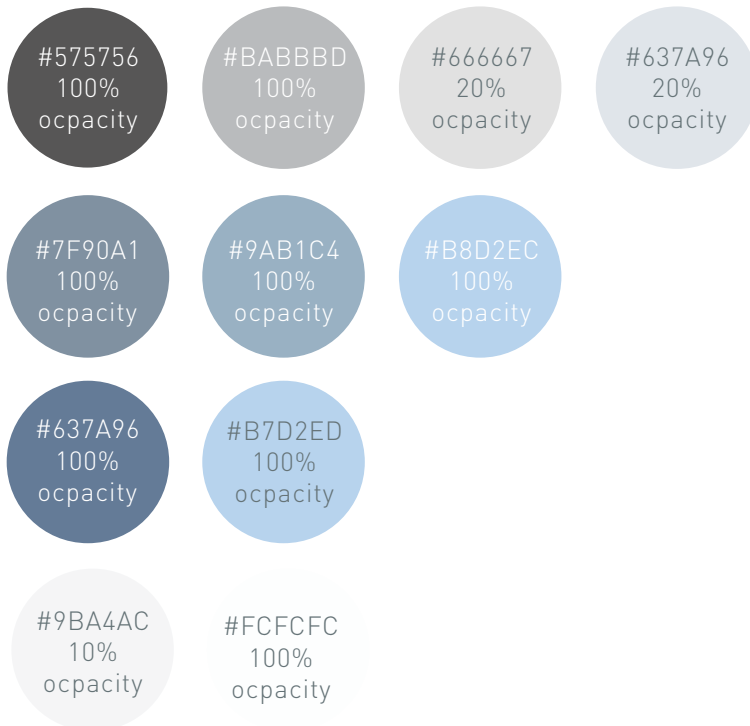


Design Style Guide:
Maximizer CRM Interface

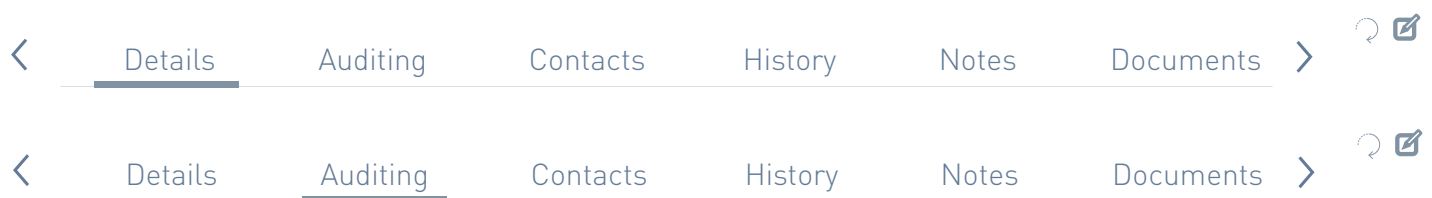
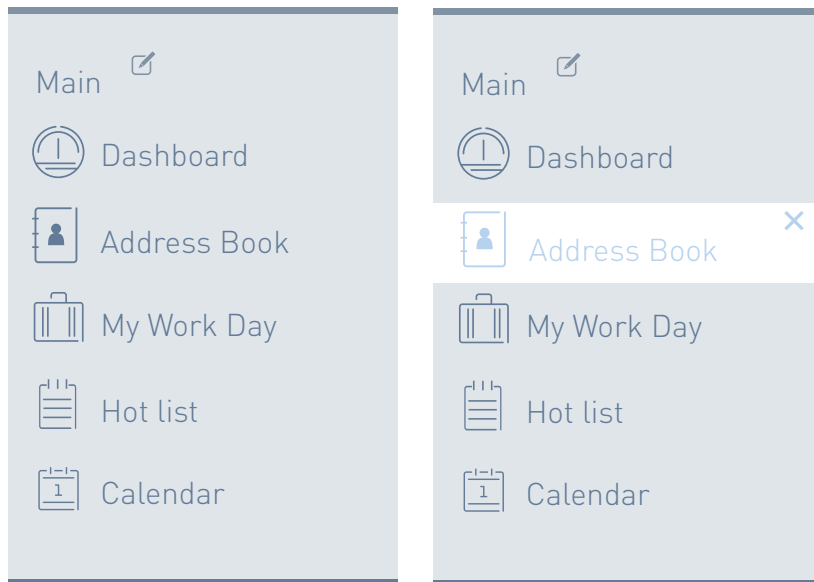
Colors



