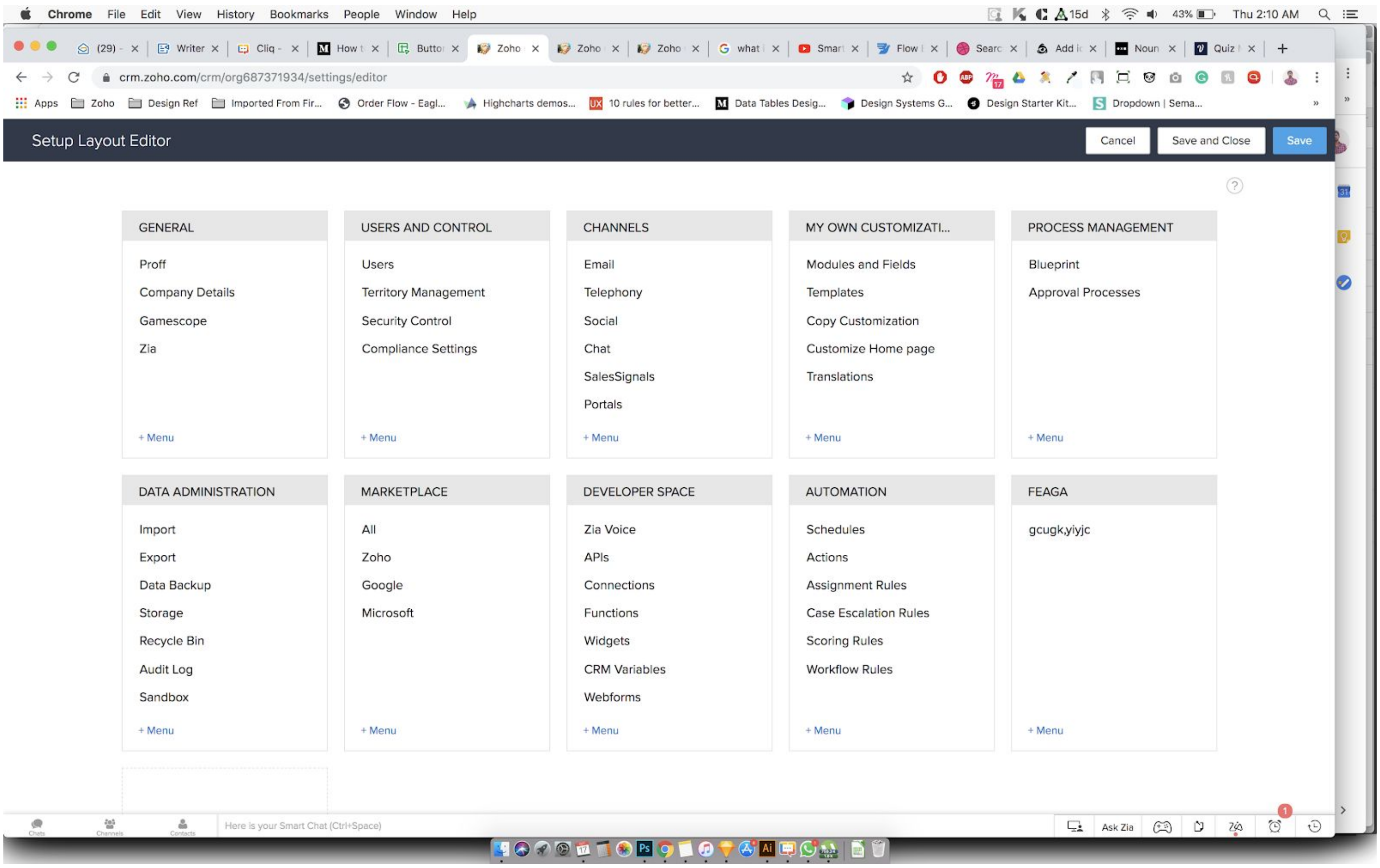
Design Validation Report for Buttons

Report Prepared by : **Vignesh Gnanasekaran**
Report Date: **November 25, 2019**.

Metadata	**Metadata Input**
Research Tagline	Design Validation for buttons
Activity Purpose	The purpose of this study is to make the buttons meaningful and then keep them consistency across the product. We have some major problems are listed below 1. “+” Playing the major role in add/create buttons and some other places too. 2. Button literals are different from the action (Not conveyed the same meaning as what action does) 3. There is no different from the primary and secondary buttons in some places. 4. Misaligned buttons. 5. Lot of duplicates & similar styles in the buttons.
Platform	Zoho CRM Web
Key Performance Metrics	Validate the buttons are actually able to convey the action message to the user or not. Validate the buttons connection between the action and the functionality is the same. Validate the buttons that user can able to identify the action buttons in the page/popup/dropdown/conditions etc.,. Validate the button styles based on the priority, and keep them all focused depends on the priority. The study will also provide us with: **Metrics**: Objective and behavioral performance data that provides a usability baseline to measure improvements. **Audience insights**: Actionable insights on how to optimize the user experience for our users. **Actionable improvements**: Concrete recommendations for improvements based on research findings.
Research Requested by	Dayanithi (CRM Visual Leadership staff)
Report Compiled by	Vignesh Gnanasekaran
Report Compiled date	November 25, 2019

Page Name : Customize setup



Pain Points:

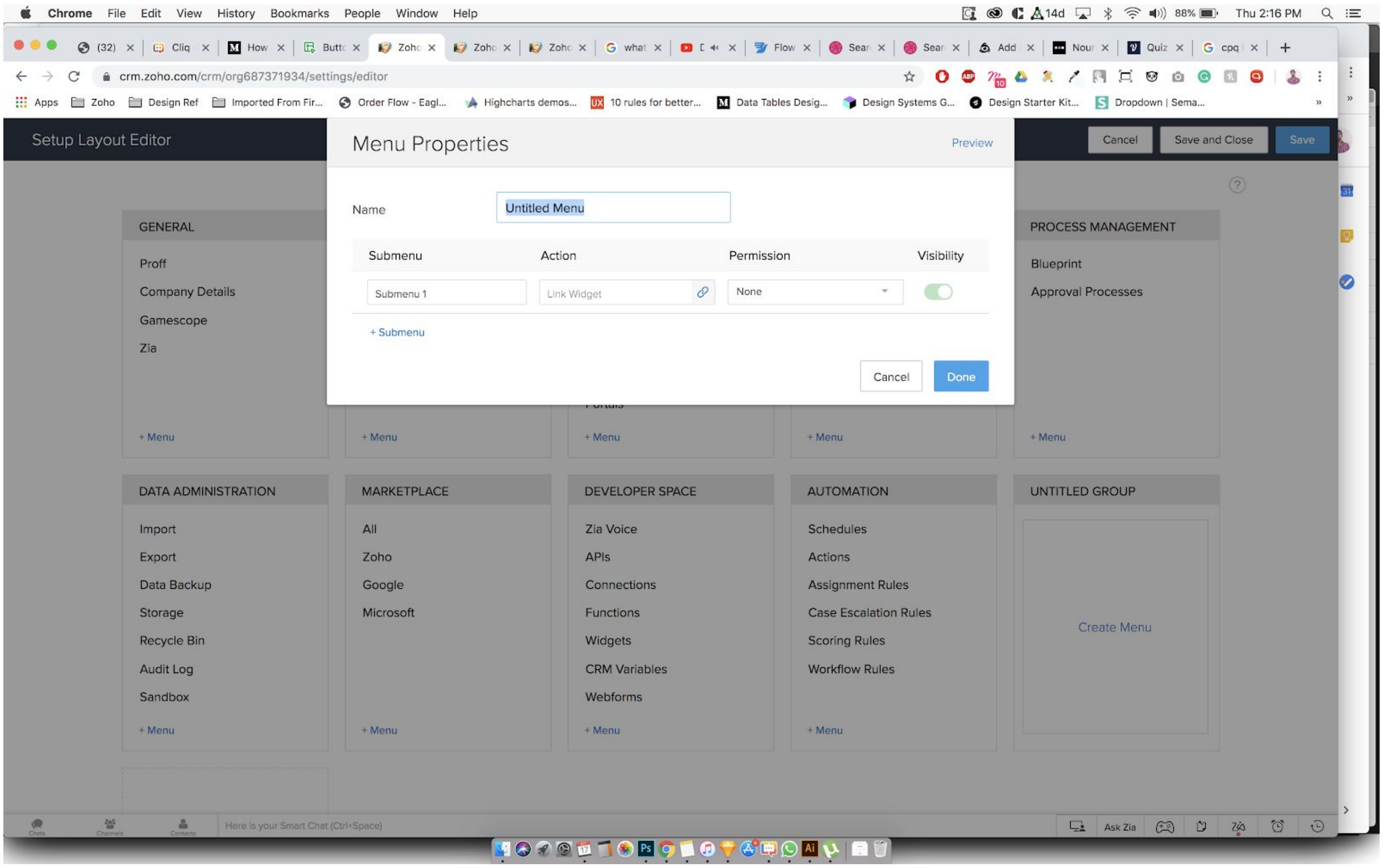
1. +Menu is repeated in all the menus (One action repeated in all the places)
2. Save and Close placed next to save.
3. Different header is used here.

Solution:

1. Instead of showing +Menu in all the places we can show the Add menu when users hover on the particular menu.
2. As a user when I completed my work and I press the save button the expected behaviour is close the window and back to normal view. But unfortunately it's not close because the save and close placed as a secondary button. As a user I'm expecting the usual behaviour to view the normal mode but it's not happening here. Do we really need this two button here? My point is to keep the two buttons. Save and cancel is enough for this page instead of three.
3. Need to use the usual header(White) so that we can avoid the new style (fill white) here.

Conclusion:

Page Name : Add New Menu



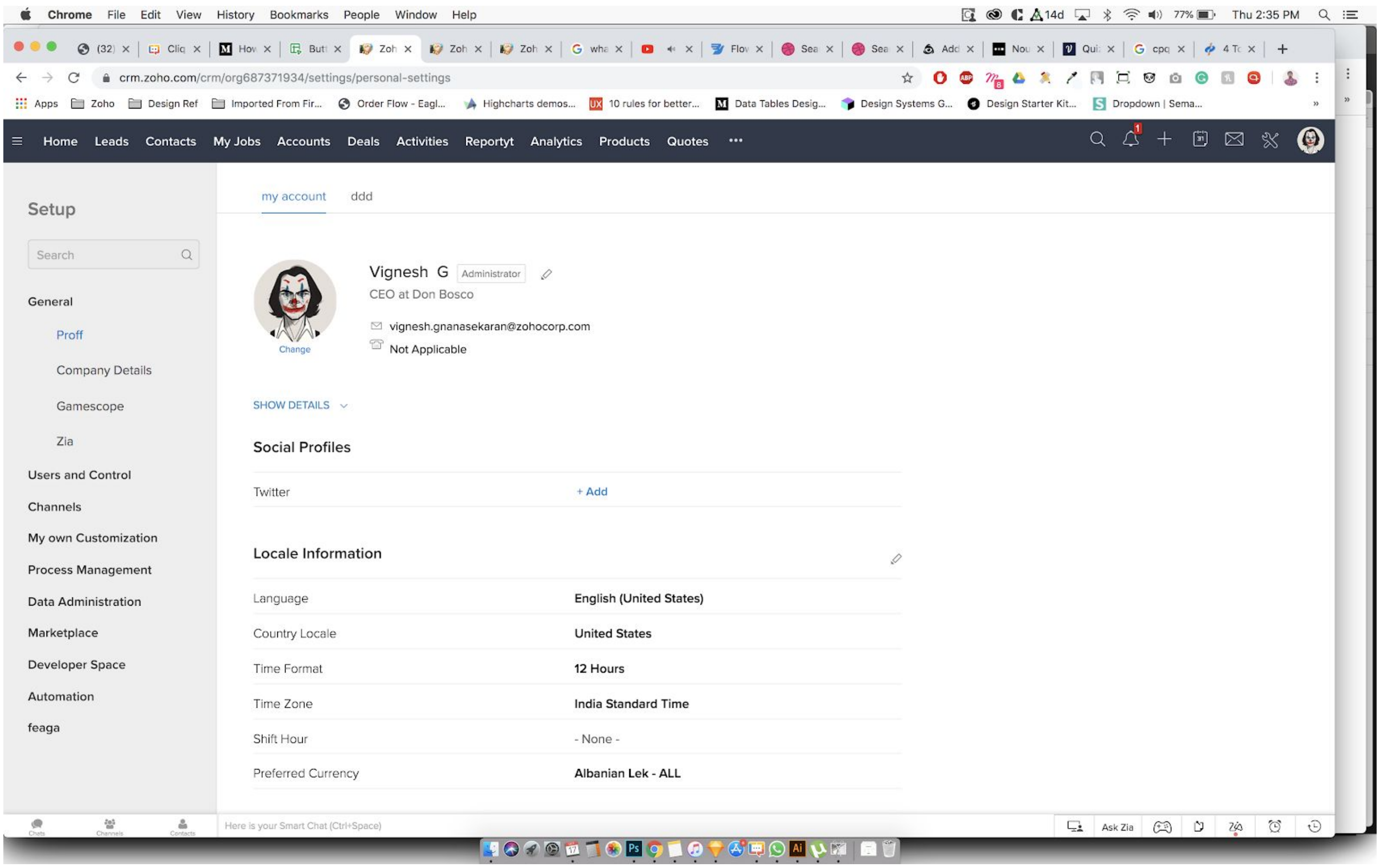
Pain Points:

1. As a user when I click the add new button the title shows the different title and the call to action is not similar to the action.

Solution: As a user when I click the add menu button in the setup page I can able to see the title as “Add New Menu” Instead of Menu properties. And the call to action should be Add Menu. So that It gives more meaningful to this popup.

Conclusion:

Page Name : My account



Pain Points:

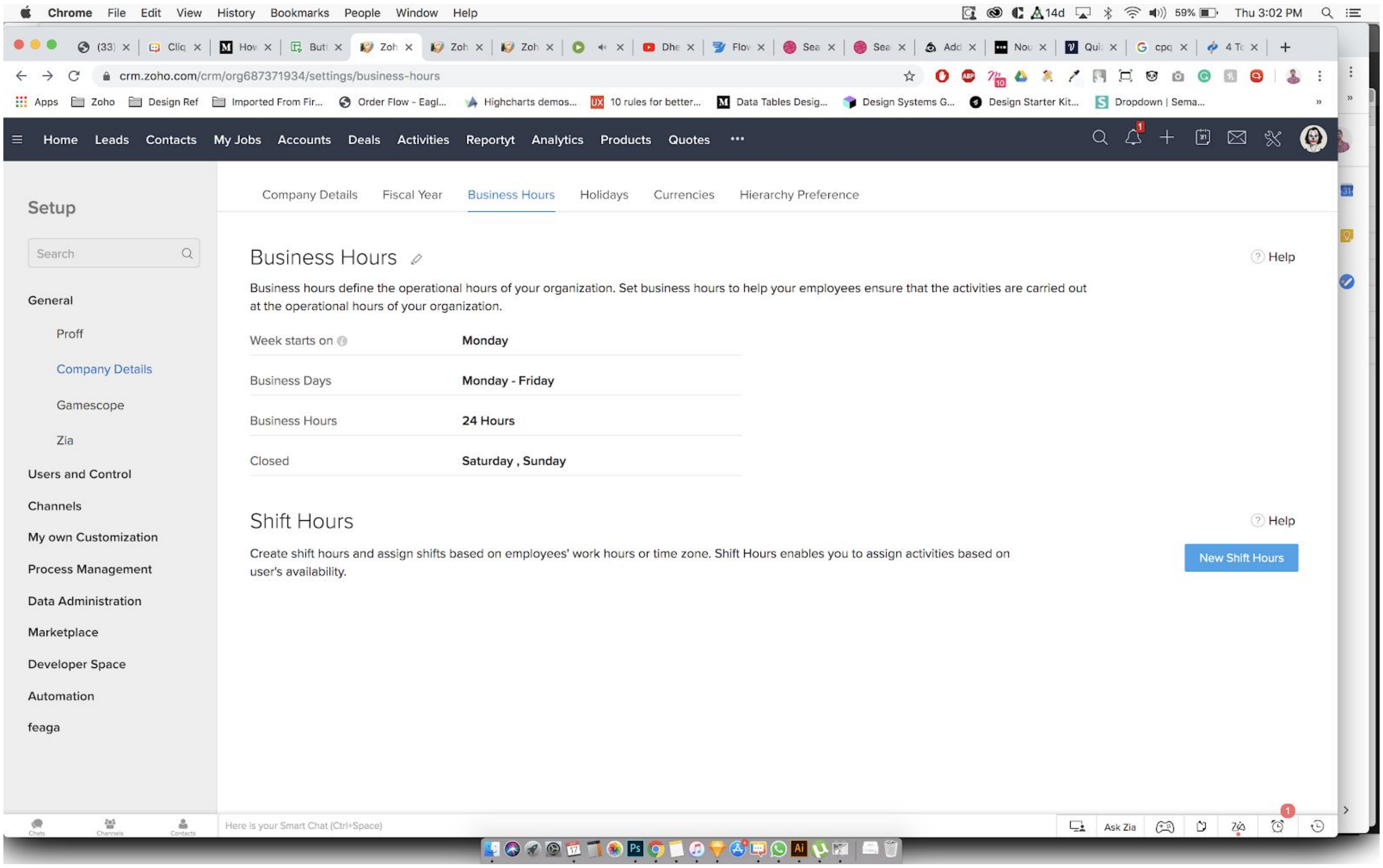
1. “+ Add” used here to add new twitter account. (+ conveys the message of add and we use the Add text next to the icon)

Solution:

1. We need to use “Add Account” as action here.

Conclusion:

Page Name : Business Hours

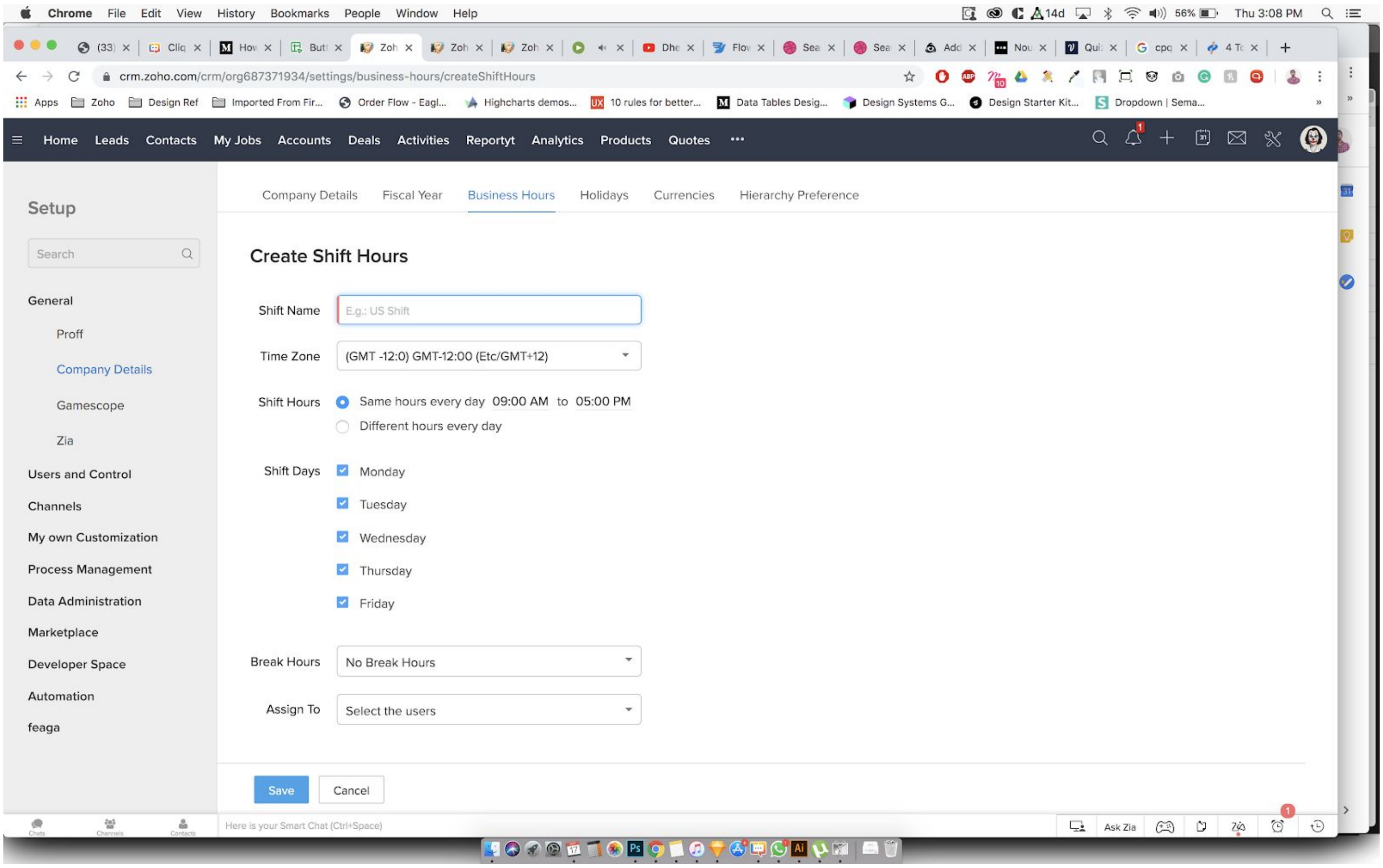


Pain Points: Here the shift hours newly created but we use the different literals “new shift hours”.

Solution: So the call to action should be “Create New Shift Hours”

Conclusion:

Page Name : Business Hours



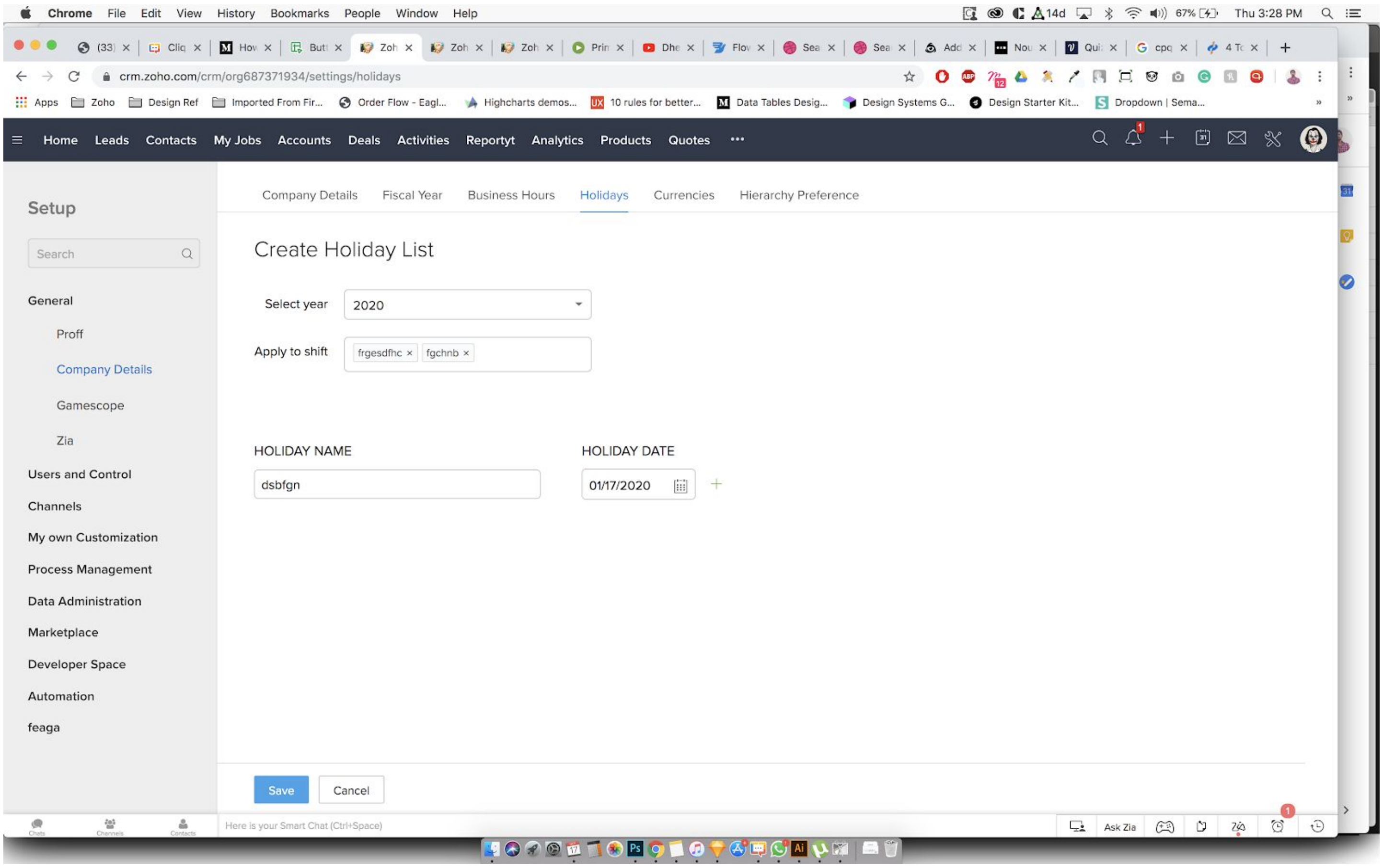
Pain Points:

1. Here the Title clearly shows; create shift hours. But why do we show the save button at the bottom instead of create?

Solution: Need to change the save button as Create shift hours/Create.

Conclusion:

Page Name : Holidays



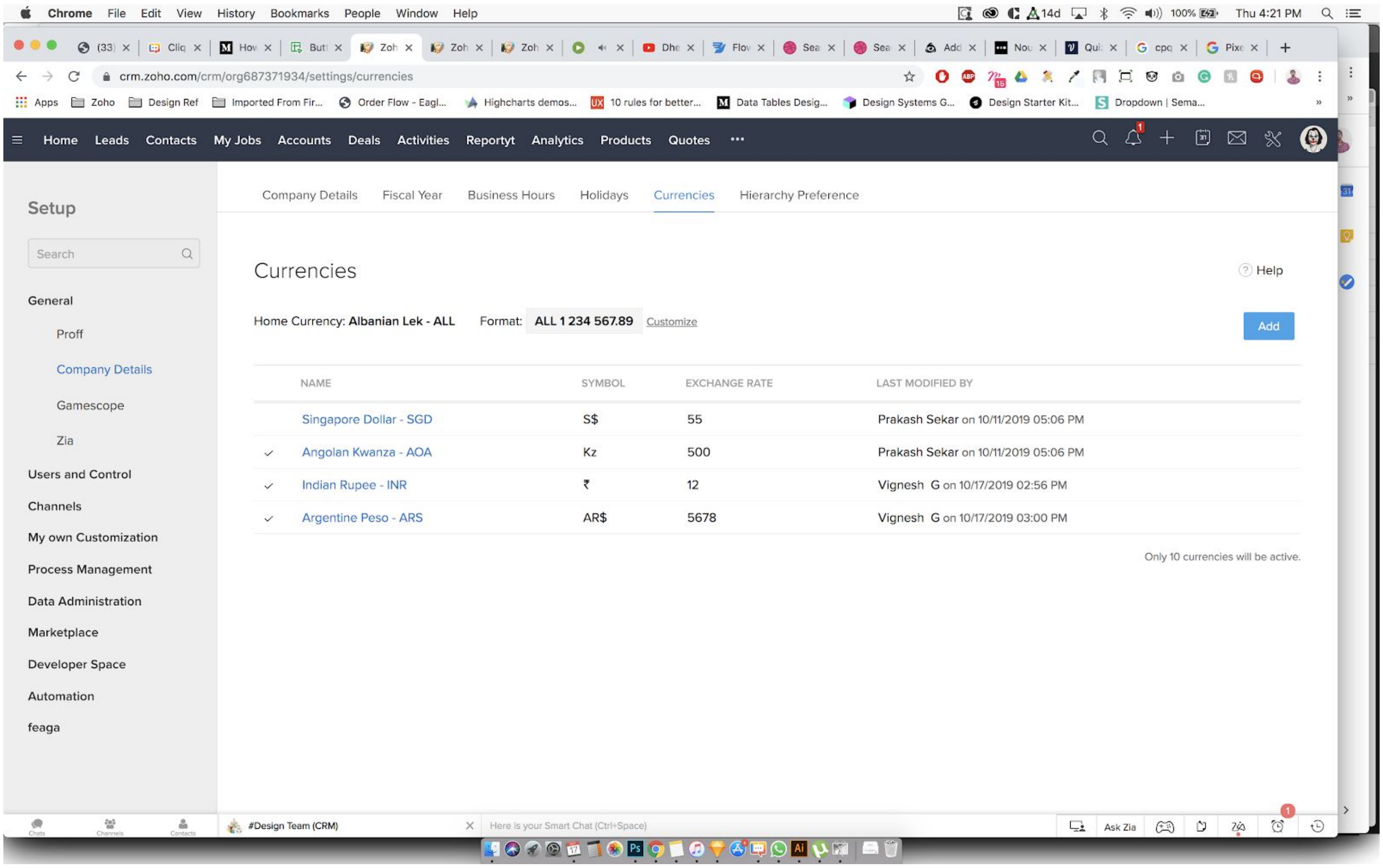
Pain Points:

1. Here the Title clearly shows: create holiday list. But why do we show the save button at the bottom instead of create?

Solution: Need to change the save button as Create Holiday/Create.

Conclusion:

Page Name : Currencies

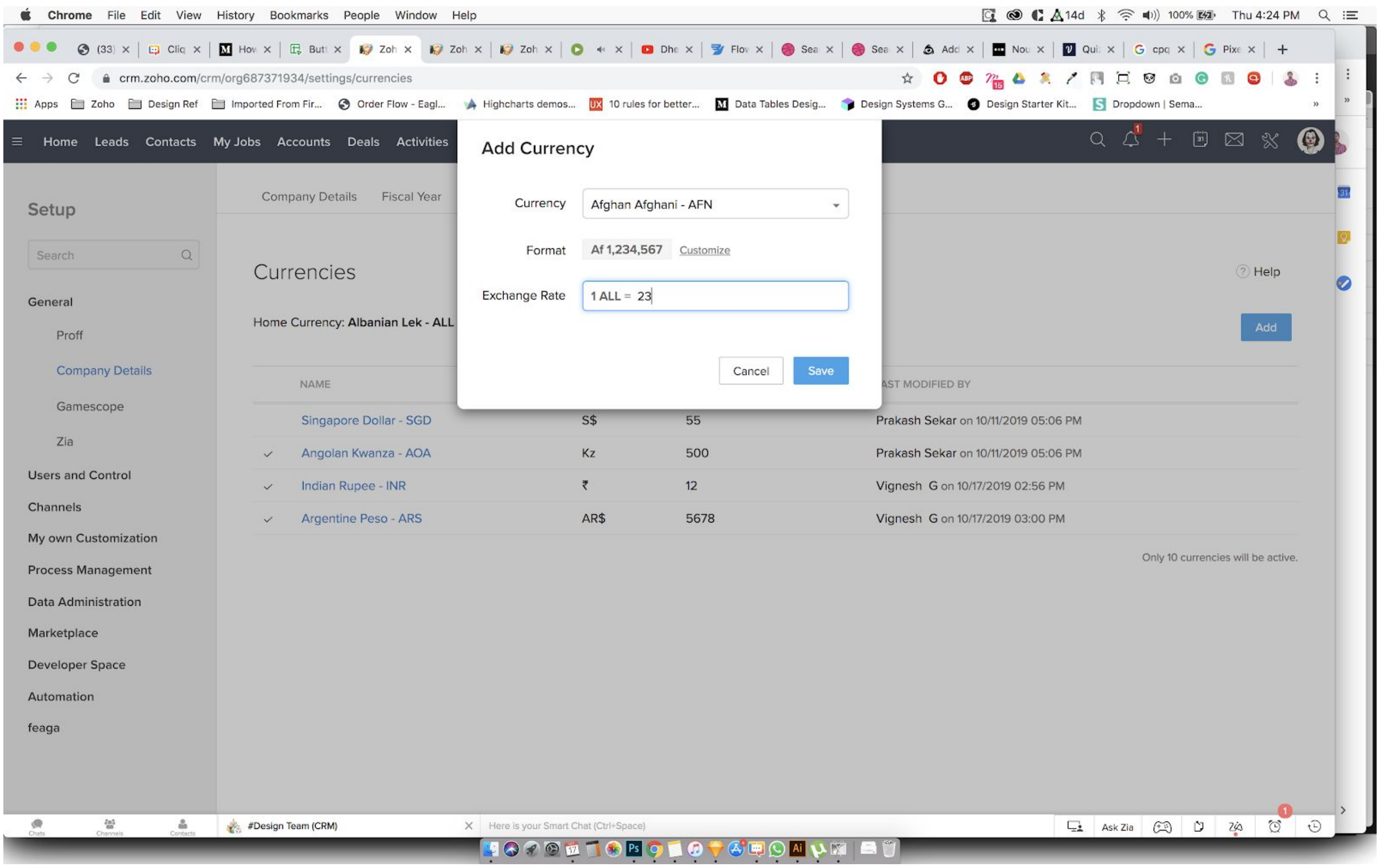


Pain Points: “Add” Button not convey the action message.

Solution: Add Currency is relevant action to this page.

Conclusion:

Page Name : Add Currency

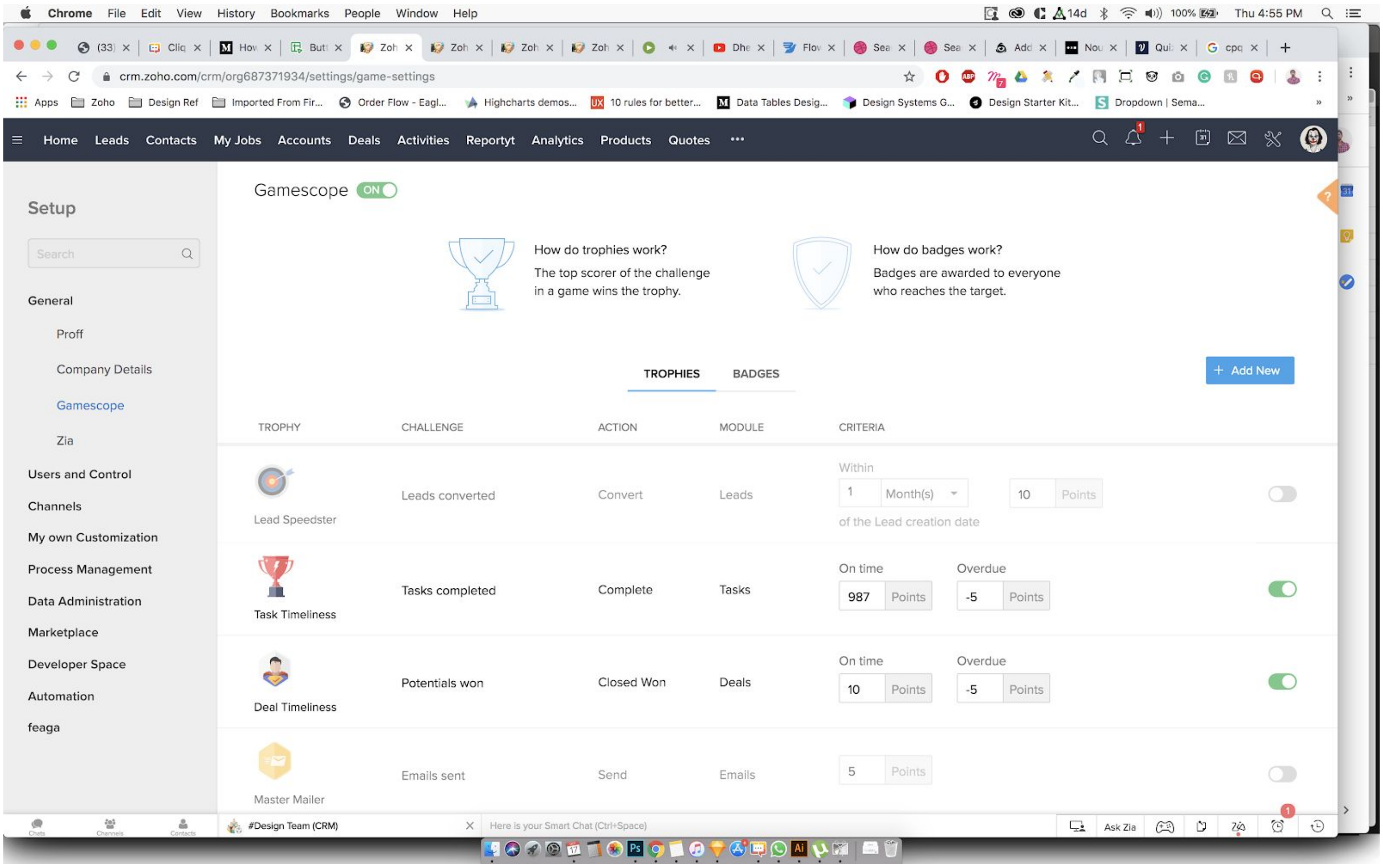


Pain Points: Here the functionality is add currency details. But the button show save this action.

Solution: Need to change the save button as add currency/Add.

Conclusion:

Page Name : Gamescope

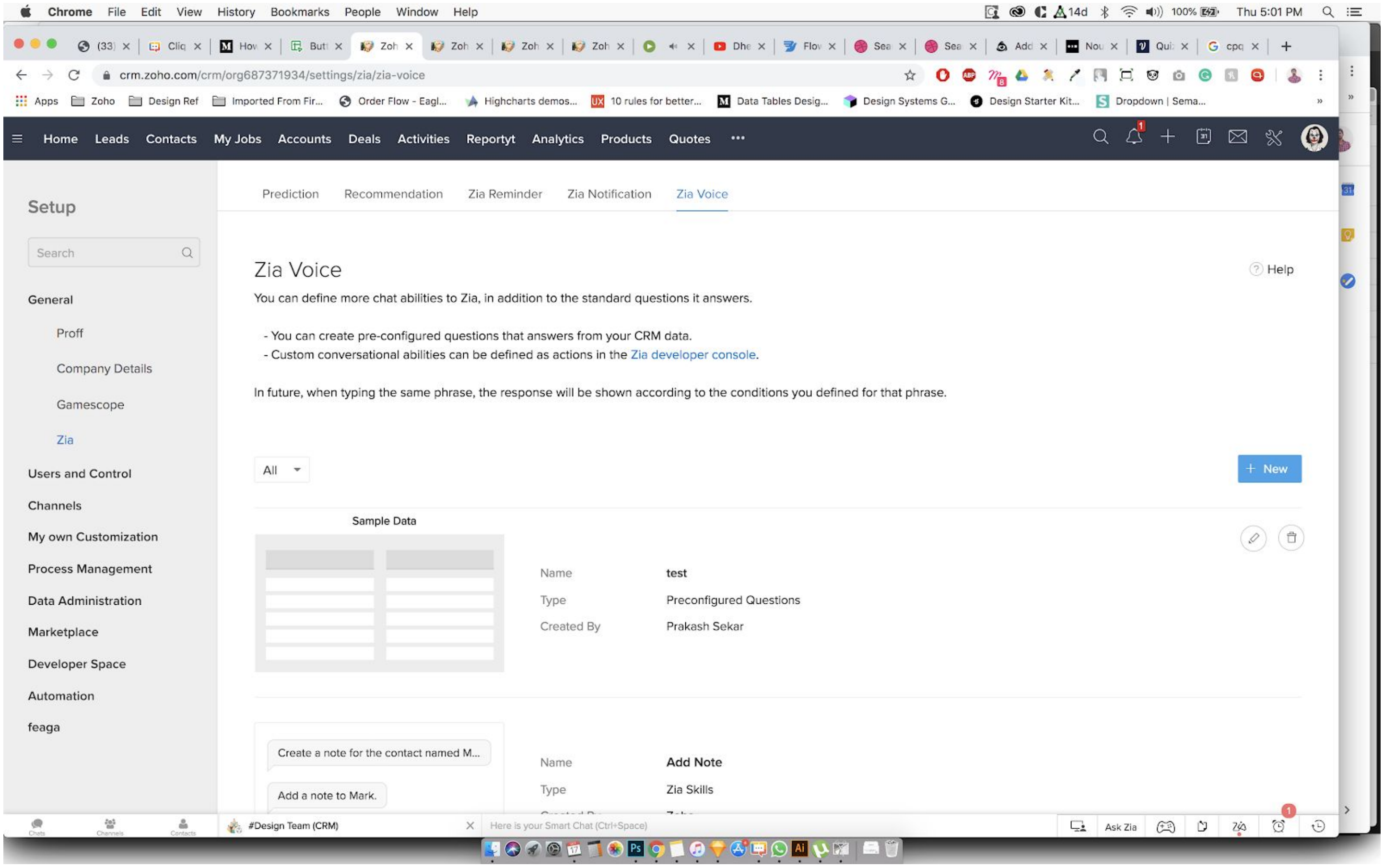


Pain Points: + Add New button in trophies & badges.

Solution: Action buttons should be Create new trophy & Create new Badges.

Conclusion:

Page Name : Zia Voice

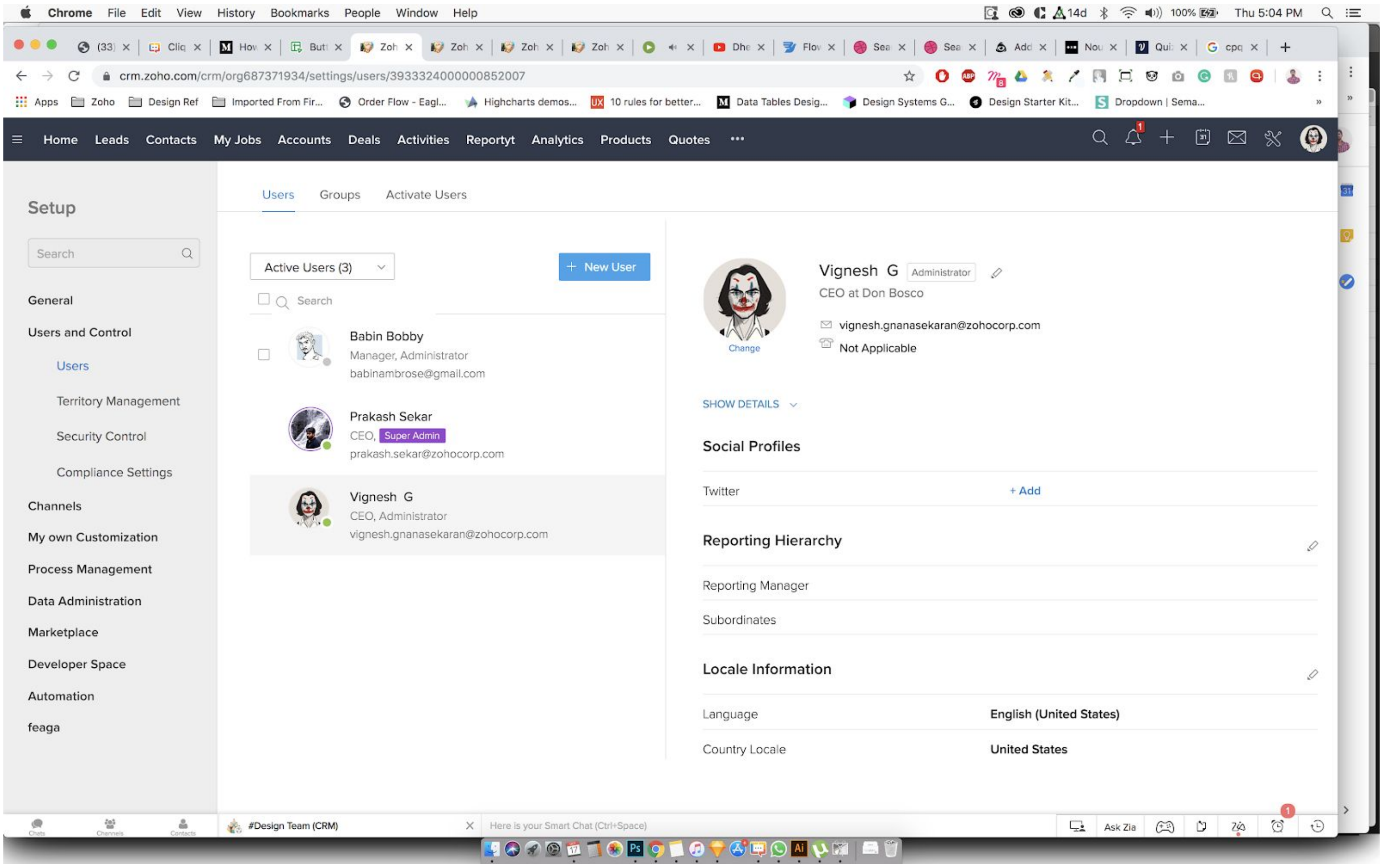


Pain Points: A simple “+New” button not convey the exact action.

Solution: Need to change the +New button as Pre configure questions.

Conclusion:

Page Name : Users



Pain Points:

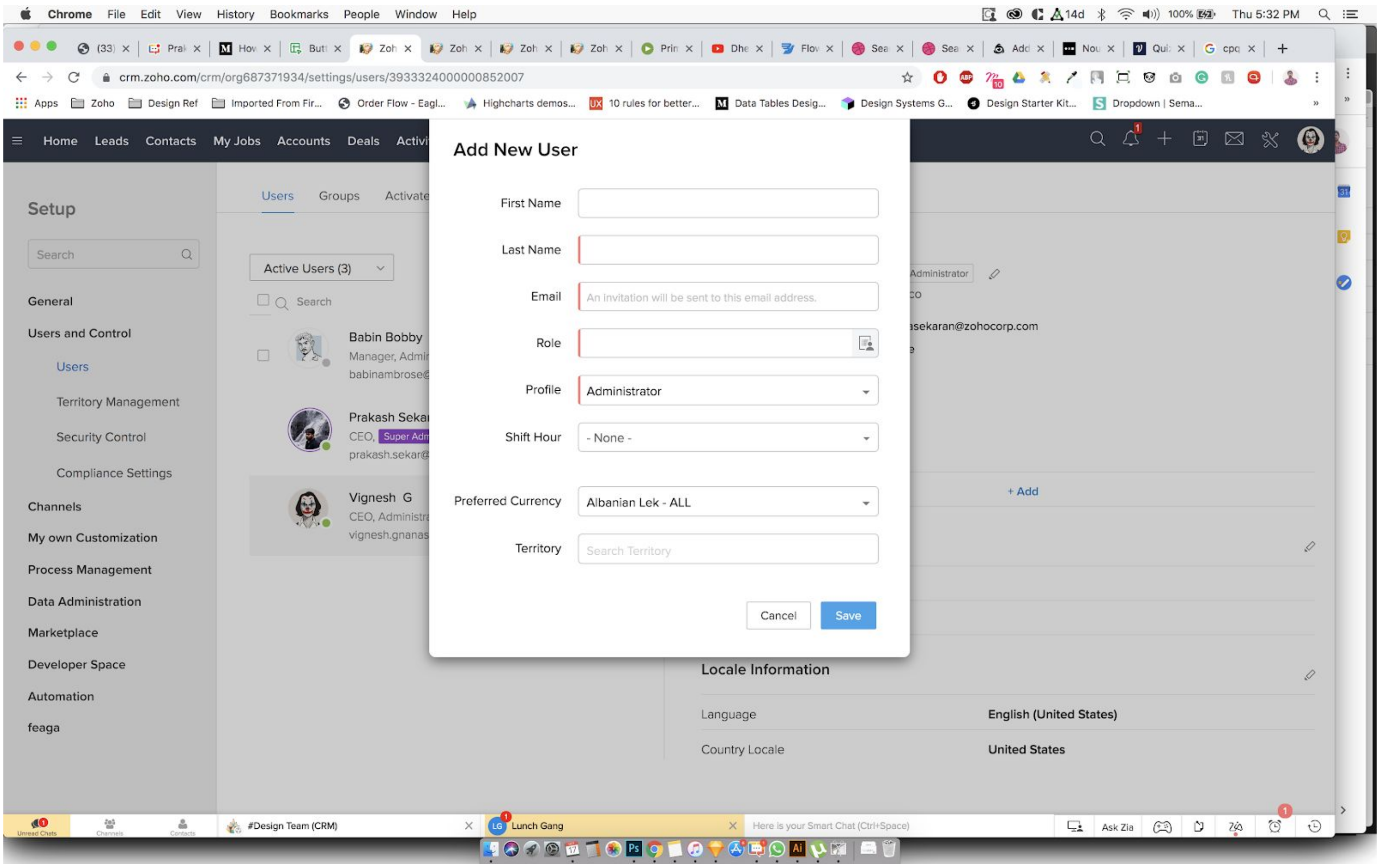
1. +New user - Here the actual functionality is inviting the new user.
2. +Add action in twitter.

