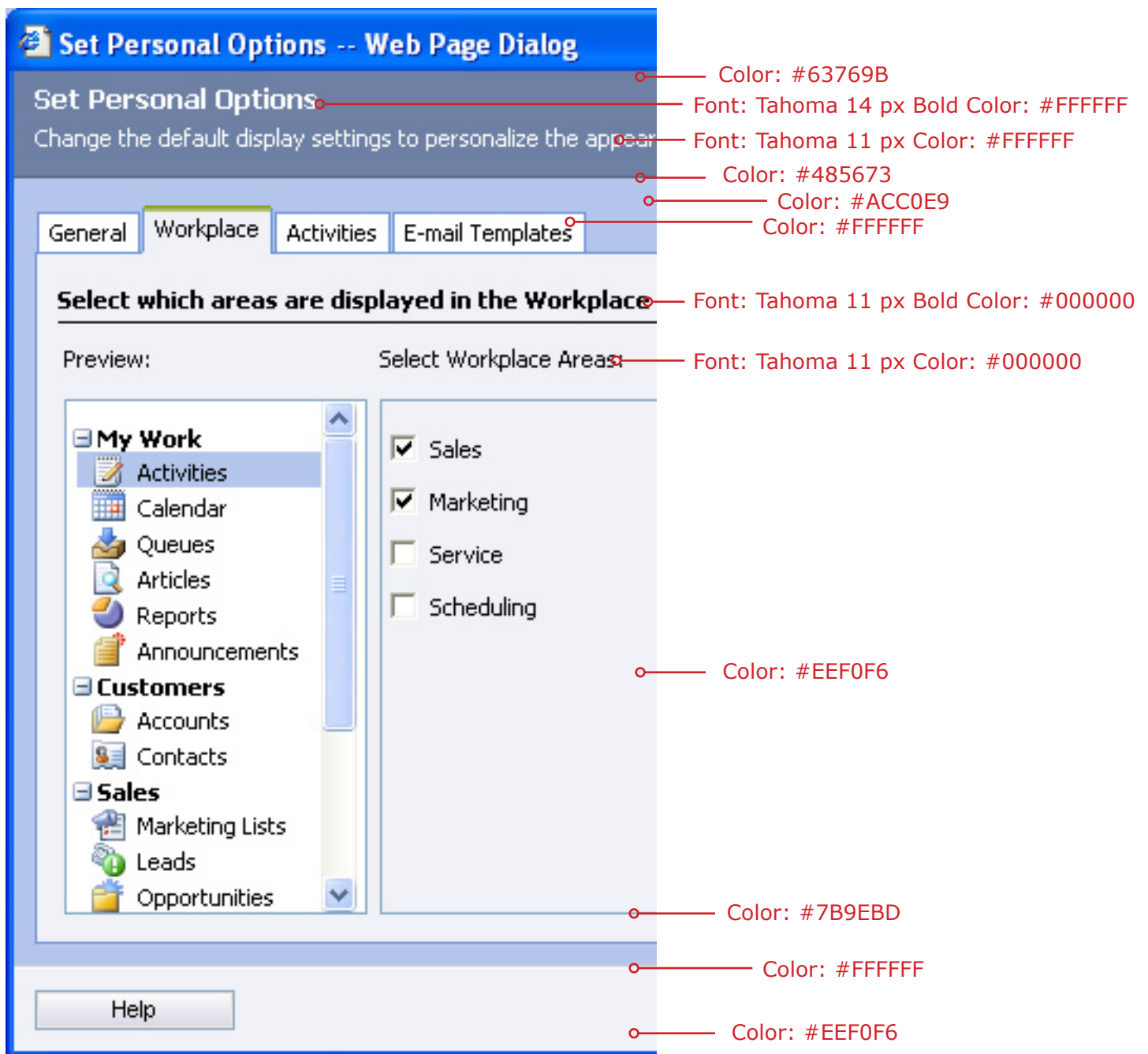
CRM UI STYLE GUIDE

Dialog Box Dimensions



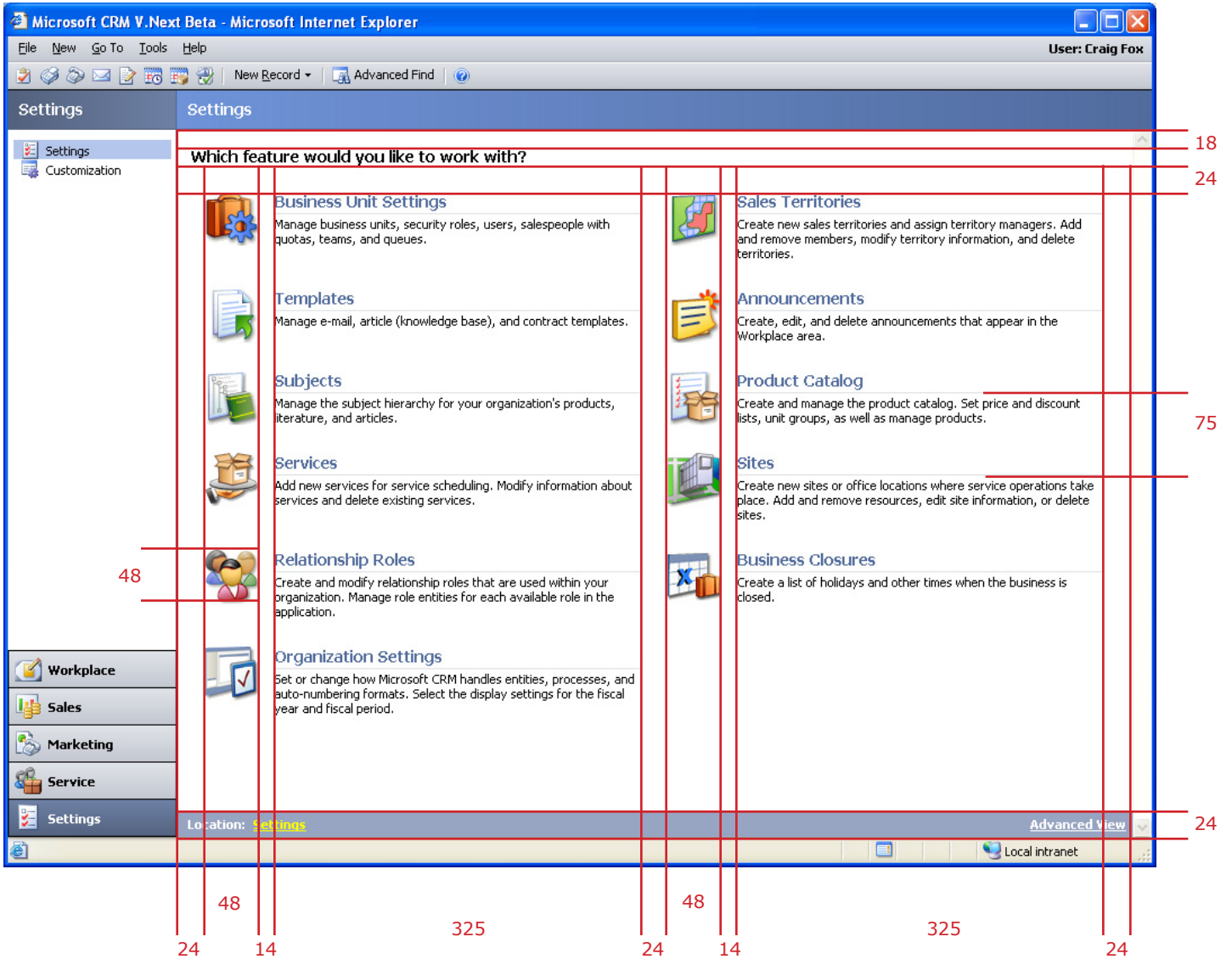
CRM UI STYLE GUIDE

Dialog Box Colors and Type



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Menu Screen Dimensions



CRM UI STYLE GUIDE

Menu Screen Colors and Type

Settings

Which feature would you like to use?

Font: Tahoma 14 px Bold Color: #000000



Business Unit Settings

Font: Tahoma 14 px Bold Color: #466094

Manage business units, security roles, quotas, teams, and queues.

Font: Tahoma 11 px Color: #000000



Templates

Color: #DCDFE5

Manage e-mail, article (knowledge



Subjects

Color: #FFFFFF

Manage the subject hierarchy for literature, and articles.



Services

Add new services for service schedule, services and delete existing services.



Relationship Roles

Create and modify relationship role organization. Manage role entities application.



Organization Settings

Set or change how Microsoft CRM auto-numbering formats. Select the year and fiscal period.