When it comes to redesigning anything, the trickiest part comes down to the fact that people don't like changes. One of the key important factor in reworking and developing a new interface is deciding what to keep and what to take away of change. As humans are creatures of habits and recognition, it's important that the we as designers don't over simplify the layout.

First of all, we want to keep the general shading of the color similar to the previous one which was blue. Changing the colors and look can cause satisfaction among existing users as they already associated themselves with that specific color to that particular brand. Hence, we just took the current color and decrease the exposure with shades of grey in order to be more pleasing to the eyes. Also, the buttons itself as well as most clickable options on the interface faces from it's shading color to a white background signifying that the particular button is active.

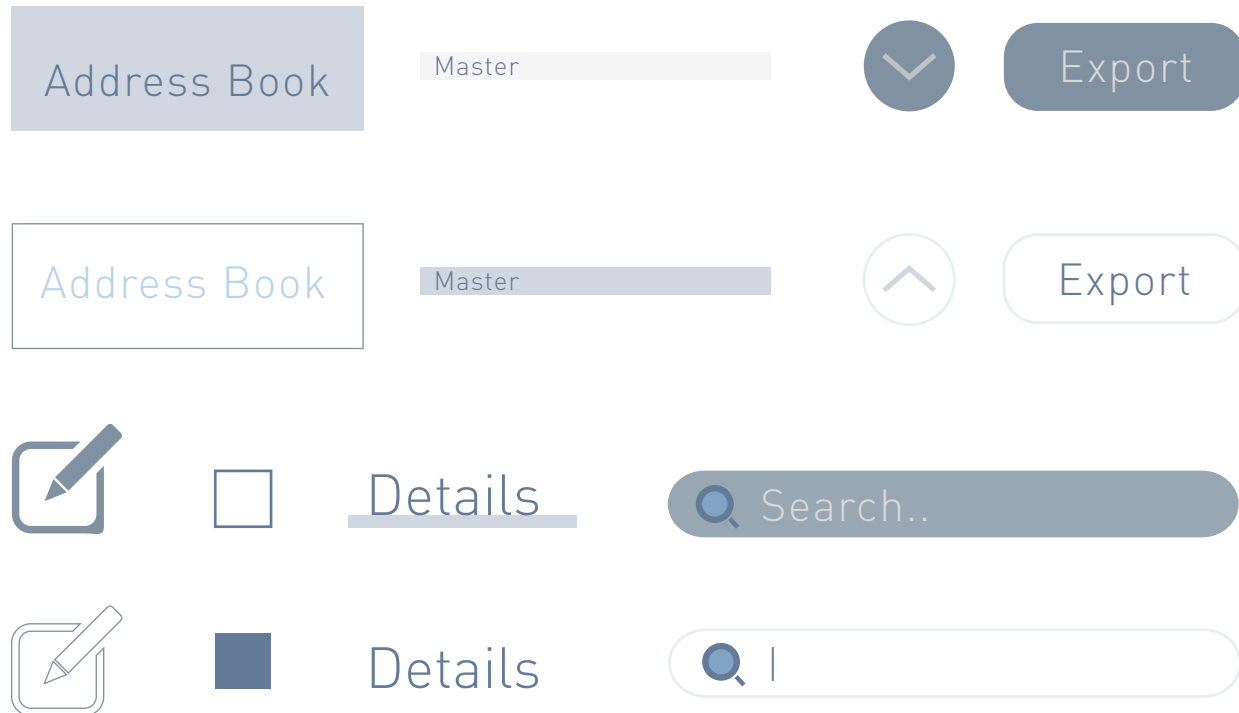
Flat Icons and Simplistic Tabs



Secondly, for the past few years, design aesthetics has been leaning towards flat and simplistic form of logos which in the case of the Maximizer CRM, we wanted to simplify the images for the action buttons located on the left side menu as well as emphasize on other interactive buttons on the interface such as the export buttons. The straightforward logo helps user identify the particular button and get the job done.