Solution:

1. As a user I'm actually inviting a new user to the zoho CRM. So here action button should be Invite User/Invite Team.
2. +Add button should be add account

Conclusion:

Page Name : Add New User

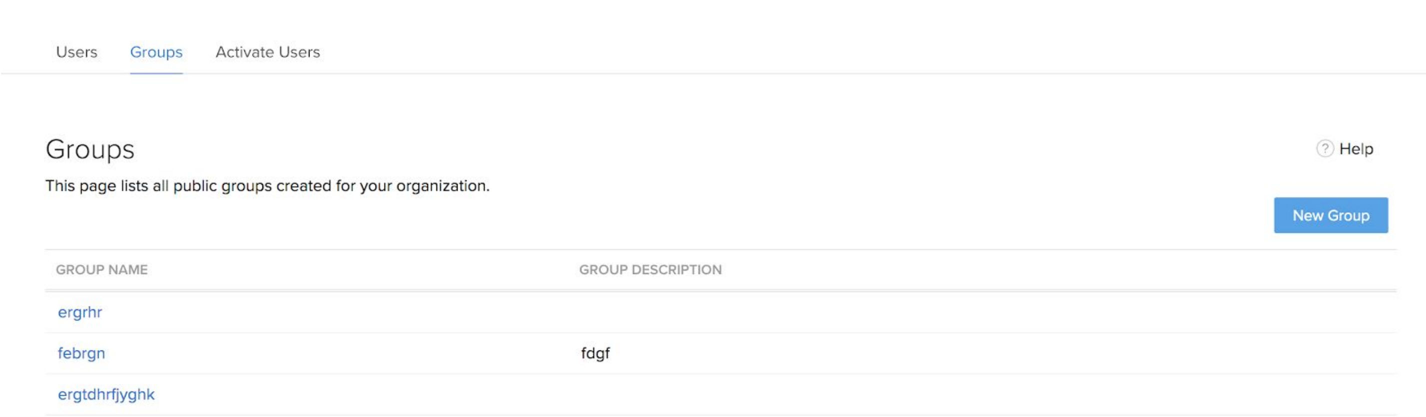


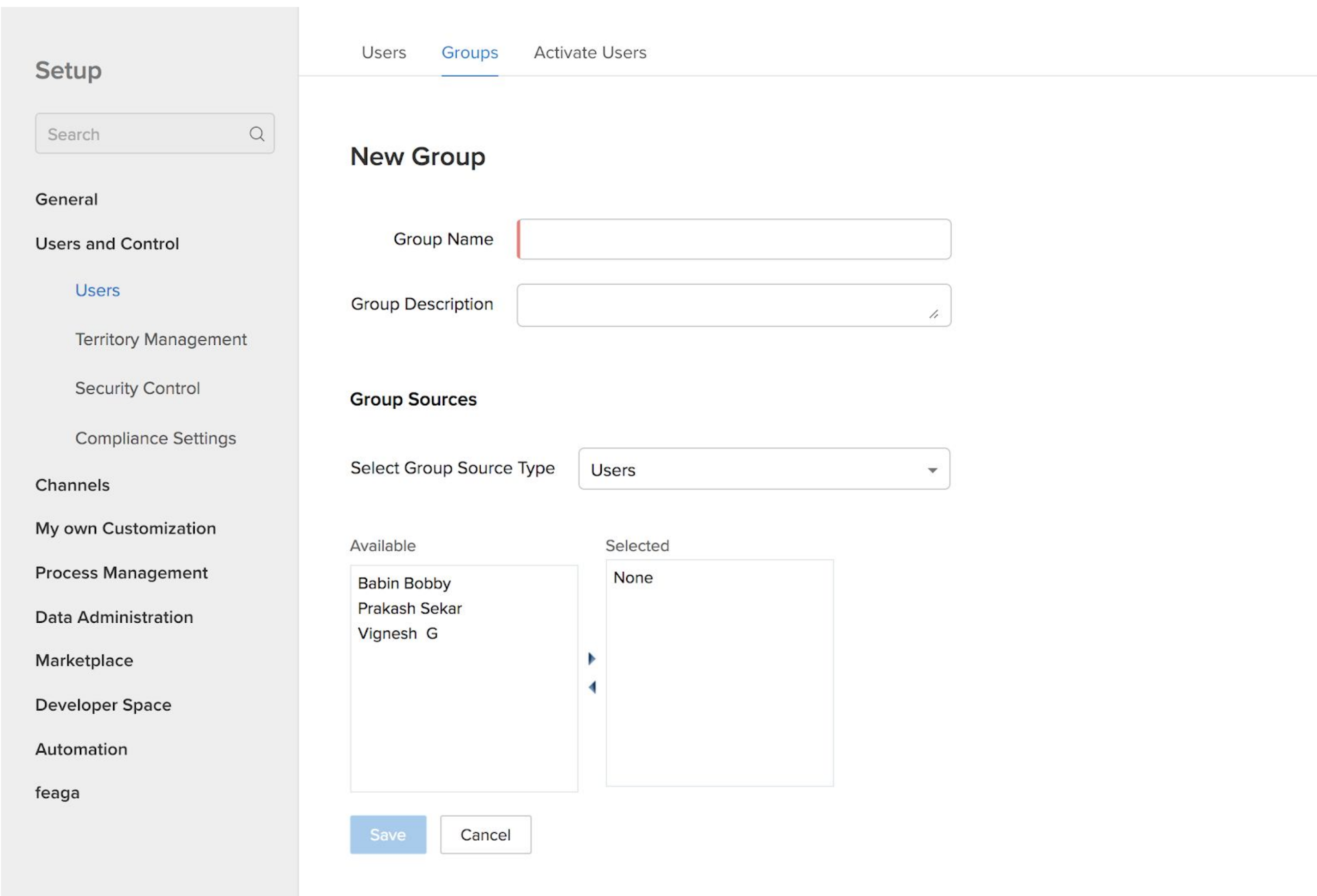
Pain Points: The functionality is Inviting the new user. But it shows add the new user.

Solution: Need to change the title as Invite new user and the action button should be Invite instead of save.

Conclusion:

Page Name : groups



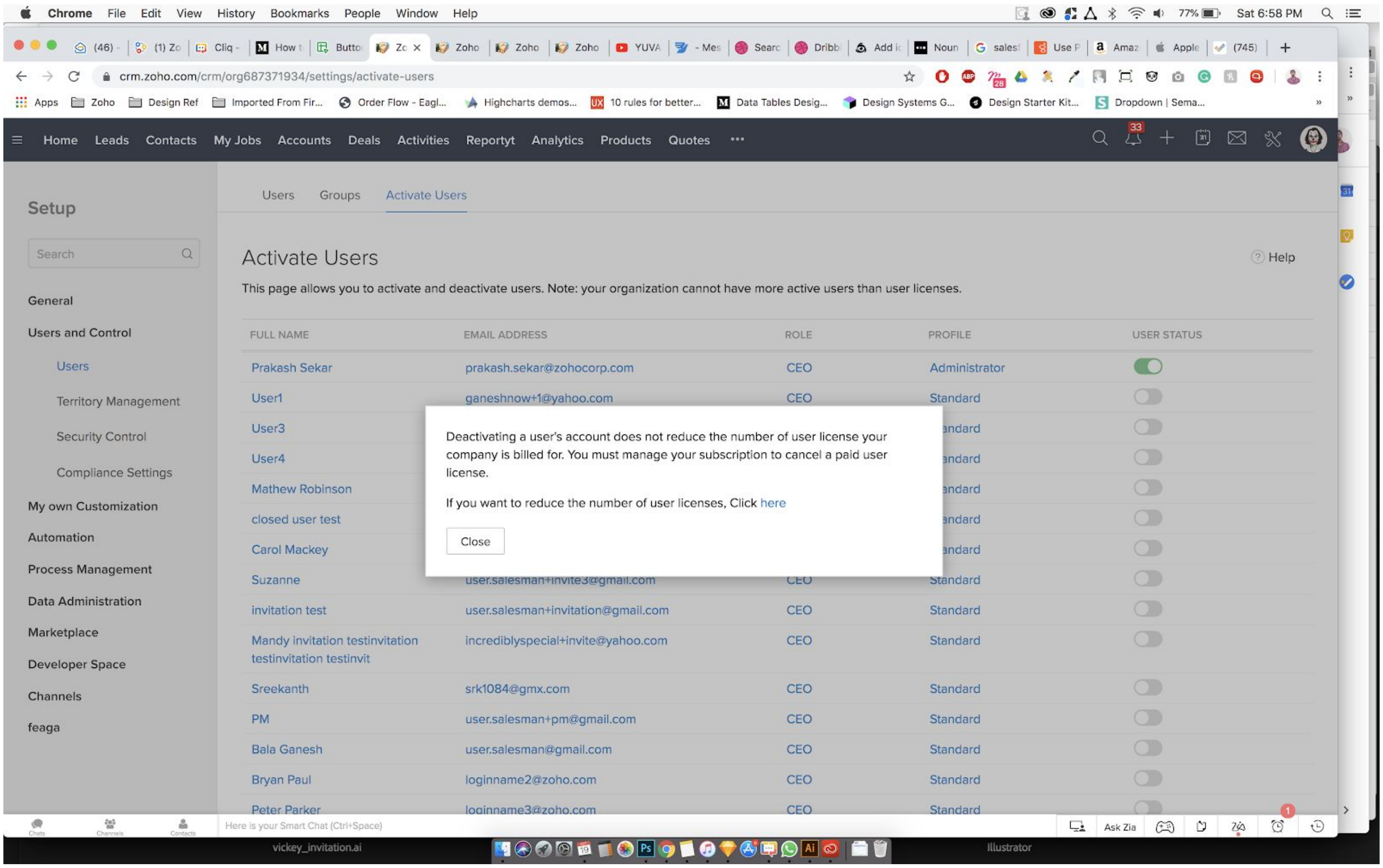


Pain Points: As a user I'm create the new group. But what is the purpose of having a "New group" alone? What are we doing here, creating? Or adding? delete?

Solution: Need to change the call to action as "Create New Group". When user click the Create new group the detail page should explain the same message. So the title should be "Create New Group" and the call to action should be Create/Create Group.

Conclusion:

Page Name : Deactivate Users

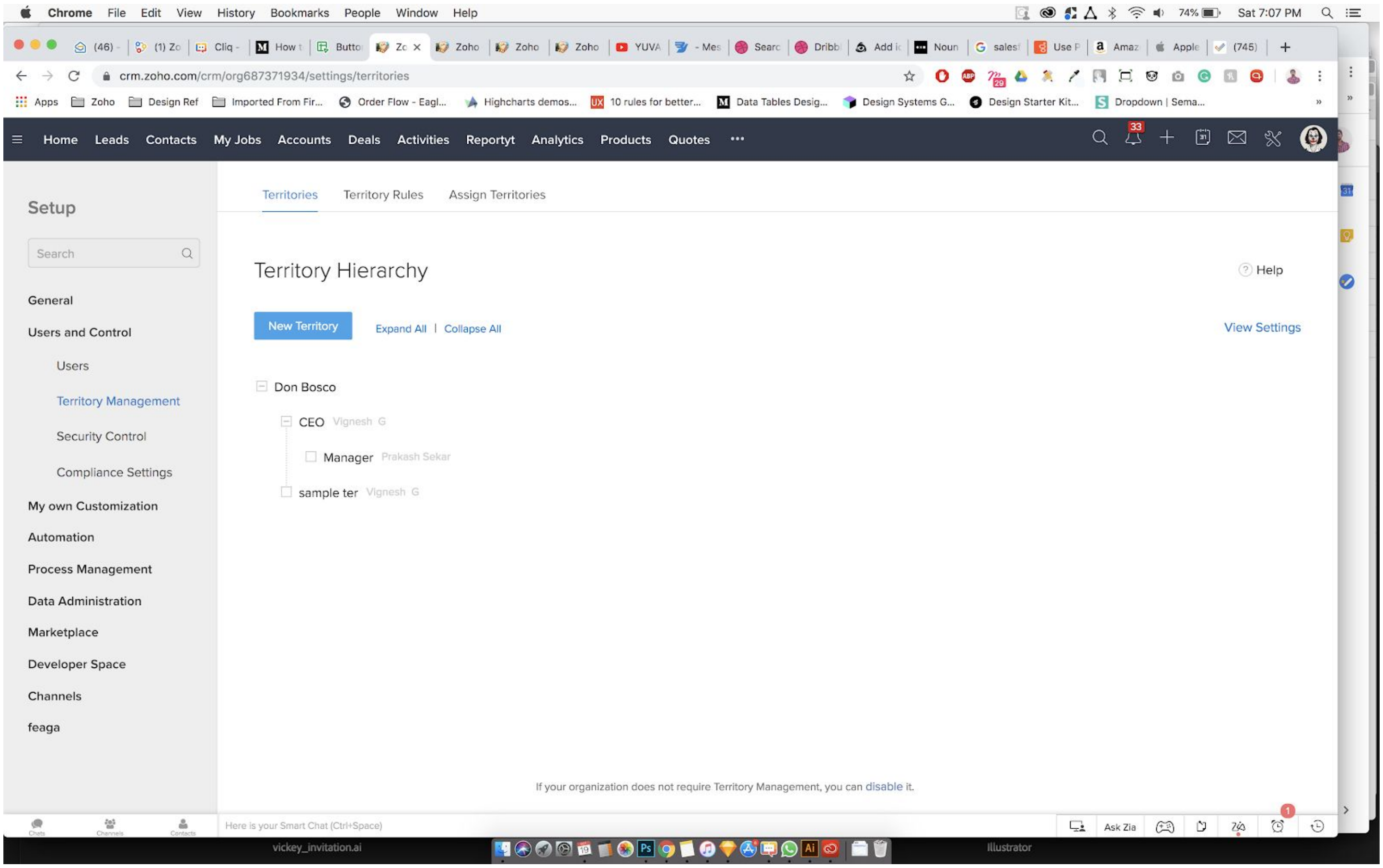


Pain Points: When I click the user status its activated. And when I turn off the active mode the popup comes. This is one of the important messages but it's not look like important or it's not readable. First time I skip this like an info next time only I ready the information clearly.

Solution: Need to change the popup style and the buttons.

Conclusion:

Page Name : Territory Management



Pain Points:

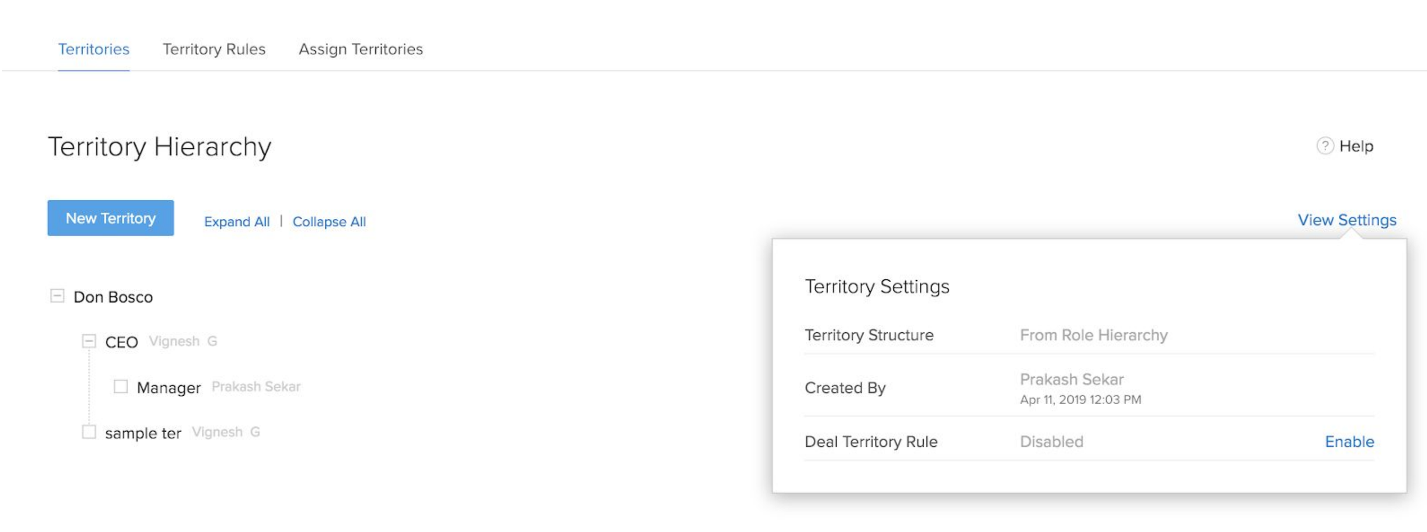
1. The button actually create the new territory but it looks like adding one.
2. Why do we need to expand all & collapse all button here?

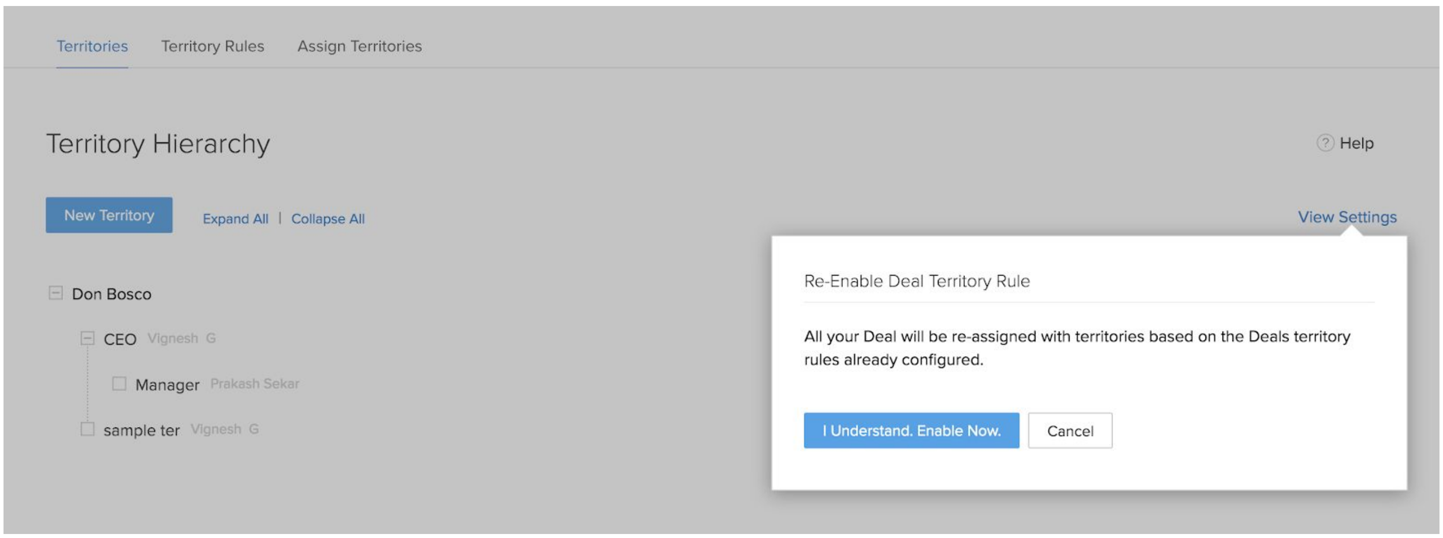
Solution:

1. The button should be “create new territory”
2. As a user I can able to see the territory hierarchy at all the time. That’s the purpose of visiting here. If I can able to add multiple territory means I can able to hide one and view another. But here I can see only one territory so there is no need of expand/collapse.

Conclusion:

Page Name : Territory settings



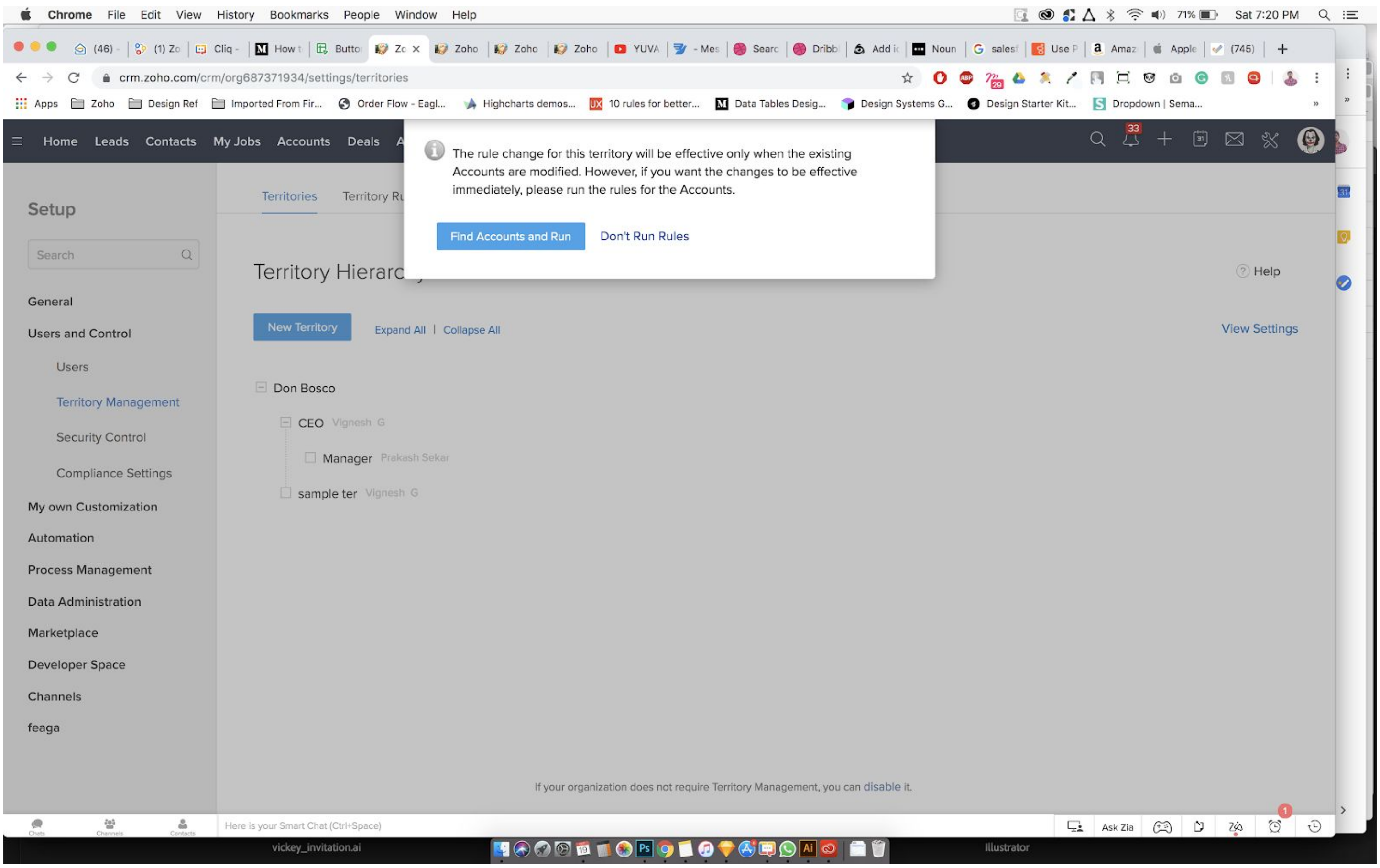


Pain Points: Unexpected popup behavior.As a user I can see all the popup at the top but suddenly this action comes in the same place.

Solution: All popup should be placed on the top and should follow the popup/alert/info style.

Conclusion:

Page Name : Edit territory with adding new rule

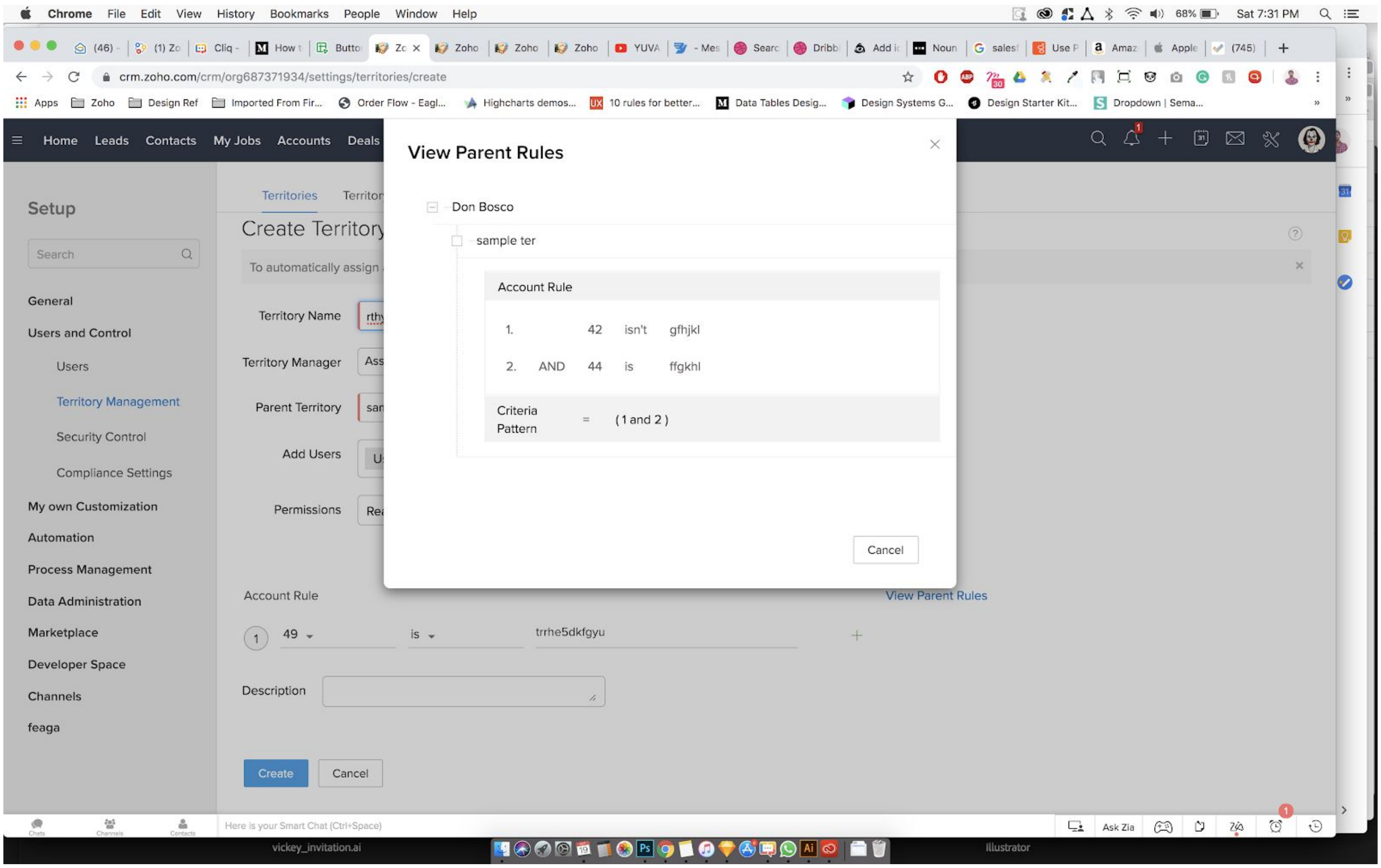


Pain Points: When I give a criteria to the existing user i can see this popup. The content on this popup is not readable. Only i can see at first sight is to "find account and run". And secondary button looks different style than usual.

Solution: All information or alert should follow the popup/alert/info style.

Conclusion:

Page Name : View Parent Territory

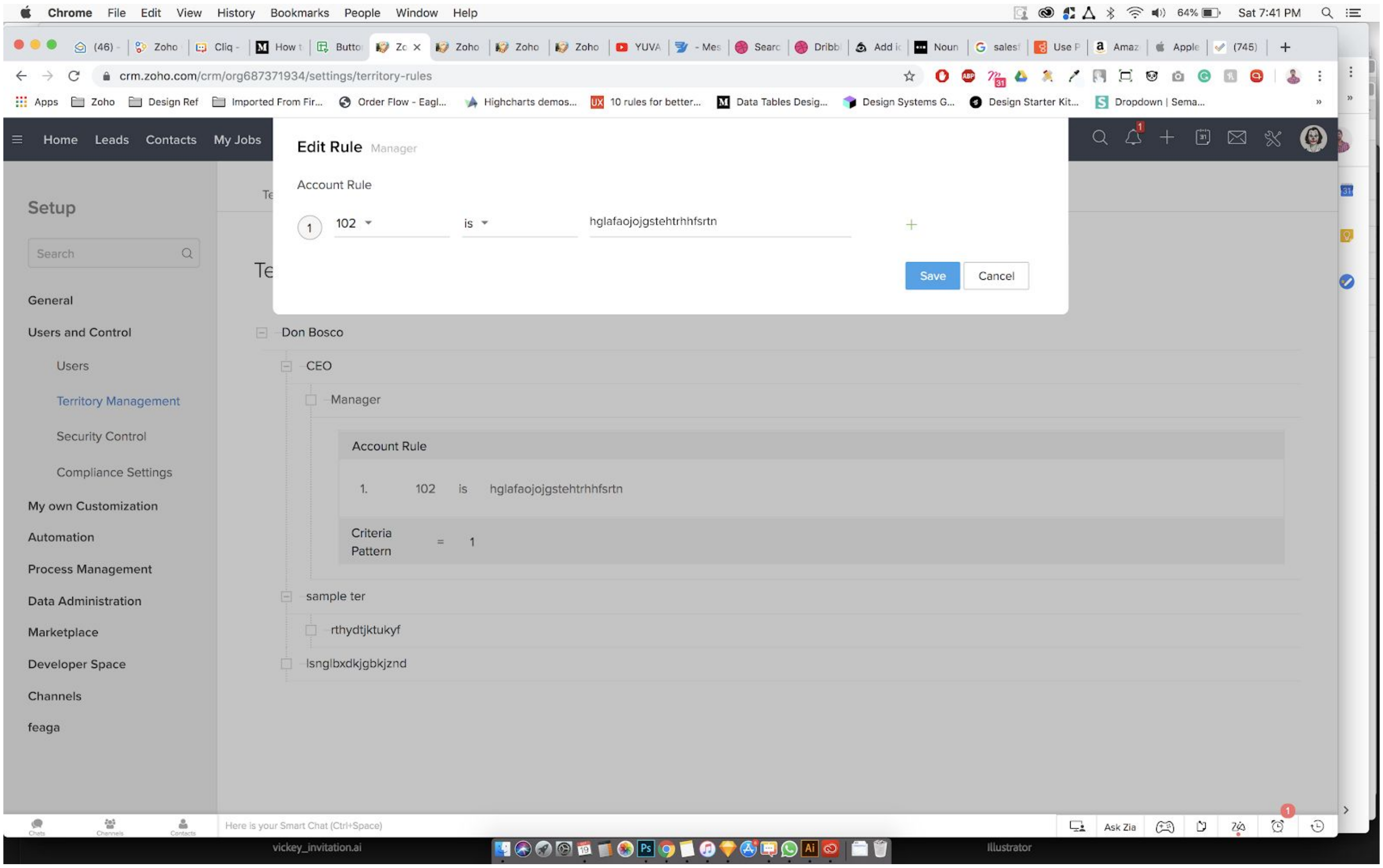


Pain Points: When I click the “view parent rule” I got this popup. Information with cancel button and close icon.

Solution: we should follow only one action to close the popup. It should be close or it should be “done”. We don’t use close icon for all the popup, we use buttons on the popup all over the place.

Conclusion:

Page Name : Territory Rules

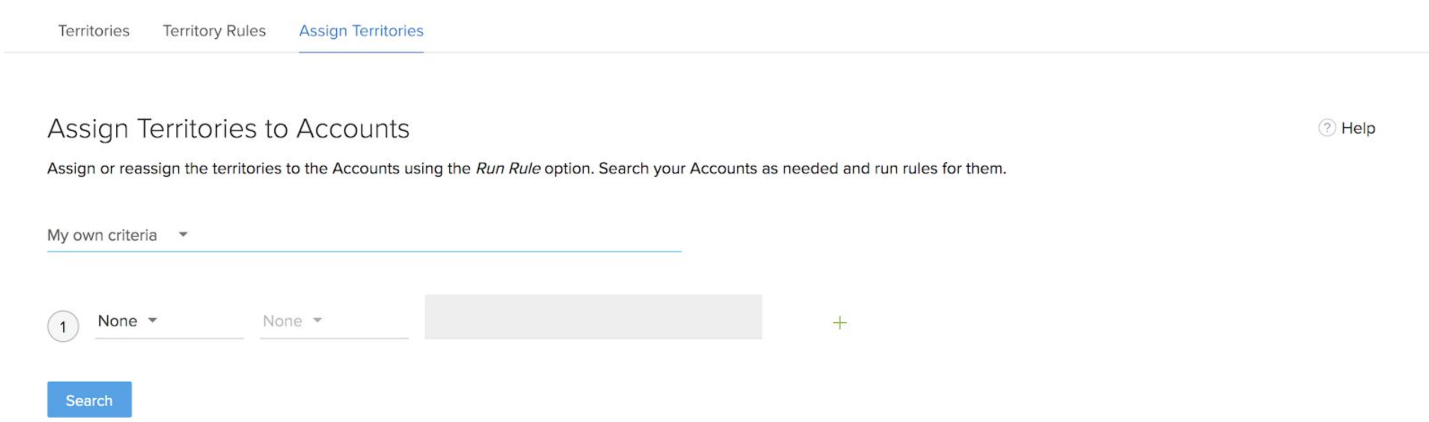


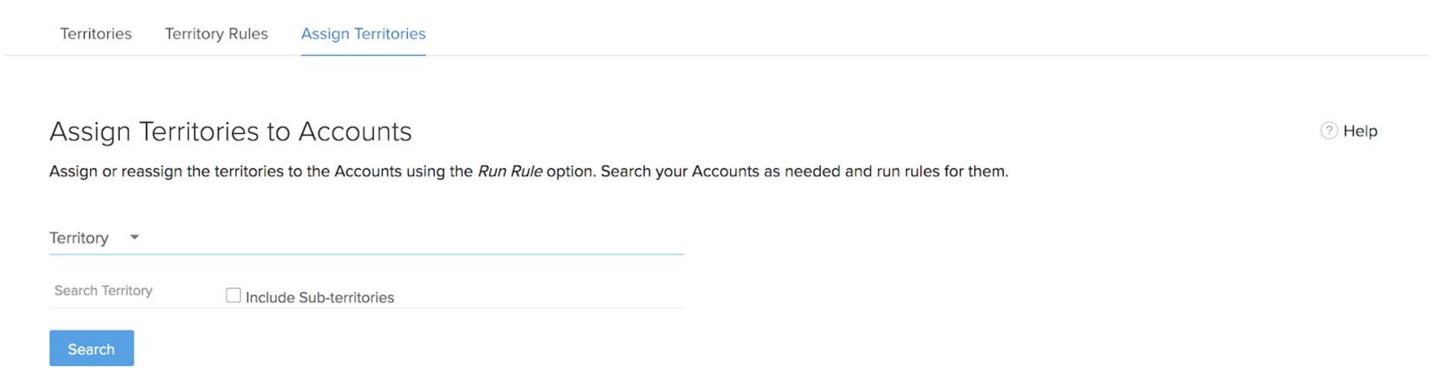
Pain Points: Unexpected button style. I can see all the primary actions at the right side and the secondary options on the left side.

Solution: Button placement should be changed in the usual style. Save button should be on the right side and cancel button should be left side.

Conclusion:

Page Name : Assign territory



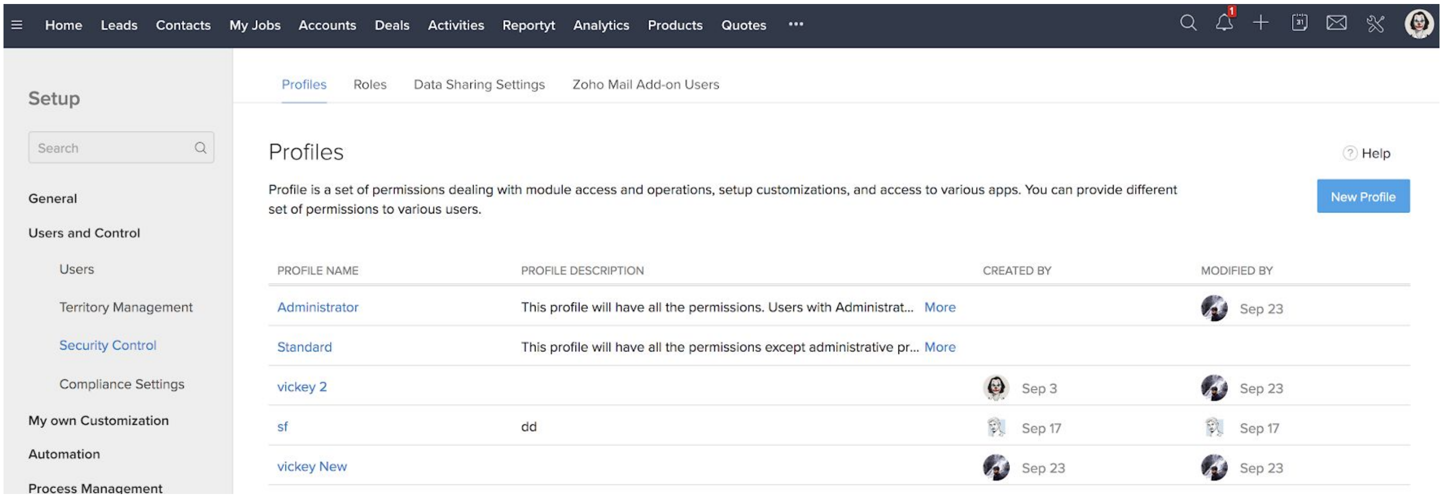


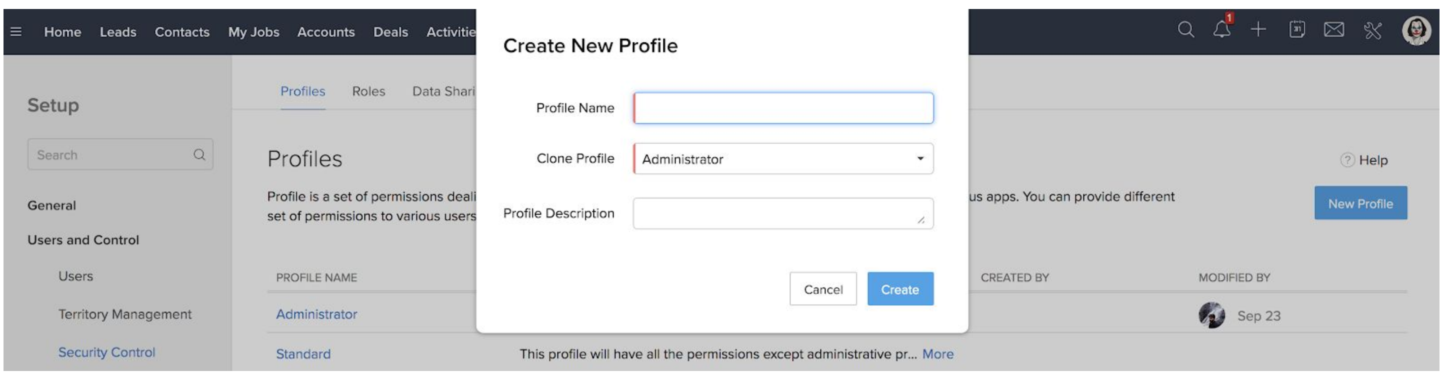
Pain Points: Search? Here the description is too length so I skip that but I understand I have to select an account to run rule. But here I can see only search button.

Solution: The button should be search account. So that user can able to understand that we can select the account based on criteria/territory.

Conclusion:

Page Name : Security control - Profiles



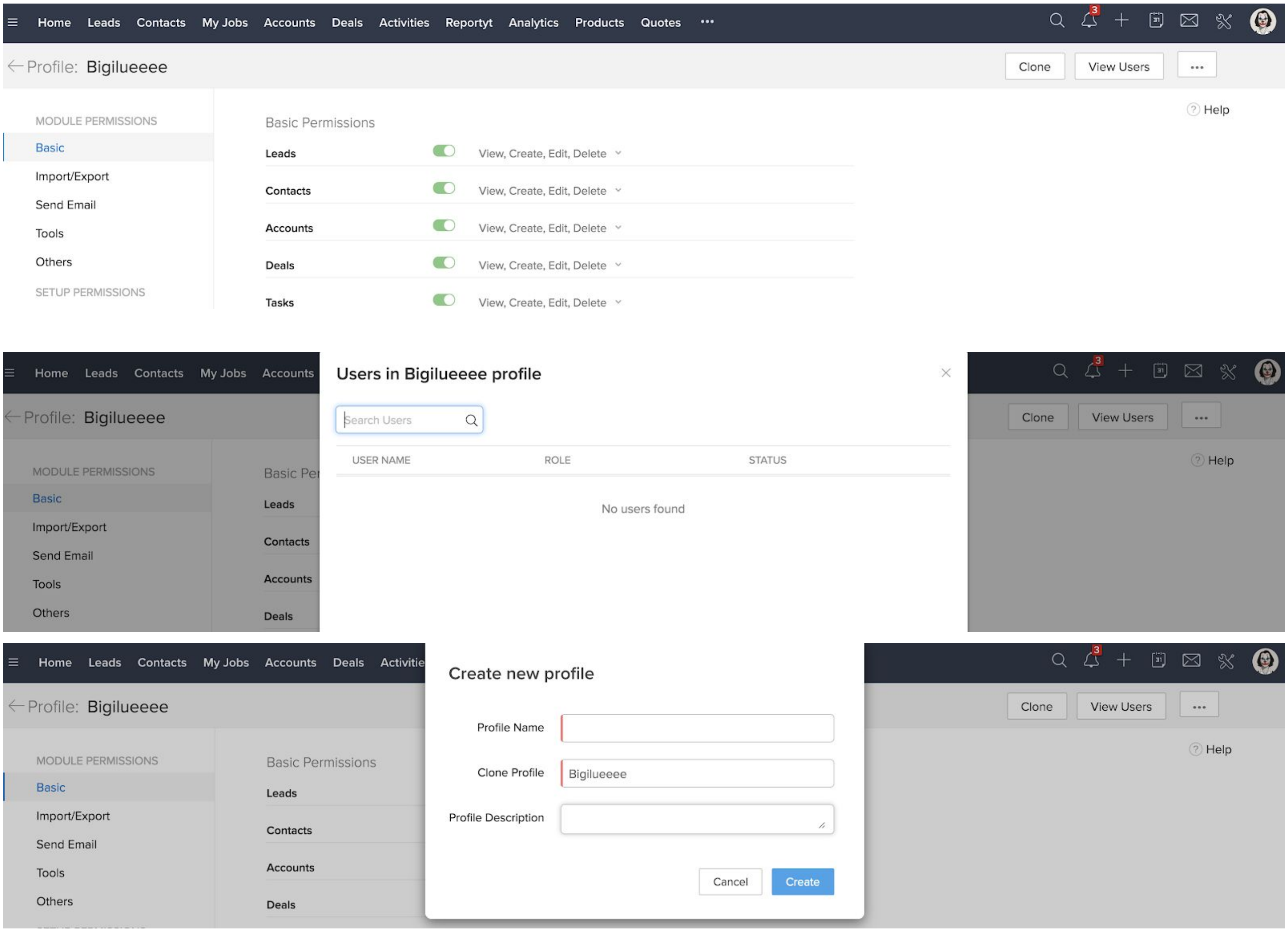


Pain Points: Here i'm creating a profile but the call to action is simply "New profile"

Solution: CTA should be Create new profile

Conclusion:

Page Name : Security Control - Profile



Pain Points:

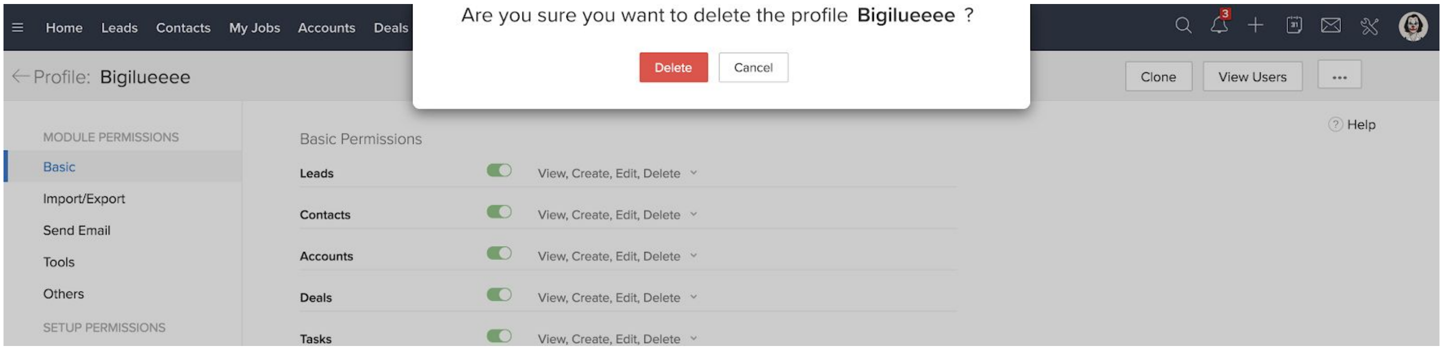
1. Here I can not able to see the Primary action. I don't know how to save these changes. And there is no information about auto save.
2. When I click View user I can see there is no users in this profile, But where can I add the users? There is no option here and I don't know how to add the user here.
3. When I click clone it ask me to create a new profile. Is it really a clone this profile or creating new profile?