Color: #FFFF00

Location: **Settings**

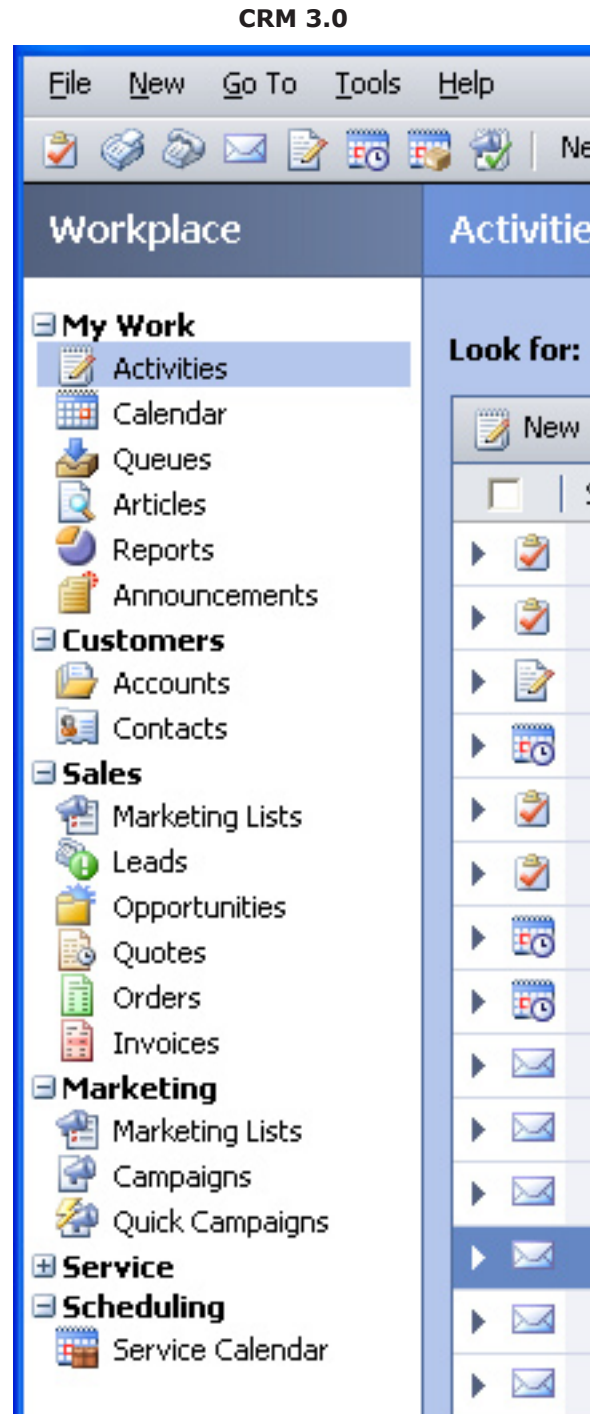
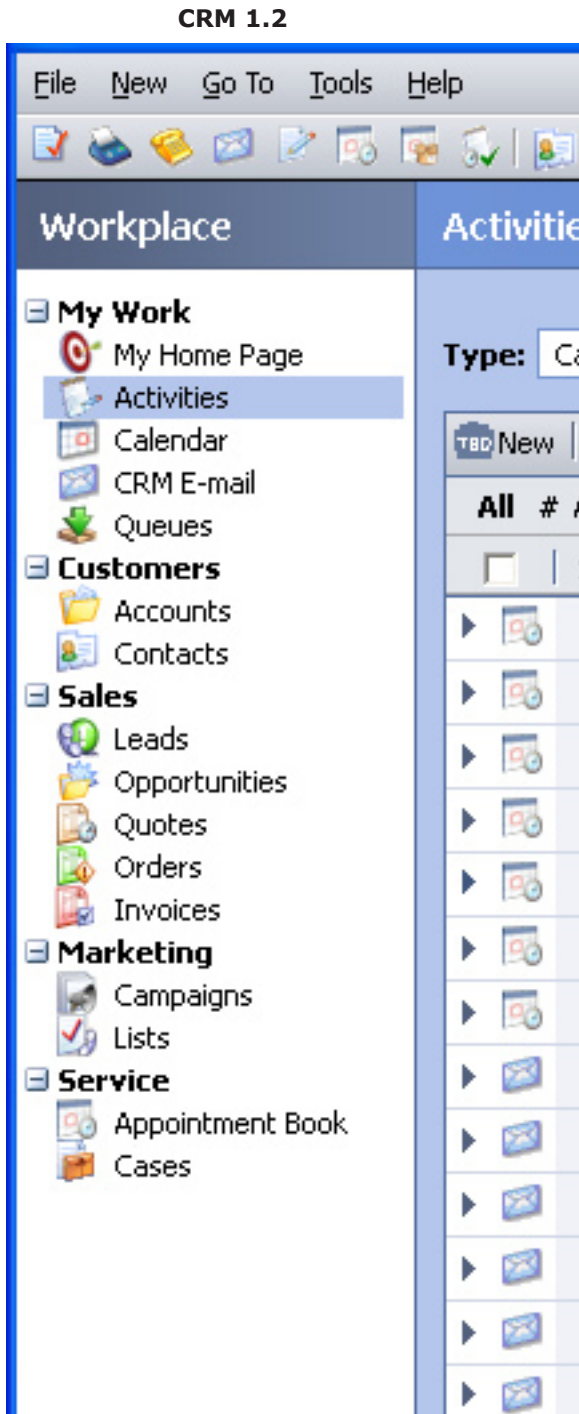
Color: #6699CC