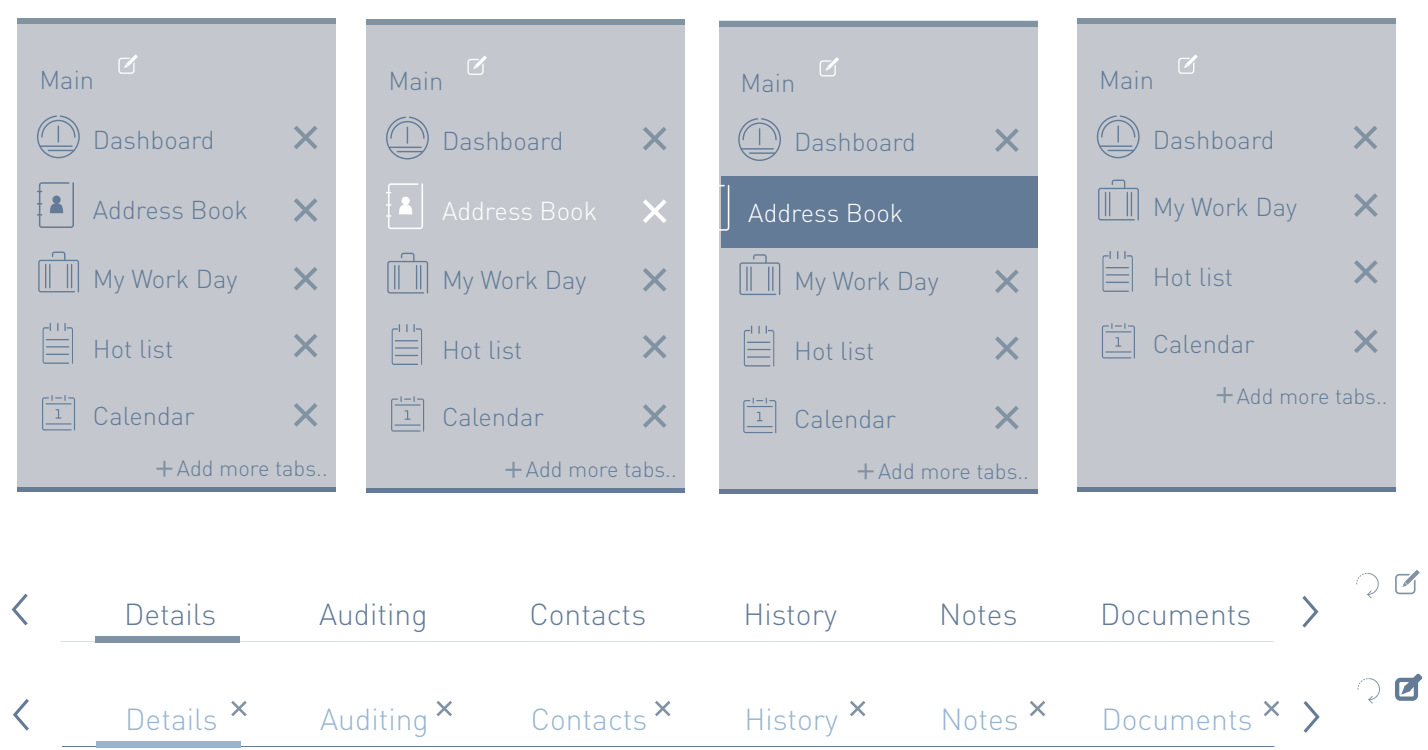
In order to keep a consistent tone for the user's experience, we also need to simplify the two operation screens as well. Instead of having more tabs, we want to reduce the cluttered by creating a singular line that runs from end to end of the display screen with a rectangular indicator that will highlight on which tab is currently in use.