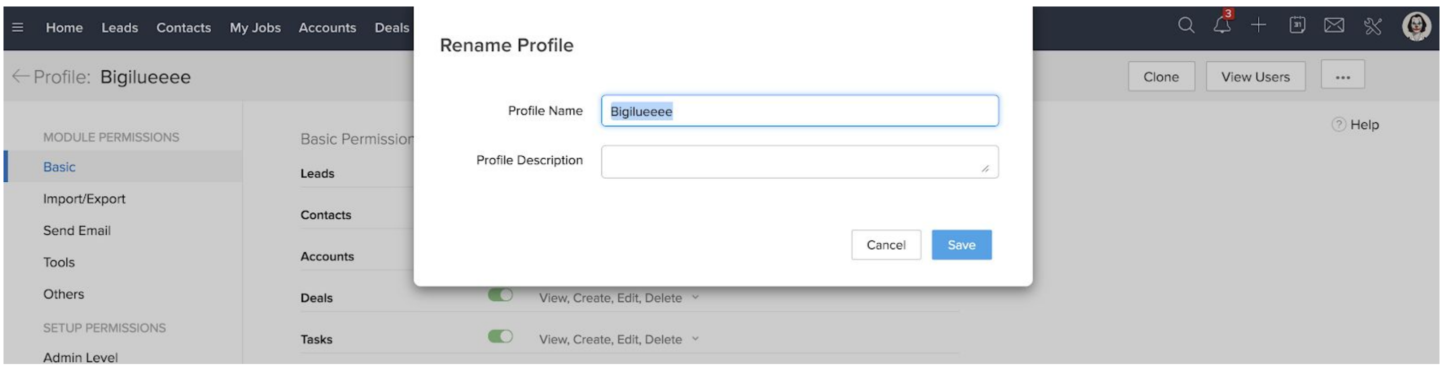
Solution:

1. The primary and secondary action "Save" cancel should be on this page. We don't use auto save for other features so here we should follow the same.
2. As a user I'm expected to view the user and I can see there is no users in this profile. But I need an option to add users from here. So we need to have the button for "Add users" here.
3. The popup should have a clone profile title and the call to action should be clone profile.

Conclusion:

Page Name : Rename & Delete





Pain Points:

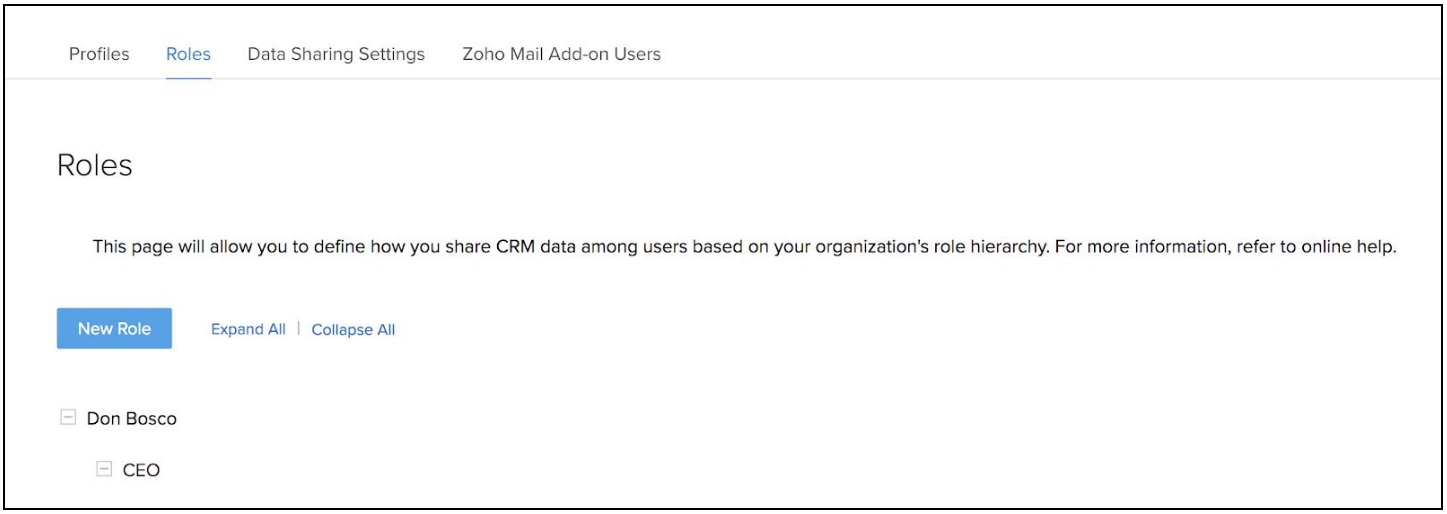
1. Delete popup is hidden half in the top. It’s not a usual style we follow for the delete/alert popup. All of a sudden I can see button on the center. And the info of delete the profile in different style.
2. Why there is a profile description is renaming the profile? Do we really need this while renaming?

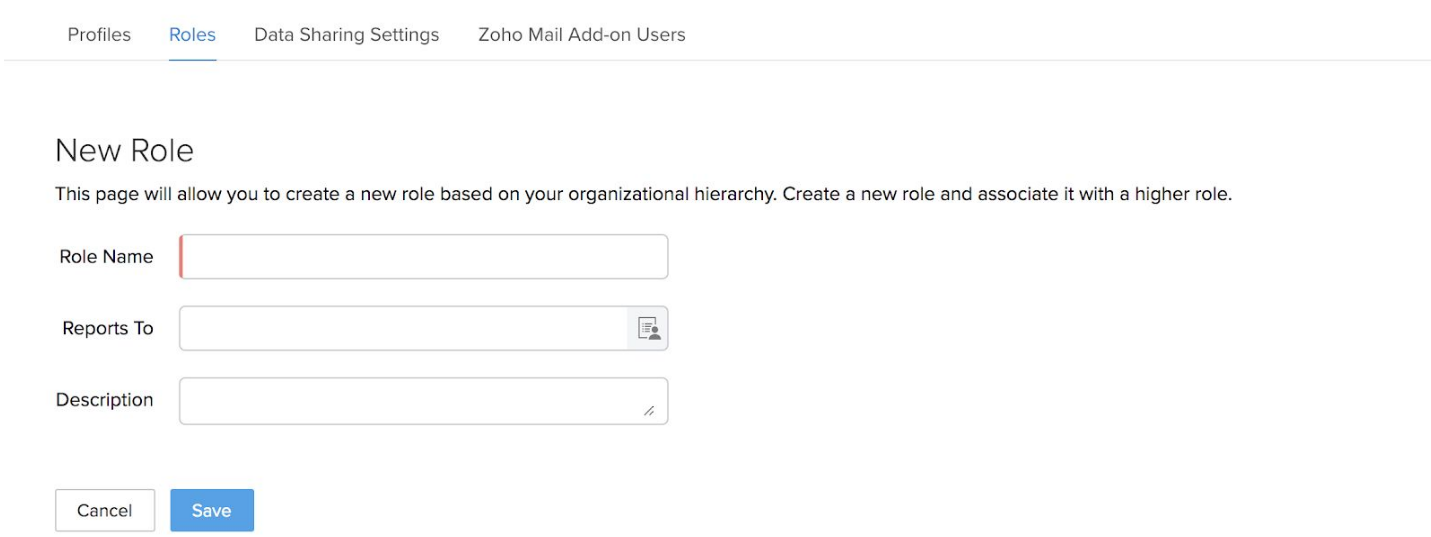
Solution:

1. Delete/alert popup should be same style so that as a user I can able to see the call to actions and the content of the alert in the same way.

Conclusion:

Page Name : Security Control: Create New Role



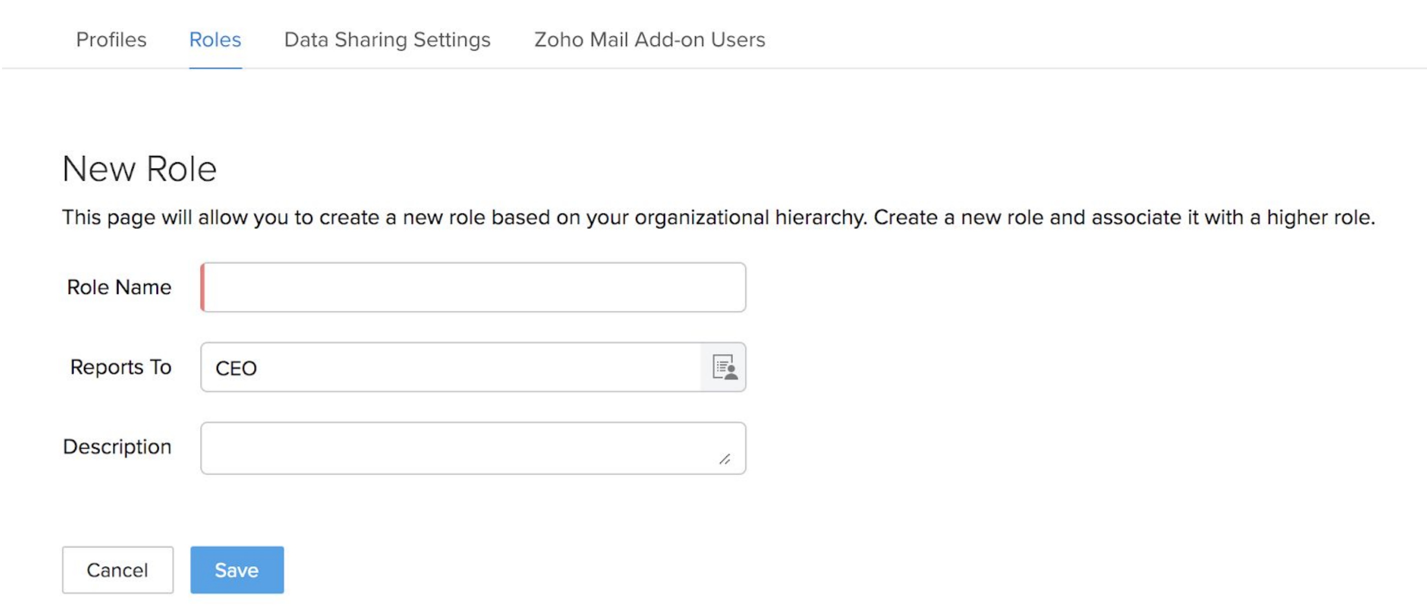


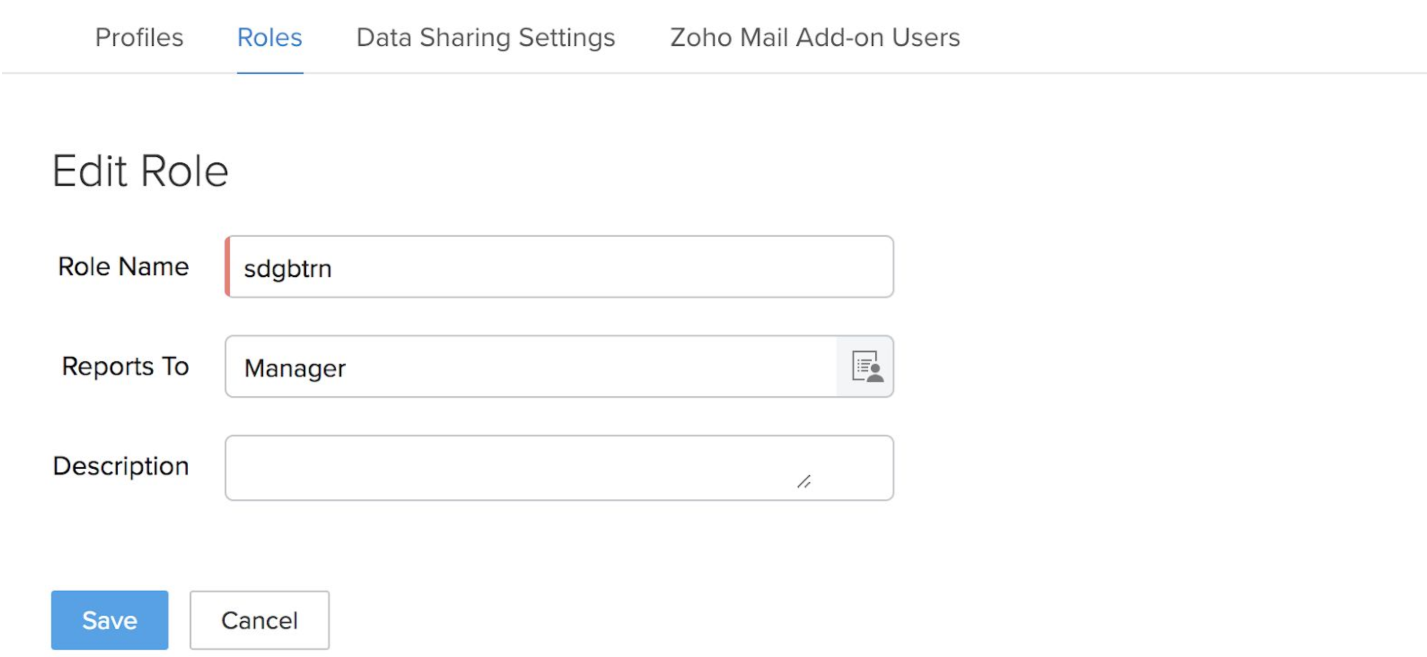
Pain Points: New Role button

Solution: Here I'm creating a new role so the button should be "create new role" and the title should be create new role with Create Role button instead of Save.

Conclusion:

Page Name : Security Control: Create / Edit Role



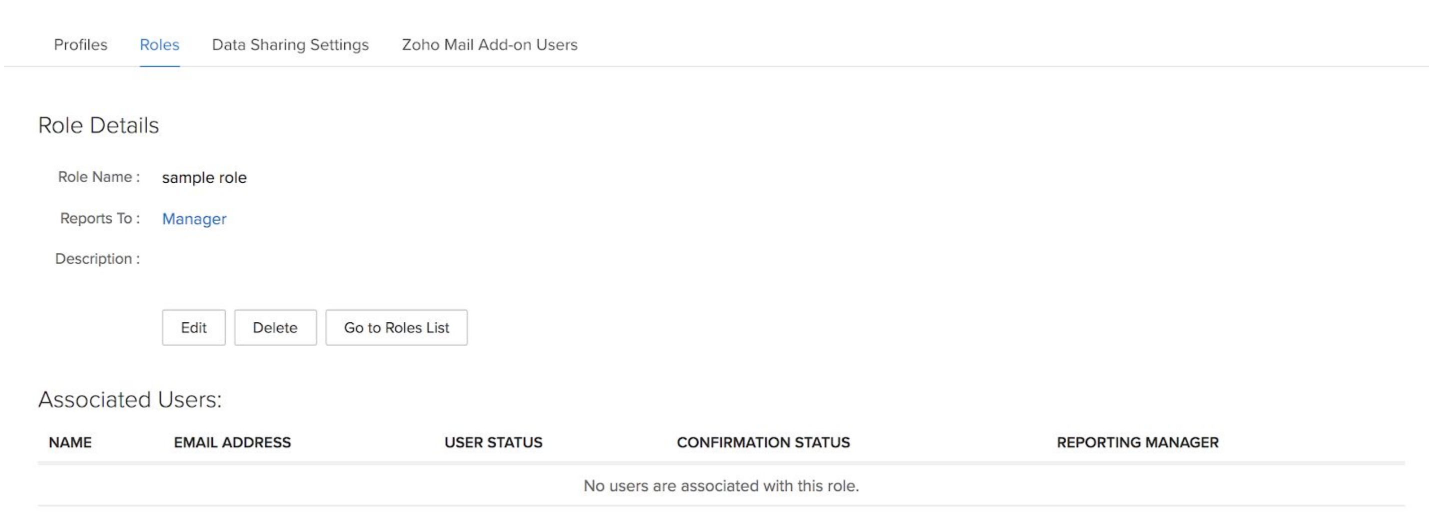


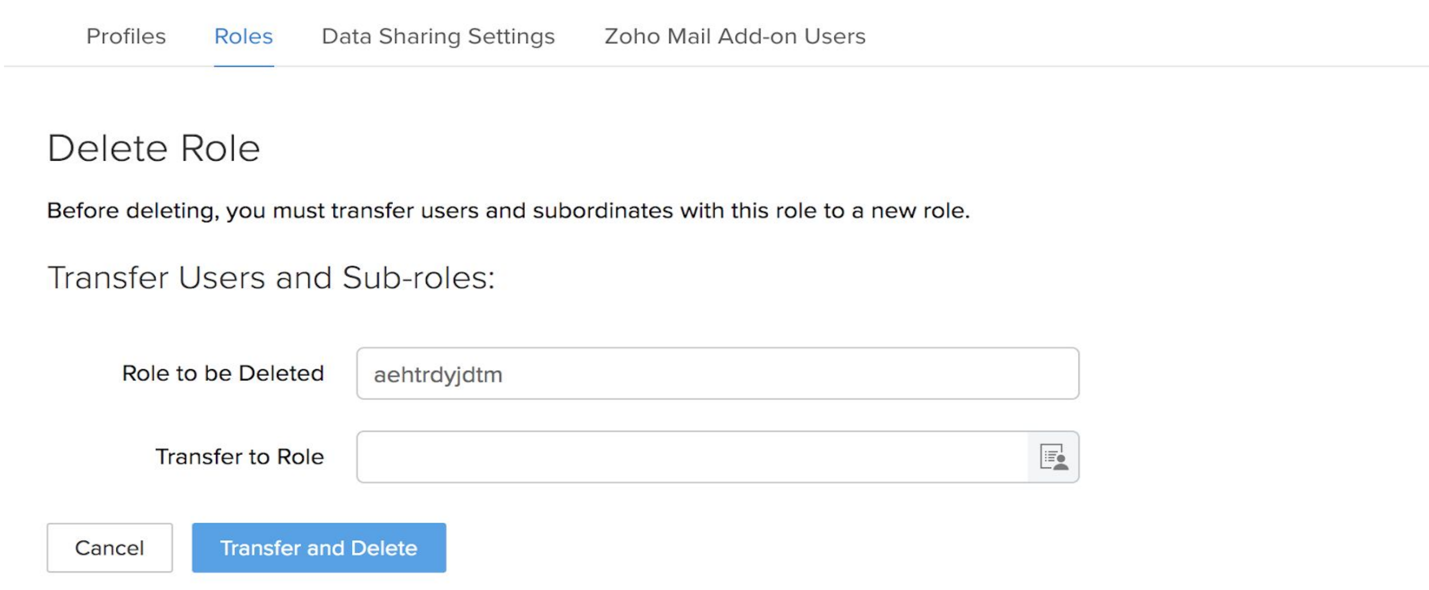
Pain Points: When I click the create new button the alignment looks usual style. But when I edit the role it's changed to left side.

Solution: Need to change the button alignment.

Conclusion:

Page Name : Security Control: Create New Role detail page & Delete Role





Pain Points:

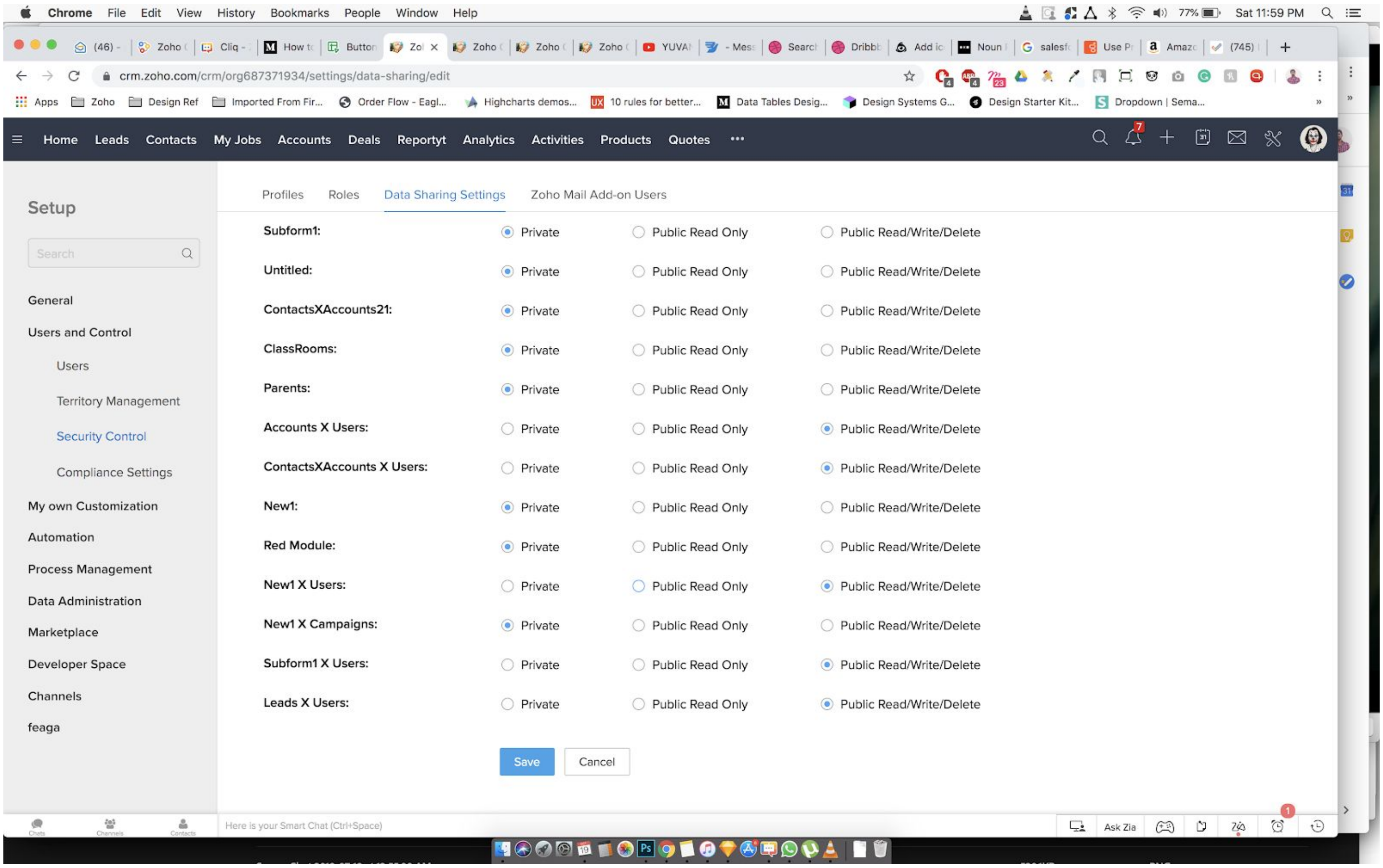
1. There is no back button to go back to list. Instead of that we use the go to list button which we don't use in all the places.
2. There is no associated users here so How can I associate? There is no option to associate the users.
3. Dete the role - By click the delete button I have to transfer my users to another role but it's not mandatory. It comes once I click the transfer button. And then I choose the user and click the button.

Solution:

1. Need to remove the back button and have to place it on top(before title)
2. We need to place the new button "Associate Users" so that user can associate from here.
3. The field should be mandatory. And need to change the button alignment.

Conclusion:

Page Name : Edit All permission

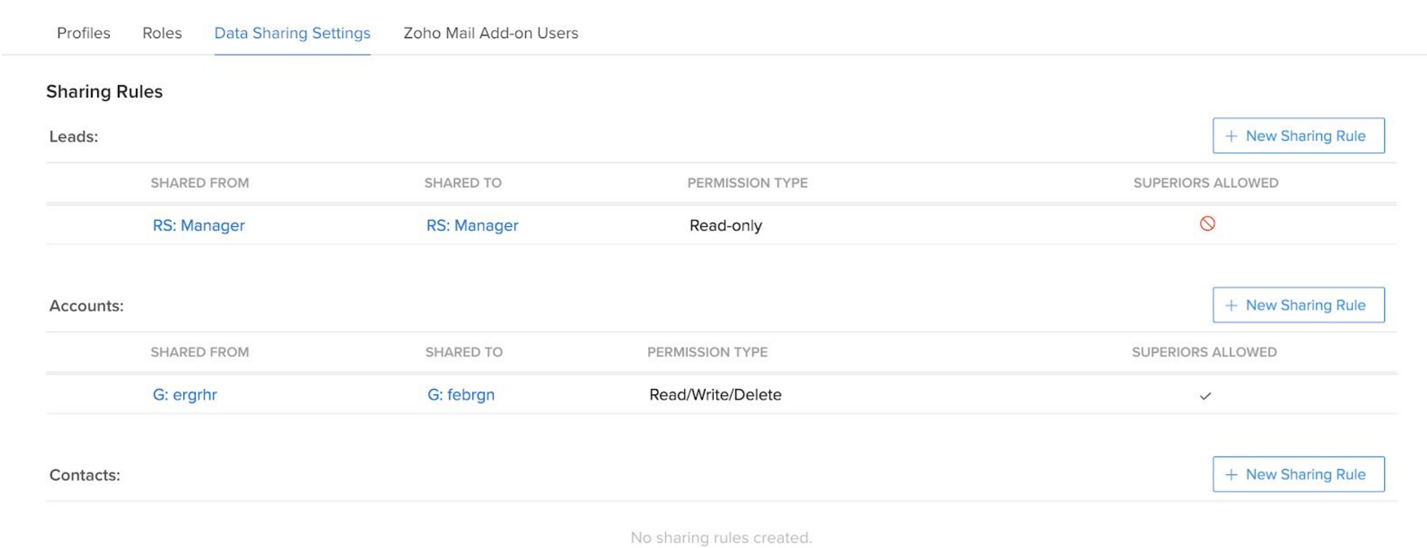


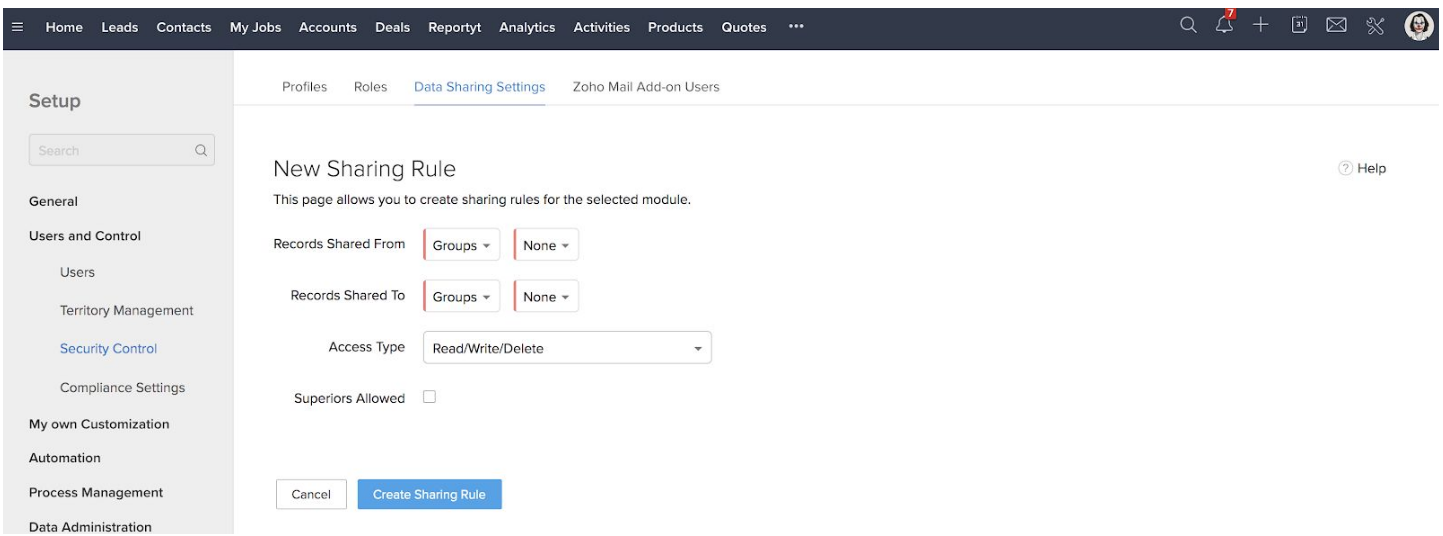
Pain Points: Call to action is not visible in the first visit

Solution: Button should be placed on the top right with default style. So that user can able to easily identify.

Conclusion:

Page Name : Sharing Rules





Pain Points:

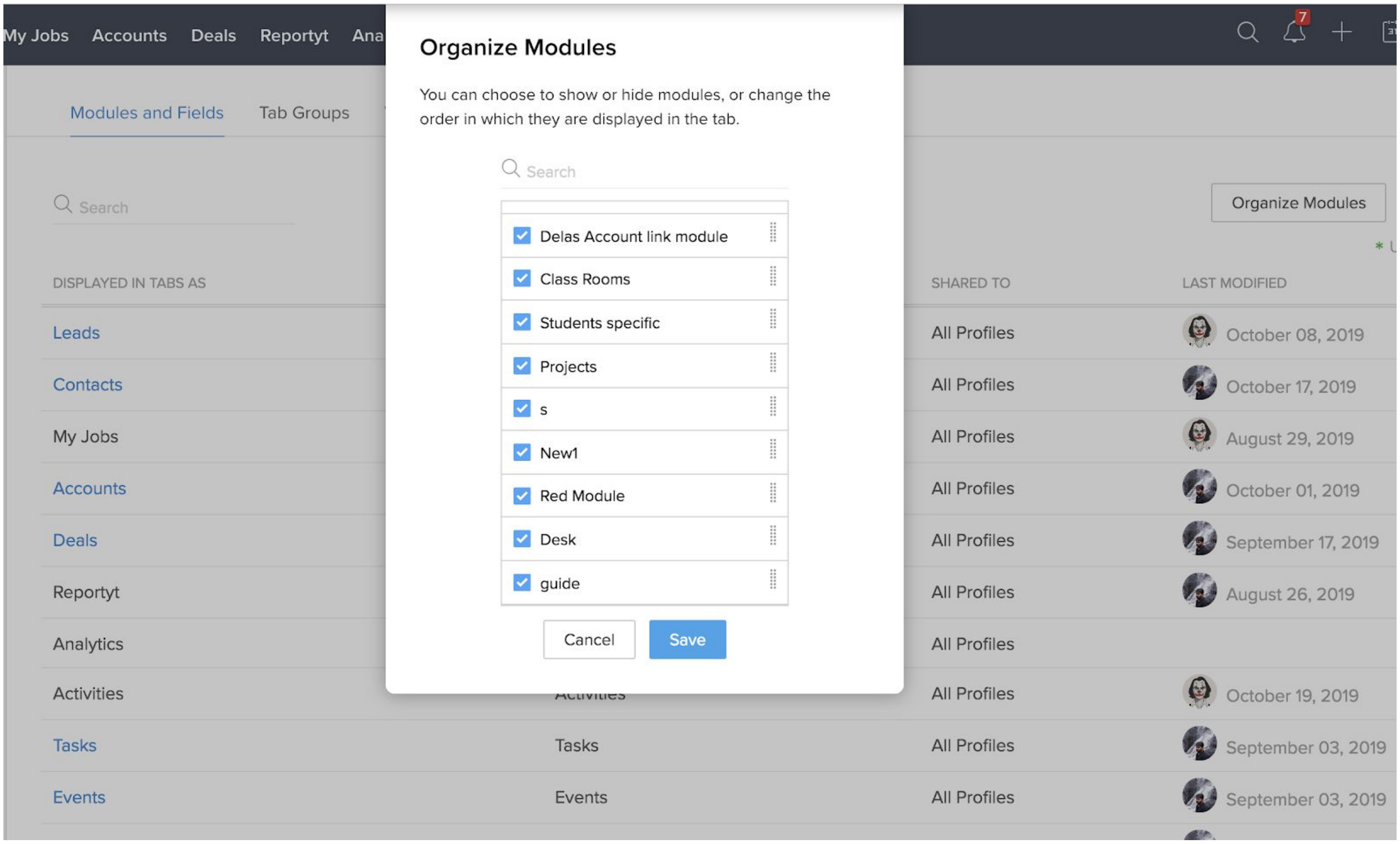
1. Repeated button for every module. And the buttons having "+" instead of add.

Solution:

1. Instead of showing all module with +New sharing rule button. We can change this as a single list and then ask the user to choose the module when created. So that we can avoid number of same buttons repeated in this page.
2. The button alignment should be default style(right aligned). The title should be create new sharing rule.

Conclusion:

Page Name : Organise Modules



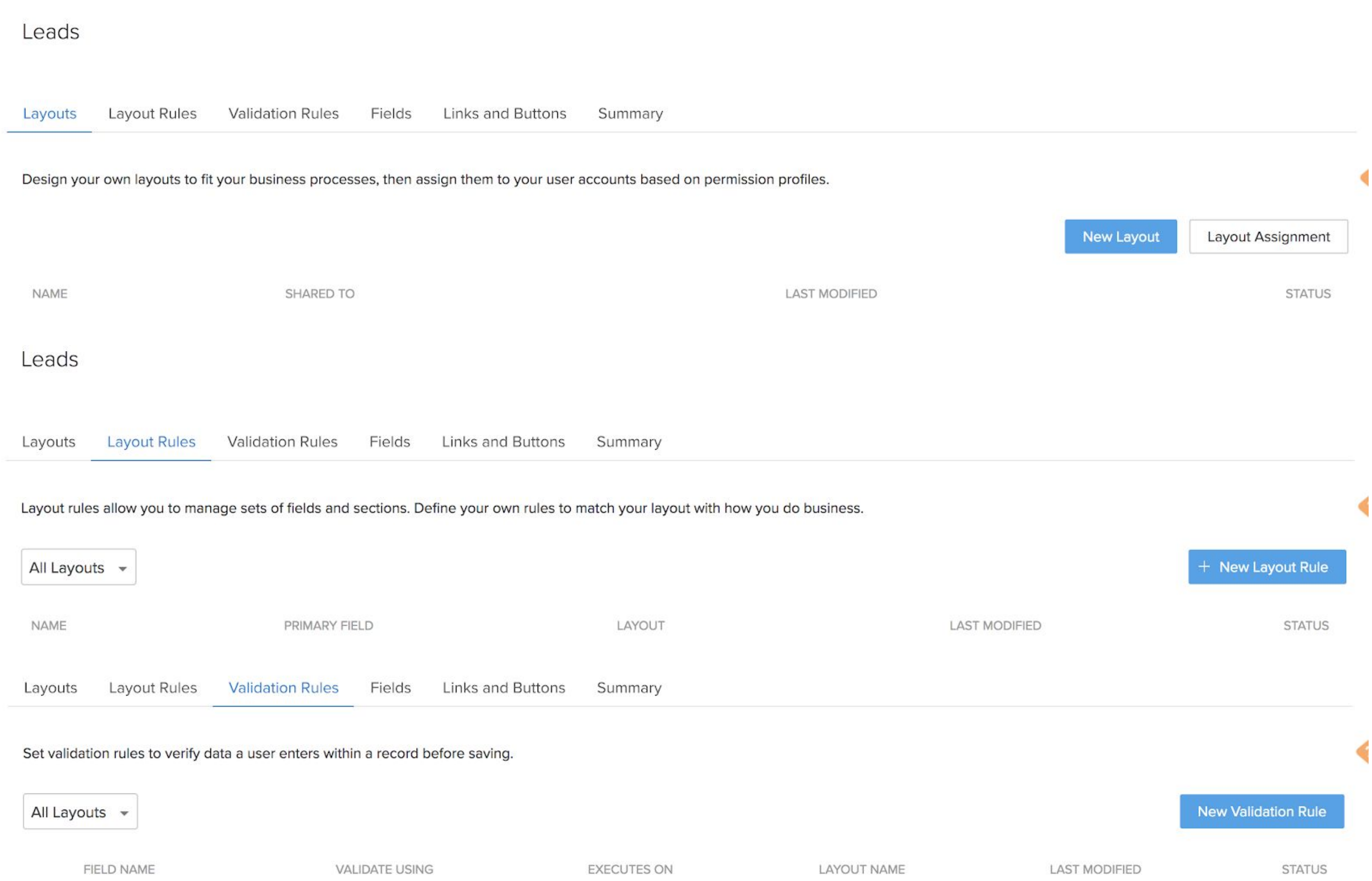
Pain Points:

1. Button Alignment is different. When I try to hide the module I have uncheck the module in a list suddenly it goes down in the list. I try to move to the same position and then click the save. Why it should goes down?

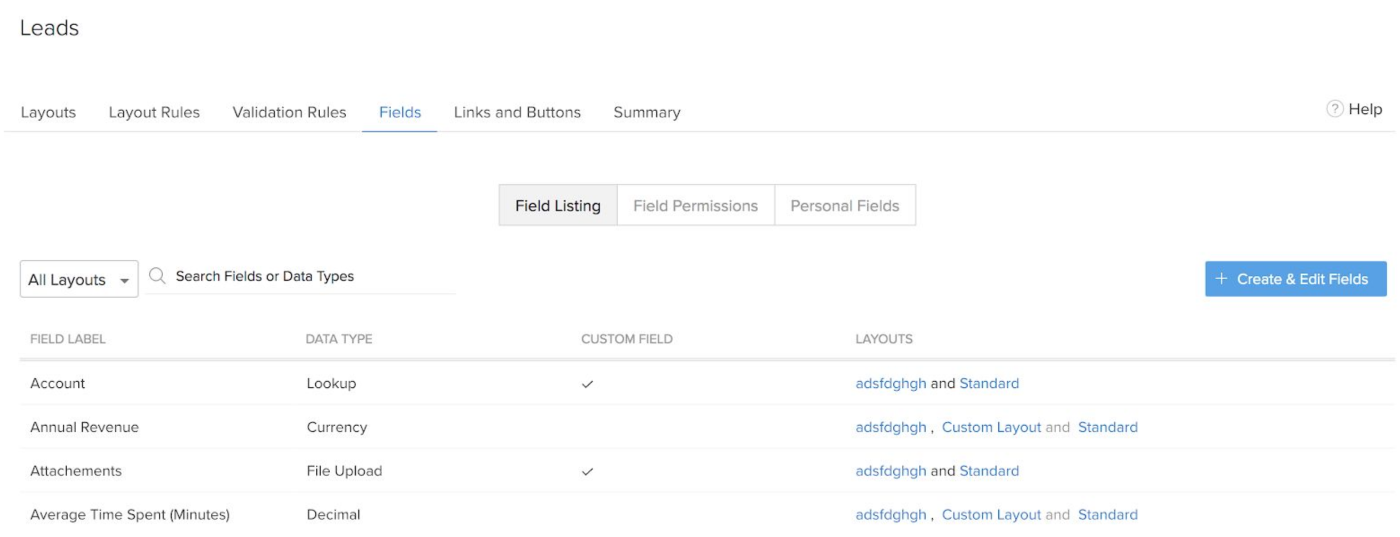
Solution:

1. Button Alignment should be right side. And when I uncheck the module it should be in the same place so that I can understand it's hide in the same position. When I needed I can click the check again and it comes to the same position. If needed I can move this to another place.

Conclusion:

Page Name : Module

Pain Points: Having Different Style buttons in the next tabs looks inconsistent of the create button.
Solution: We should follow the same style in all these places. Create Layout, Create Layout Rule, Create Validation Rule.
Conclusion:

Page Name : Fields

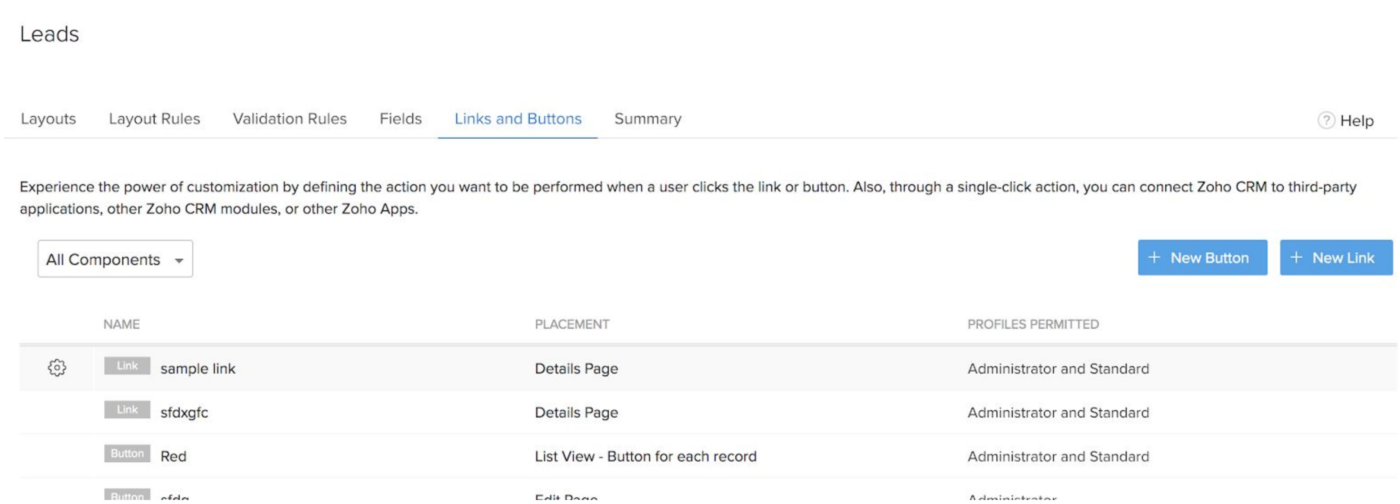


Pain Points: Got bit confusion about the button. Is it Add/Create/Edit fields

Solution: Actual function is edit the fields in the existing modules so the call to action should be Edit Fields.

Conclusion:

Page Name : Links & Buttons

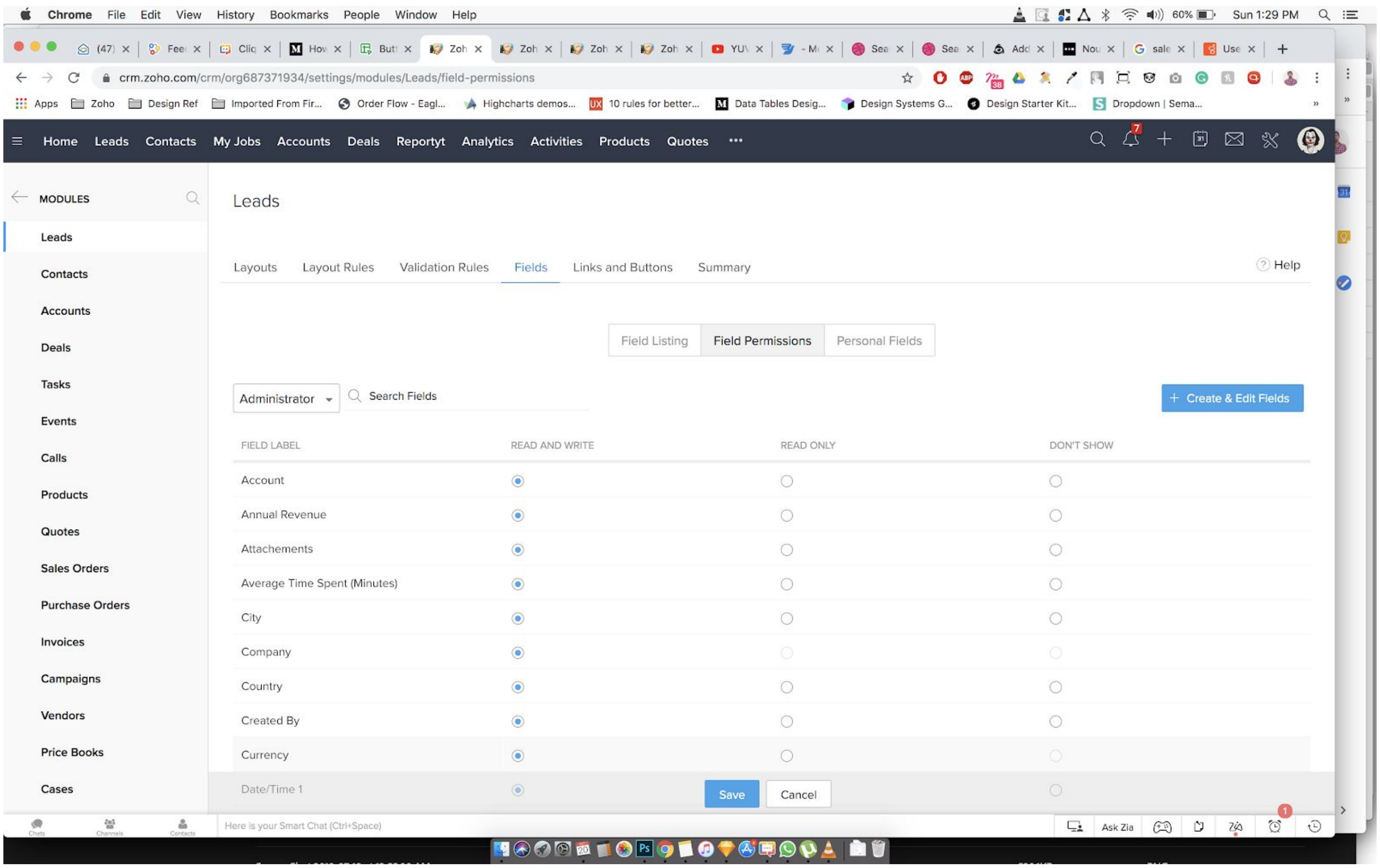


Pain Points: Similar buttons with +New.

Solution: We have this option to create new button/Link so the action should be “Create Button” “Create Link” So we can group the button with mostly used “Create button” first and then keep the link inside the dropdown.

Conclusion:

Page Name : Field Permission

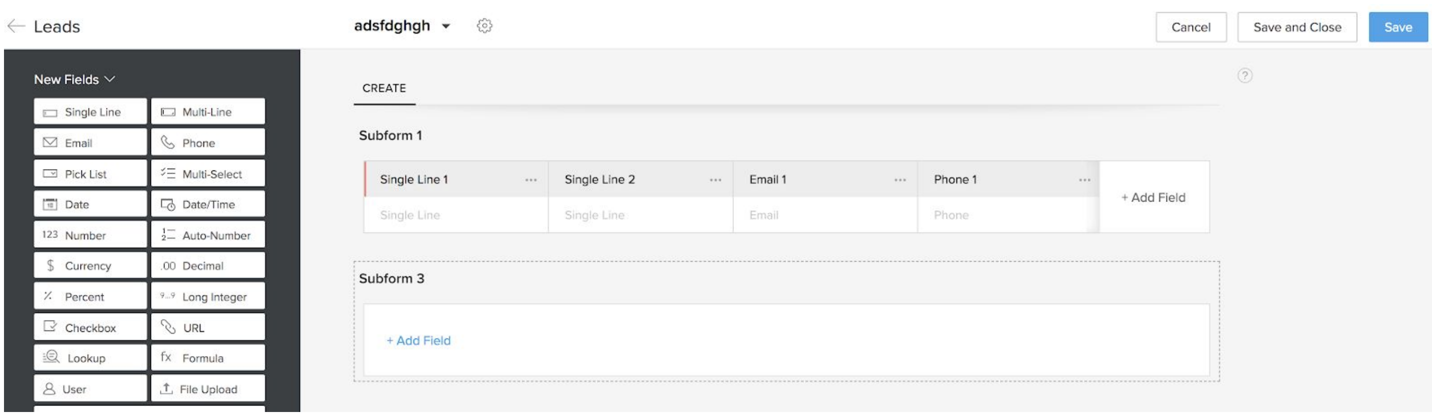


Pain Points: Save&Cancel button alignment is different.