Color: #8E9CBB

CRM UI STYLE GUIDE

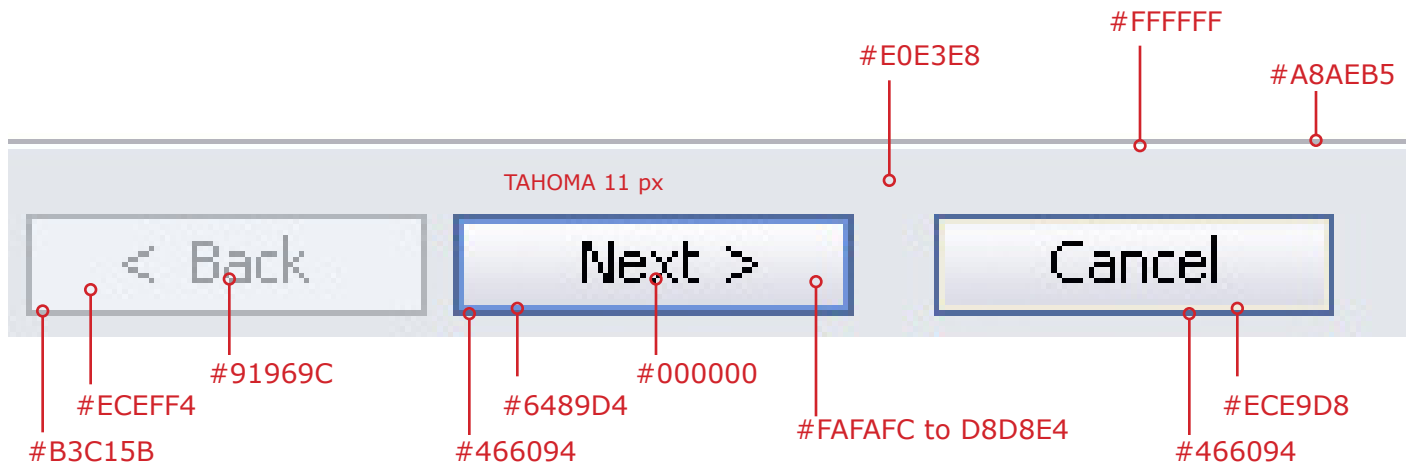
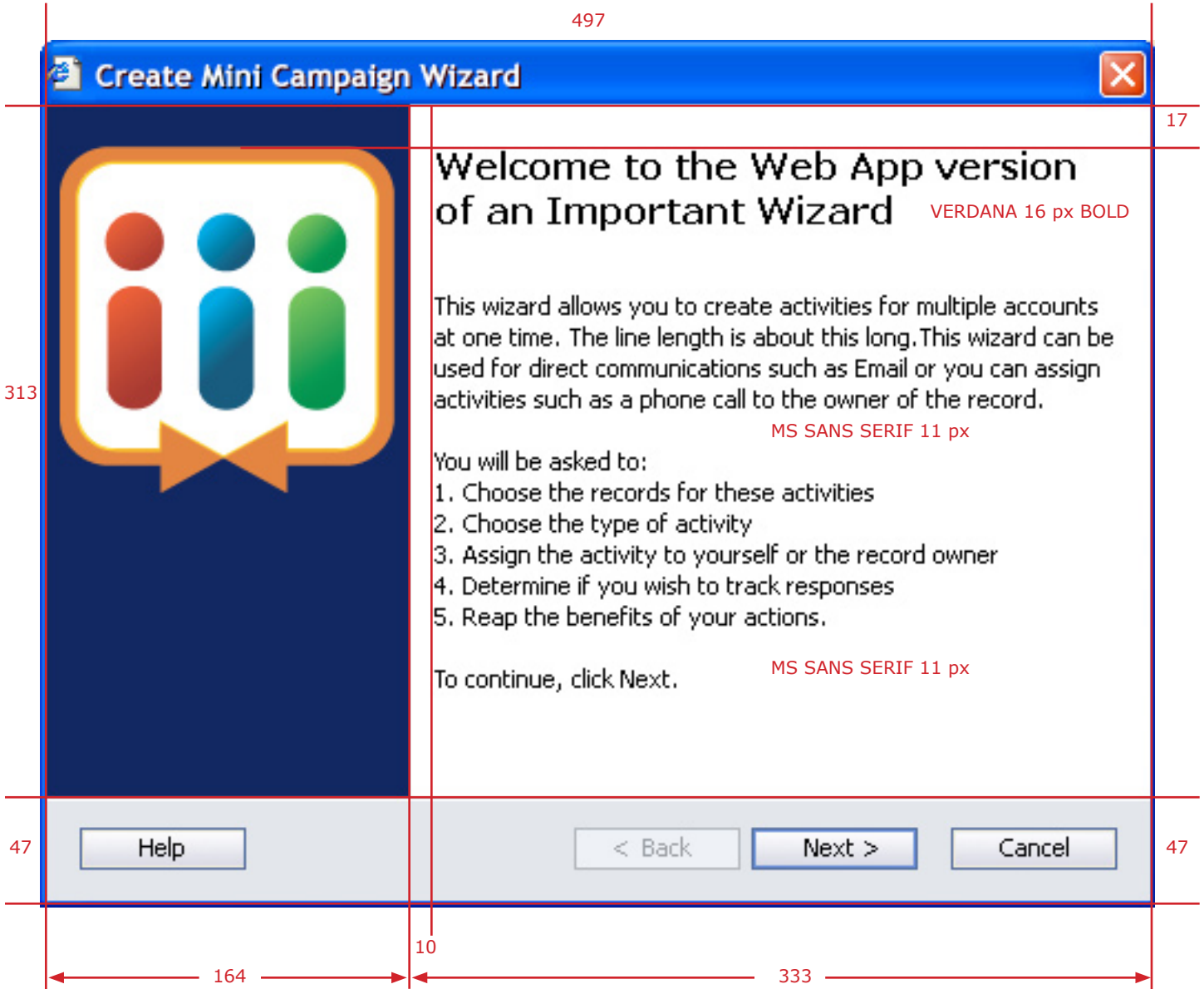
Revised Icon Style