Action Buttons



Aside from the consistency of the colors applied to the interface, the new interface also incorporate smooth transitional movements ranging from sliders, drop down menus, to check box options. The idea is to be as minimal as possible without losing the brand's initial impression that current existing users already has. It's important to acknowledge that the brand comes first and aesthetics second.

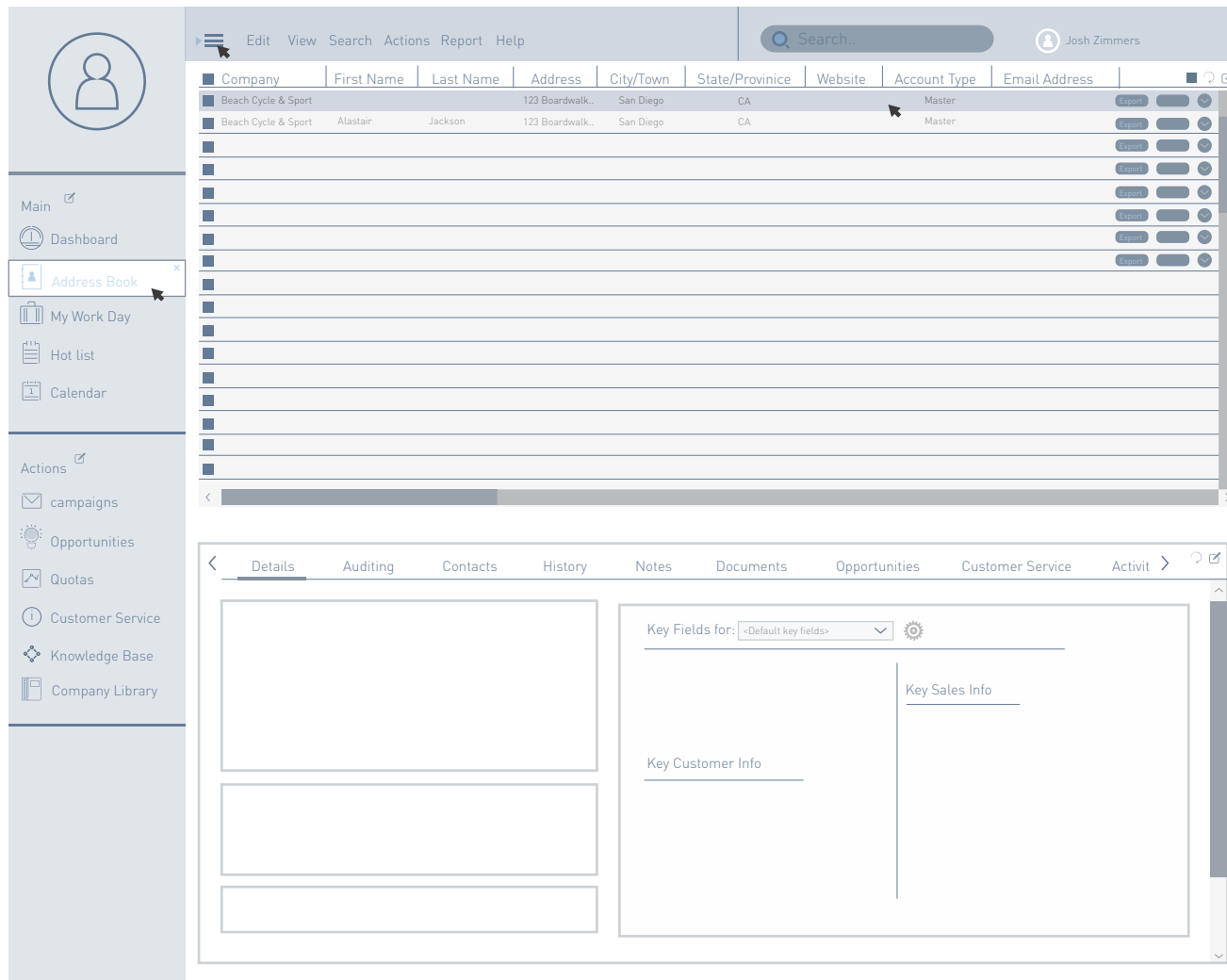
Closable Menu and Tabs



One of the issue that has been brought to my attention was that majority of the tabs are closable which can be helpful for users to minimize the cluttered display. Taking inspirations from a lot of other web applications and even tablet interfaces, the options of closing tabs and menu options should have an indicator. Once clicked upon, there are options to either add or delete the current tab. Another option to close the current tab would also appear under each selected tab.

By allowing the users the ability to control how many tabs they want open as well as easy access to certain tabs through a click of a button would give them a smooth transition from jumping from screen to screen and tabs to tabs. However, this still doesn't solve one of the biggest issues that the current interface is facing which is the lack of spaces and access to particular files. In order to allow the user a better flow and experience, it's important to have multiple views of the interface.