Solution: Button alignment should be on the right side of the page with default style (Primary on the right side)

Conclusion:

Page Name : Module Builder



Pain Points:

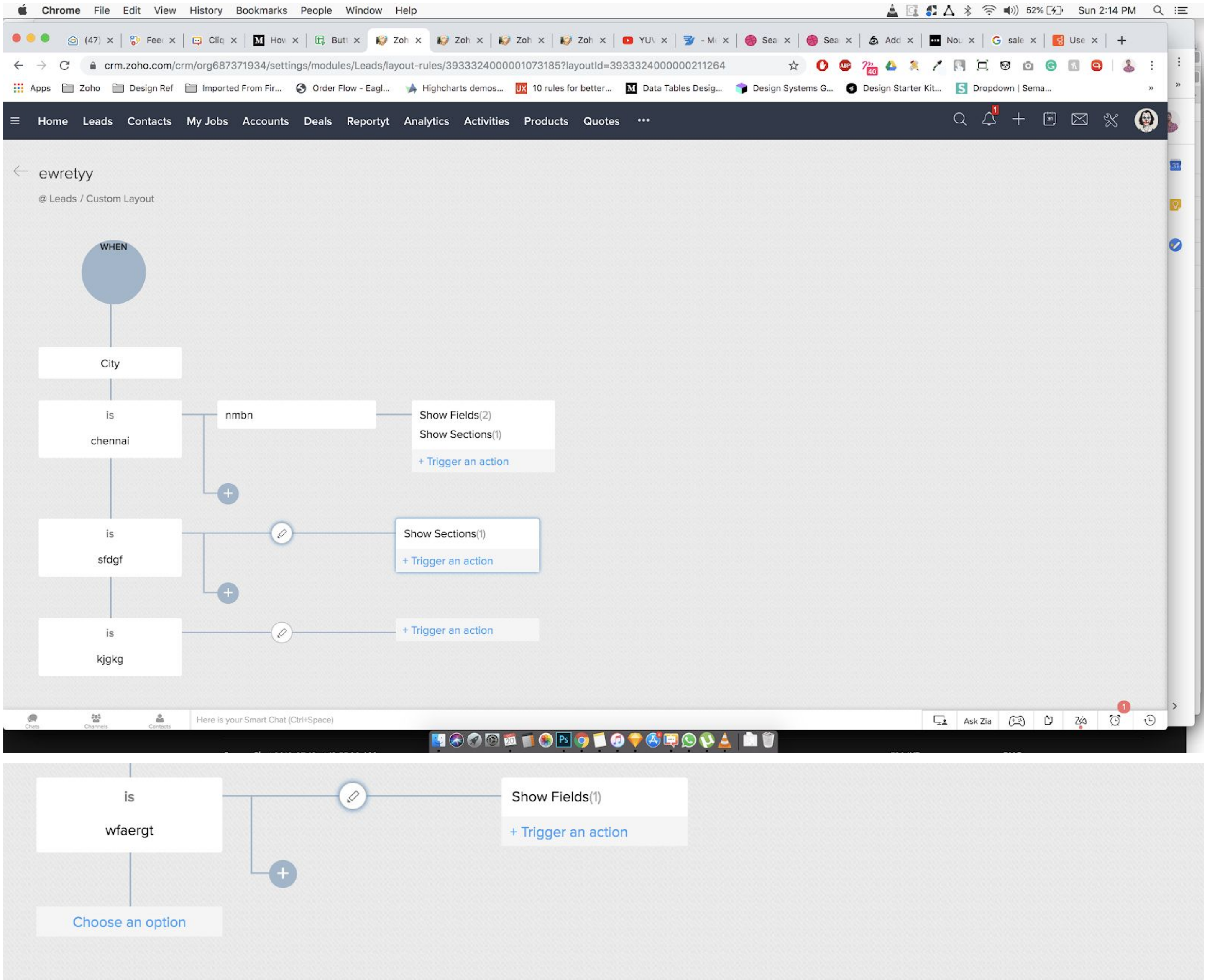
1. When I click the save button it's not closed (expected behaviour not happen). Why we need Save&Close and Save button?
2. + & Add convey the same meaning but both placed in the single action.

Solution:

1. As a user if I wanted to check the changes means I need an option to preview the changes. So that I can be able to view the changes in the same page. In this case we can remove the button "Save and Close" and keep preview as second priority so that It won't be confusing to the user when click the save.
2. Need to remove "+" from the action and it should be "Add New Field". If we need the "+" in any case we should use the icon.

Conclusion:

Page Name : Layout Rule



Pain Points:

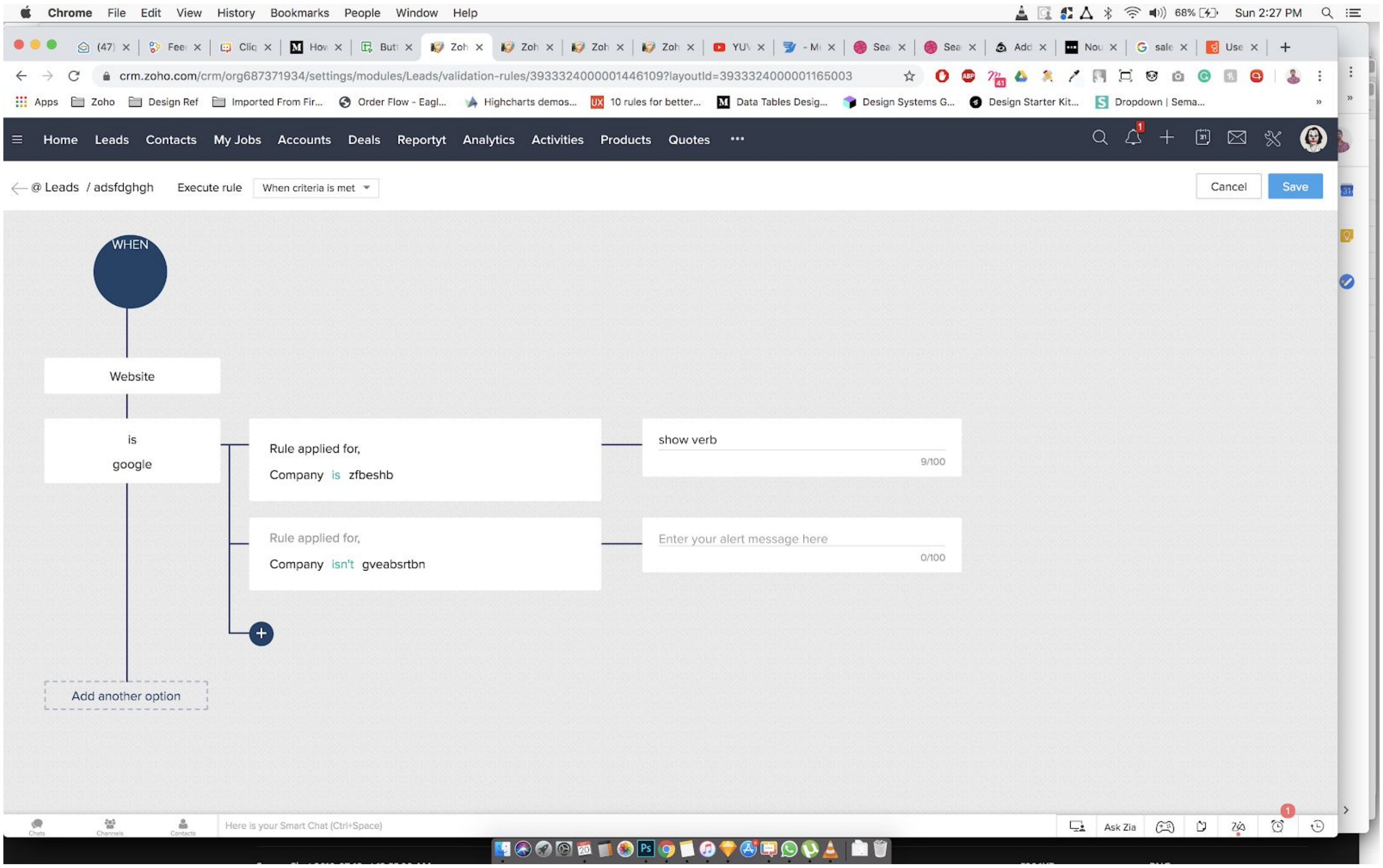
1. Here the “+” conveys Add trigger an action.
2. There is no save/Cancel button on this page.
3. There is no separation between the Rule name and the rule.
4. As a user i need to add criteria here but it shows choose an option

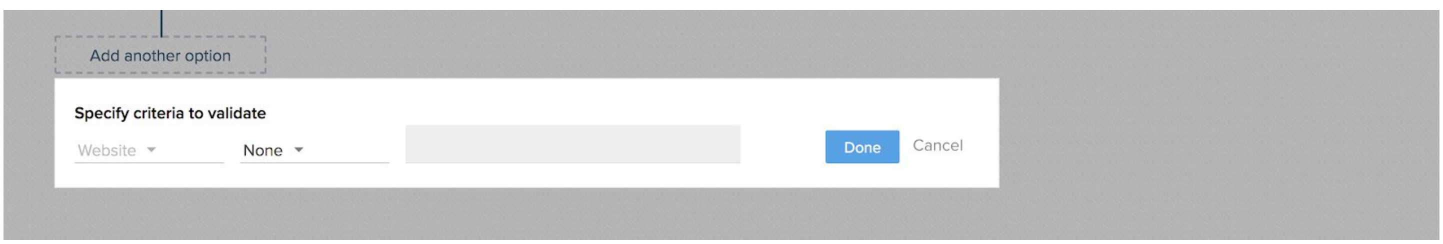
Solution:

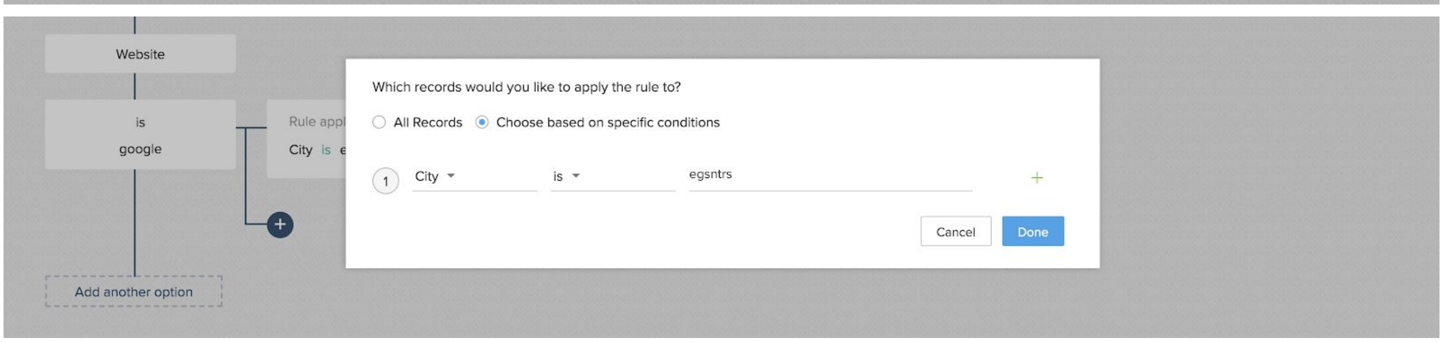
1. Action should be “add action”
2. Need save/cancel button in this page. As we don’t follow the auto save in other features we need to keep the consistency here.
3. Need a separation for the title and the rule.
4. Action should be “Add New Criteria”

Conclusion:

Page Name : Validation Rule







Pain Points:

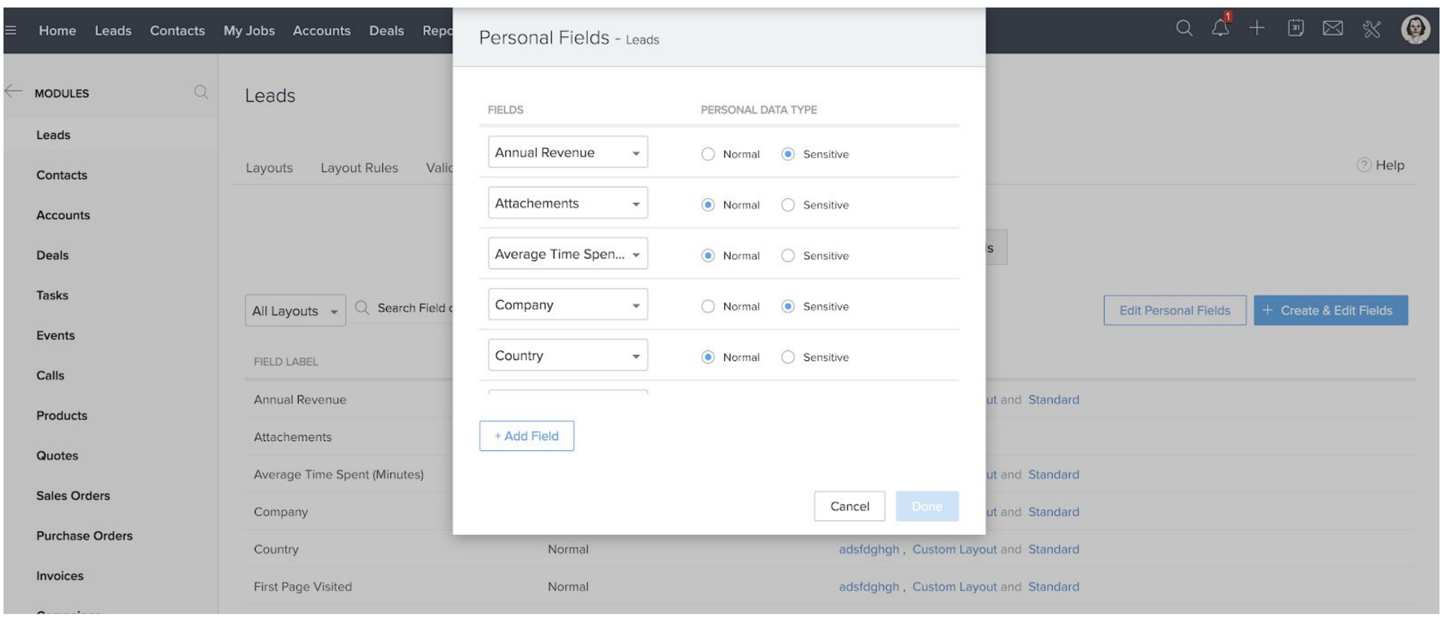
1. I need an option to save the message. I don't know if it is saved/not.
2. As a user i need to add criteria here but it shows Add another option
3. Button alignments are different for edit criteria and add new criteria.

Solution:

1. When user type the alert message we should give a done/save button while typing the message.
2. The action should be "Add New Criteria"

3. Need to follow the same style(Primary on the right side) in all the places.
Conclusion:

Page Name :Fields - Personal Fields

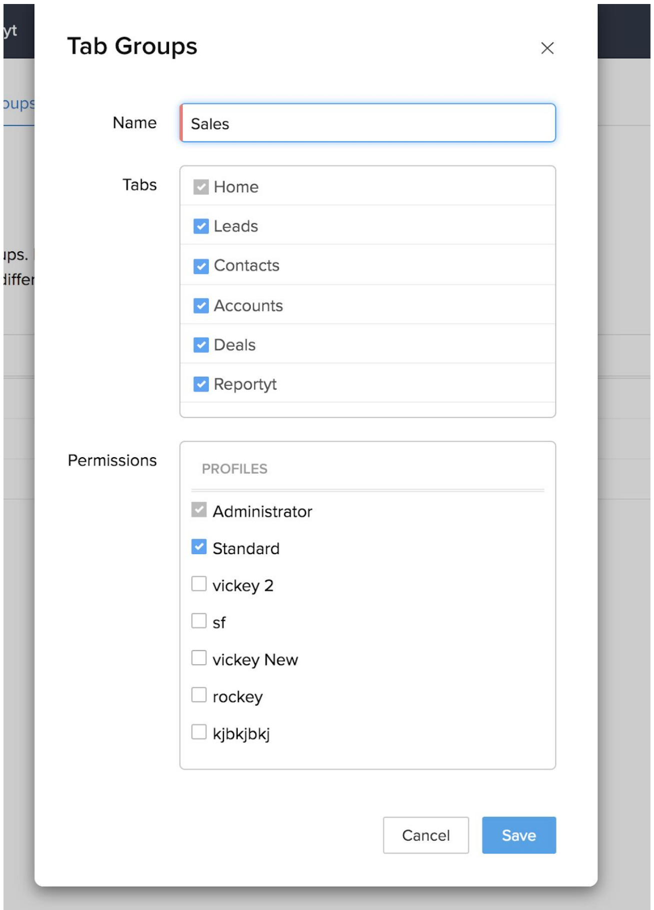


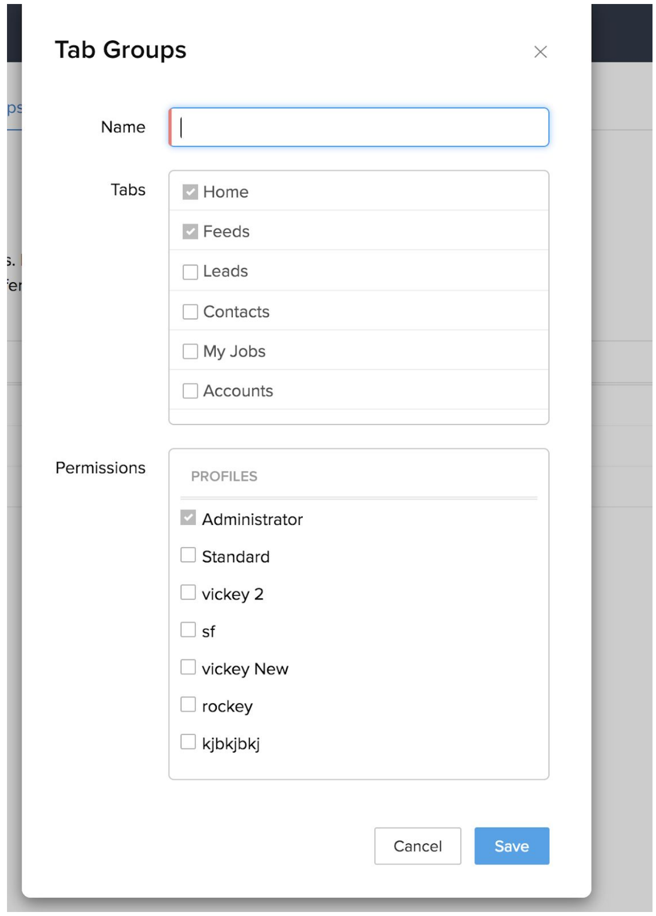
Pain Points: “+” and “Add” convey the same meaning.

Solution: Need to remove the “+” and the action is “Add Field”

Conclusion:

Page Name : Tag Group





Pain Points:

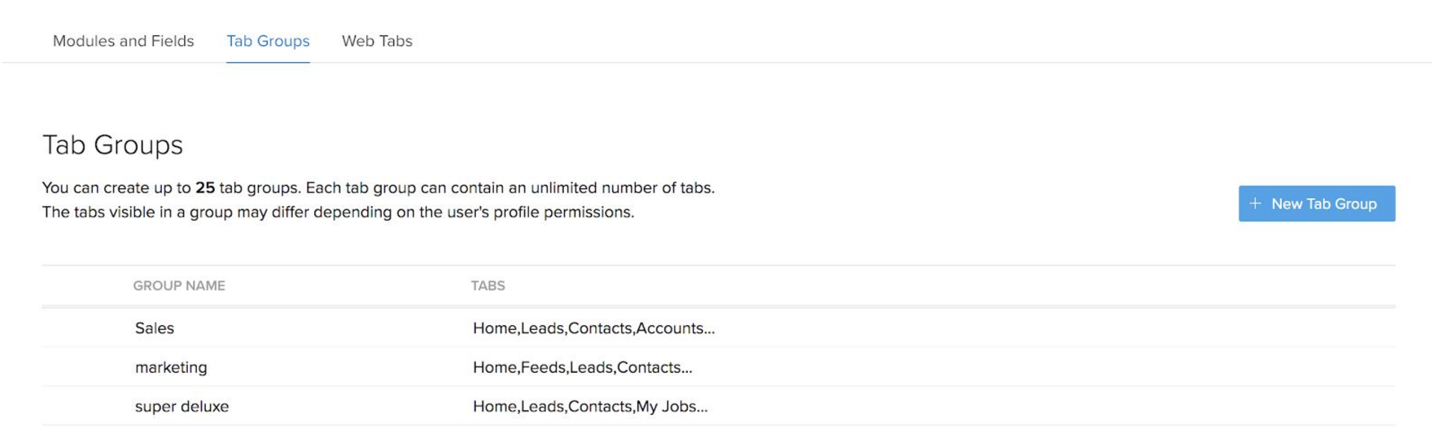
1. First one is edit tab group and the another one is Create New Tab group. There is no difference between create and edit.

Solution:

1. When I click the edit the title should be “Edit Tab Group”.
2. When I create New tab group the title should be “Create New Tab Group” and the call to action should be “Create”

Conclusion:

Page Name : Tab Groups



Pain Points:

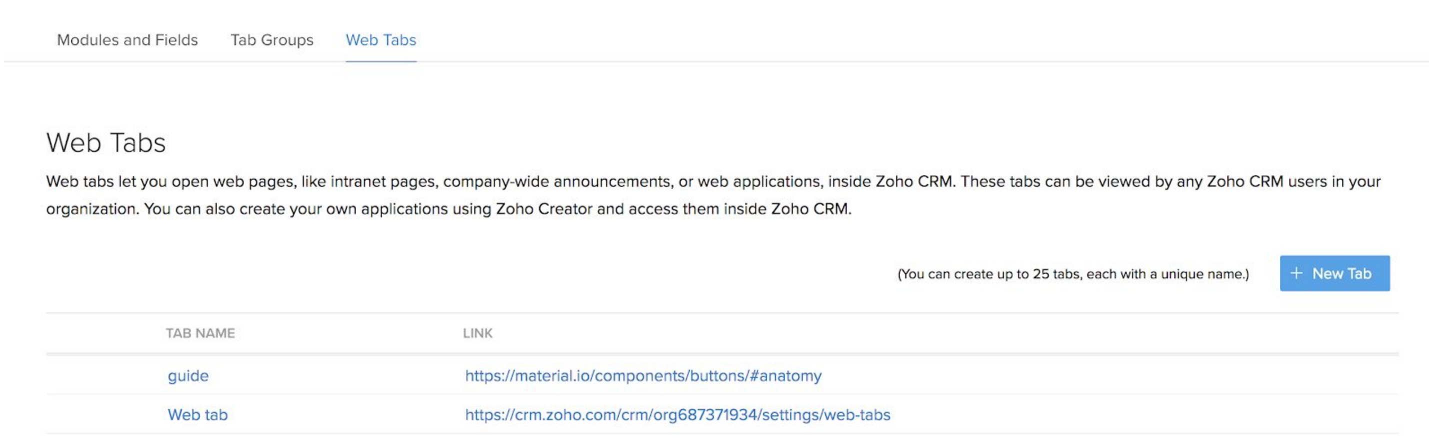
1. Here the call to action is add new but its purpose is to create new tab group.
2. We have a lot of space we not yet show all the tabs in the list.

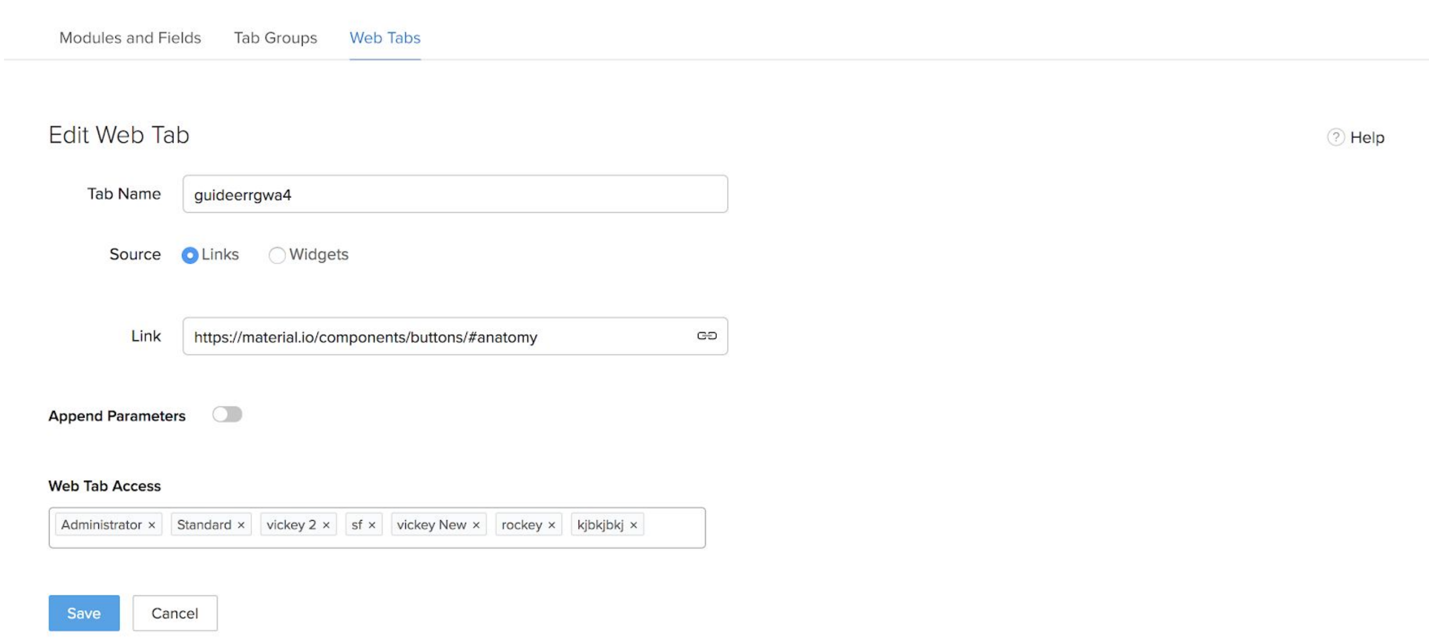
Solution:

1. Call to action should be “Create Tab Group”
2. Need to show all tabs/maximum tabs in the list.

Conclusion:

Page Name : Web Tabs





Pain Points:

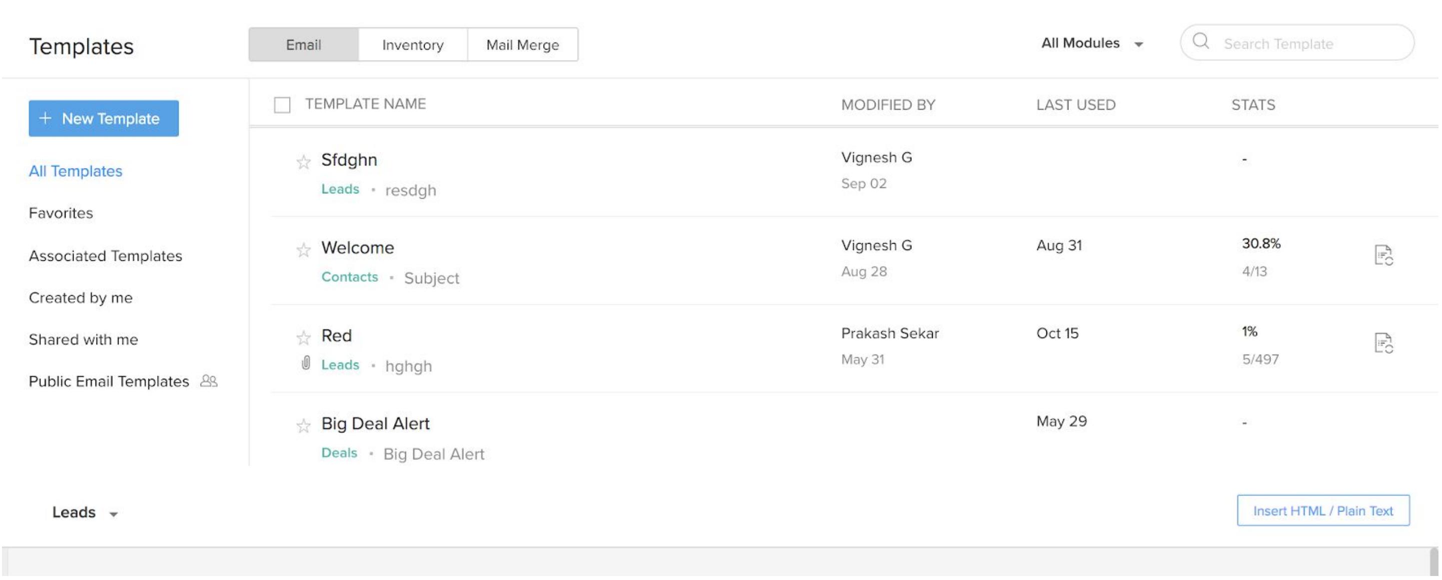
1. Again the “+New Tab”
2. Button alignment is different than usual.

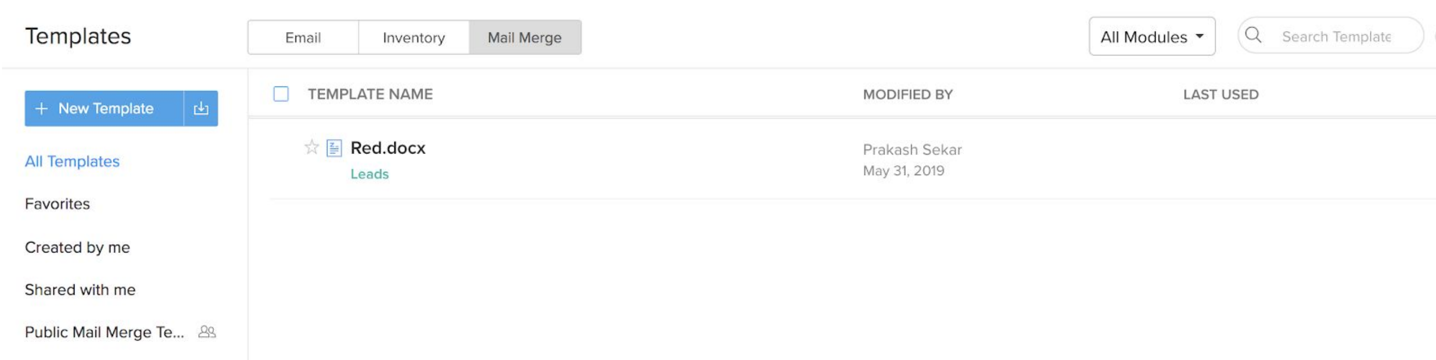
Solution:

1. Call to action should be Create Web Tab
2. Button should be default style(Primary on the right side).

Conclusion:

Page Name : Templates





Pain Points:

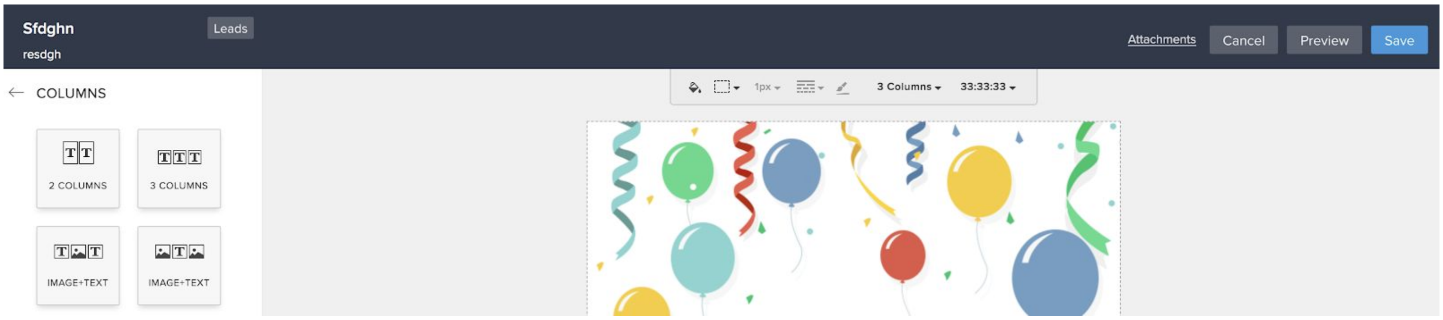
1. Instead of creating new one we use "+ new button"
2. Different style for call to action
3. The icon looks like a download icon.

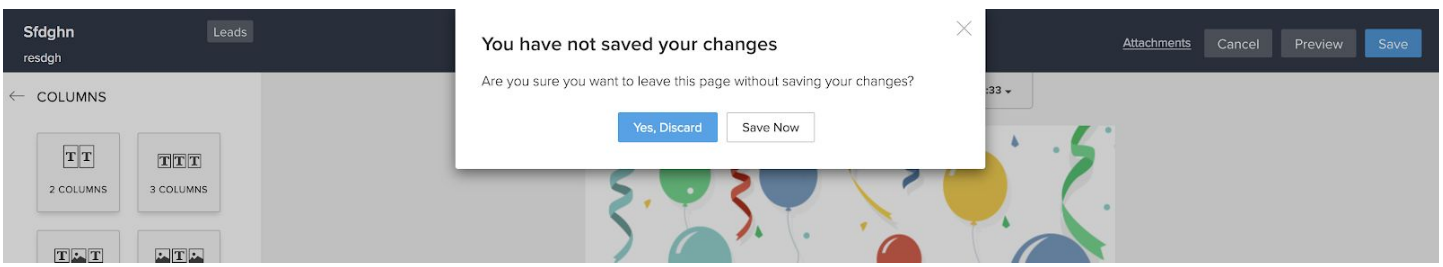
Solution:

1. Need to replace the literal as Create New Template.
2. This action should be primary for this page so need to change this as a primary button.
3. Need to replace the icon with dropdown and inside that we can show the "import template" so that user can easily identify the two options.

Conclusion:

Page Name : Edit Template





Pain Points:

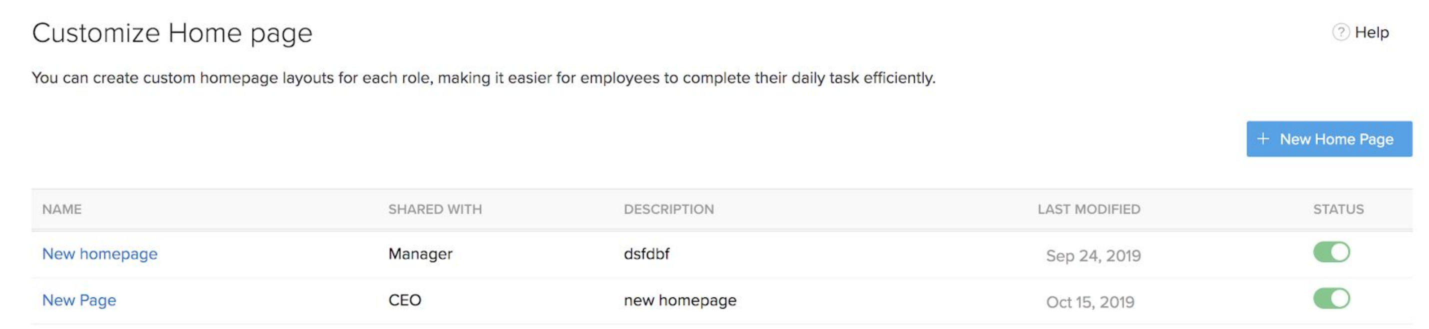
1. Alert popup is different than usual style.

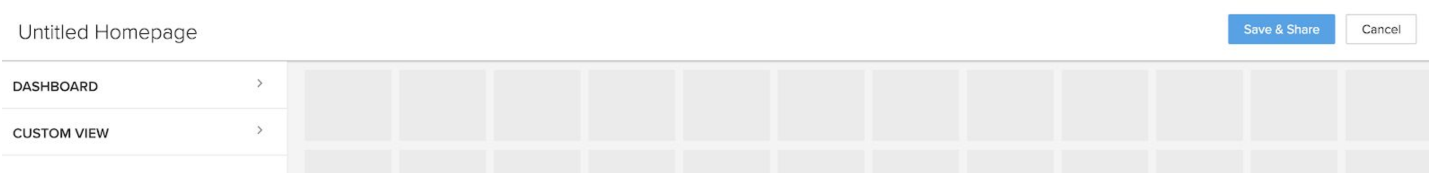
Solution:

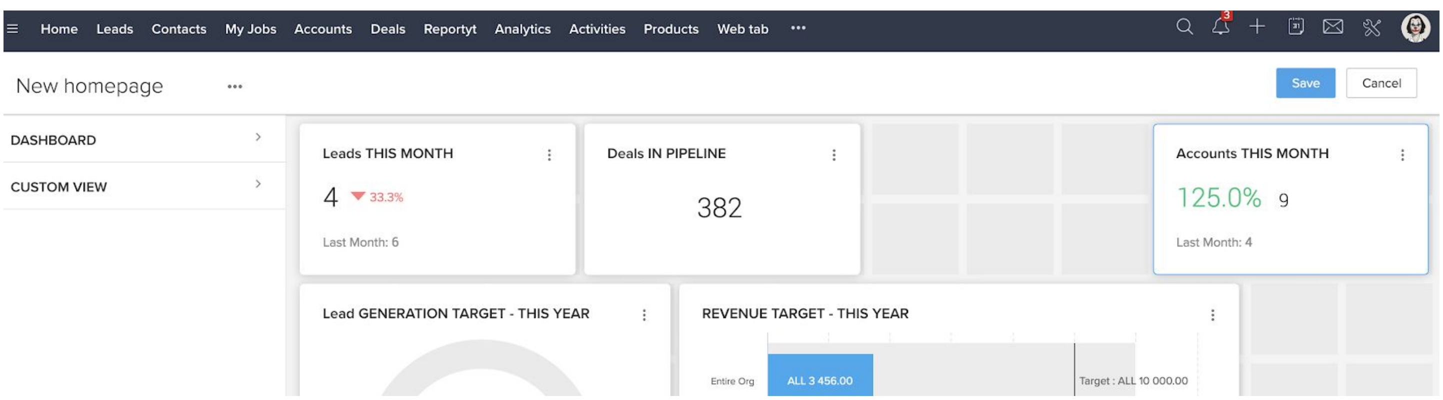
1. Need to follow the default alert style.

Conclusion:

Page Name : Customize home page







Pain Points:

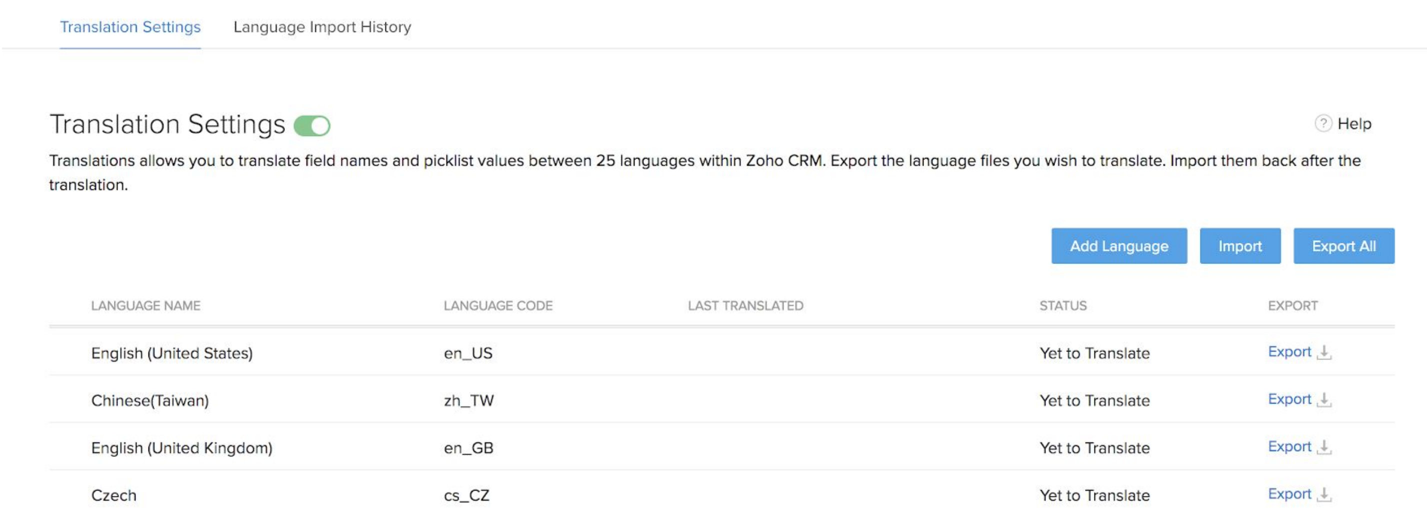
1. Primary action is creating a new homepage but is adding a new one to the list.
2. Button alignment is different than the usual one.

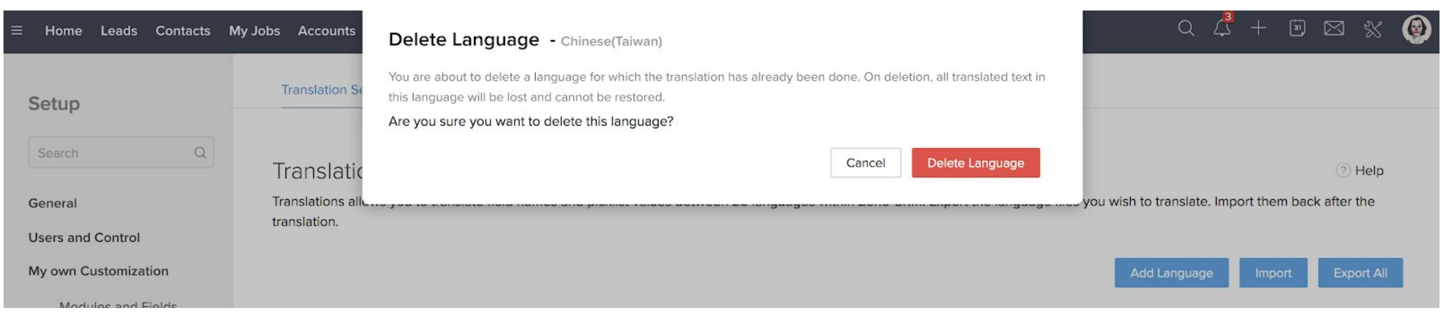
Solution:

1. Primary action should be “Create Home Page”
2. Button alignment - Primary should be on the right side.

Conclusion:

Page Name : Customize home page





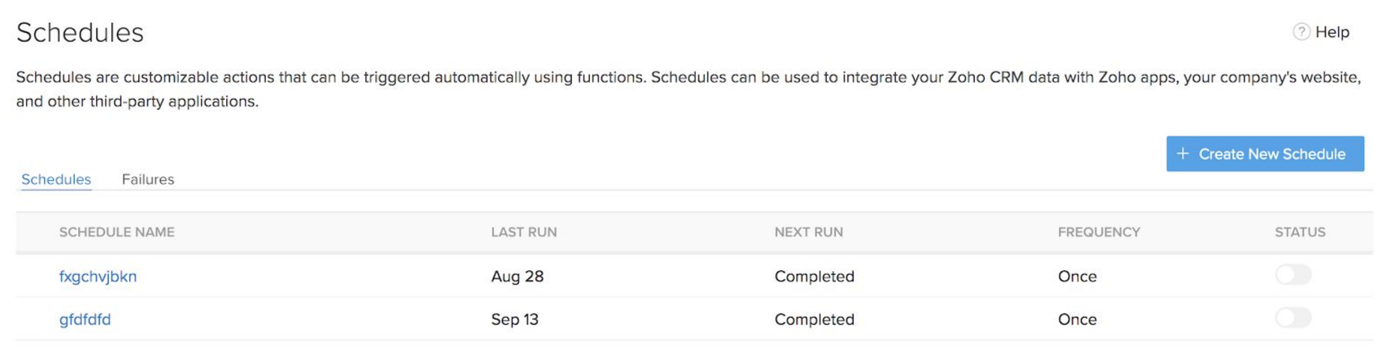
Pain Points:

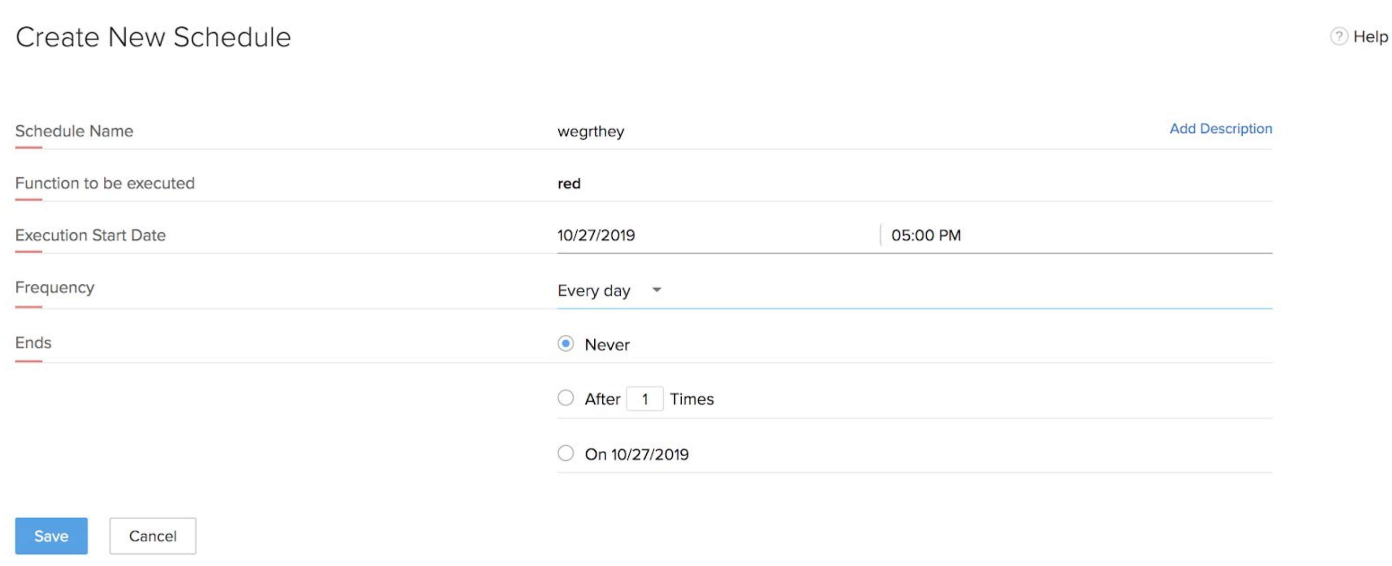
1. Placed three primary buttons in a row.
2. Alert/Delete info is different than usual style.

