

MICROSOFT CRM 3.0 UI STYLE GUIDE

August 12, 2005 | Revision 17



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Screen Regions by Name

🙆 Microsoft Business So	olutions CRM - Microsoft Internet Explorer			
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🙆 Done				ocal intranet

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

Main Screen Dimensions

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	Articles	Subject 🔺	Regarding	Activity Type	Activity Status	Owner	Priority	Start Da 🔁		_ 22
	Reports	▶ 💆 !		Task	Open	<u>Jacob Johansen</u>	Normal	^		_ 24
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Navigation Pane Specifications

H:1 Color: #485674



Wunderbar Specifications

H:1 Color: #C6CEDC

H:1 Color: #000000	
Personalize Workplace	H: 23 Font: Tahoma 11 px Color: #3366CC
🥑 Workplace	H: 34 Font: Tahoma 11 px Bold Color: #FFFFFF Selected Button Gradient: #485673 to #63769C
ligi Sales	H: 33 Font: Tahoma 11 px Bold Color: #000000 Button Gradient: #DCDFE5 to #BBC0CA
🗞 Marketing	
Service	H: 33 Font: Tahoma 11 px Bold Color: #000000 Button Gradient: #DCDFE5 to #BBC0CA
🛃 Settings	
5 24 6	

Wunderbar With Mouse Over States

n kan ka	
Personalize Workplace	Mouse Over displays hyperlink underneath text
🧉 Workplace	
Sales	
ਠ Marketing	H: 33 Font: Tahoma 11 px Bold Color: #000000 Mouse Over Button Gradient: #EDF1D5 to #D4DD9C
Service	
Settings	

Workspace Specifications

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App Toolbar Specifications





App Toolbar Drop Down Menu Specifications

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	Account	ts			2	а		30	Ouick Campaigns	
8	Contact	ts				ABC				

Grid Toolbar Specifications



Grid Toolbar Drop Down Menu Specifications



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



Grid Specifications





All Toolbars with Mouse Over States

Microsoft CRM V.Next Beta - Microsoft Internet Explorer												
<u>File New Go To Tools</u>	Help											
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Activities	Look for:	Find	ate: All	*								
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Mueues		Subject 🔺	Regarding	Activity								
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💣 Announcements	► 🔊	123		Task								
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🐨 Campaigns		AppTest shortstring 8/9/2005 12	testcontact01 test	E-mail								
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Form Dimensions

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Form Colors and Type



Form Assistant



Dialog Box Dimensions

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	Articles		_				
0	Reports		Scheduling				
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🗆 Cus	tomers						
	Accounts						
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Dialog Box Colors and Type



Menu Screen Dimensions

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Settings	Sett	ings							
差 Settings	Whi	ich feat	ure would you like to work with?					^	<u> </u>
📑 Customization									24
	ſ		Business Unit Settings			Sales Territories			_
		£	Manage business units, security roles, users, salespeople with quotas, teams, and queues.		<u></u>	Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.			
	ſ		Templates			Announcements			
	Ц	_5	Manage e-mail, article (knowledge base), and contract templates.		E	Create, edit, and delete announcements that appear in the Workplace area.			
	20		Subjects		1	Product Catalog	L		
			Manage the subject hierarchy for your organization's products, iterature, and articles.		10	Create and manage the product catalog. Set price and discount lists, unit groups, as well as manage products.			75
	3	X	Services		a D	Sites			
	Ś		Add new services for service scheduling. Modify information about services and delete existing services.			Create new sites or office locations where service operations take place. Add and remove resources, edit site information, or delete sites.			
	C	2	Relationship Roles			Business Closures			
48		<u></u>	Create and modify relationship roles that are used within your organization. Manage role entities for each available role in the application.		×	Create a list of holidays and other times when the business is closed.			
		_	Organization Settings						
🧉 Workplace	_	V	Set or change how Microsoft CRM handles entities, processes, and						
lige Sales	-	~	auto-numbering formats. Select the display settings for the fiscal year and fiscal period.						
ਠ Marketing									
Service									
🏂 Settings	Lo :at	tion: 🔒 🖬	lings			Advanced	iew	×	24
é						🔲 🧐 Local intranet			
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Menu Screen Colors and Type

Settings

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Business Unit Settings Font: Tahoma 14 px Bold Color: #466094

Manage business units, security ro quotas, teams, and queues

Manage e-mail, article (knowledge

– Font: Tahoma 11 px Color: #000000



Templates

— Color: #DCDFE5

— Color: #FFFFFF



Subjects

Manage the subject hierarchy for literature, and articles.



Services

Add new services for service sche services and delete existing servic



Relationship Roles

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



Organization Settings

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



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.





Wizard - Welcome or Finish



Wizard - Content

		578	
5	Microsoft CRM 3.0 Client for Outlook	Setup	
	Install Required Components TAHC To install the listed required components, o	DMA 11 pt BOLD lick Install. Then, click Next.	ТАНОМА 11 рх
	Component	Status	Message
	Microsoft SQL Server Desktop Engine (C	Installing	
	MSDE Service Pack 4	Missing	Minimum version required: 8
		MS SANS SERIF 11 px	
		км)	Install
		< <u>B</u> ack	Next > Cancel

Wizard - License Agreement

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

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253		Lorem ipsum dolor sit amet, o ullamcorper sed, eleifend seo gravida in, facilisis in, congu	consectetuer adipiscing elit. P d, nunc. Donec vestibulum ve e quis, neque.	raesent dolor velit, nonummy non, ehicula mi. Morbi urna massa, MS SANS SERIF 11 px	^	
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Documentation Installer - Splash and Mouse Over Views





Setup Splash Screen



Wizard - Left Navigation Menu and Complex Form

🗿 Create Mini Camp	aign Wizard	
Email Content The wizard needs to know where to find the required file.		
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Activity Type & Owner	To: 20 Bcc: 20	
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	Regarding:	
	Owner:	
	Duration: 🛛 📴 🗸 🔽 Priority: 🔍	
	Due:	
	Category: Sub-Category:	
	Help Cancel Cancel	47
151	497	



About CRM Window

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	iii	Microsoft® CRM 3.0 (2.0.5222.0) TAHOMA 16 px BOLD
		For technical support questions within the U.S. and Canada, see <u>https://mbs.microsoft.com/customersource/support</u> or <u>http://support.microsoft.com</u> or call (800) 456-0025. TAHOMA 11 px
		Support outside the U.S. and Canada may vary. For regional contact details, visit <u>http://support.microsoft.com/international.aspx</u> . If there is no Microsoft subsidiary office in you country or region, please contact the establishment from which you obtained the Microsoft produ
		For additional information, see <u>http://www.microsoft.com/crm</u> . Privacy statement: <u>http://watson.microsoft.com/dw/dcp.asp</u> .
		This product is licensed to: TAHOMA 11 px BOLD Adventure Works Cycle
		© 1985-2005 Sales Performance International LLC, All rights reserved. Solution Selling® and Situational Fluency Prompter® are registered trademarks and service marks of Sales Performance International LL 9 Block Vision Processing Model [™] , Pain Chains [™] , Pain Sheets [™] , Pipeline Milestone Worksheet [™] are trademarks and service marks of Sales Performance International LLC. All other referenced marks are those of their respective owners. <u>TAHOMA 10 px</u>
		Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.
		© 2005 Microsoft Corporation. All rights reserved. TAHOMA 11 px