CRM 1.2 icons did not meet the Windows XP specifications. Note that the isometric style of the icons at the 16 x 16 size and how it makes the toolbars and navigation pane appear jagged. The CRM 3.0 icons are squared off and follow the XP and Office icon guidelines.



CRM UI STYLE GUIDE

Wizard - Welcome or Finish



CRM UI STYLE GUIDE

Wizard - Content

578

60

303

47

Microsoft CRM 3.0 Client for Outlook Setup

Install Required Components TAHOMA 11 pt BOLD

To install the listed required components, click Install. Then, click Next. TAHOMA 11 px

Component	Status	Message
➔ Microsoft SQL Server Desktop Engine (C...	Installing	
➔ MSDE Service Pack 4	Missing	Minimum version required: 8...
		MS SANS SERIF 11 px

Installing Microsoft SQL Server Desktop Engine (CRM)...

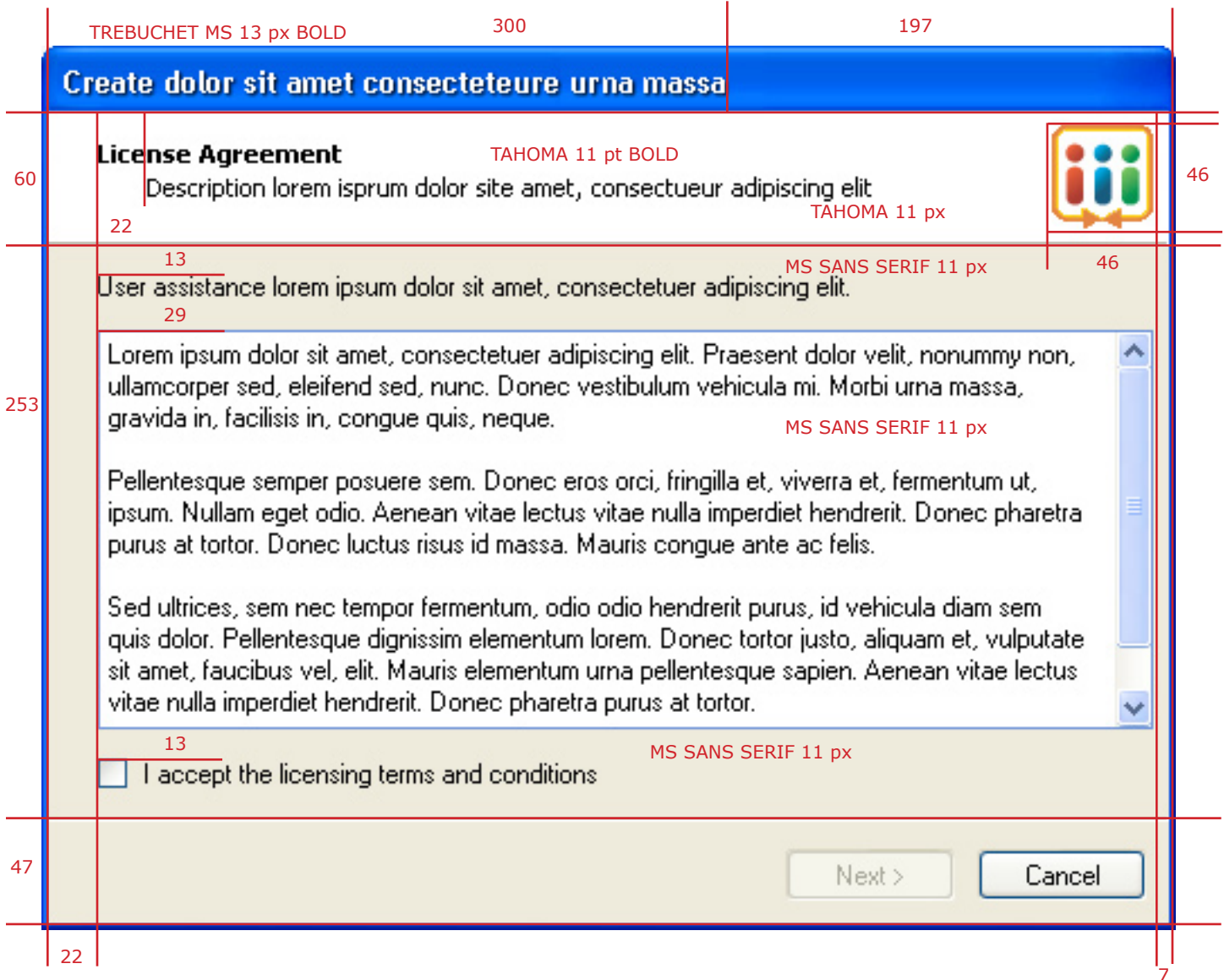
Install

< Back Next > Cancel

CRM UI STYLE GUIDE

Wizard - License Agreement

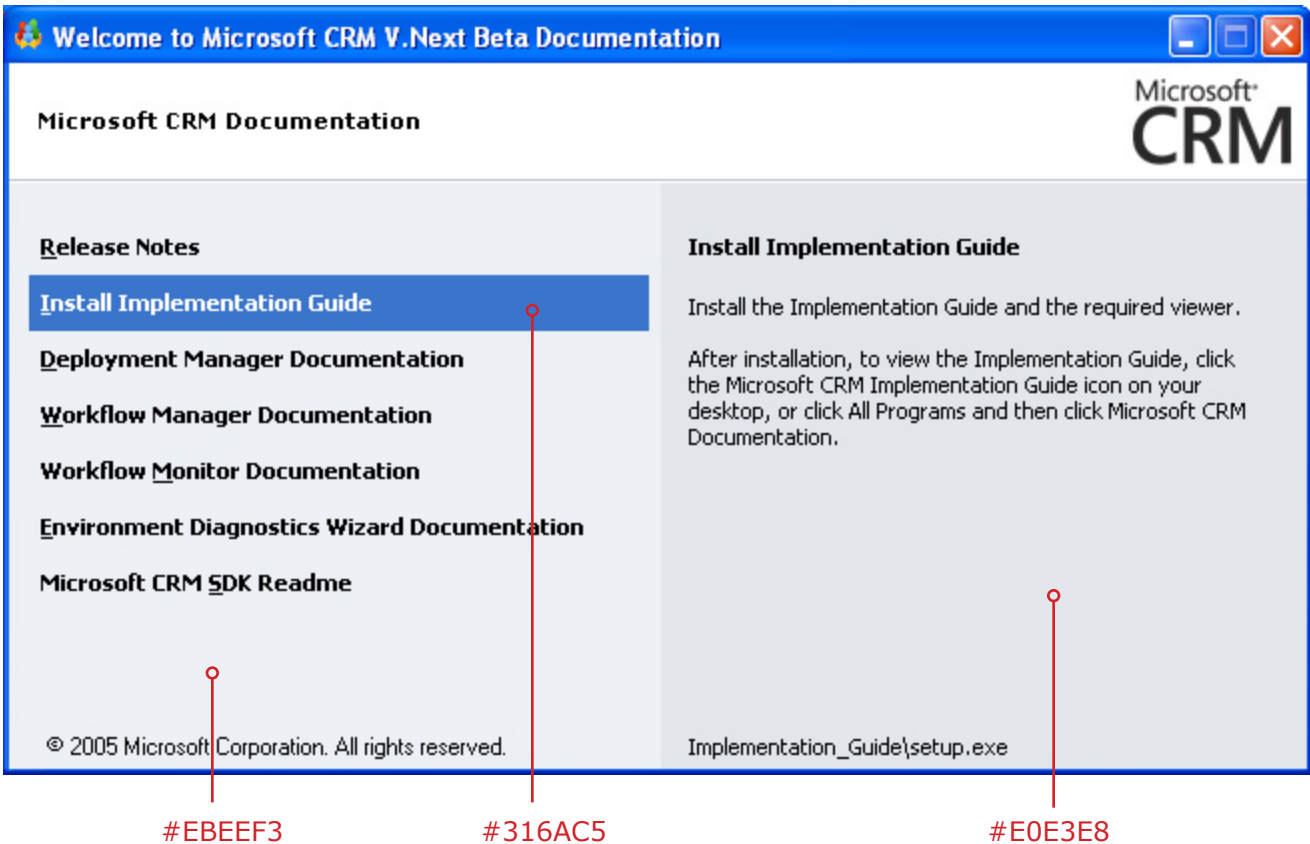
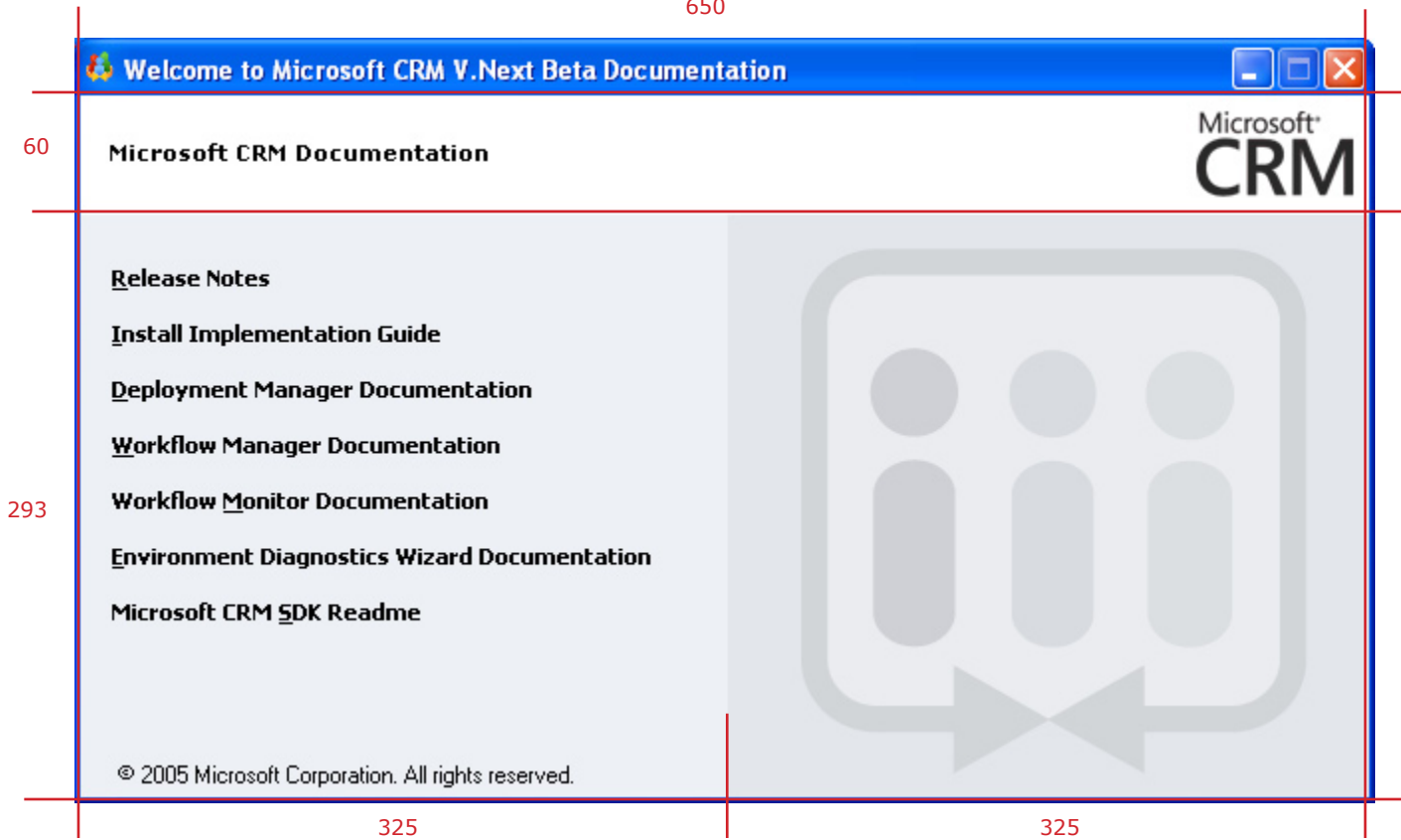
Title bar text should not wider that 300 px. This provides an extra 30% for localization.