Solution:

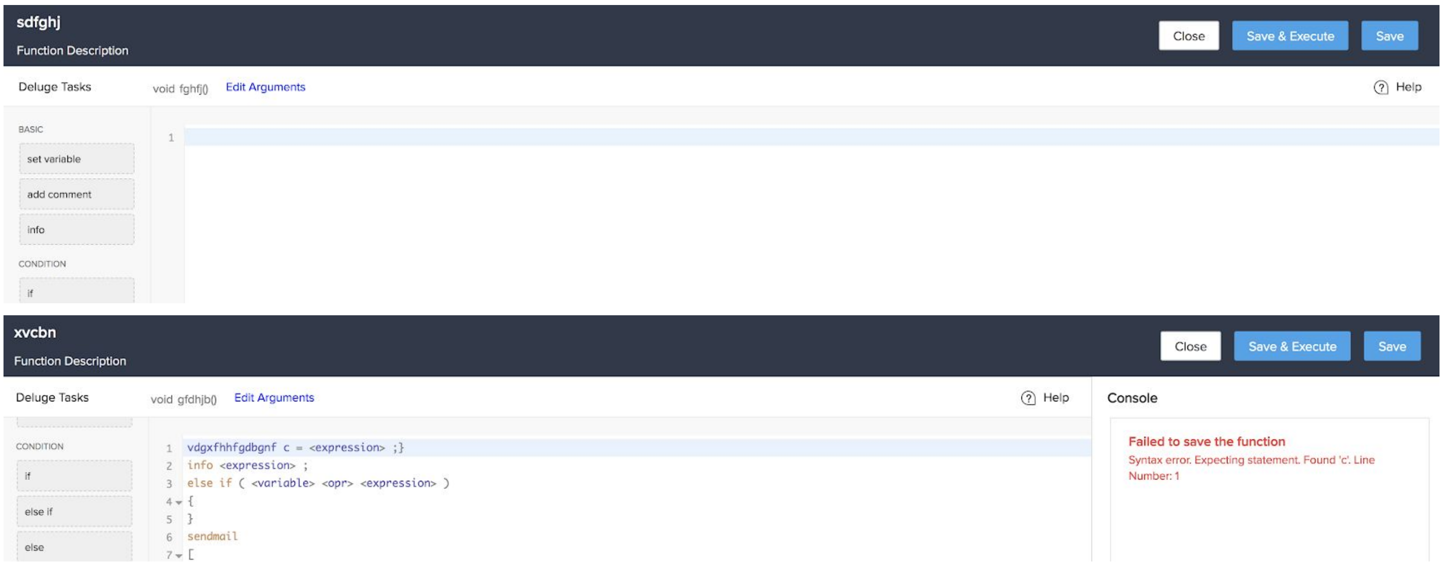
1. Primary button should be “Add Language”. And the secondary buttons should be import and export all.
2. Need to follow one style for all the alert/info.

Conclusion:

Page Name : Schedules

Pain Points: “+” used before the call to action
Solution: Need to remove the “+” and the call to action should be Create New Schedule.
Conclusion:

Page Name : Create Schedules

Pain Points: For Creating the new schedule the call to action not explain the same message.
Solution: Call to action should be Create/Create Schedule. And alignment should be right side.
Conclusion:

Page Name : Schedule Function

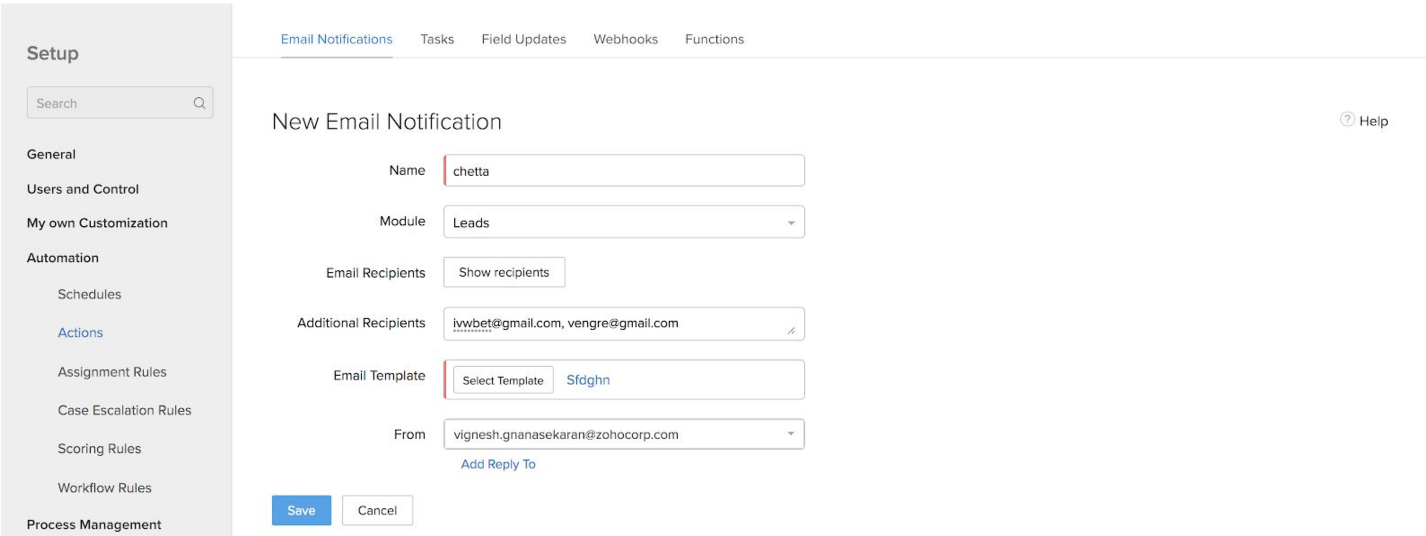


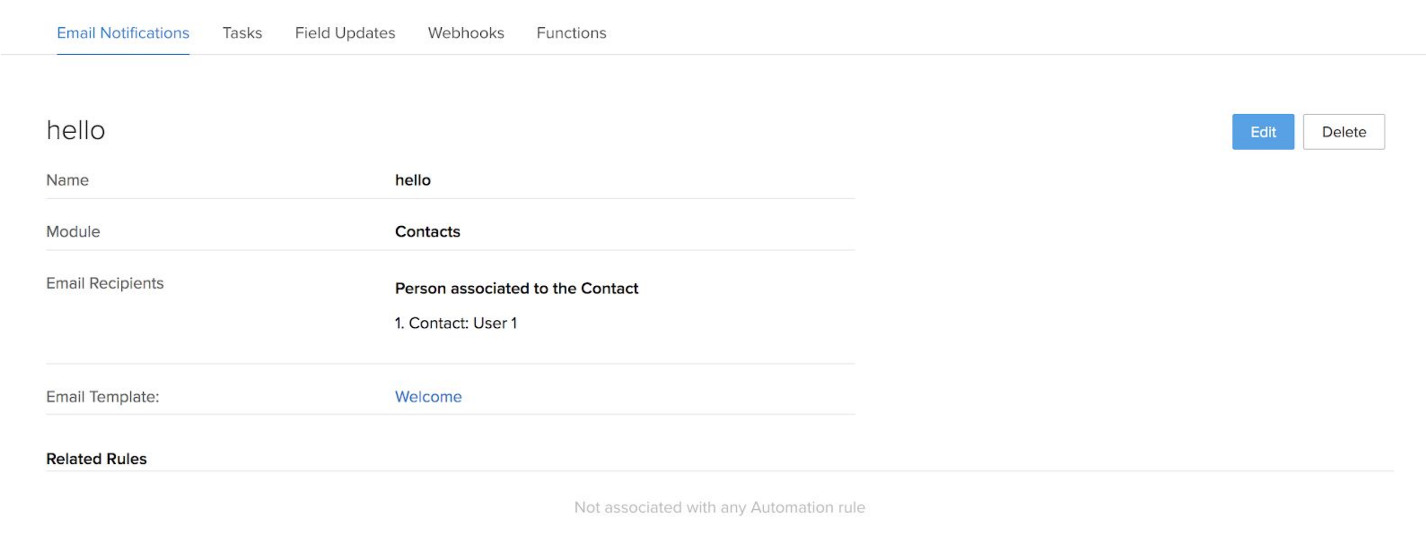
Pain Points: Two primary buttons. Save&Execute,Save.

Solution: There is no need for two buttons here. When as a user If I click the save it saves and execute the function. Same thing happen for save&execute. If anything error in the function I can see the error on the right side. It happens for both buttons. Then what is the purpose of two here.
Suggestion to keep only one button save/Save&execute.

Conclusion:

Page Name : Email Notifications





Pain Points:

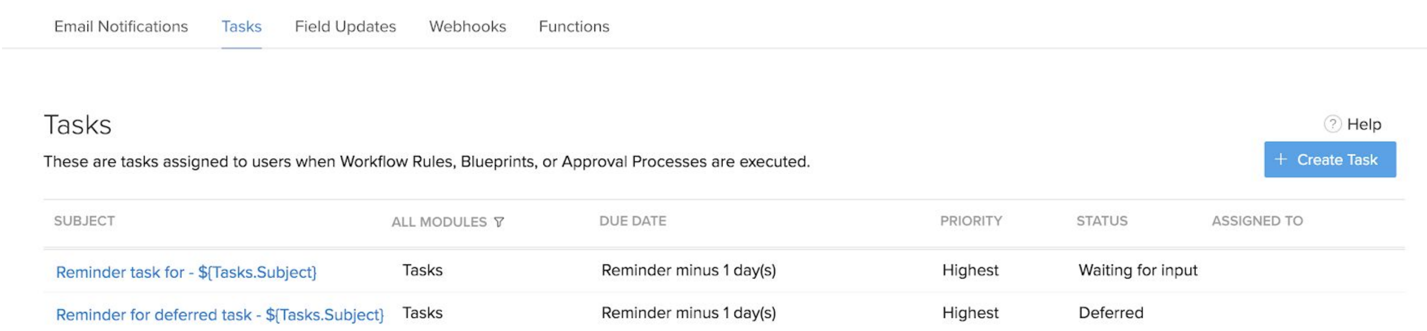
1. Button alignment is different.
2. There is no way to go back. If a user come to this page there is only two ways one I need to edit or I need to delete this.
3. Show recipients and email template not looks like a button.

Solution:

1. Button alignment should be right side.
2. Need to provide back button here.
3. We don’t have seperate style in lyte. We already have designs for (Upload, choose recipient, browse) kind of action. Need to follow the same.

Conclusion:

Page Name : Tasks



Pain Points:

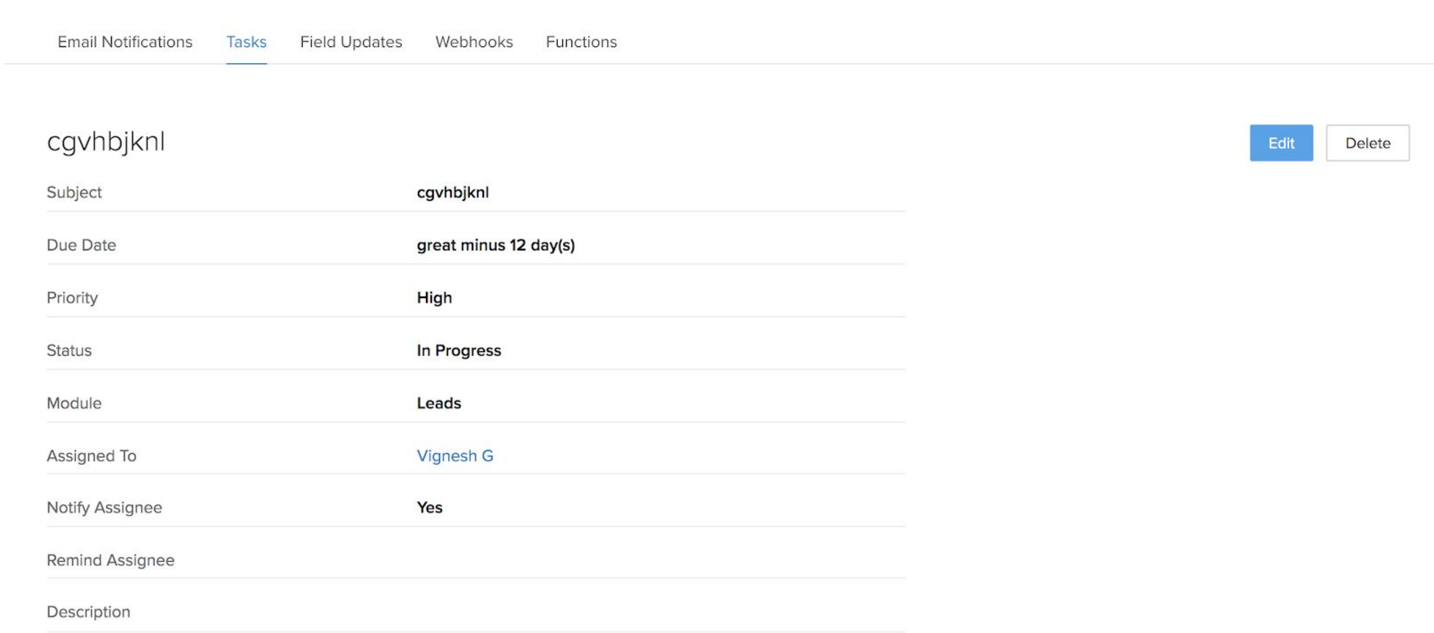
1. Need to remove the “+” in the create task button.
2. Title and call to action is different than functionality. Here task is newly created so the title and CTA should be different.

Solution:

1. Button text should be Create New Task.
2. Title should be create workflow task and the button text is create task.

Conclusion:

Page Name : Tasks

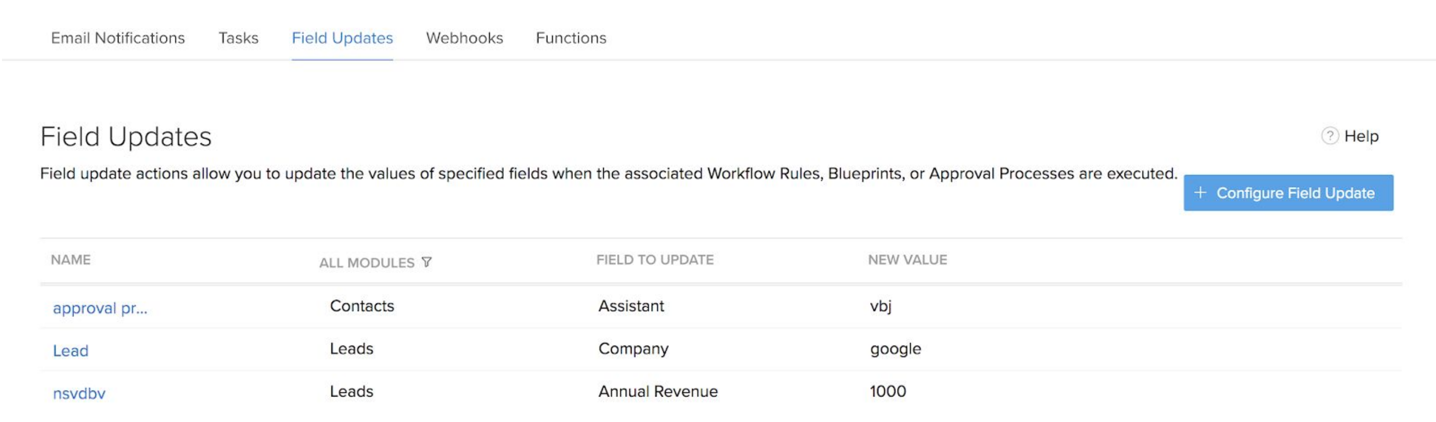


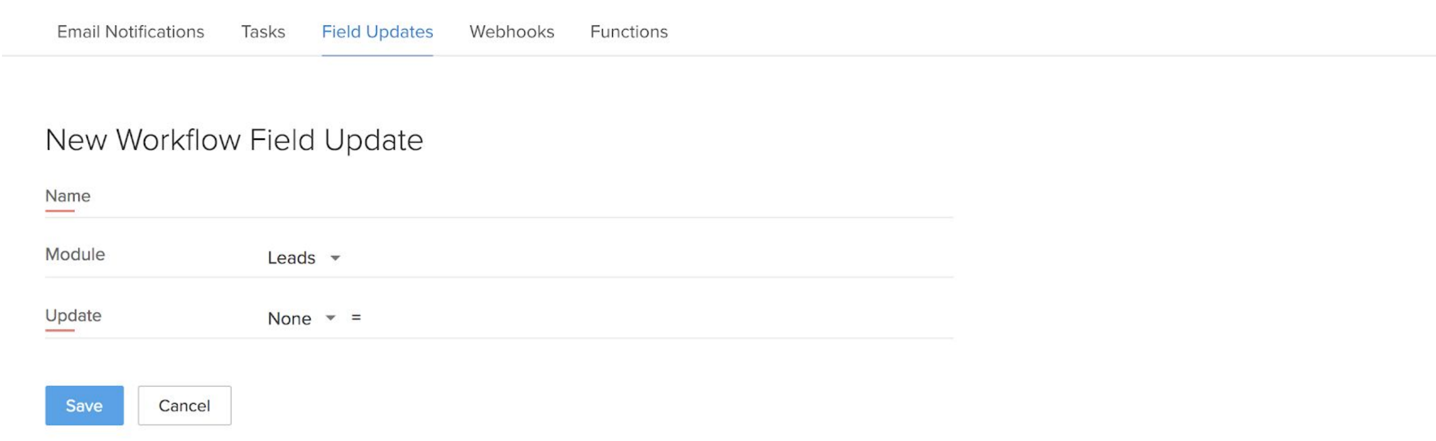
Pain Points: here is no way to go back. If a user come to this page there is only two ways one I need to edit or I need to delete this.

Solution: Need to provide back button here.

Conclusion:

Page Name : Field Update





Pain Points:

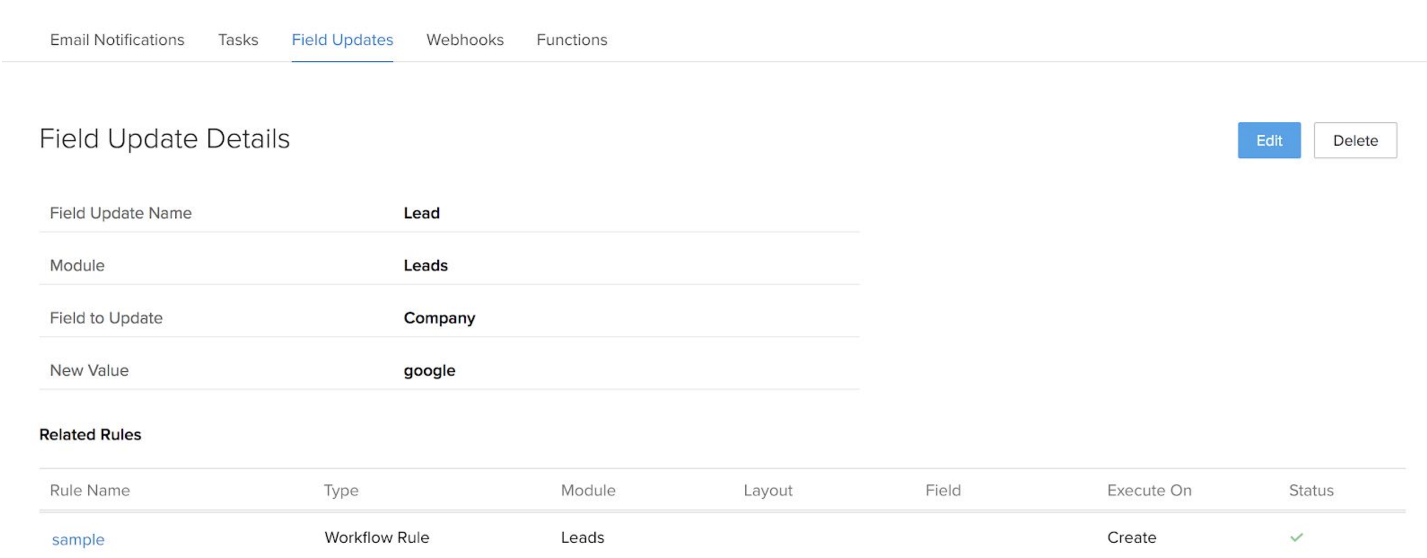
1. + used in the starting.
2. Title and call to action should be the same.

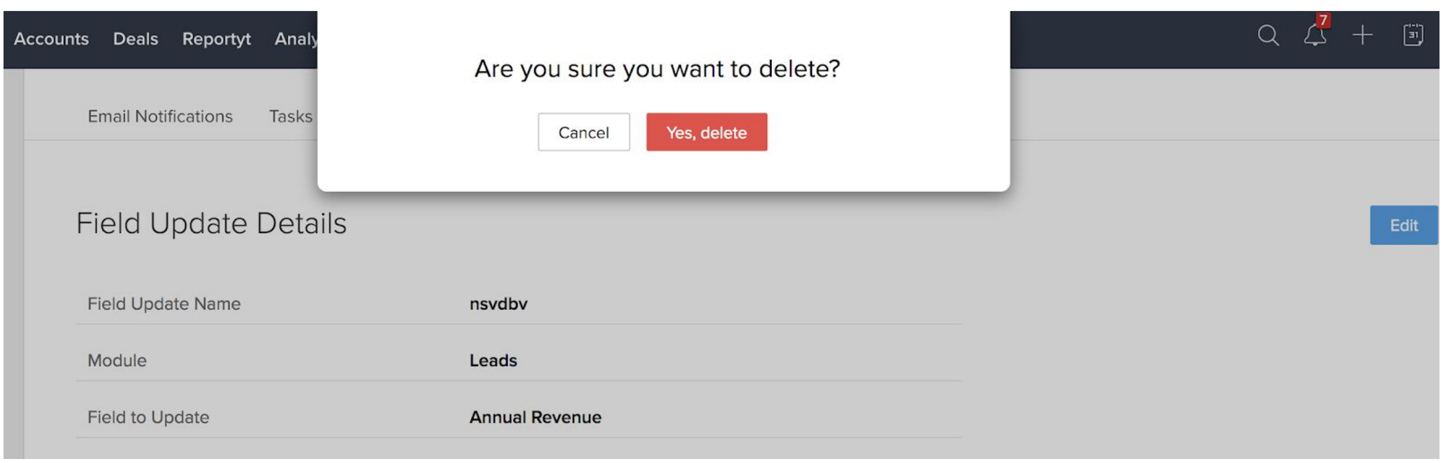
Solution:

1. Button should be create field update. Need to remove “+”
2. Here the field update is applicable for blueprint, workflow, approval process so Title should be “Create New Field update” as common for all. Call to action should be create.

Conclusion:

Page Name : Field Update





Pain Points:

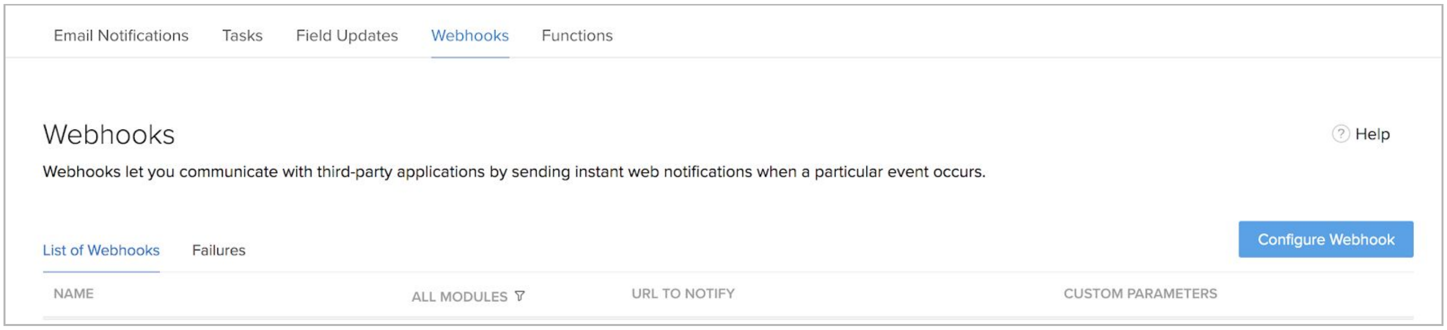
1. There is no way to go back.
2. Alert popup should be consistent all over the pages.

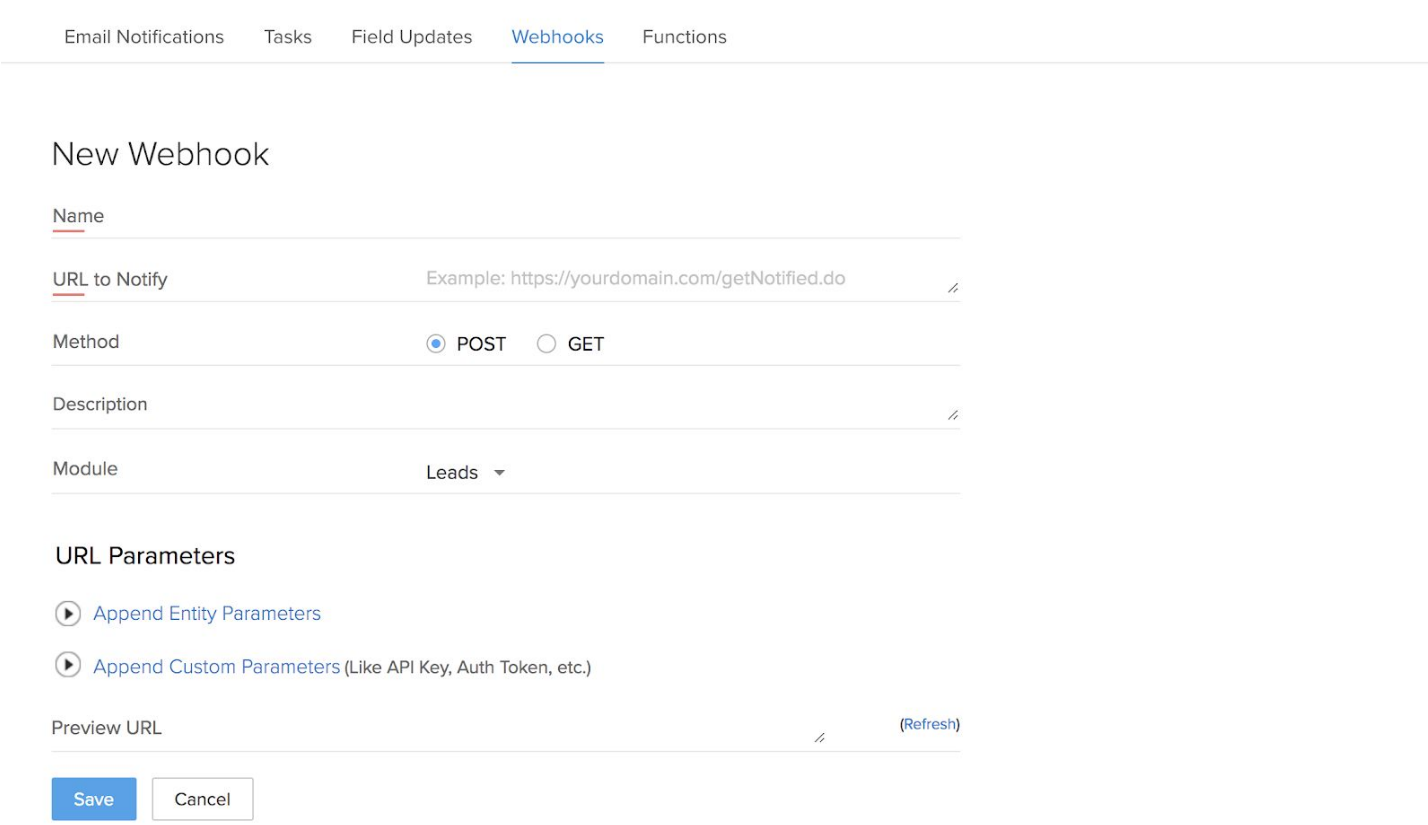
Solution:

1. Need back button on this page. So that we can keep consistency on all the pages.
2. Need to change the alert info with title and proper description and button alignment.

Conclusion:

Page Name : Webhooks





Pain Points: Title and call to action should be relevant to the mail action. The functionality is creating new webhooks.

Solution:

1. Call to action should be “Create new webhooks”
2. Title is “Create New webhooks. And the CTA should be Create.

Conclusion:

Page Name : Functions

Existing Functions

Help

Listed below are the functions created by users in your organization. Configure the functions based on your business needs.

new — Configure

dsfzdgfhcgvj — Configure

Capturing Sales Region

Global sales region is geographically categorized as US, UK, Europe-MiddleEast-Asia EMEA , SAMERICA South America and Asia Pacific APAC . This function will determine the sales region based on countries. There are a few predefined countries using which the function is written. You can include as many countries as you like to determine the sales region. Here is how you map the arguments of the custom function to achieve it. 1. leadId: Choose Lead Id column from the list of fields. 2. country: Choose Country column from the list of fields. How to make it work? Associate this custom function under the appropriate workflow rule to capture sales regions based on countries.

Duplicate

Already used in Leads

Gallery

Configure a function to satisfy your business needs.

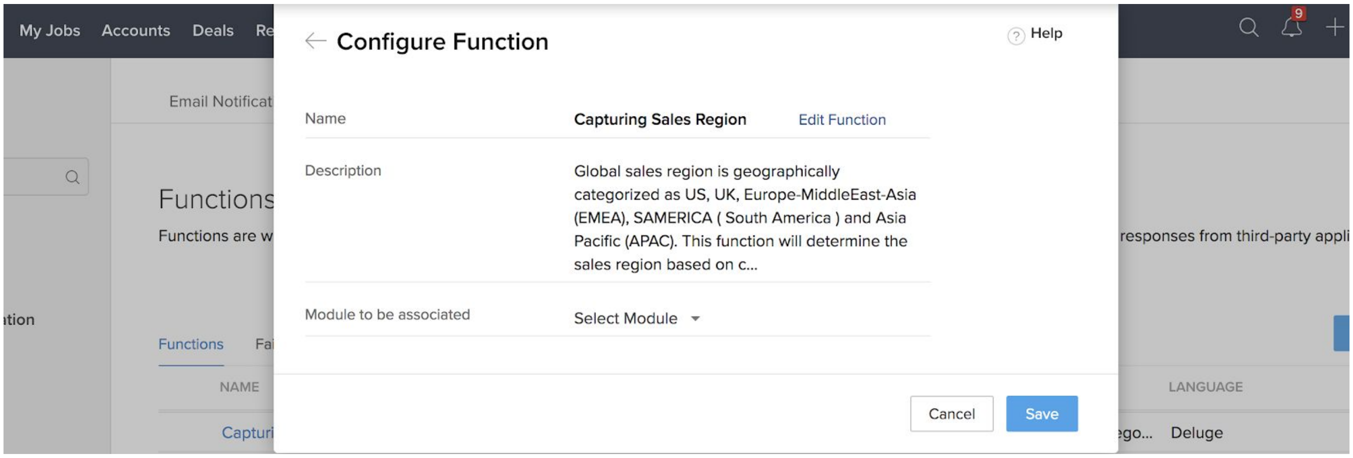
Capturing Sales Region

Global sales region is geographically categorized as US, UK, Europe-MiddleEast-A...

Configure

Lead Scoring

Lead Scoring is a methodology used to rank leads based on a scale that represent...

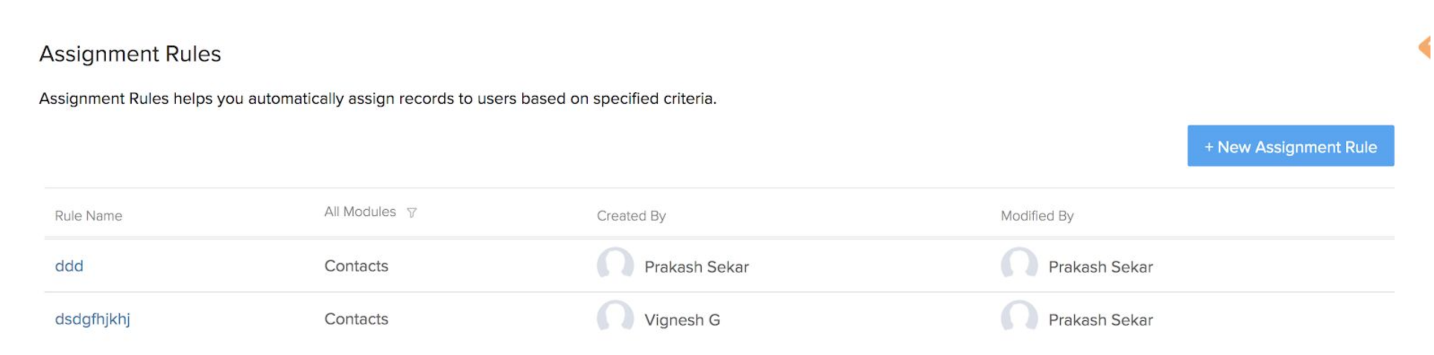


Pain Points: As a user when I click the configure function I have to select the function from gallery or existing function so the configure button is irrelevant here.

Solution: Need “select function/select” instead of configure.
Third image: this is the place where I can configure the function. So the call to action should be configure instead of save.

Conclusion:

Page Name : Assignment Rule

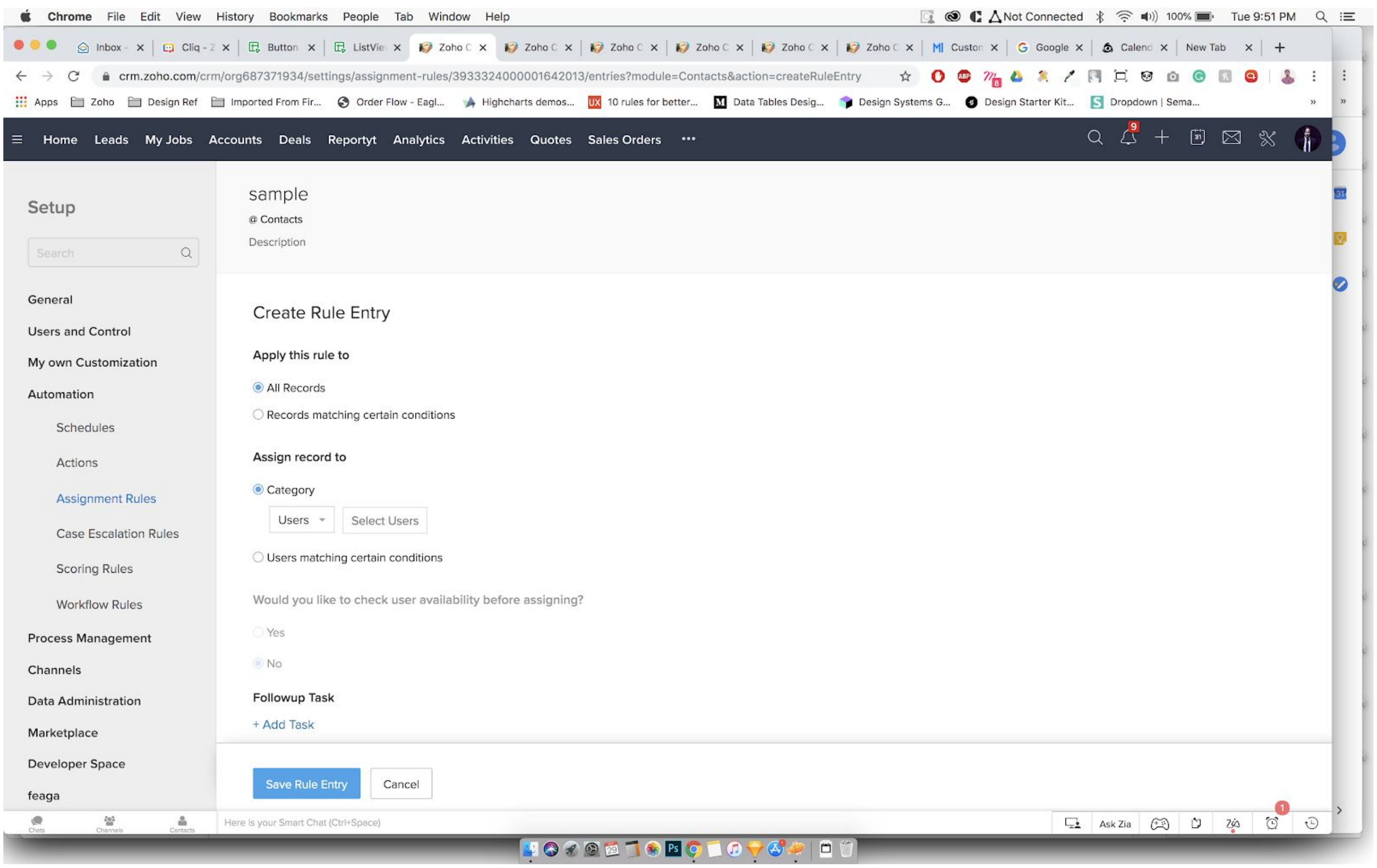


Pain Points: When as a user i’m creating the new assignment rule but CTA shows “+New”

Solution: CTA should be Create assignment rule.

Conclusion:

Page Name : Assignment Rule detail page



Pain Points:

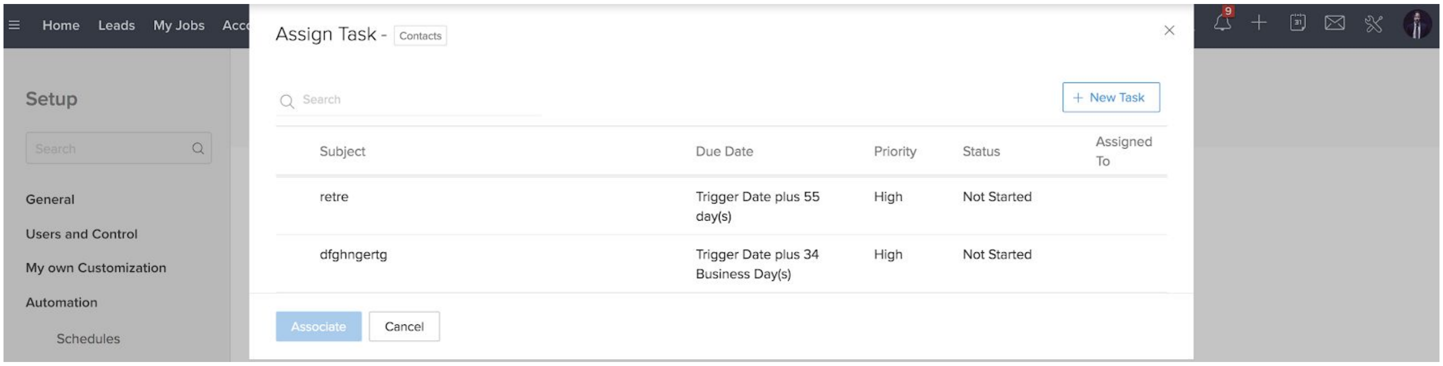
1. Below the assign record the “select users” action not looks like a button.
2. As a user I have an option to assign/Associate task to this rule but it shows “+add task”
3. Title is different than “Assignment Rule”. Call to action is looks like save the edited entry.

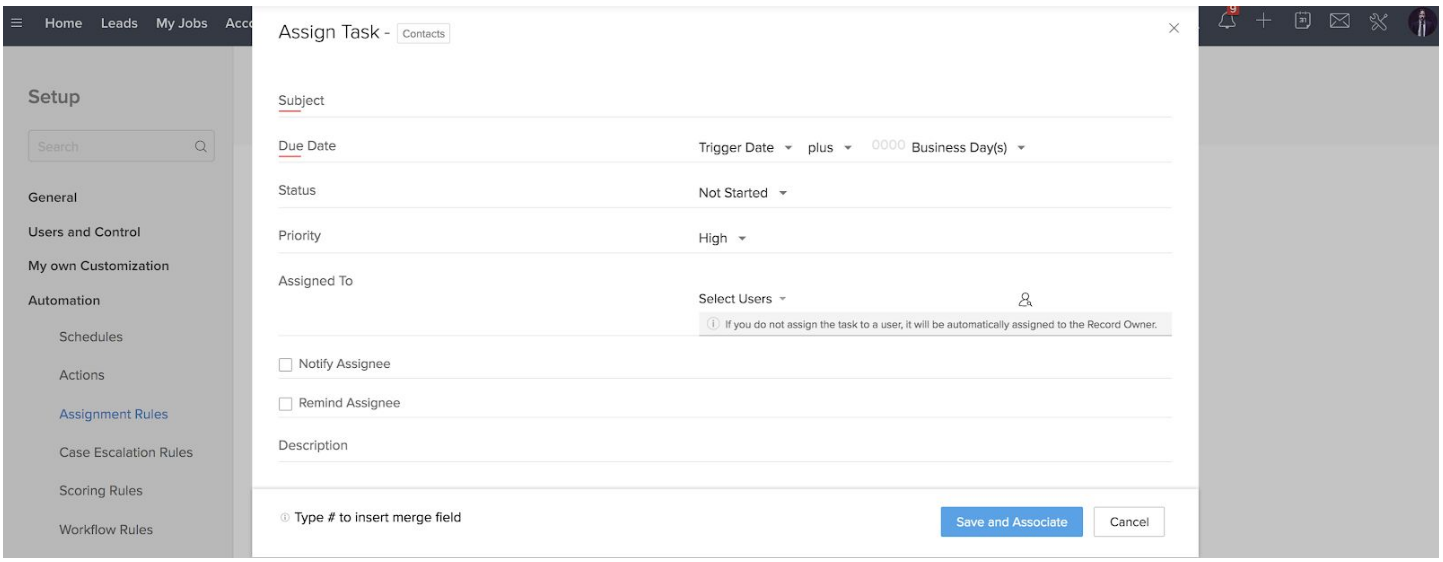
Solution:

1. Need a shuttle style for select users button.
2. Below the follow up task the action should be “+Assign Task”
3. Main CTA should be Create Rule.

Conclusion:

Page Name : Assignment rule - Assign task.





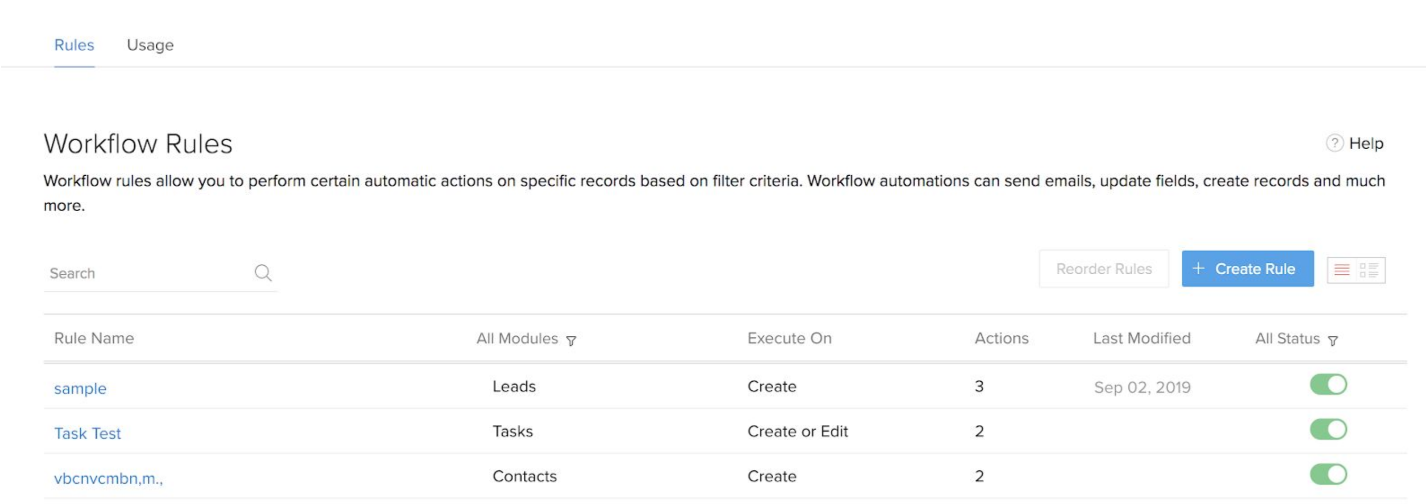
Pain Points:

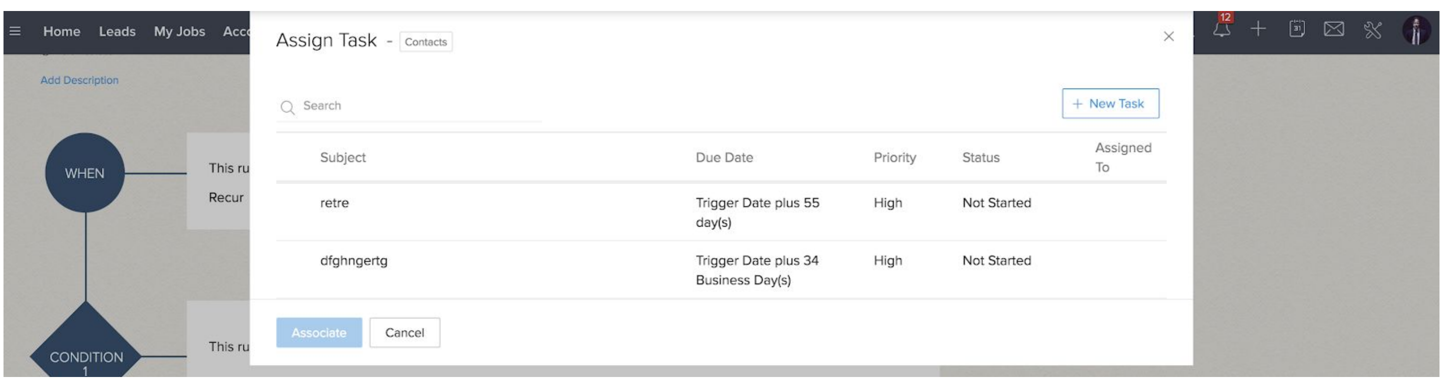
1. Title and the main call to action is different.
2. Again “+new Task”

Solution:

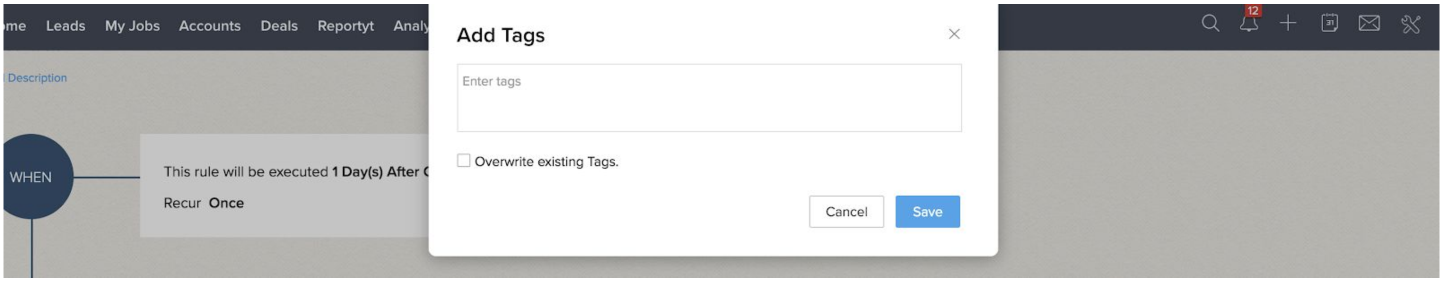
1. Once user select the existing task the main call to action should be Assign instead of associate.
2. Secondary button “+New Task” should be “Create New/Create Task”.
3. Second Image: Title should be create New Task and the call to action is save and assign.