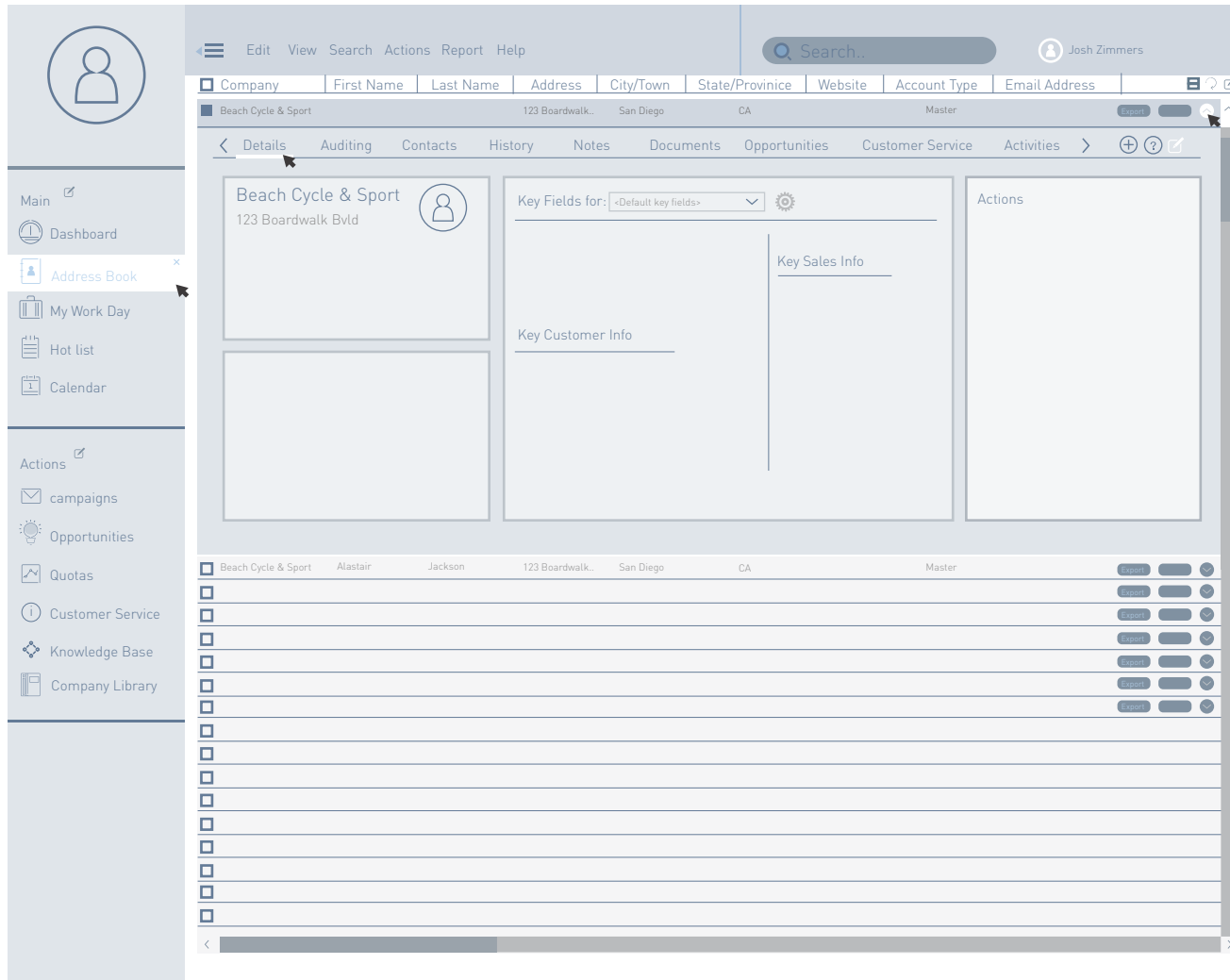
Single or Dual Screen Option



Dual Screen Option

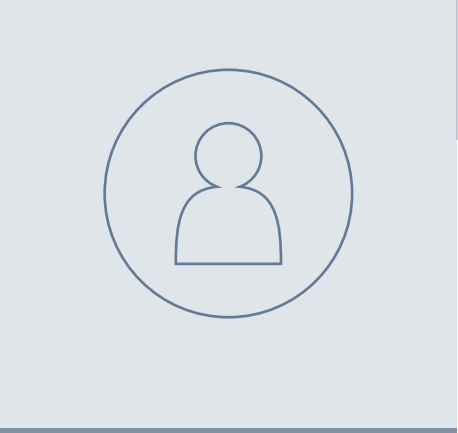
It's important for the users to have the ability to choose the form in which they want to interact with. I noticed that the top screen with the list of address was hidden when I watched the youtube video for the first time. It made sense, as the user of the application would be looking for information and as it's currently structured, the information will be located at the screen located at the bottom. Both screens have multiple options but the top screen is ultimately used for browsing while the bottom screen is where the actual information is located. In the dual screen option, the user have the ability to view in the traditional format with minimalistic aesthetics that will help them navigate through both interface with ease, however it's still quite cluttered.


Single or Dual Screen Option

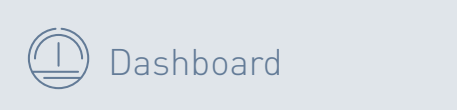


Single Screen Option

Which brings us to the single screen option that utilizes a drop down menu instead of having two display. First of all, The hierarchy allows the users to be able to navigate the information similar to that of the dual display, however in this case, the user also has the option to open multiple lines by selecting the squares located on the left. Since the tab contains the information screen and the sub tabs from within the screen, the users wouldn't have to shrink the viewing screen as they can navigate through sub tab. We choose to highlight the sub tab with a different shade of color in order to better demonstrate the hierarchy for the users.




Main 




Address Book



 Hot list



Actions 


 Opportunities

 Customer Service




 Company Library

[illegible]

Key Fields for: <Default key fields> 

Key Customer Info

Key Sales Info



✓



<input type="checkbox"/> Company	First Name	Last Name	Address	City/Town	State/Province	Website	Account Type	Email Address	
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<input checked="" type="checkbox"/> Beach Cycle & Sport	123 Boardwalk..	San Diego	CA	Master	Export	
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- DetailsAuditingContactsHistoryNotesDocumentsOpportunitiesCustomer ServiceActivities
-

Beach Cycle & Sport

123 Boardwalk Blvd

Key Fields for: <Default key fields>

Key Sales Info

Key Customer Info

Actions

<input type="checkbox"/> Beach Cycle & Sport	Alastair	Jackson	123 Boardwalk..	San Diego	CA	Master	Export		
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