CRM UI STYLE GUIDE

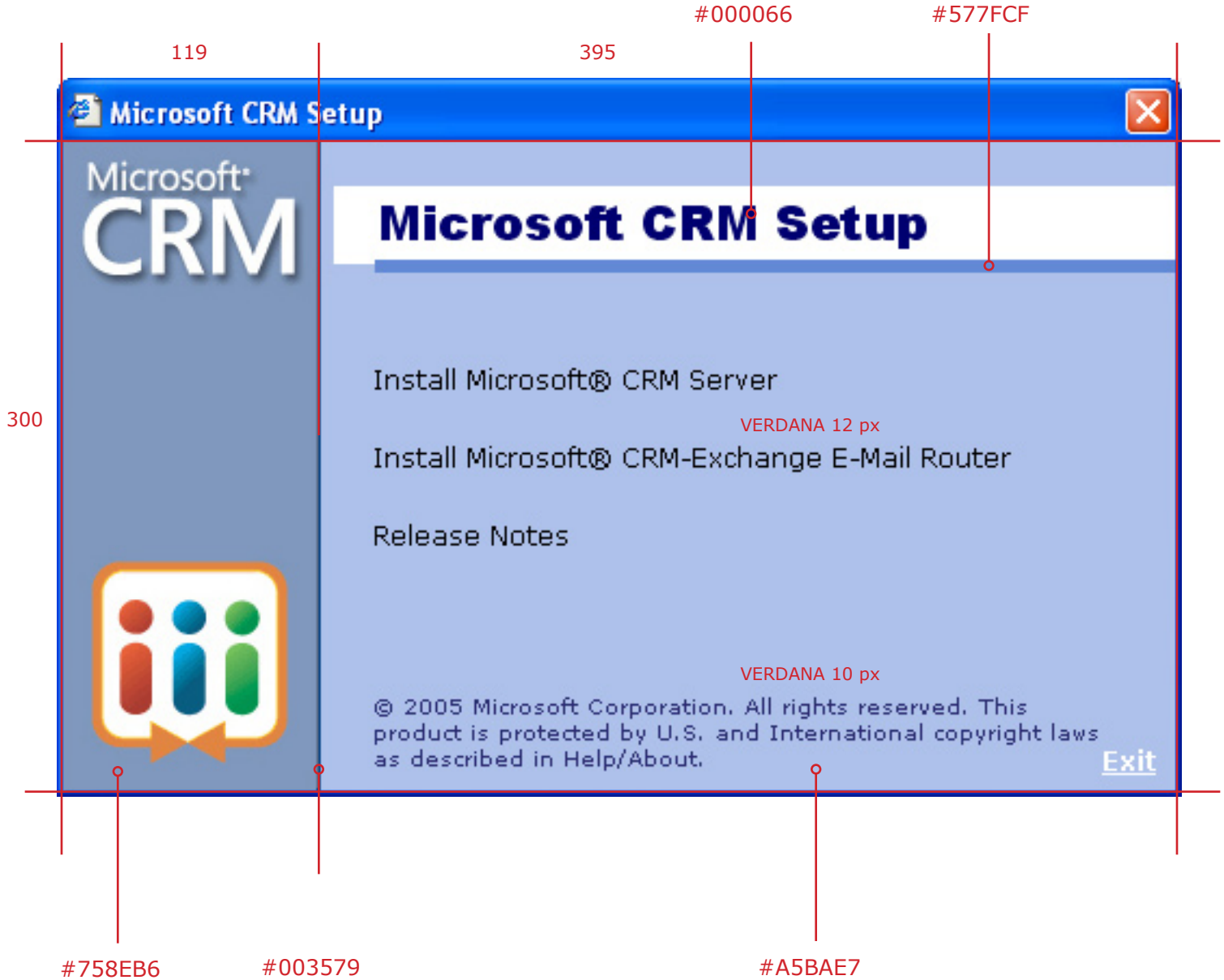
Documentation Installer - Splash and Mouse Over Views

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Setup Splash Screen



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Wizard - Left Navigation Menu and Complex Form

Create Mini Campaign Wizard

Email Content
The wizard needs to know where to find the required file.

TAHOMA 11 px
Welcome
Activity Type & Owner
Content
Name
Summary

#C6CEDC

From: Cc:
To: Bcc:
Subject:

Regarding:
Owner:
Duration: Priority:
Due:
Category: Sub-Category:

Help

60
342
47
151
497

#FFFFFF
#A8AEB5

Subject:

#FFFFFF
#C6CEDC
#485673

CRM UI STYLE GUIDE

About CRM Window