Conclusion:

Page Name : Workflow Rules

Pain Points: "+ Create Rule"
Solution: Remove "+" and use Create Rule.
Conclusion:

Page Name : Workflow - Assign task

Pain Points: 1. Title and the main call to action is different. 2. Again "+new Task"
Solution: 3. Once user select the existing task the main call to action should be Assign instead of associate. 4. Secondary button "+New Task" should be "Create New/Create Task". 5. New task popup: Title should be create New Task and the call to action is save and assign.
Conclusion:

Page Name : Workflow - add tag



Pain Points:

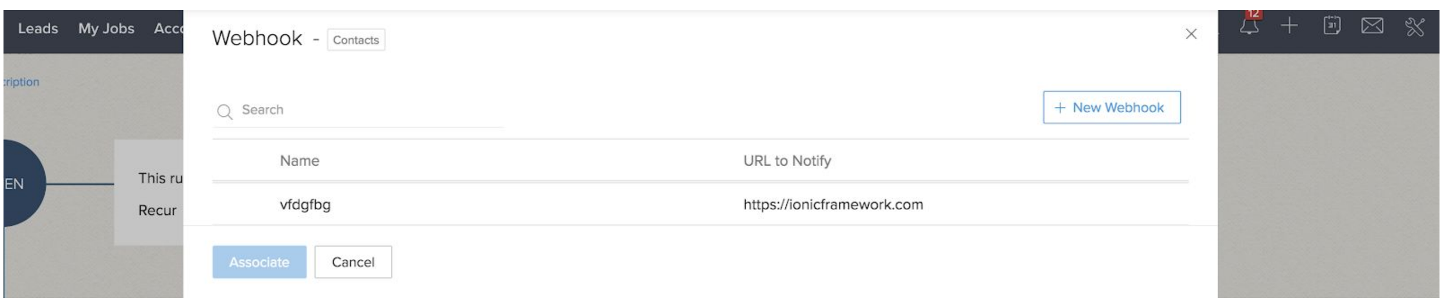
1. Every popup in this feature have left alignment but this button alignment is different than others.
2. Add is more meaningful than save

Solution:

1. Need to follow the same alignment for this popup.
2. Need to change the CTA as Add tag/Add instead of save.

Conclusion:

Page Name : Workflow - webhooks



Pain Points:

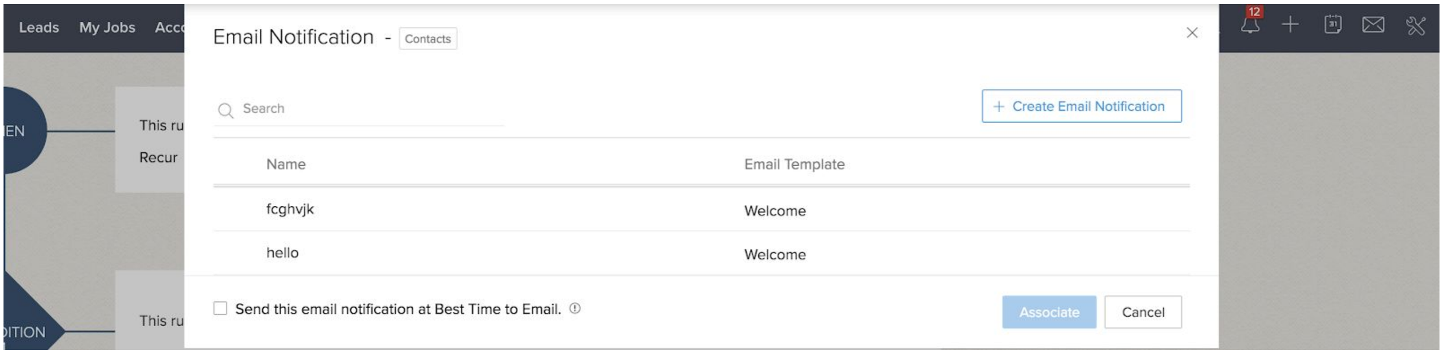
1. Title and the main call to action is different.
2. Again “+new webhook”

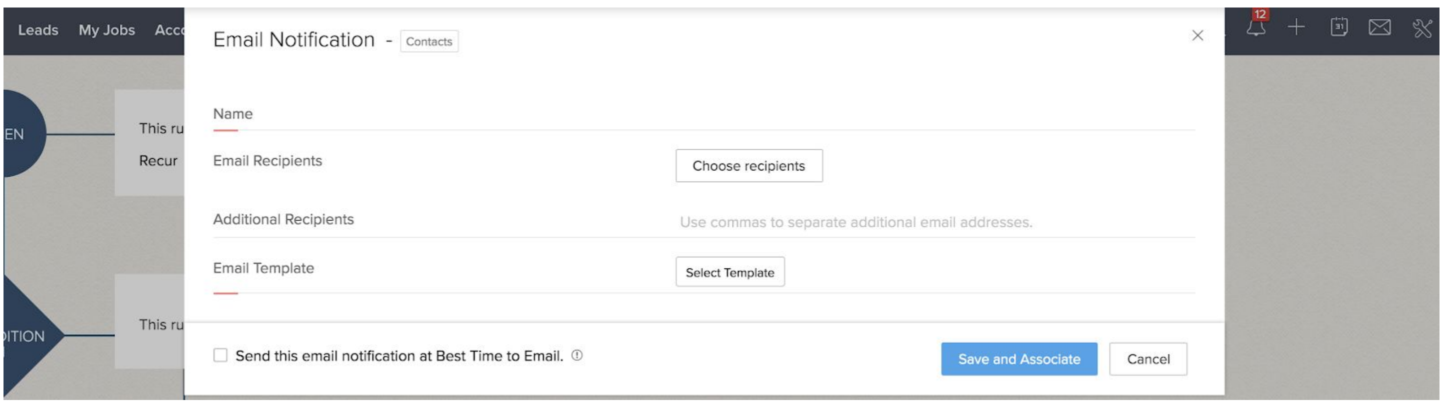
Solution:

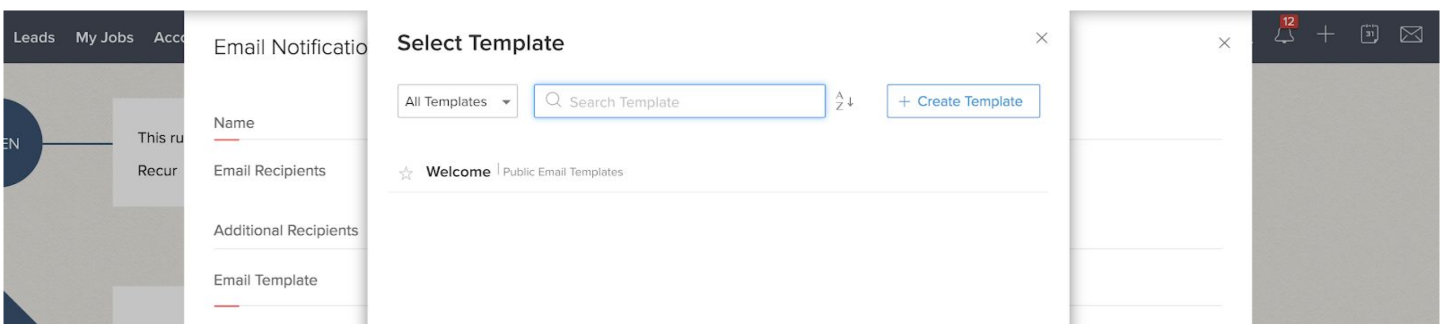
1. Need to follow the “Assign Task” style here.

Conclusion:

Page Name : workflow - Email Notification







Pain Points:

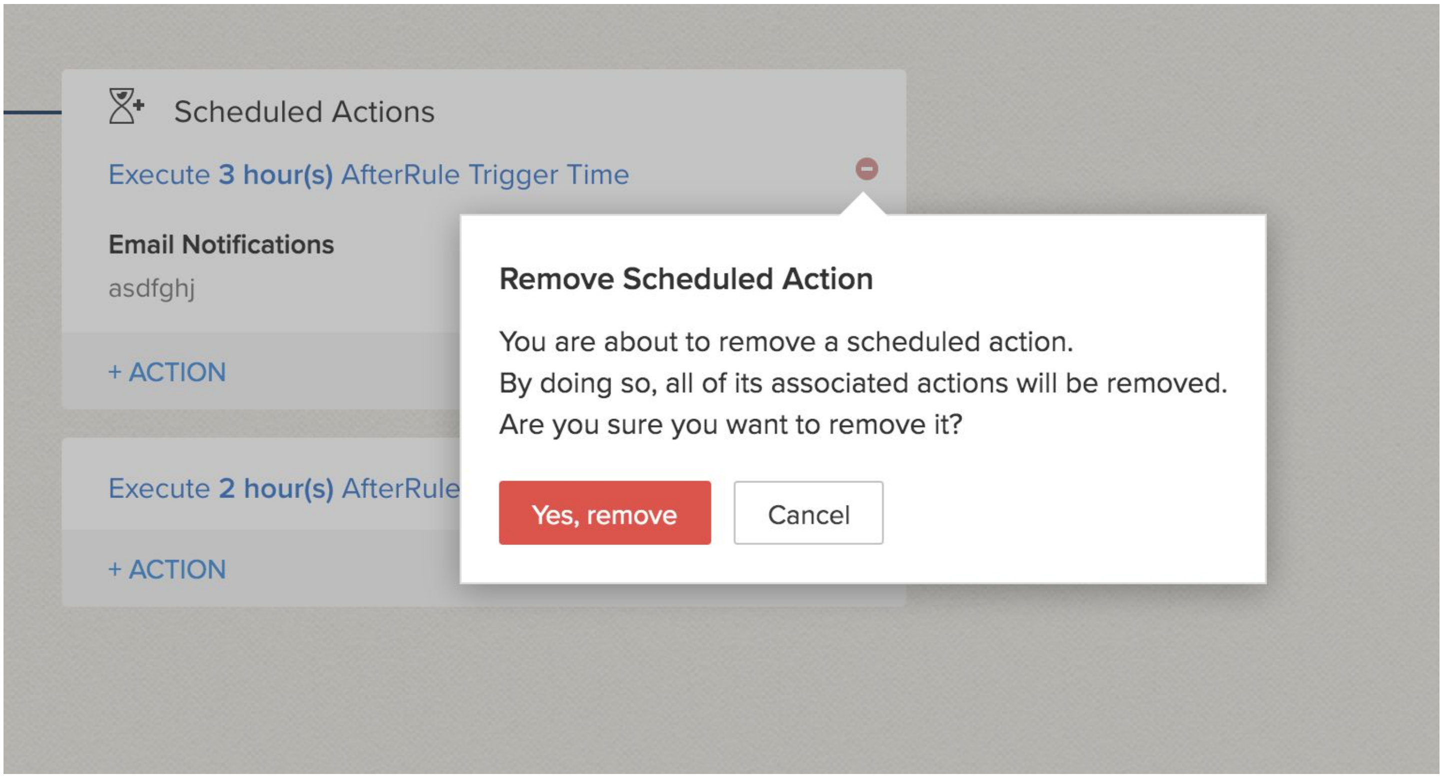
1. Popup type is not consistent for 1&2 image.
2. “+” added before call to action in the template selection page.

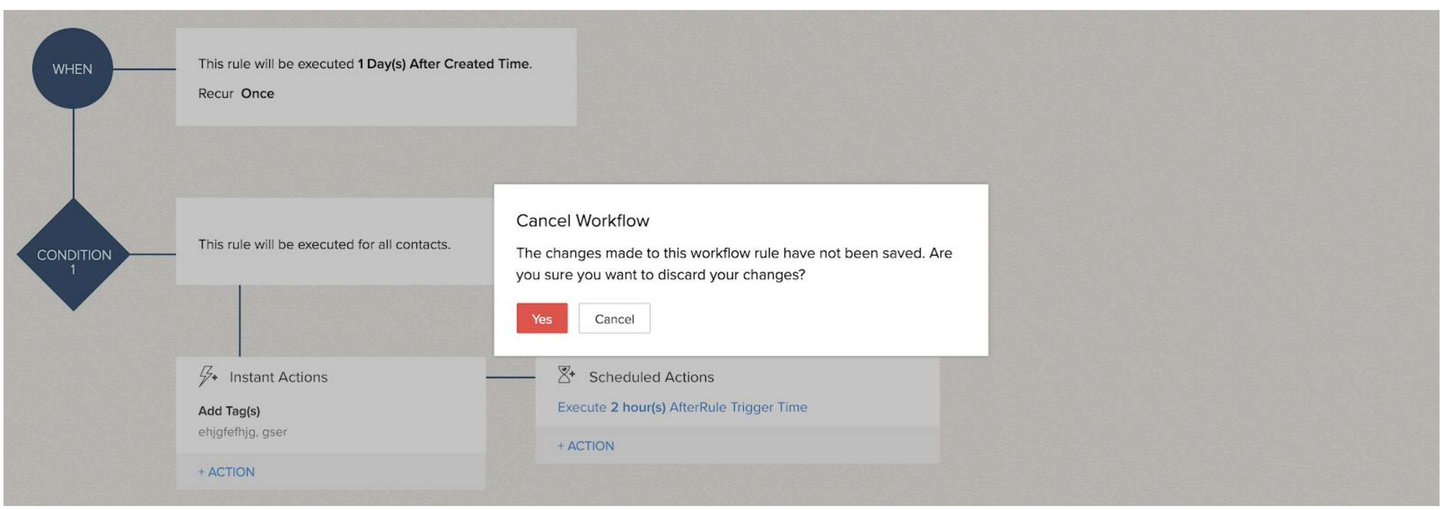
Solution:

1. Need to follow the “Assign Task” style.
2. Need to remove the “+”. And the call to action should be Create Template.

Conclusion:

Page Name : Workflow - Remove action, Cancel workflow



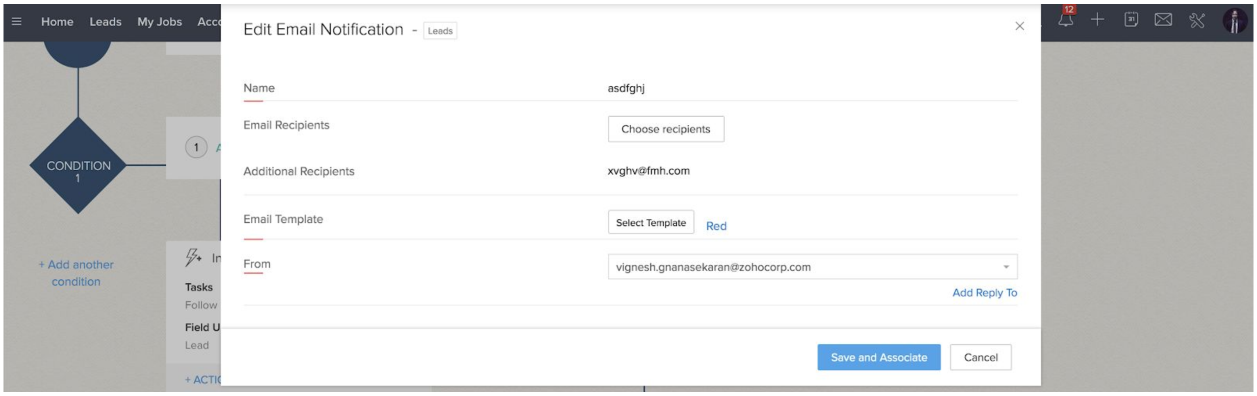


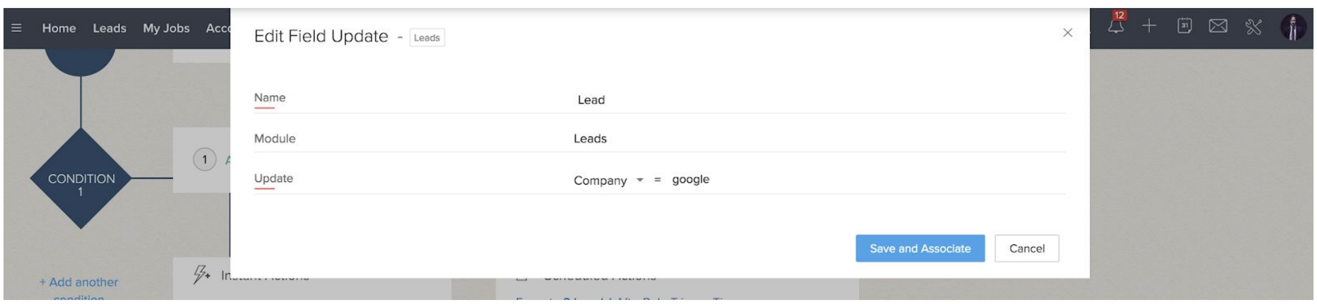
Pain Points: Two type of alert message style used in the same feature.

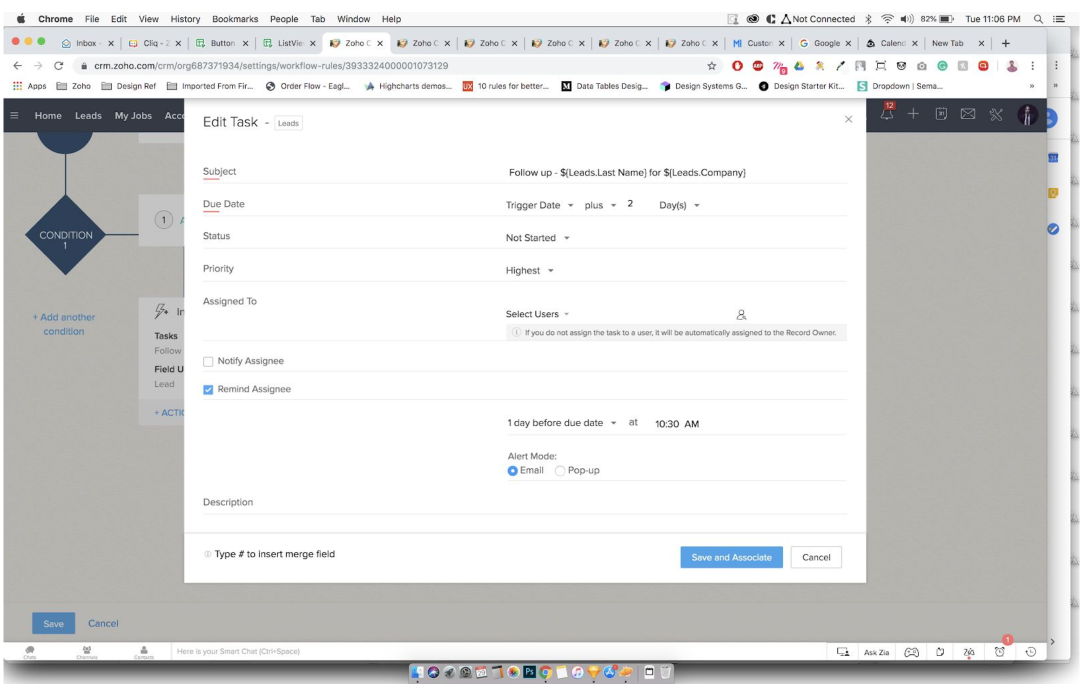
Solution: Need to follow the same style for alert/delete info.

Conclusion:

Page Name : Alignment Issue





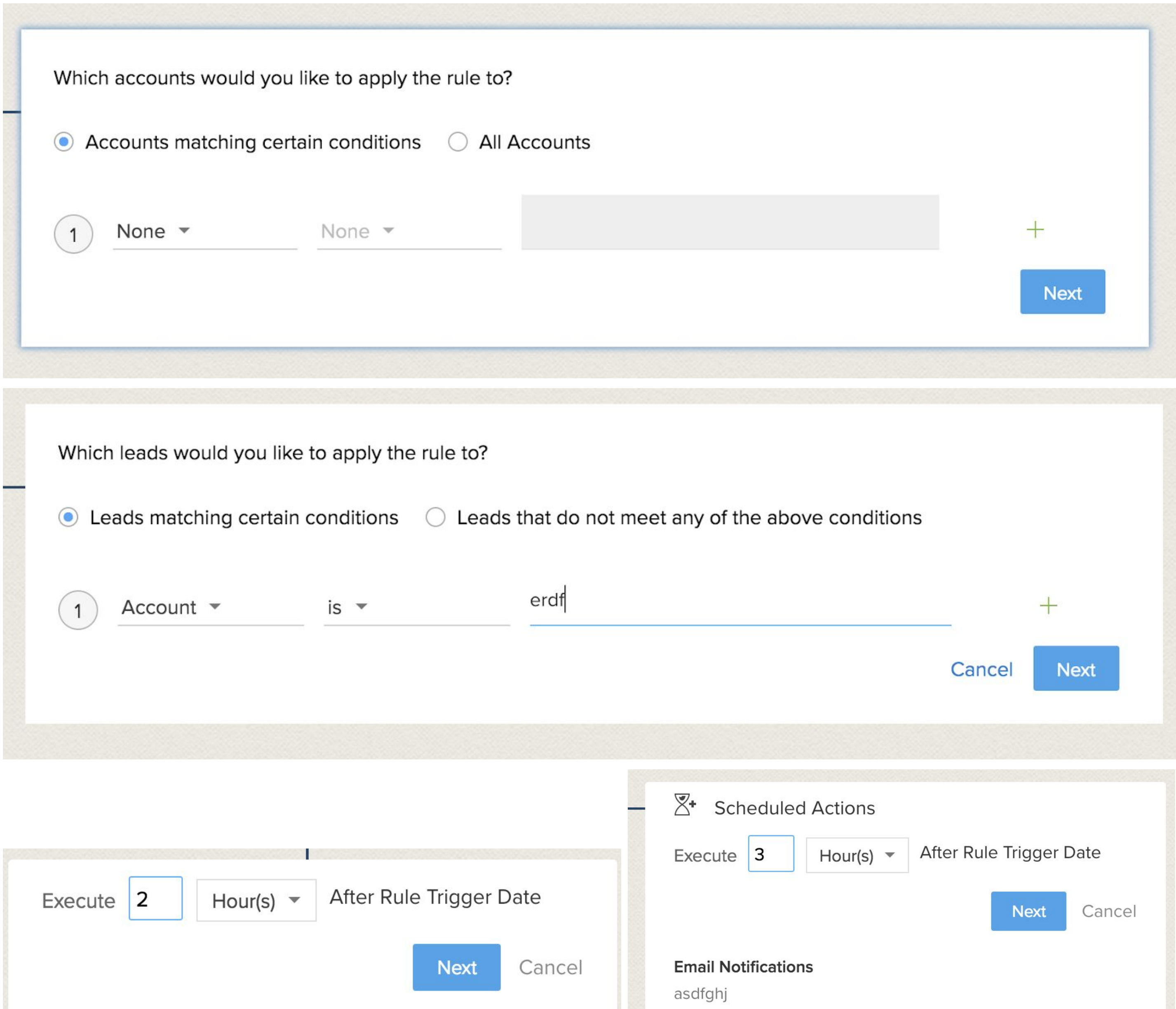


Pain Points: When I create/assign new task/field update/email notification/webhooks the button alignment is on left side. When I click the edit all the button alignments are different.

Solution: Need to follow the similar style to all the buttons for create&Edit pages.

Conclusion:

Page Name : Workflow - Criteria

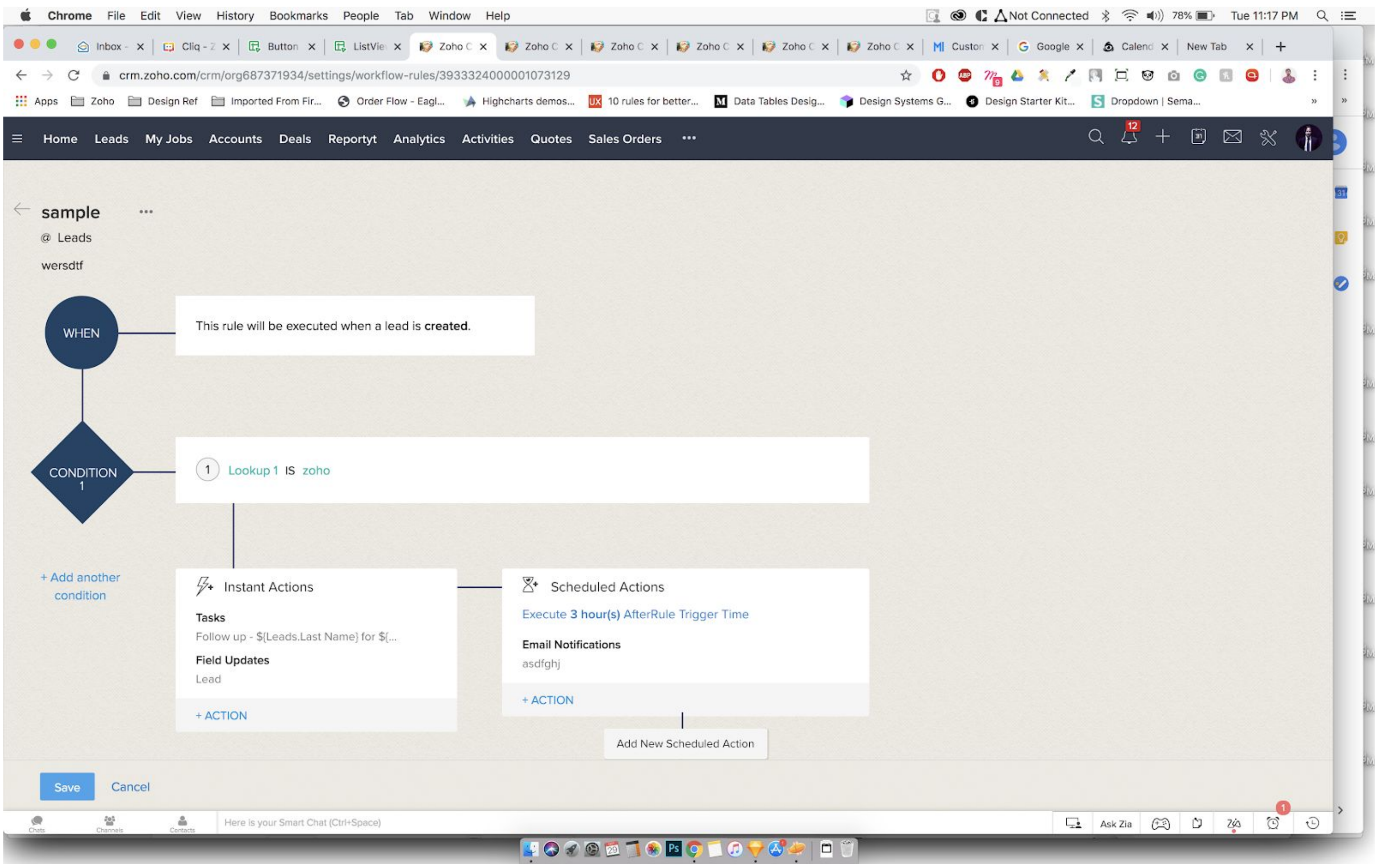


Pain Points: Used cancel for some places with different alignment.

Solution: Need to keep consistency across all the criteria editor.

Conclusion:

Page Name : Workflow - Add new criteria, Save button



Pain Points:

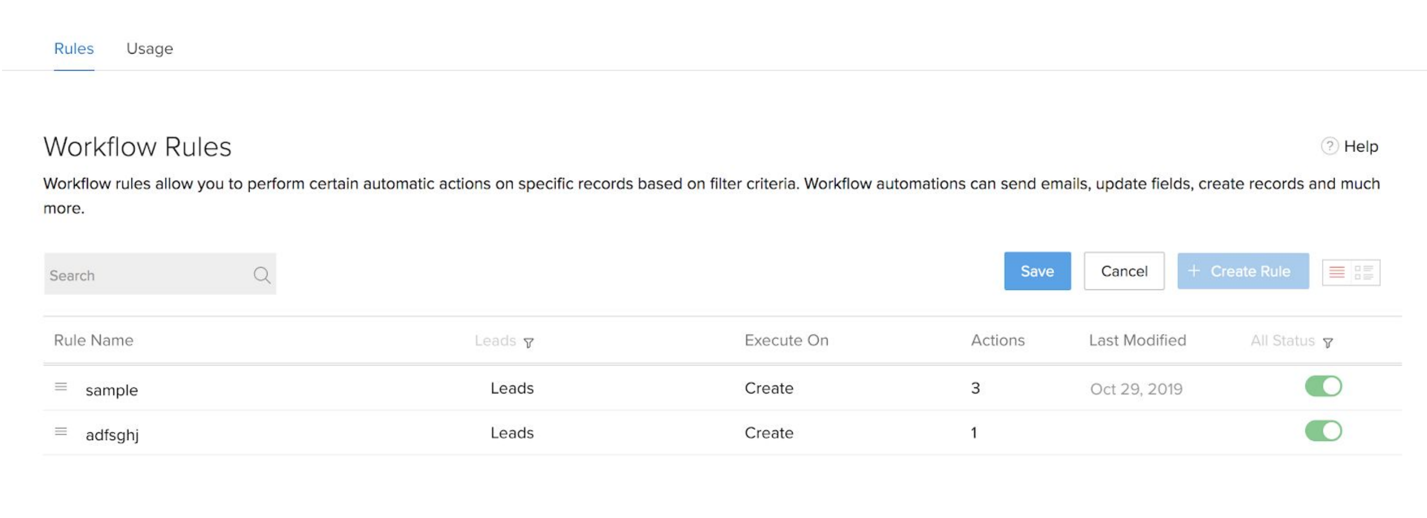
1. “+” Add” used in the same place.
2. Call to action should convey the clear message.

Solution:

1. Need to remove the “+” from add another condition. This should be (Add New condition/ “+ condition”)
2. Need to change the call to action “save” as “Save Rule”. This is more meaningful than having a save.

Conclusion:

Page Name : Workflow - Reorder

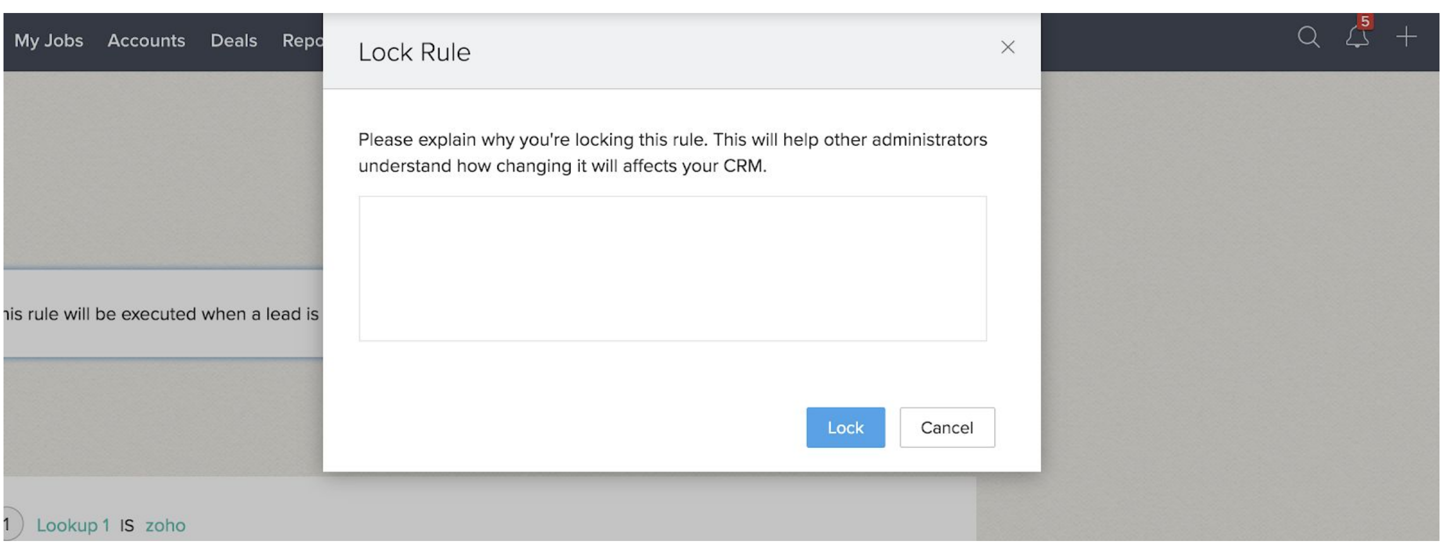


Pain Points: When I click the reorder button I have an option to reorder my rules. But why? What is the purpose of having reorder button here? Is this the order system need to validate the rule one by one?

Solution: Need to give some criteria for reorder so that user can choose the order in the criteria rules. In this case if it's not possible means show the purpose of button hint for “reorder button” so that as a user everyone understand the purpose of the reorder button.
And the call to action should be “Done”. Instead of save/cancel.

Conclusion:

Page Name : Workflow - Lock Rule

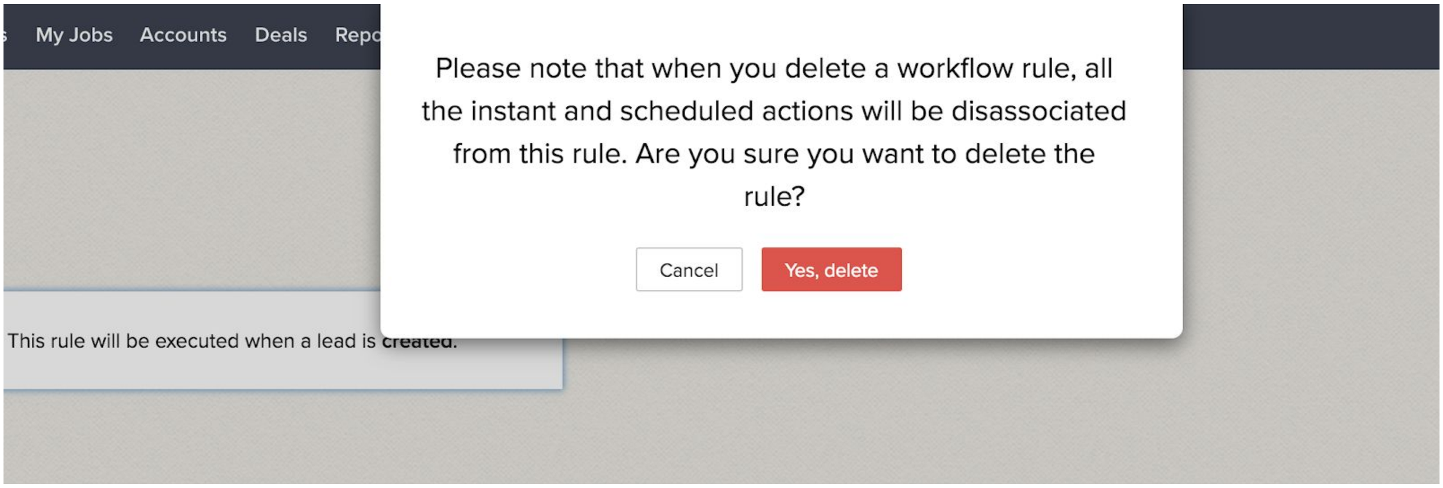


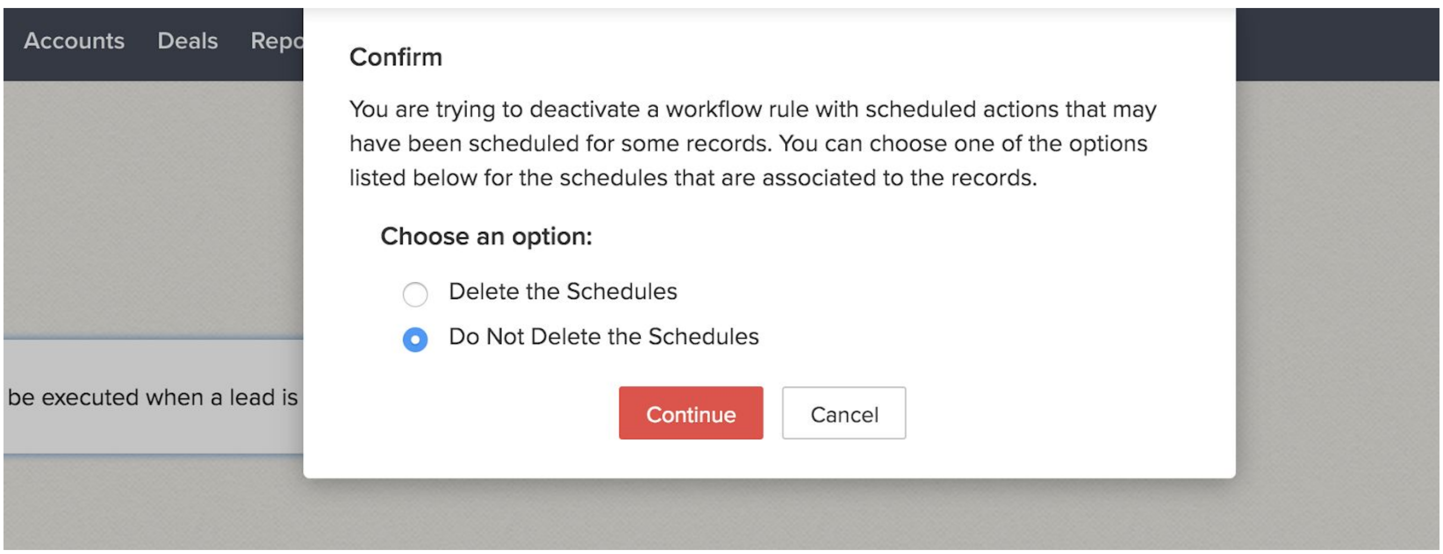
Pain Points: Different button alignment.

Solution: Primary action should be right side and the secondary on left side.

Conclusion:

Page Name : Workflow - Alert message



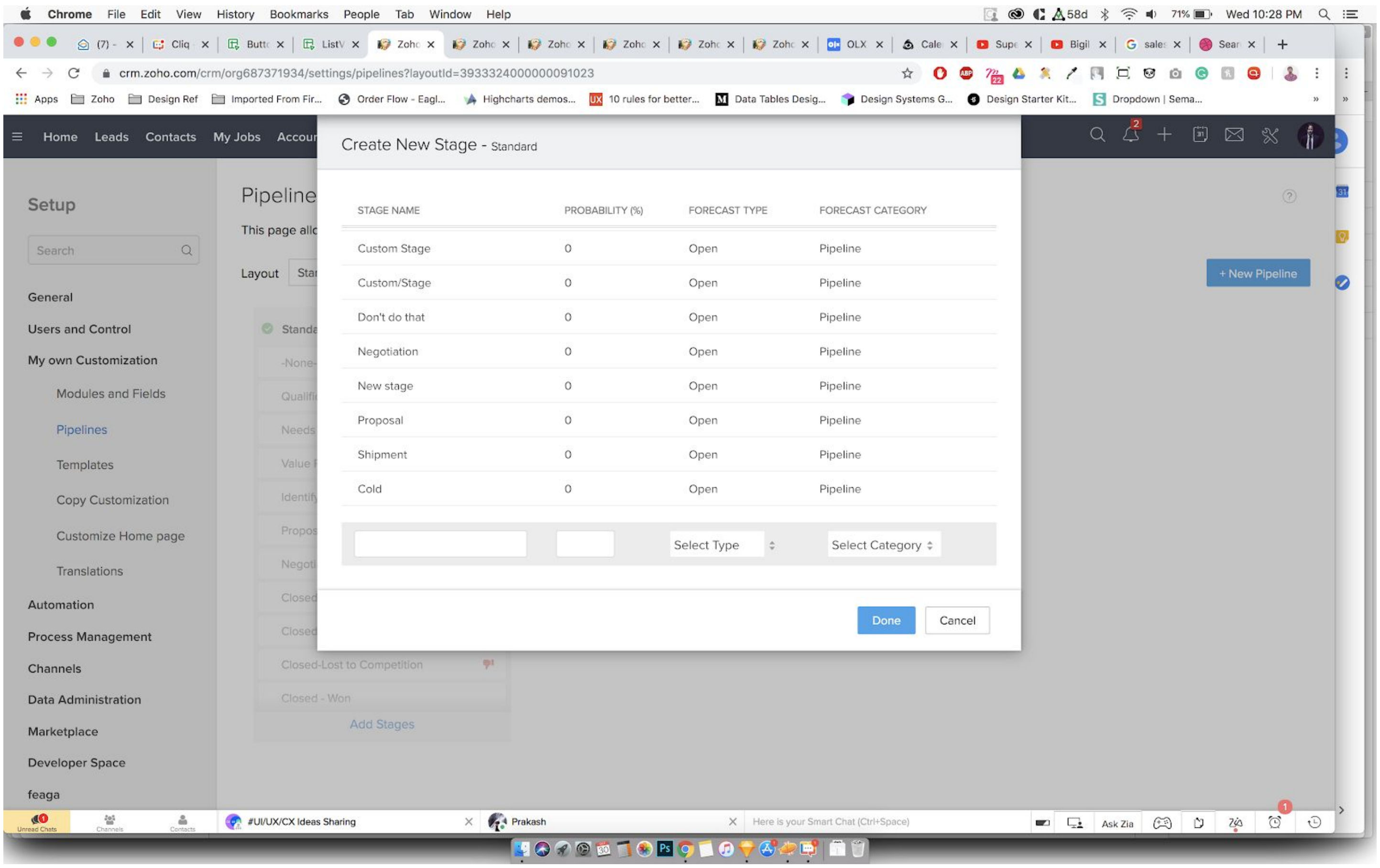


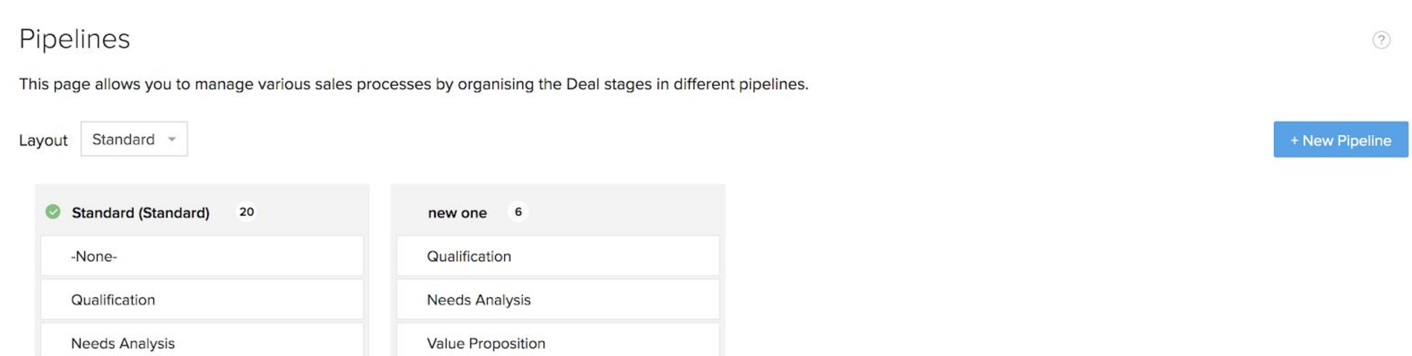
Pain Points: Different style for alert/delete popup.

Solution: Need to follow the same style for all the alert/info messages.

Conclusion:

Page Name : Pipeline - Create New





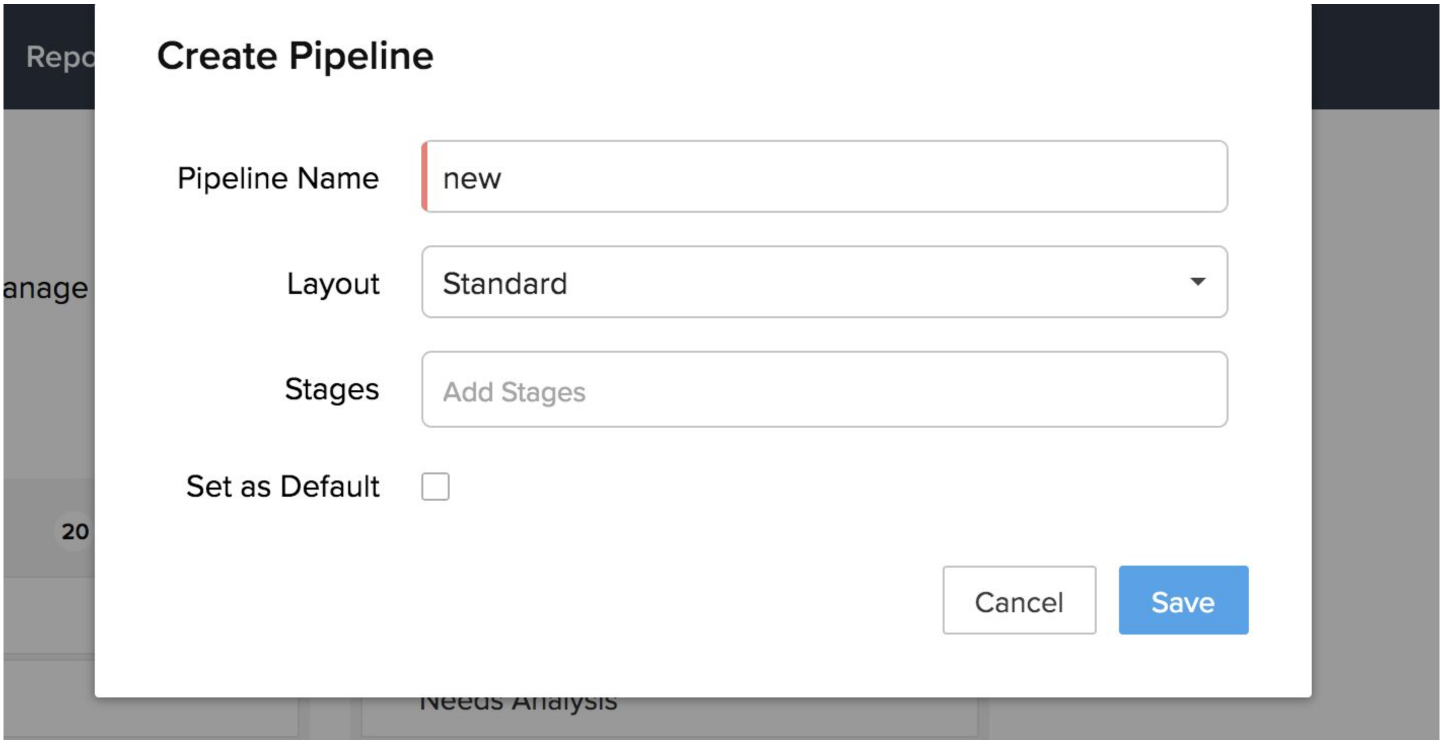
Pain Points:

1. Button alignment is different.
2. Here the function is creating a new pipeline but we use “+”. + explain the add new.

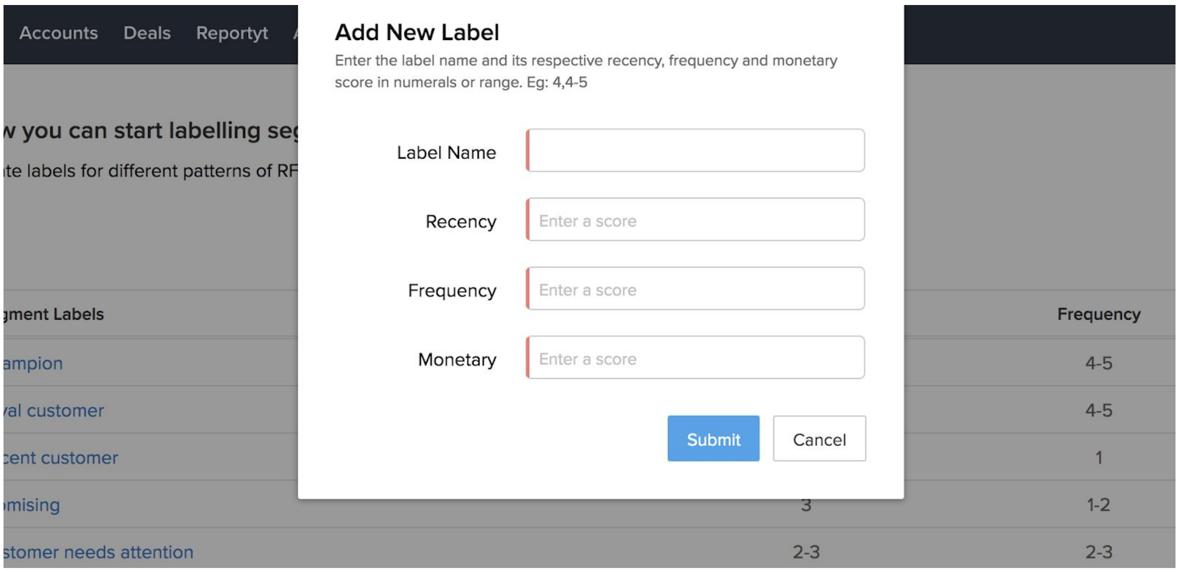
Solution:

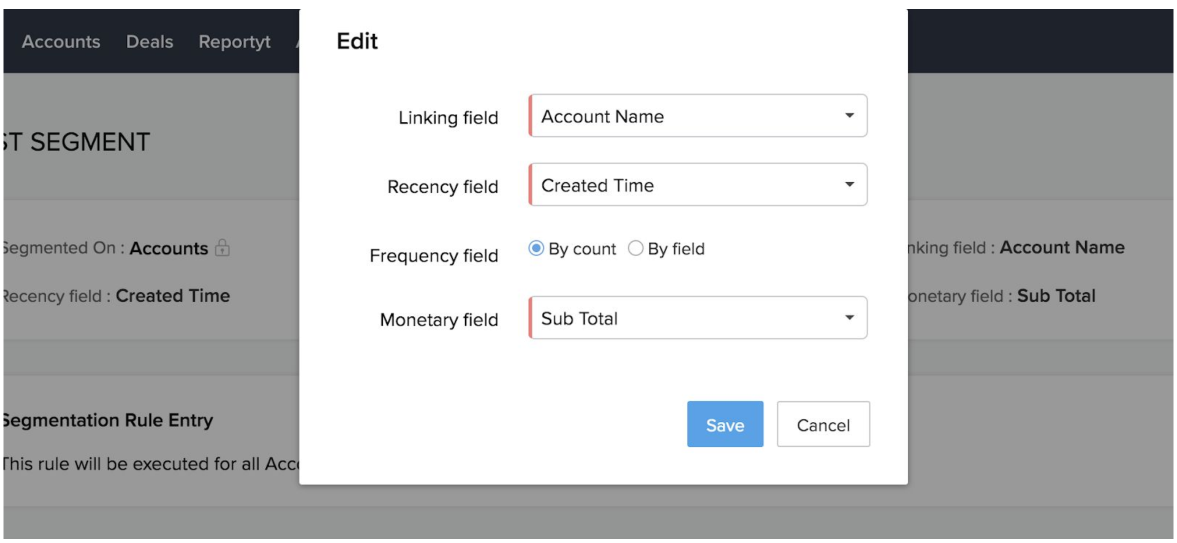
1. Need to align the primary on left side and cancel on right side.
2. CTA should be Create New Pipeline.

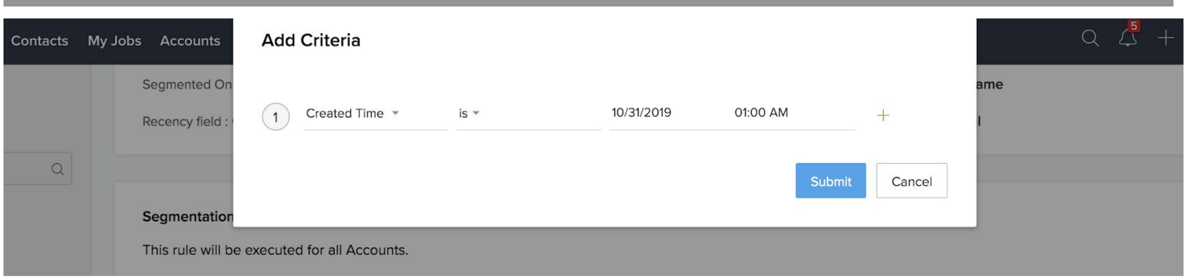
Conclusion:

Page Name : Pipeline - Create New

Pain Points: CTA is different. We use save for edit and other places. For creating a new one why we use the same.
Solution: we can use “Create” so that it looks more relavant to this page.
Conclusion:

Page Name : Segmentation





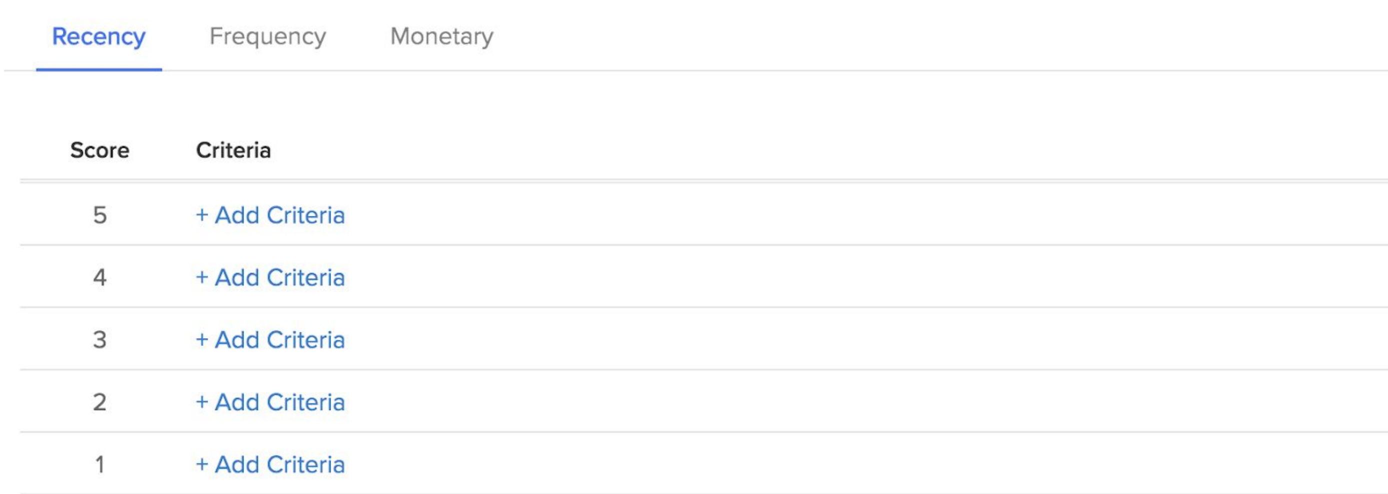


Pain Points: All button alignment is different.

Solution: Need to align the primary button on the right side. And cancel on the left side.

Conclusion:

Page Name :Segmentation - Add Criteria

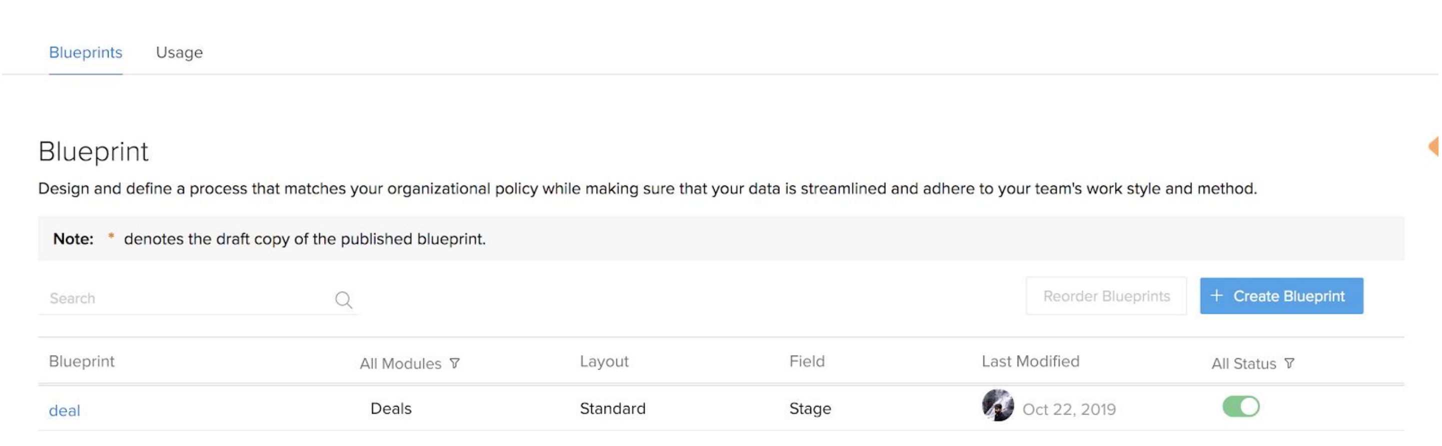


Pain Points: “+” and “Add” used in the same place.

Solution: Need to remove the “+” from the beginning/Use “+Criteria” instead.

Conclusion:

Page Name : Blueprint

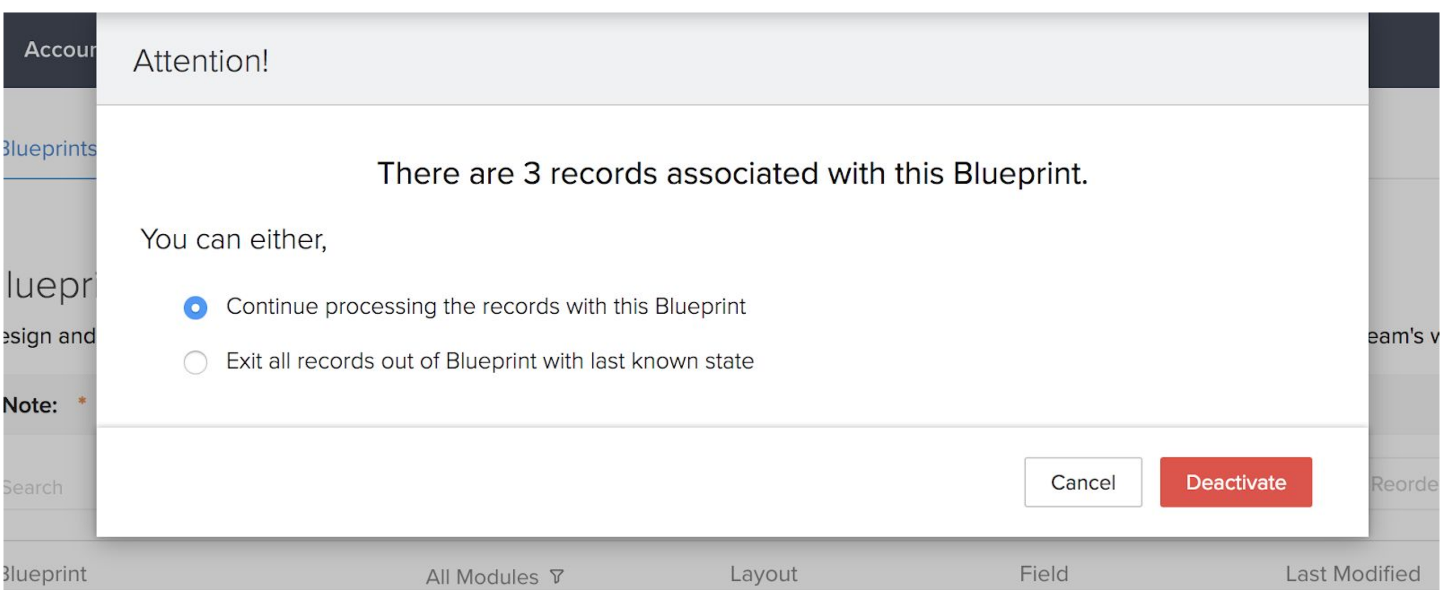


Pain Points: We used “+” before create. It gives confusion like its a add/create blueprint.

Solution: Need to remove the “+”.

Conclusion:

Page Name : Blueprint - Deactivate

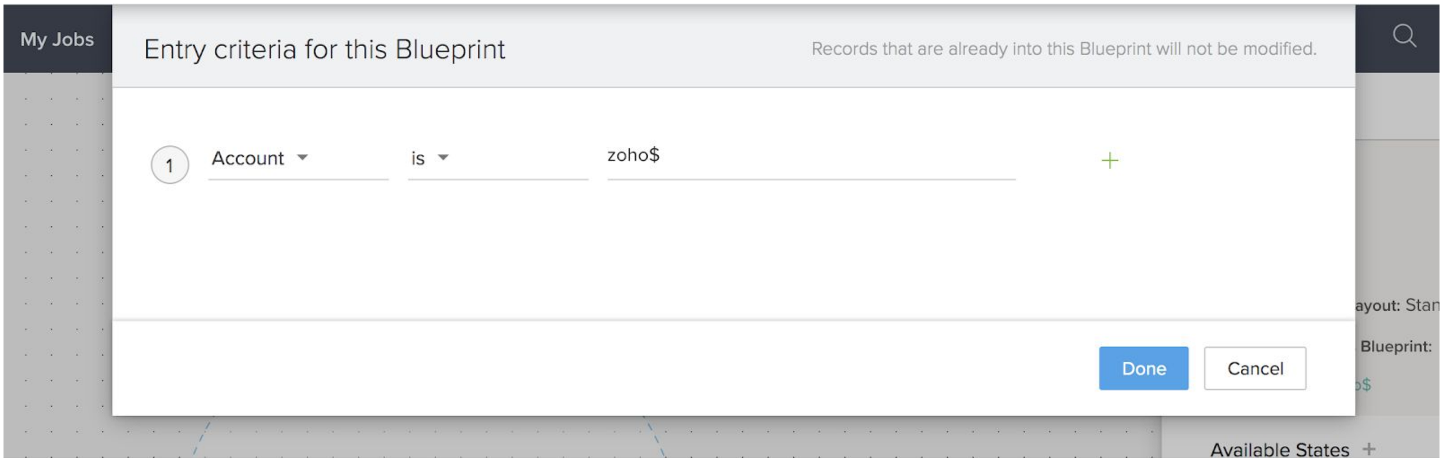


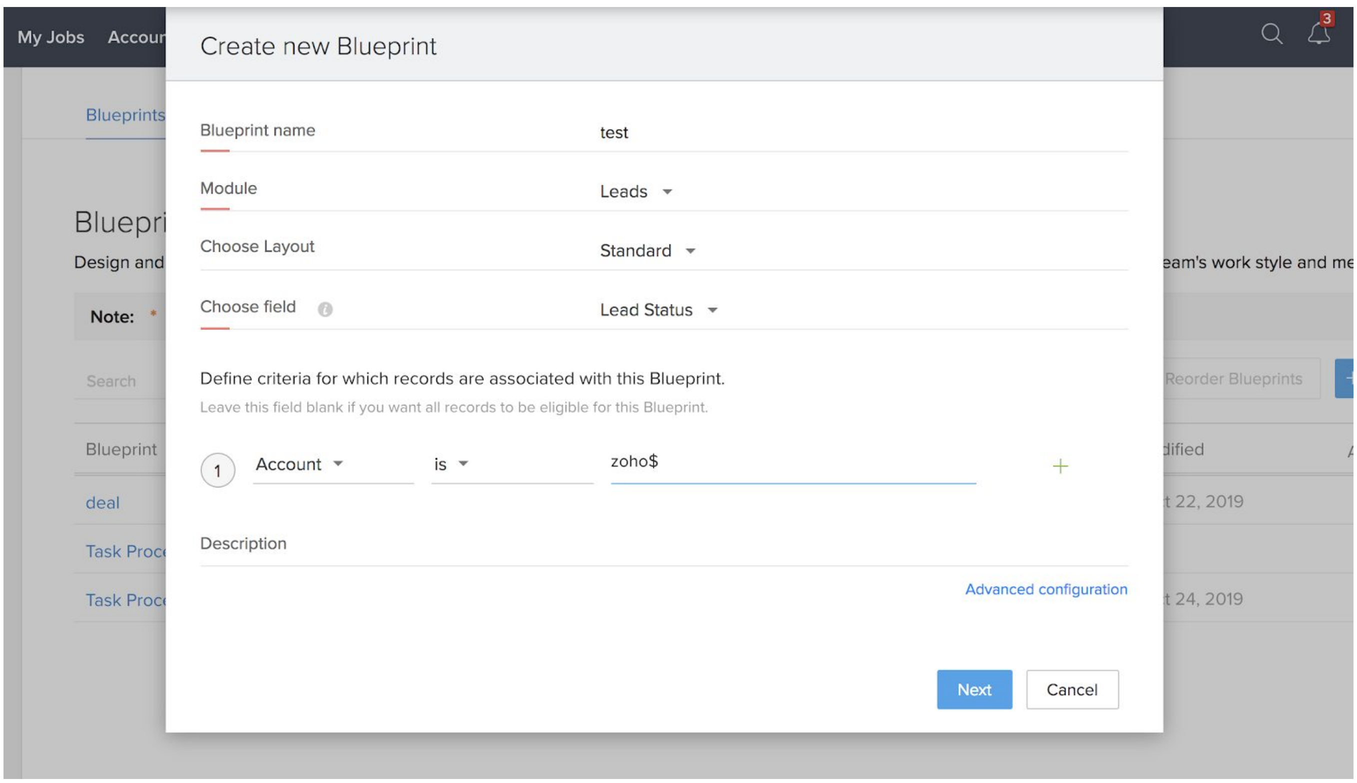
Pain Points: Different style for alert/delete popup.

Solution: Need to follow the same style for all the alert/info messages.

Conclusion:

Page Name : Blueprint

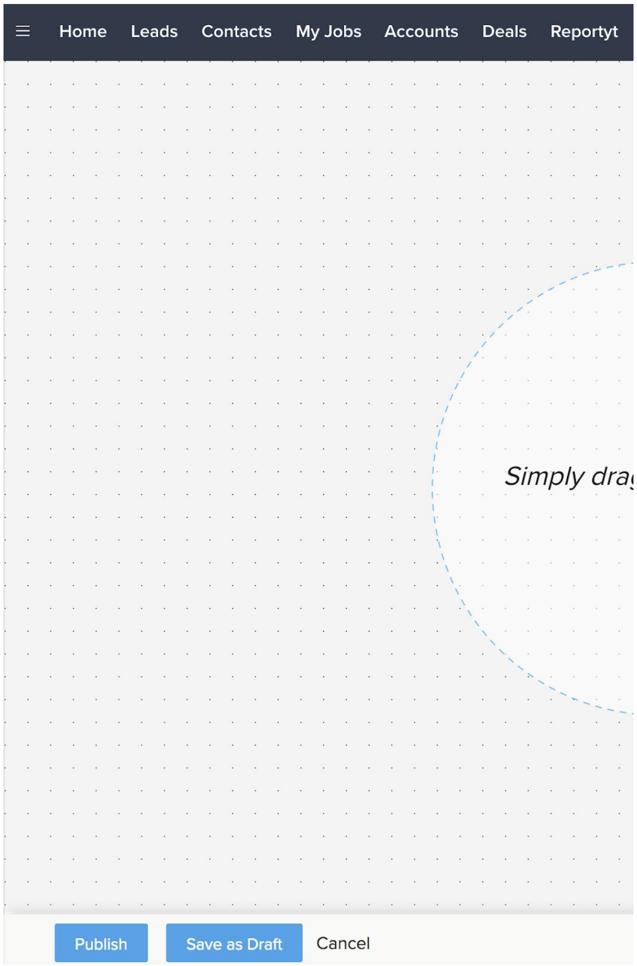




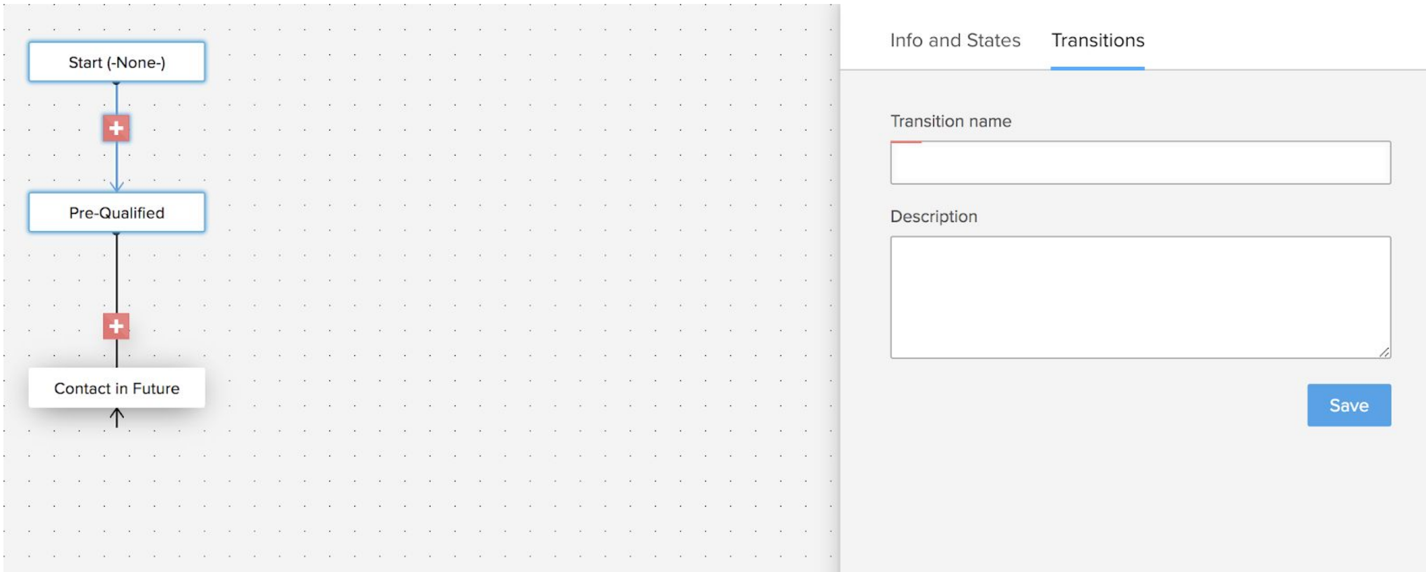
Pain Points: button alignment - When we use the call to actions on the right side need to follow the primary on the right side and the secondary on the left side.

Solution: Need to follow the button alignment

Conclusion:

Page Name : Blueprint

Pain Points: Two primary button next to each other gives some confusion on what to do first.
Solution: Publish should be primary and the “Save as draft” should be secondary.
Conclusion:

Page Name : Blueprint - Transition

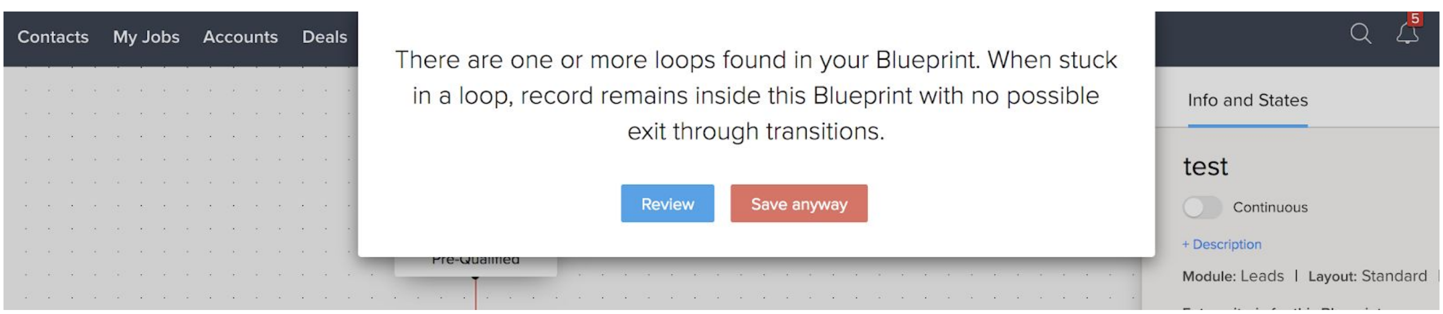


Pain Points: Every transitions and every actions have cancel next to the save. When I don't have "cancel" here suddenly I don't understand how to cancel this transition.

Solution: Need cancel button here to cancel this transitions.

Conclusion:

Page Name : Blueprint - Alert message

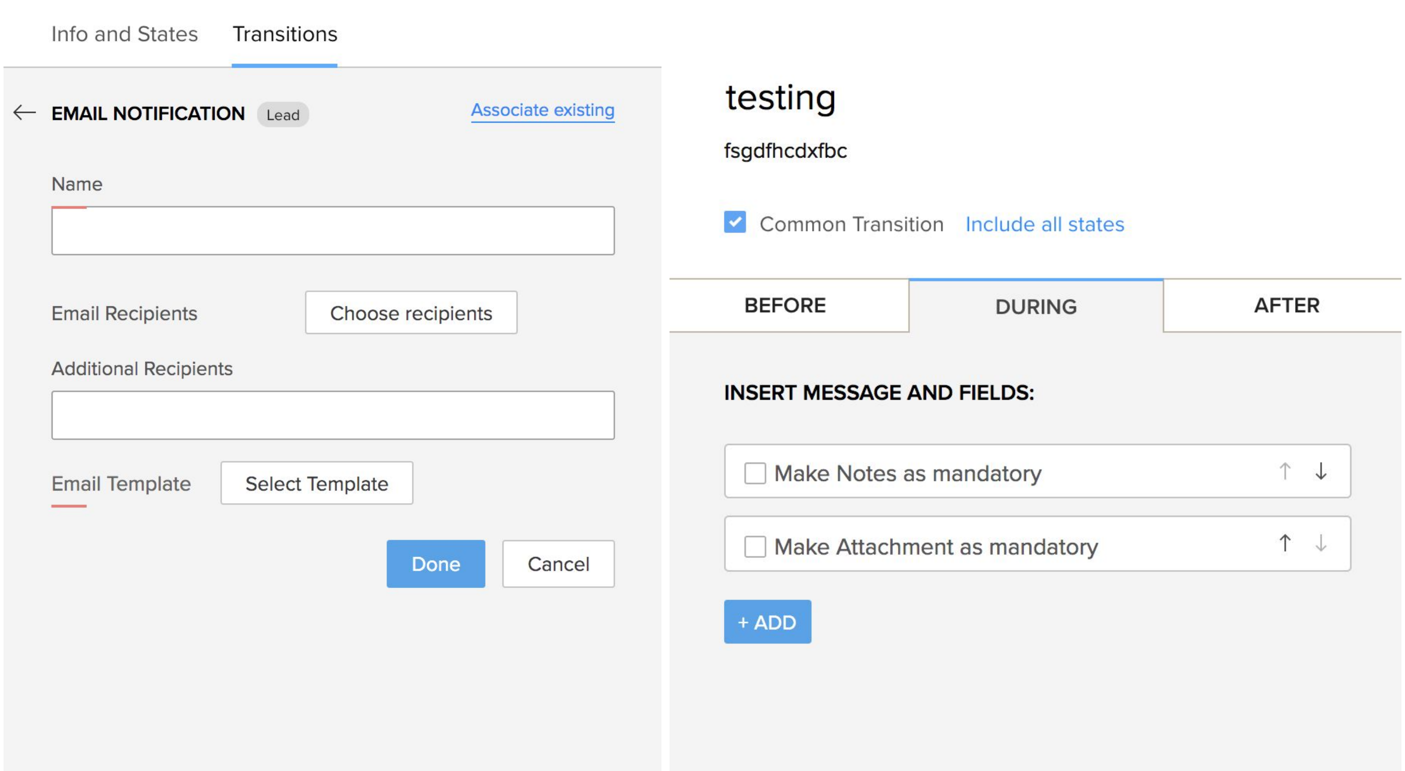


Pain Points: This alert message is not readable. And totally out of all other models.

Solution: Need to follow the same style for all the alert/info messages.

Conclusion:

Page Name : Blueprint - Button alignment



Pain Points:

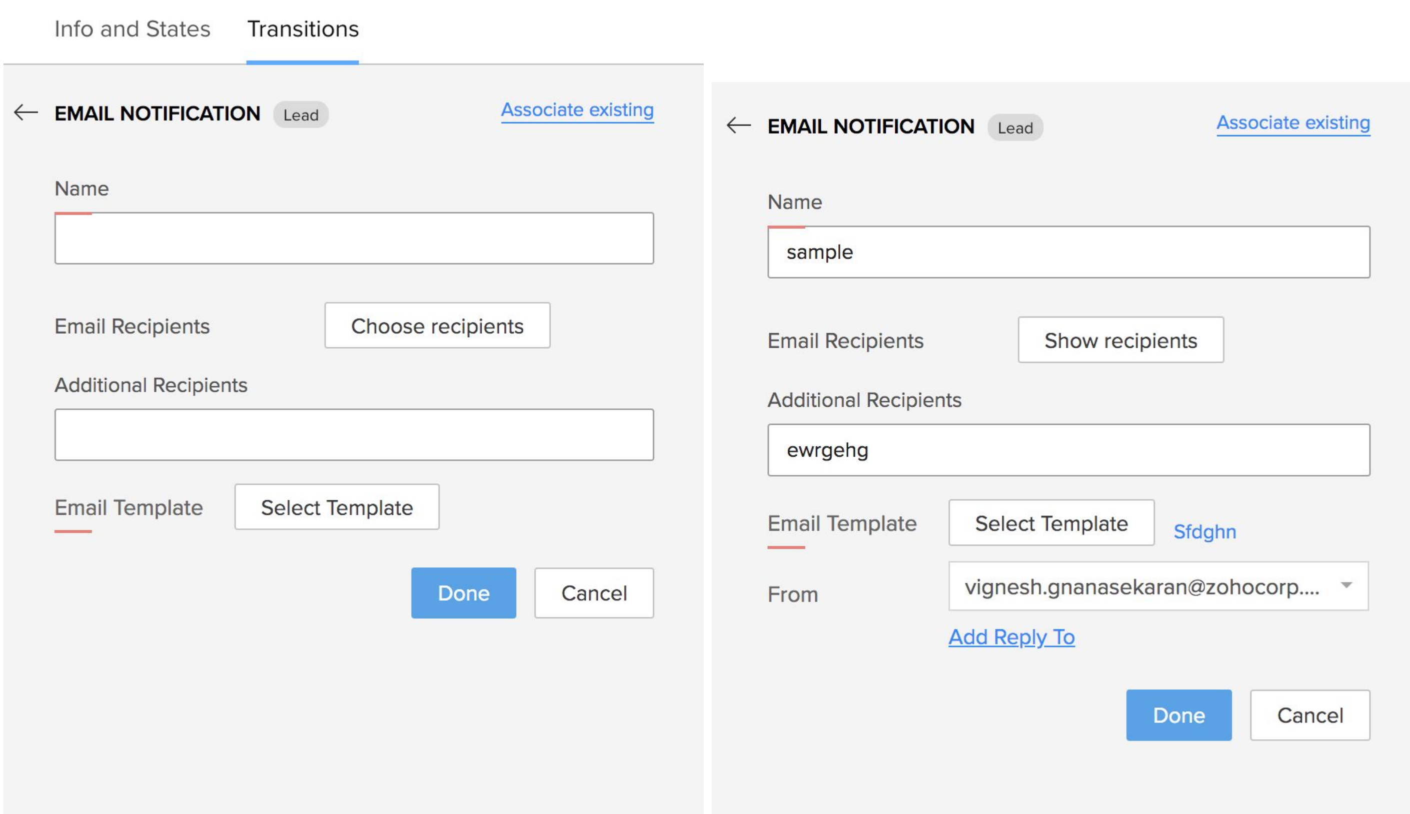
1. Used two different alignment buttons in side Nav bar.
2. “+” and “ADD” convey the same message. When I see this first time I got a question “Add What”

Solution:

1. Need to follow the same style in all the places.
2. We can use “Add Action” as CTA literal.

Conclusion:

Page Name : Blueprint - show recipients, Select template



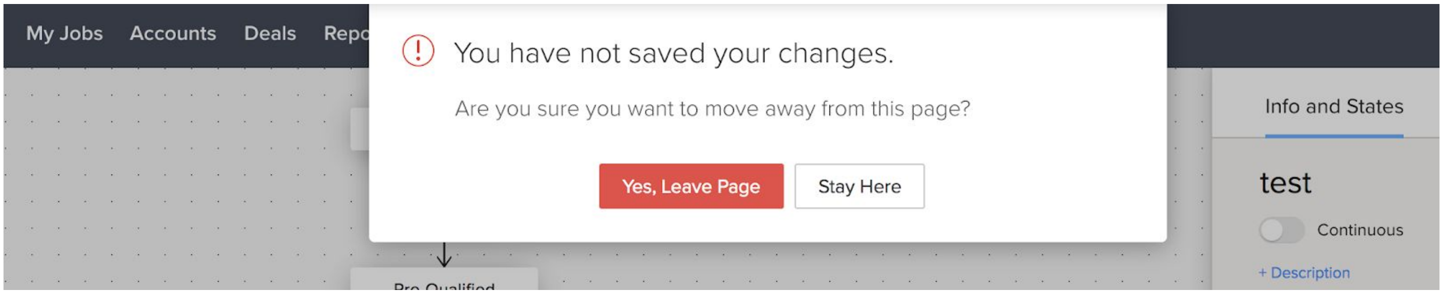
Pain Points:

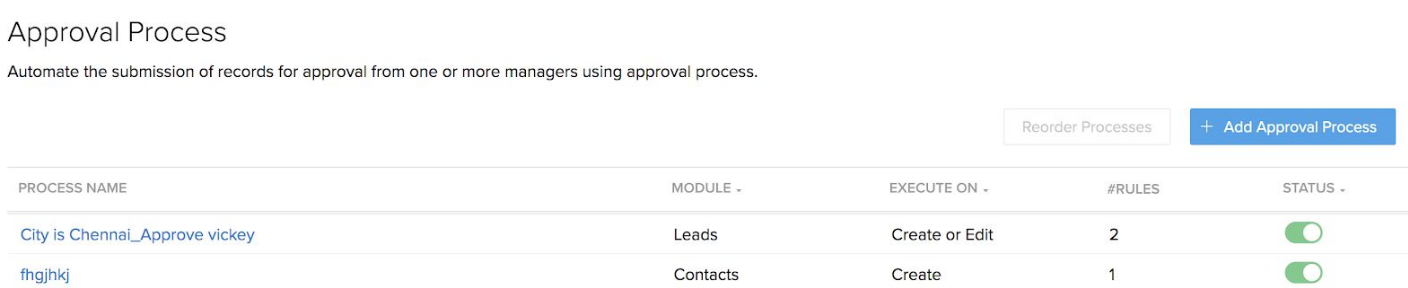
1. Show recipients & Select template not look like a button.
2. When I choose the recipients I don't get any info about recipients. When I select template I got the template name showed here. Two different types of input buttons used here.

Solution:

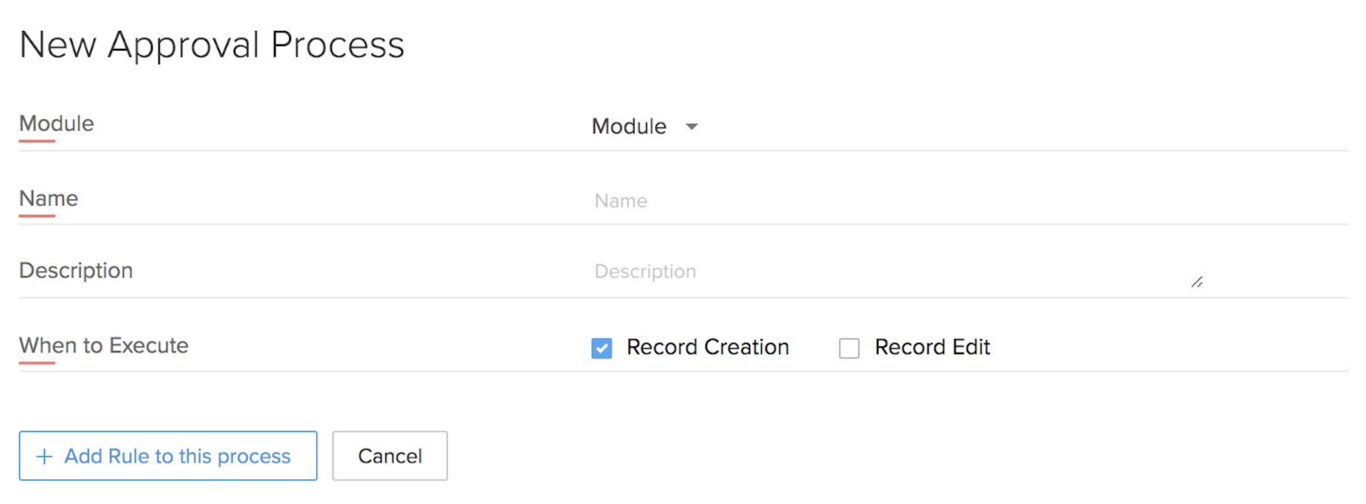
1. Need to create new button style for this/follow the existing style.
2. Need a consistency in all the input selection buttons. If we showed in a place need to follow in all other places.

Conclusion:

Page Name : Blueprint - Alert Message

Pain Points: Different style for alert/delete popup.
Solution: Need to follow the same style for all the alert/info messages.
Conclusion:

Page Name : Approval Process

Pain Points: + & Add used in the beginning. It's actually creating a new one.
Solution: Need to remove "+" and the call to action should be Create approval process.
Conclusion:

Page Name : Approval Process - Create New



Pain Points: Title and call to action is different. Primary action not look like a primary button.

Solution: When creating a new approval process the creating part should convey the message. So the title should be "Create New approval process" and need to remove "+" in the beginning.
Button style should be primary here.

Conclusion:

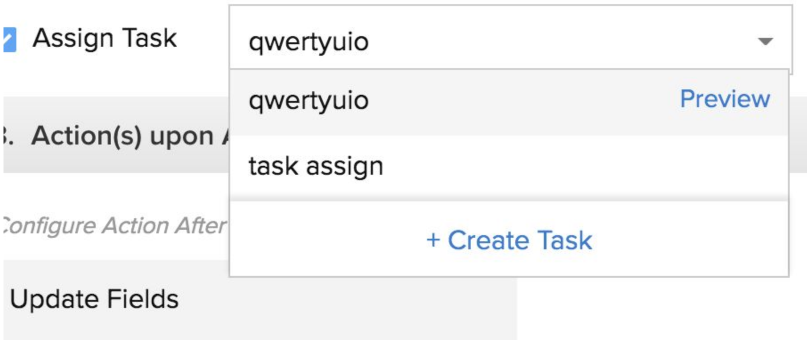
Page Name : Approval process - description

Pain Points: When I add the description there is no save/cancel/done button to save the description.

Solution: Need to use save/cancel icon/button what we followed in other places.

Conclusion:

Page Name : Approval process - Add Task



Pain Points:

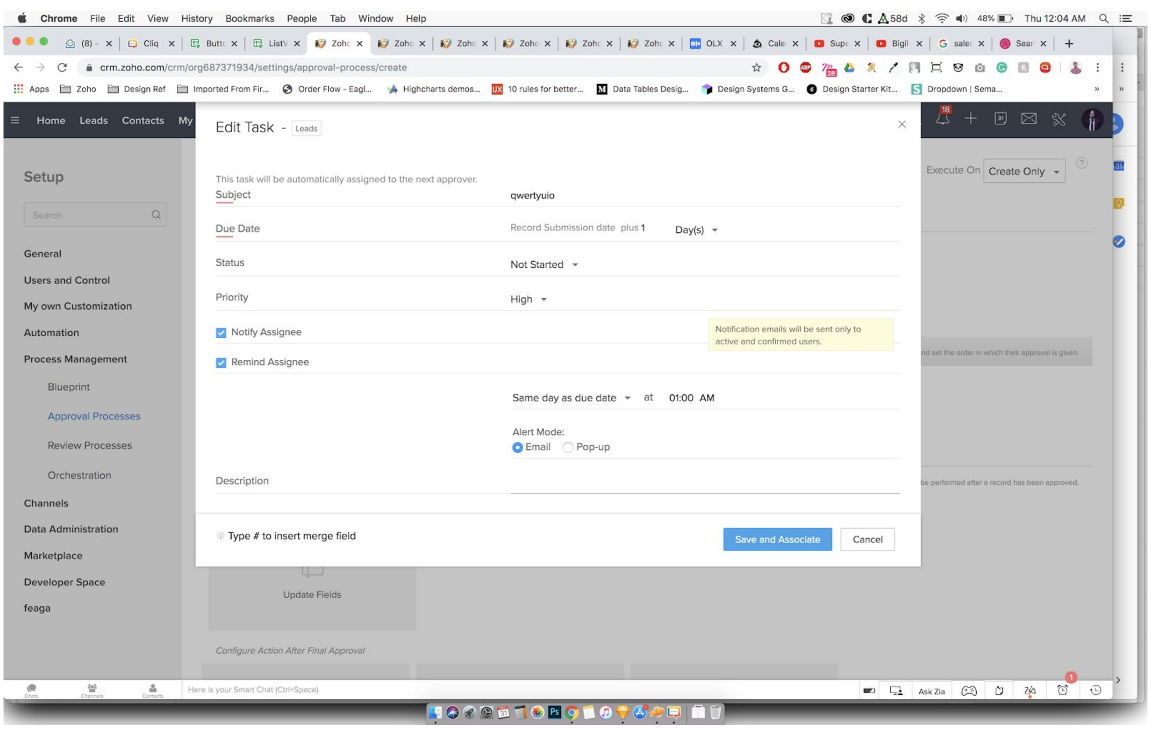
1. “+” before Create New.
2. When I click the preview it doesn’t work like preview, edit opens in a popup.

Solution:

1. Need to remove “+” and use the Create task alone.
2. There is no need to preview here. Need to change the text as “Edit”

Conclusion:

Page Name : Approval Process - preview

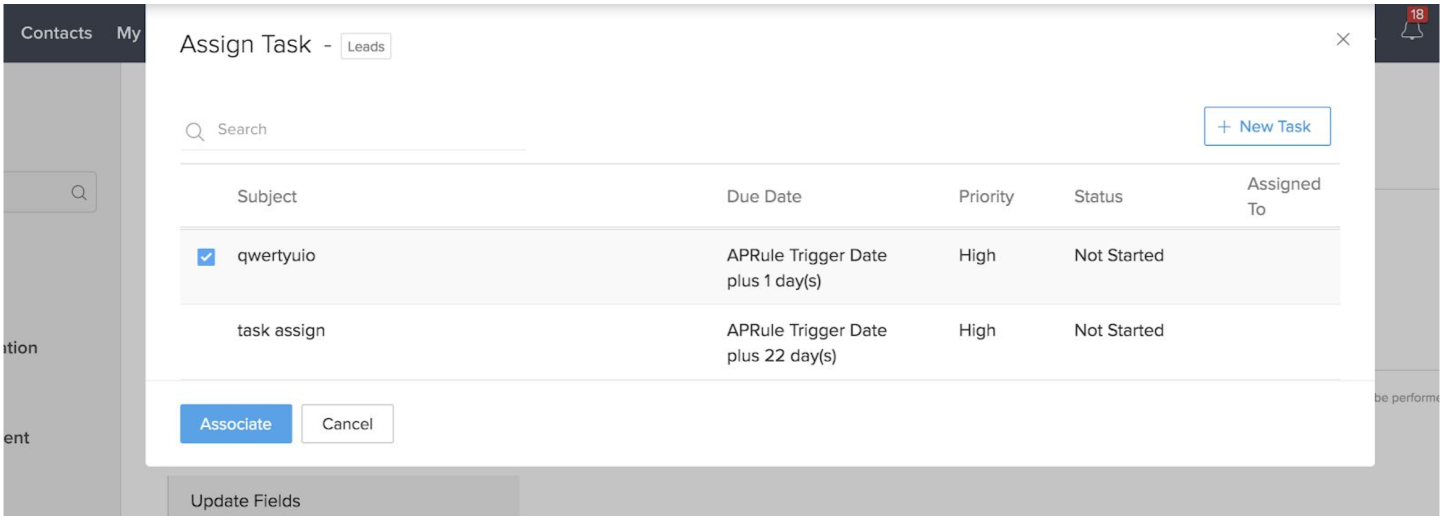


Pain Points: Button alignment is different.

Solution: Primary button should be on the right side and the secondary on the left side.

Conclusion:

Page Name : Approval process - Assign Task



Pain Points:

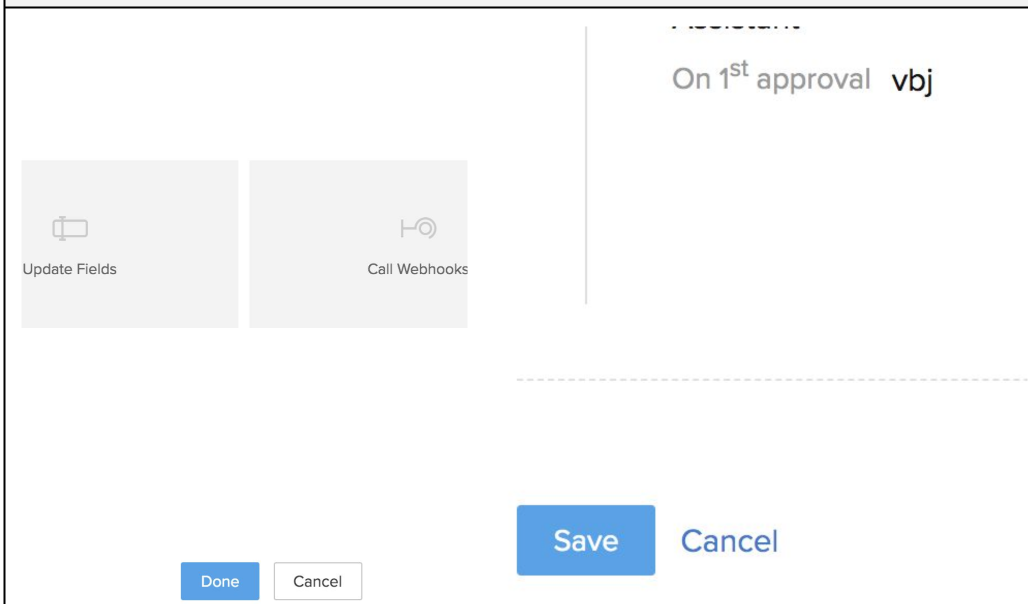
1. Title and the CTA is different.
2. +New Task for creating a new one.

Solution:

1. The label of CTA should be Assign.
2. For creating a new task the CTA should be Create Task.

Conclusion:

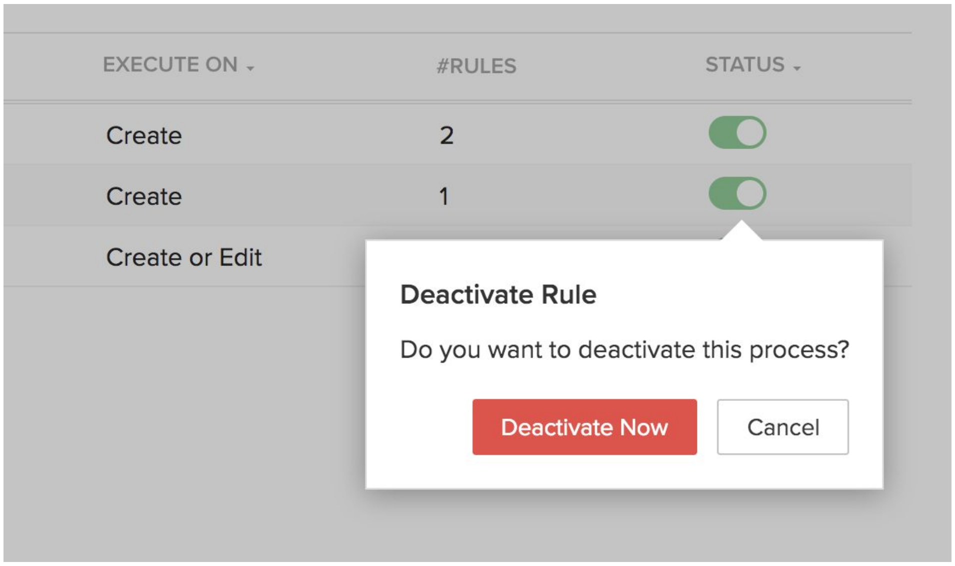
Page Name : Approval process save

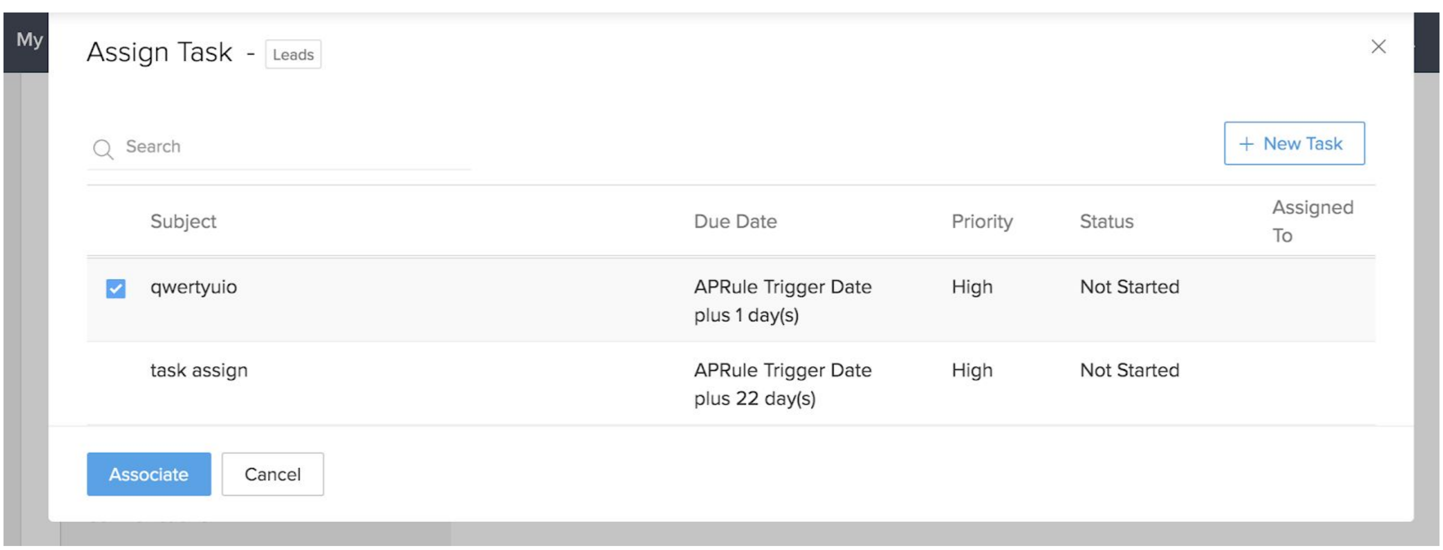


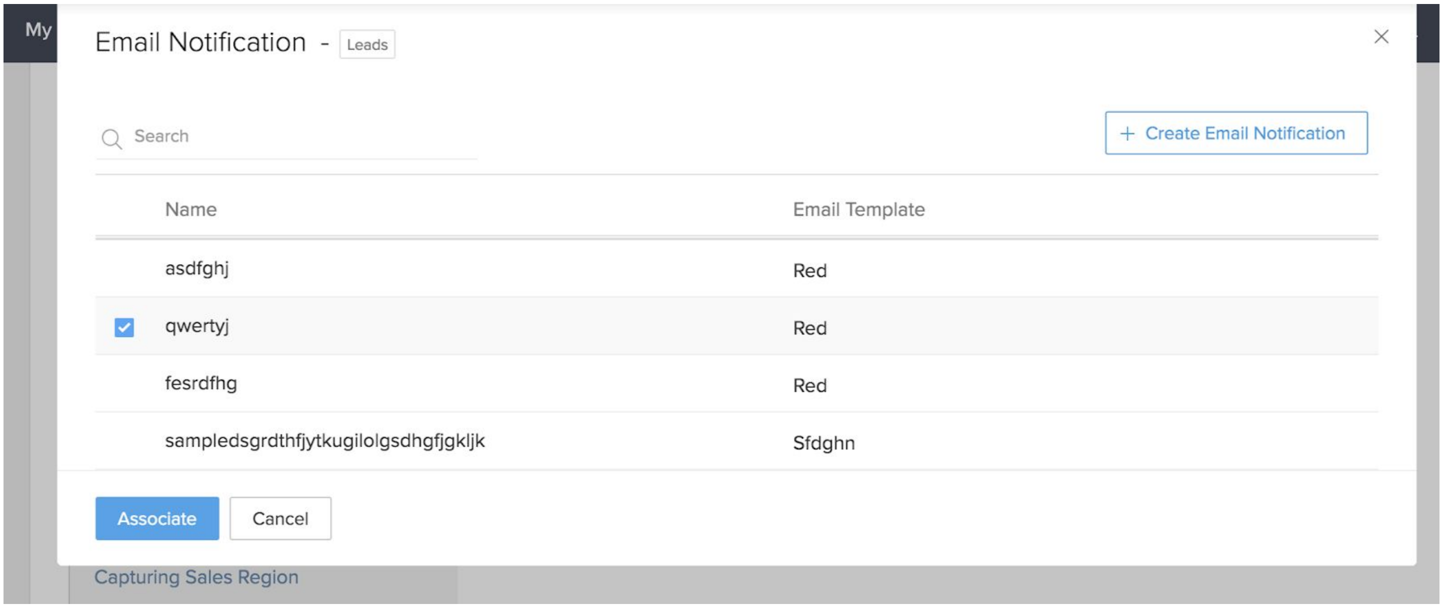
Pain Points: Done/cancel comes before save this process. Do we really need this?

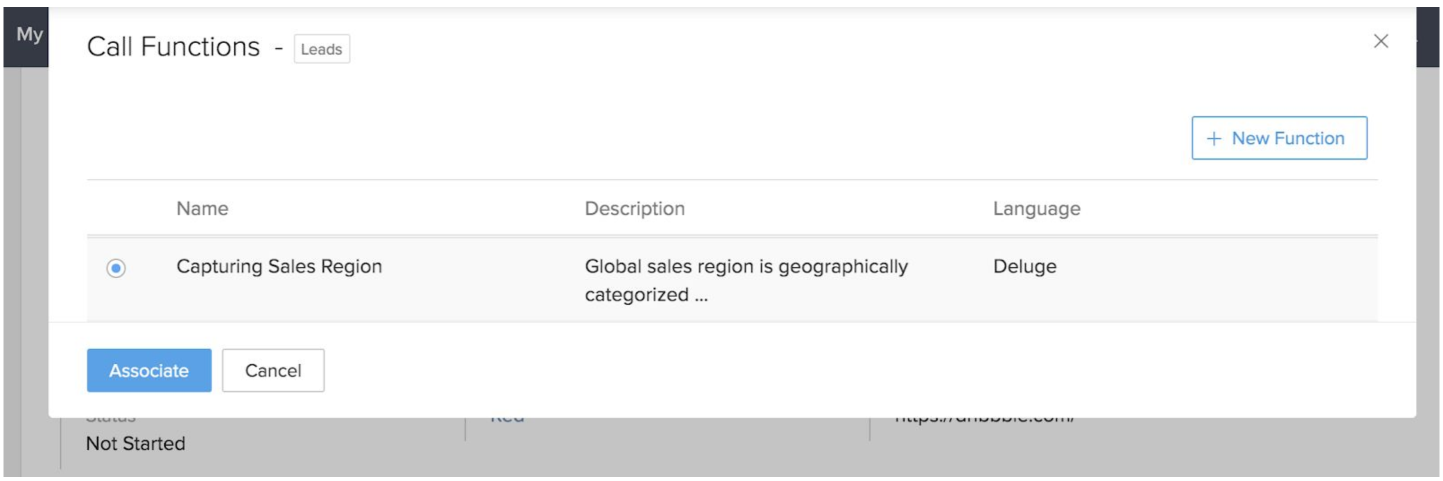
Solution: We don’t need done/cancel before save/cancel here.

Conclusion:

Page Name : Approval Process - Deactivate Rule

Pain Points: Button alignment is different.
Solution: Need to change the alignment to left side.
Conclusion:

Page Name : Approval Process - Popup






Pain Points: Repeated issues for create new button.

Solution: Some popup has "+New" "+Create" like that.
Need to follow the same button style for creating the "New" from popup. So that everything looks consistent.

Conclusion:

Page Name : Approval Process - Add another rule

Pain Points:

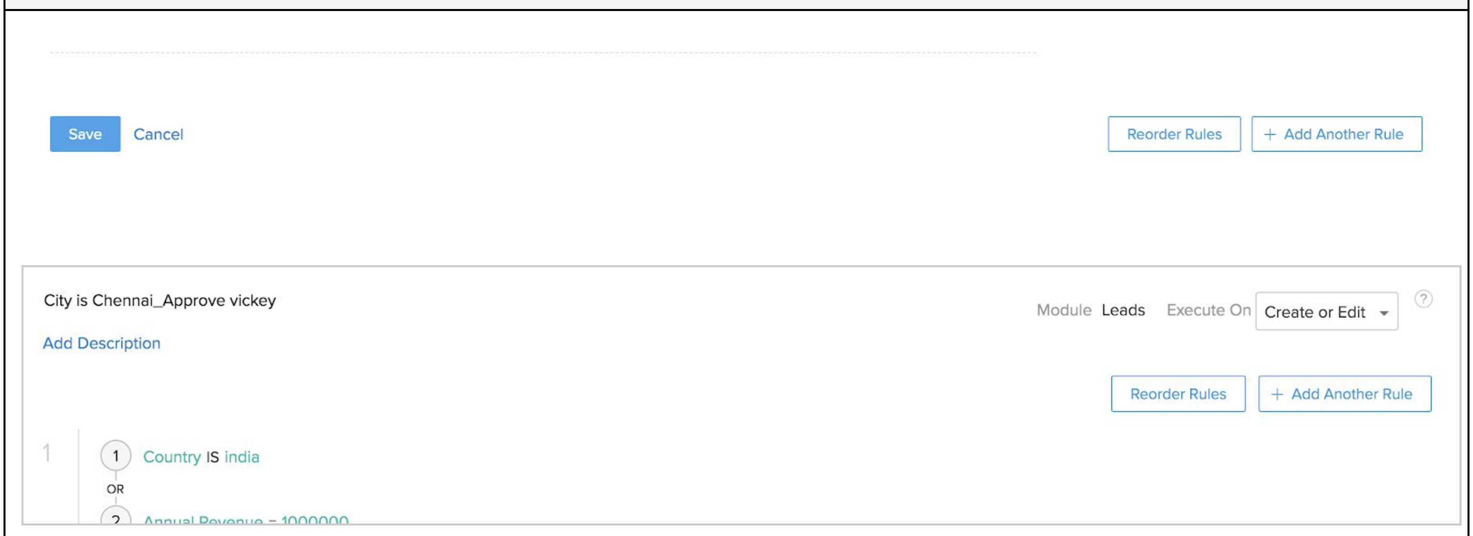
1. Primary action button style is different.
2. Here the action is adding another one so the CTA should be “Add another rule/Add new rule”. Need to remove the “+”

Solution:

1. This should be Primary blue button.
2. Here the action is adding another one so the CTA should be “Add another rule/Add new rule” & Need to remove the “+”.

Conclusion:

Page Name : Approval Process - Repeated buttons



Pain Points:

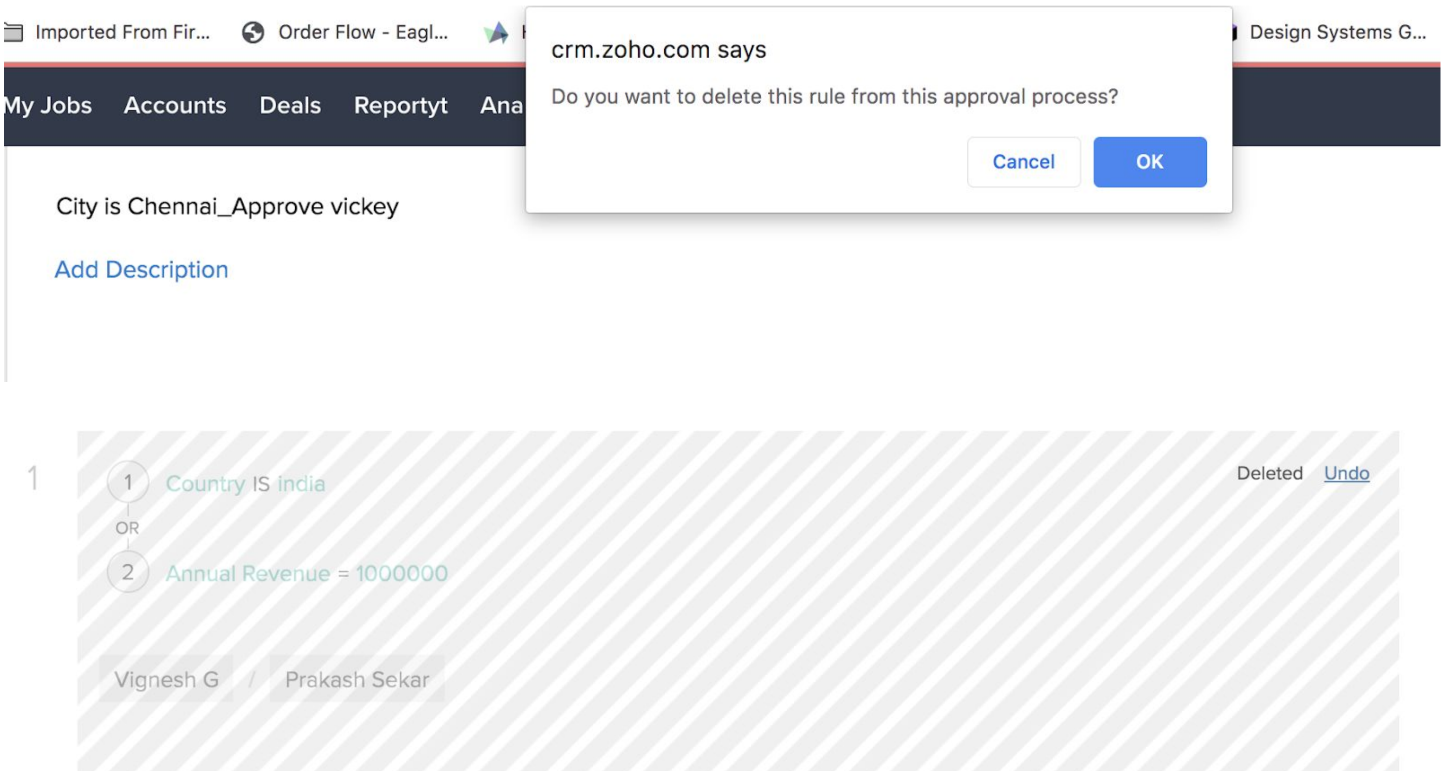
1. Repeated call to actions. Reorder rules and add another rules used at the top and the bottom.

Solution:

1. Need to remove the repeated buttons in the bottom.

Conclusion:

Page Name : Approval Process - delete rule



Pain Points:

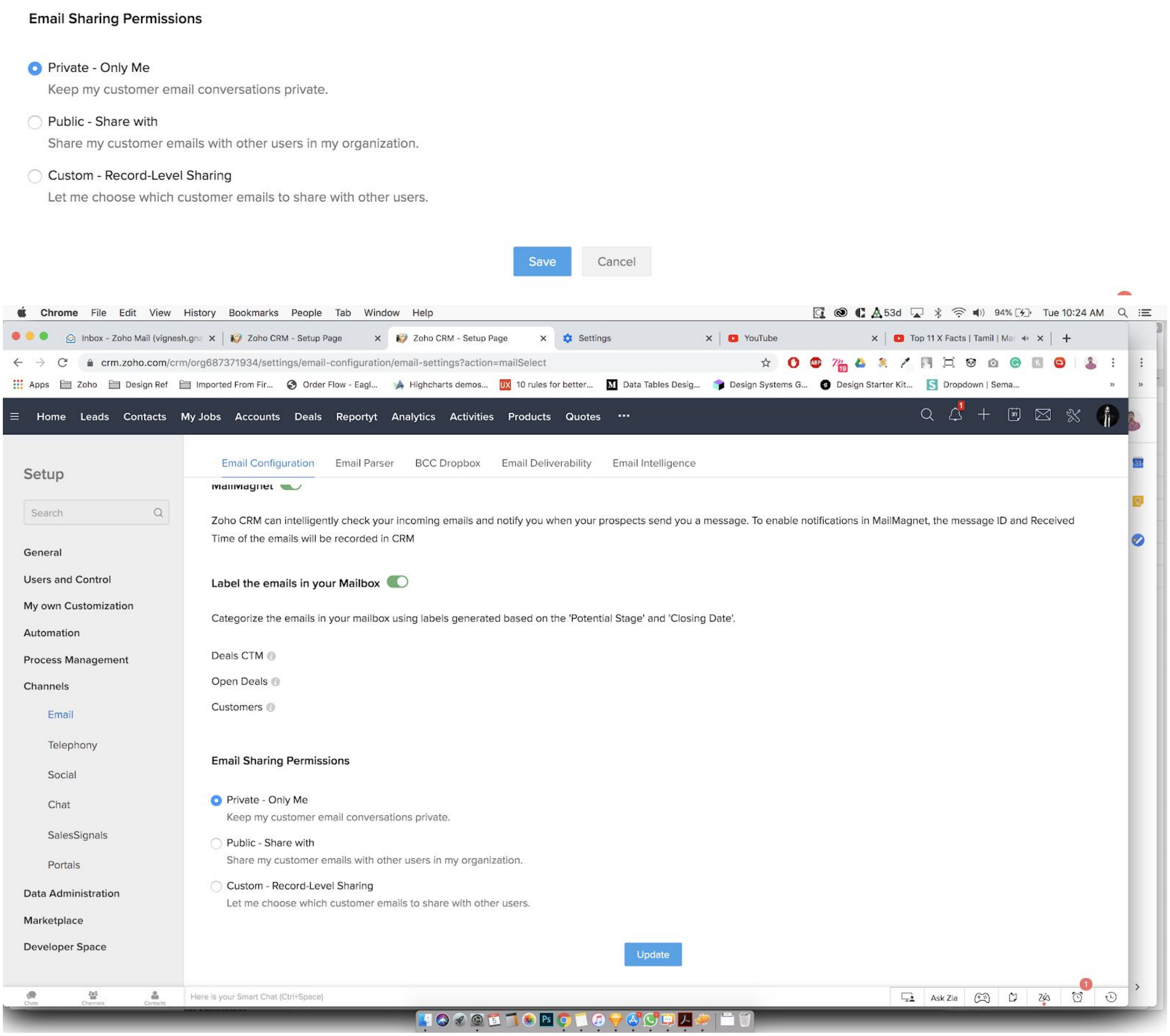
1. Showing the browser popup style gives confusion.
2. When I delete the rule we showed the thumbnail and option to "Undo" the deleted rule.

Solution:

1. This all functions are totally different from other features.
2. We don't follow this style in any other places. If used delete the record it will be deleted and not able to undo the actions.

Conclusion:

Page Name : Channels - Email configuration



Pain Points:

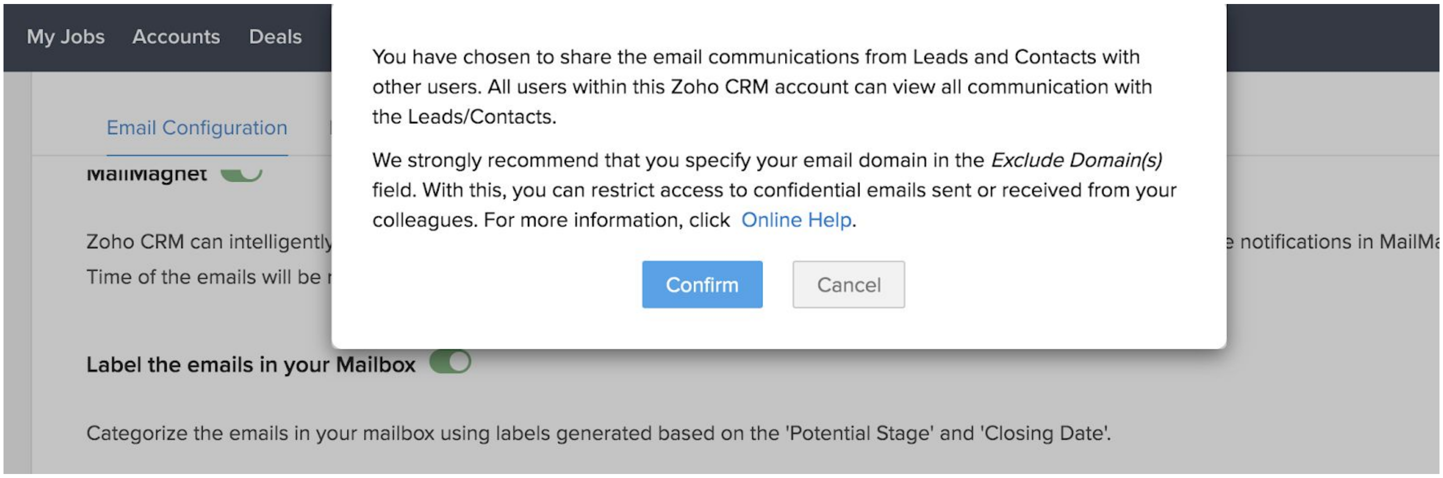
1. Button style and alignment is different while adding a new email ID.
2. Without doing any actions the primary buttons visible at all times gives confusion about what I have changed.

Solution:

1. Need to follow the default button style. Here all the details in left so alignment should be left side.
2. Button should be disable by default. It should be enabled once the user changes anything.

Conclusion:

Page Name : Channels - Email configuration public



Pain Points:

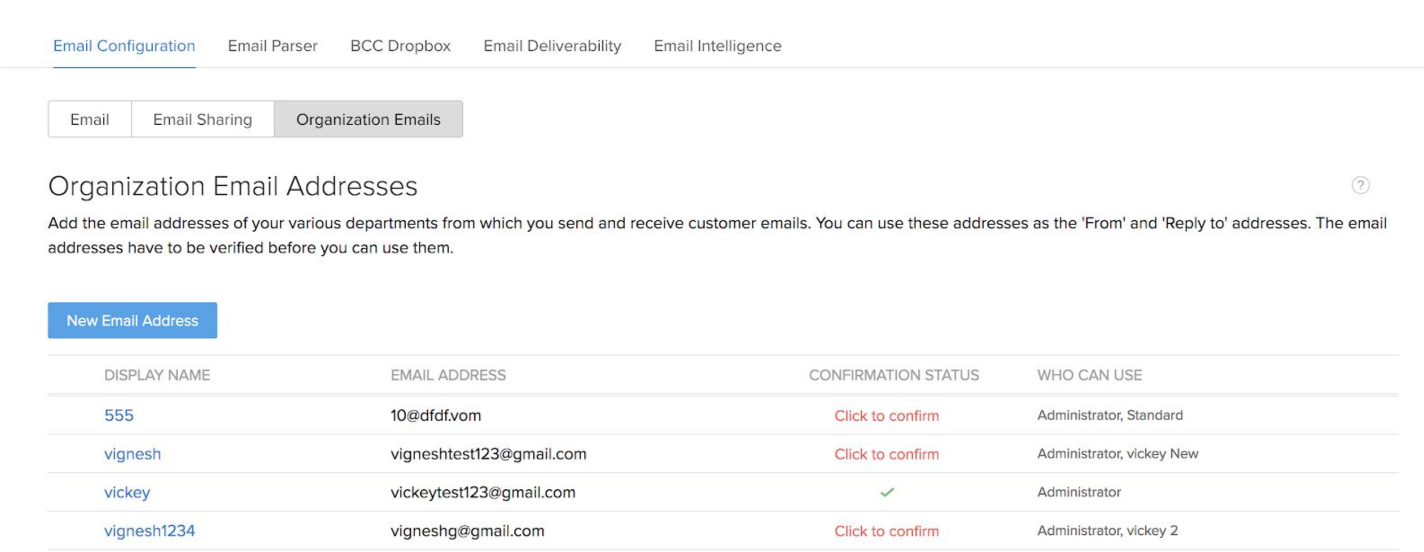
1. When I configure my email private to public I got summary with confirm text. Which is not clear to read. And used the different style for buttons.

Solution:

1. Alert/info needed to follow the similar or same style. Here We need to give the clear info about the purpose of this popup and need to follow the default button style and alignment.

Conclusion:

Page Name : Channels - Email configuration/Organization emails

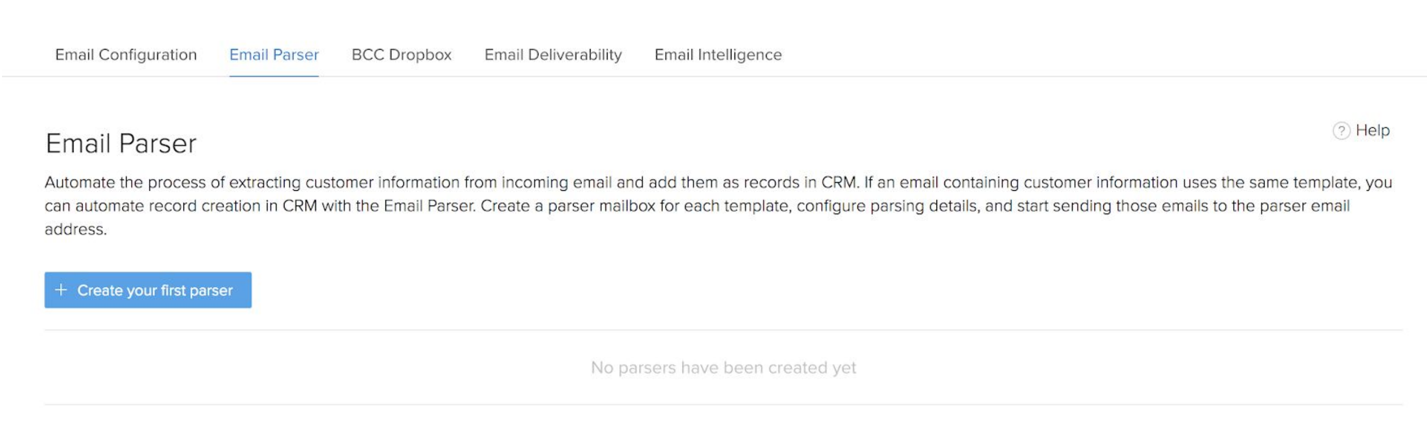


Pain Points: Primary action is placed in different position.

Solution: All the primary button in the list page(feature) should be right side. Need to follow the same style in all the places.

Conclusion:

Page Name : Channels - Email parser

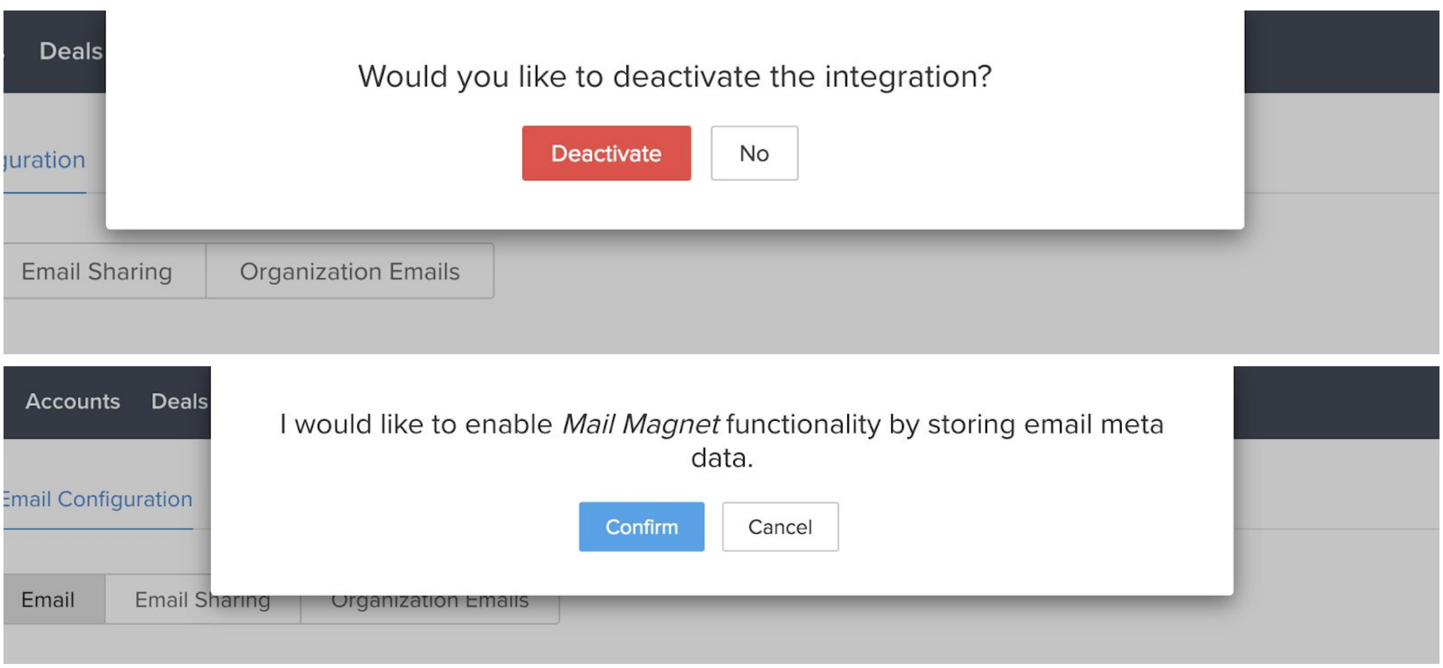


Pain Points: Primary action is placed in different positions.

Solution: All the primary button in the list page(feature) should be right side. Need to follow the same style in all the places.

Conclusion:

Page Name : Channels - Email configure



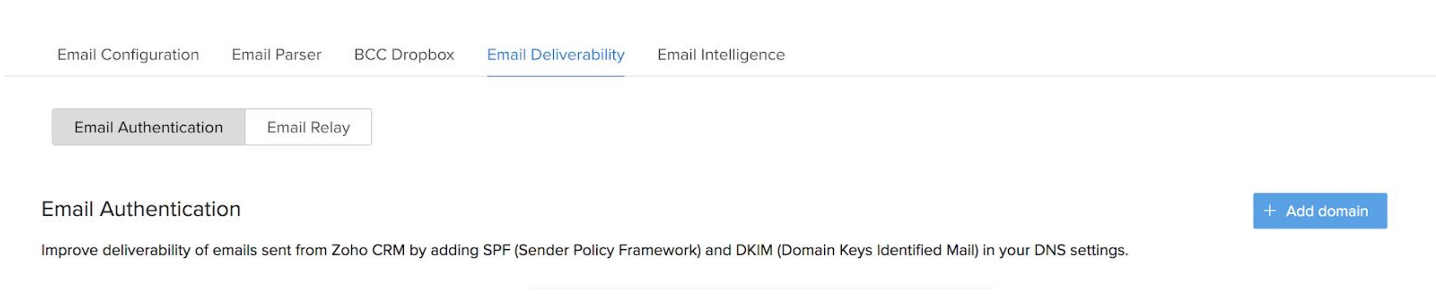
Pain Points:

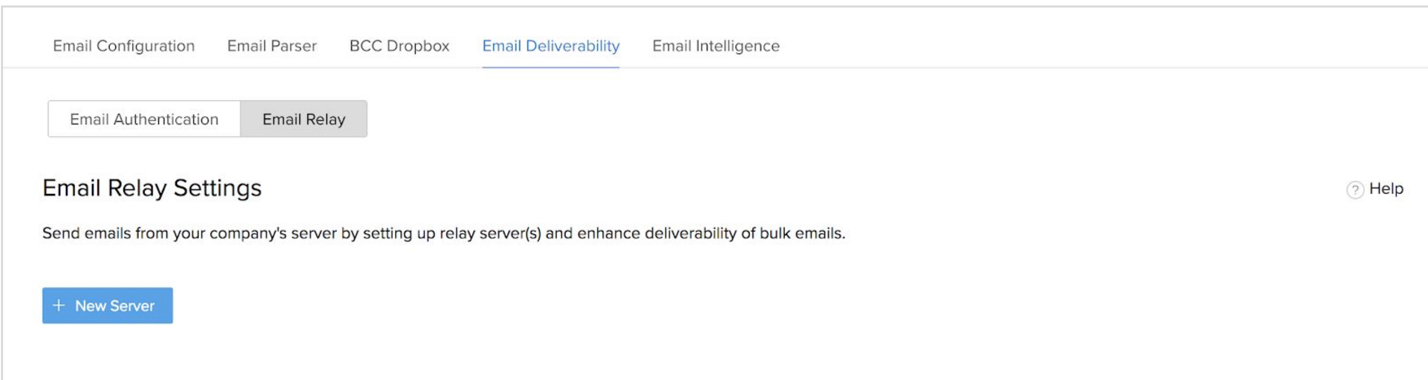
1. Different style for alert/delete info. There is no detailed info here. If a user deactivate the integration we should inform the problem of deactivating.
2. For enabling the mail magnet we don't show this kind of popup while activate other process/feature.

Solution: Alert/info button should be consistent in all the places.

Conclusion:

Page Name : Channels - Email deliverability





Pain Points:

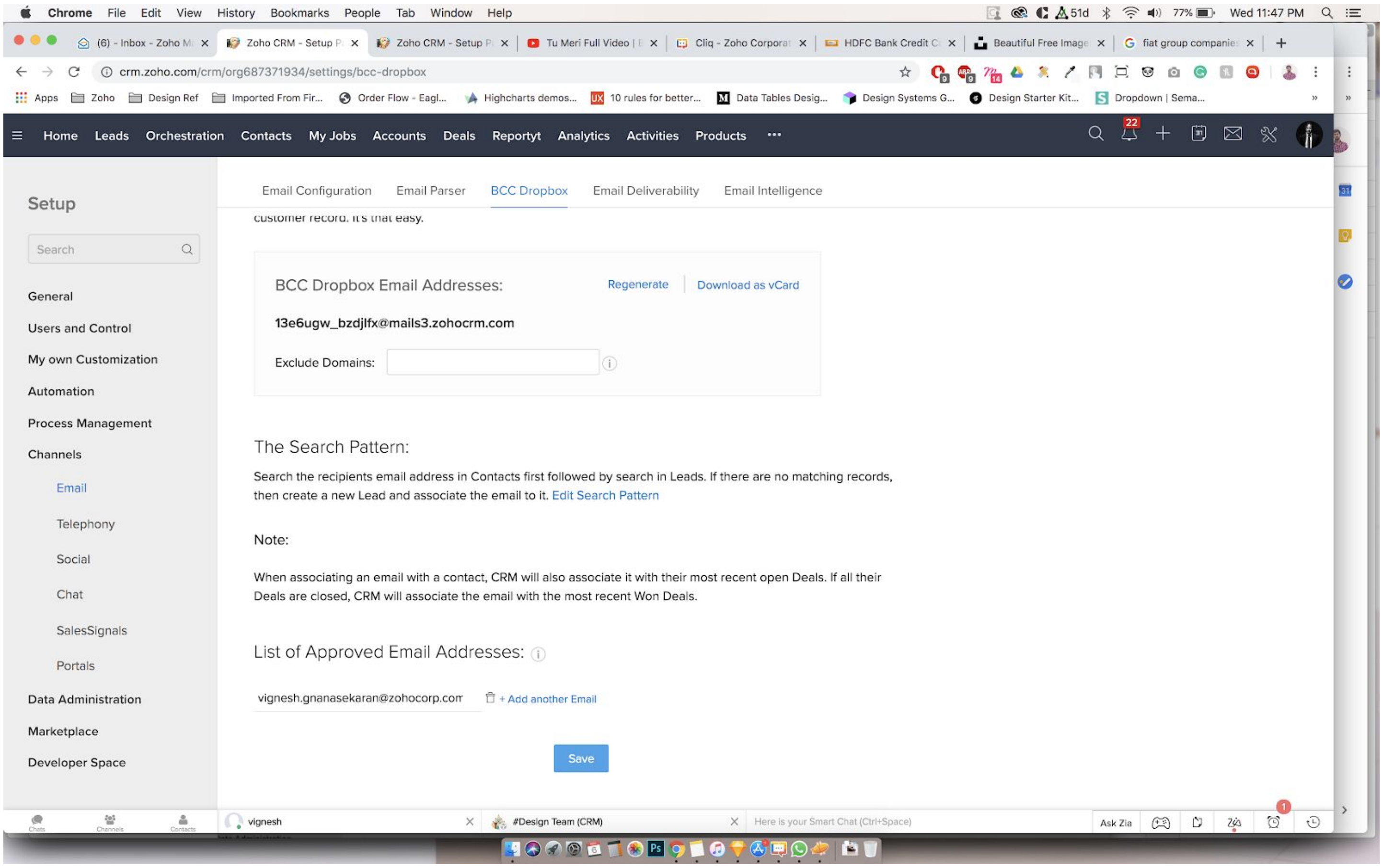
1. "+" and "Add" conveys the same message.
2. Alignment is different.

Solution:

1. Need to remove "+" and keep the CTA as "Add Domain" "Add New Server"
2. We need to follow the same style for create new button here. All the primary buttons are placed in the right hand side. So we need to follow the same here.

Conclusion:

Page Name : Channels - BCC dropbox



Pain Points:

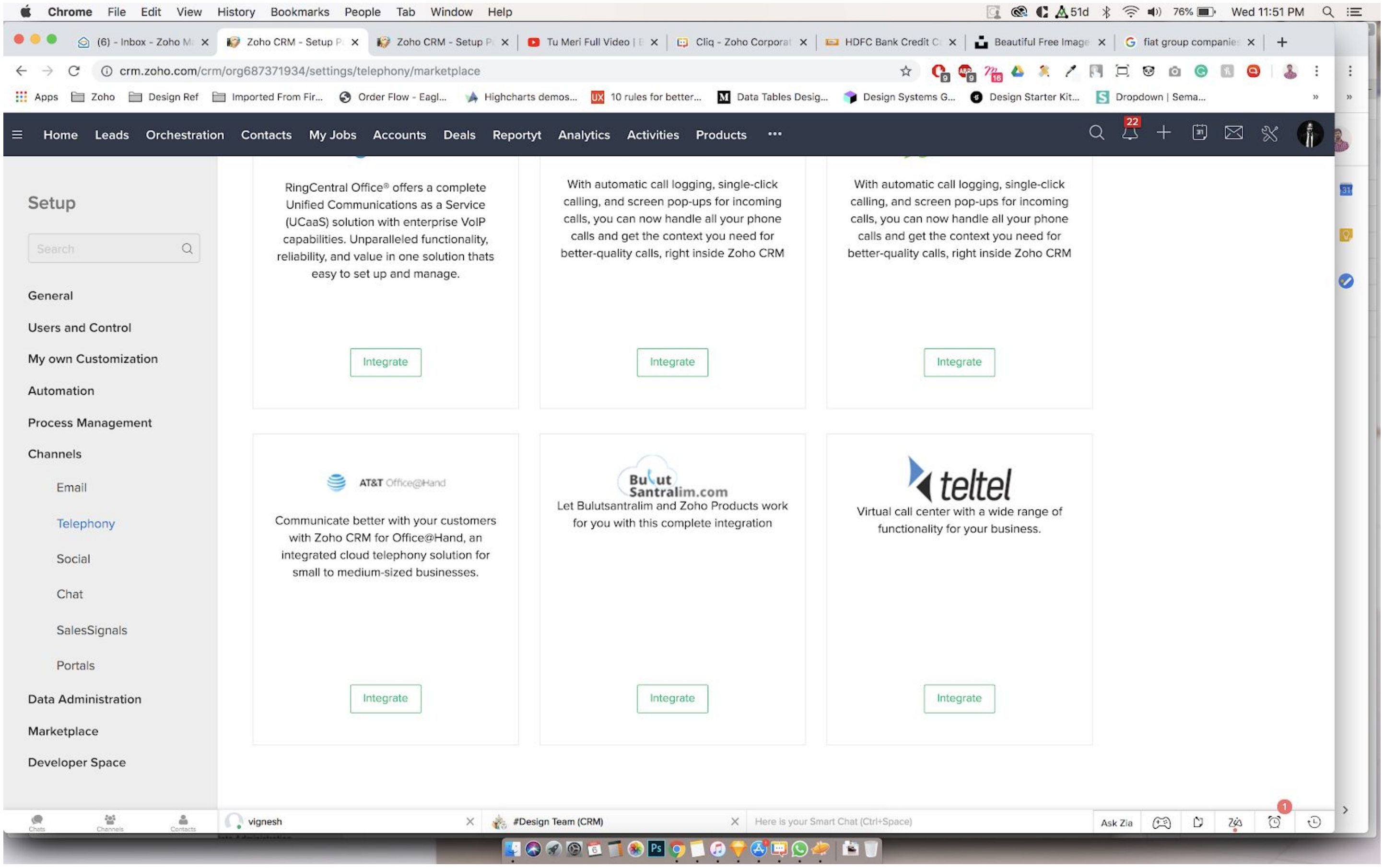
1. Without doing any action button is visible and give us the confusion like it's edited.
2. "+Add another email"

Solution:

1. It should be disable at first time. When if any changes happen it should be enable.
2. We can use "+New email" here.

Conclusion:

Page Name : Channels - Telephony integration

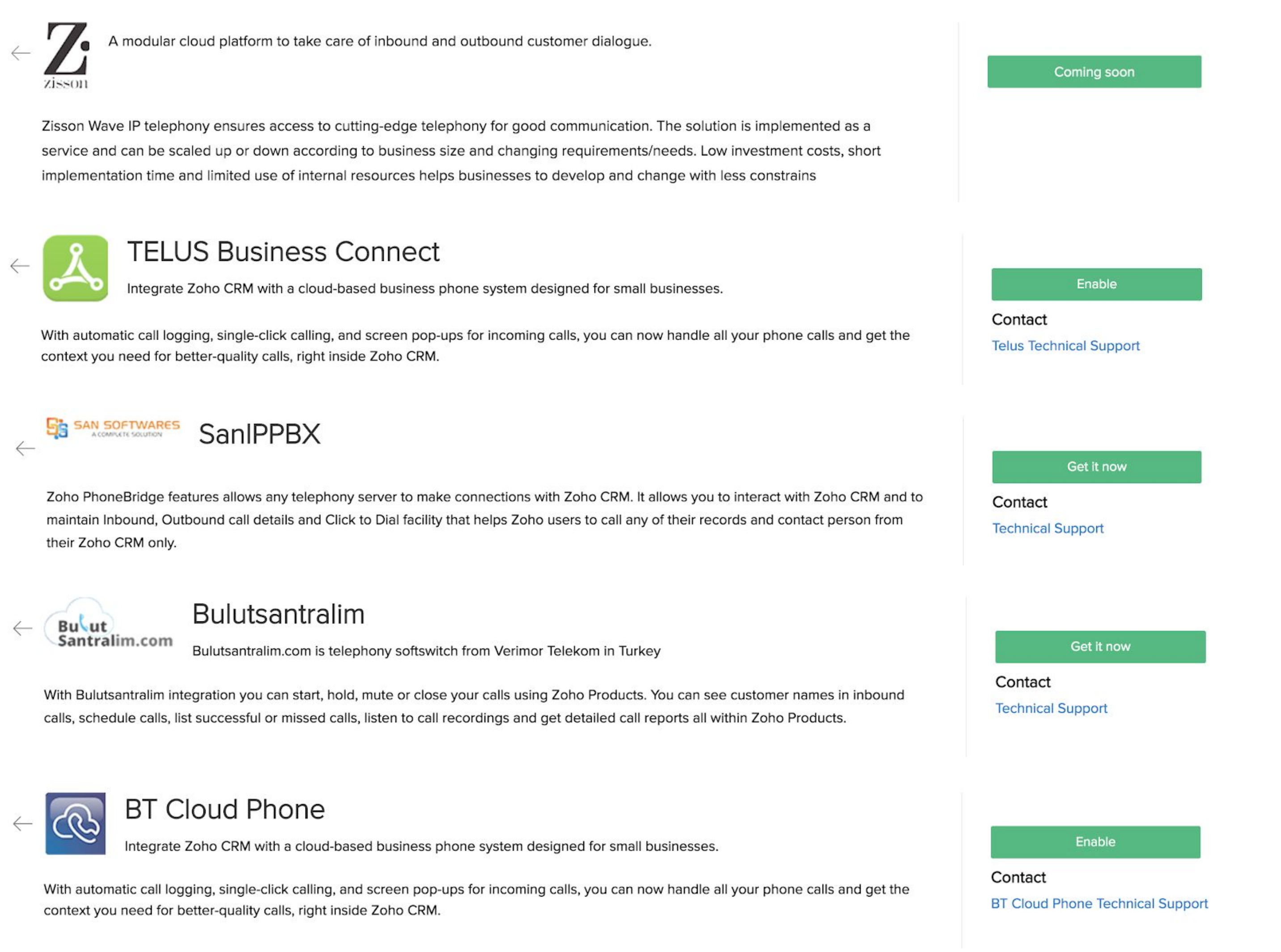


Pain Points: Primary buttons are in different color.

Solution: All the buttons should be primary blue color with fill style.

Conclusion:

Page Name : Telephony

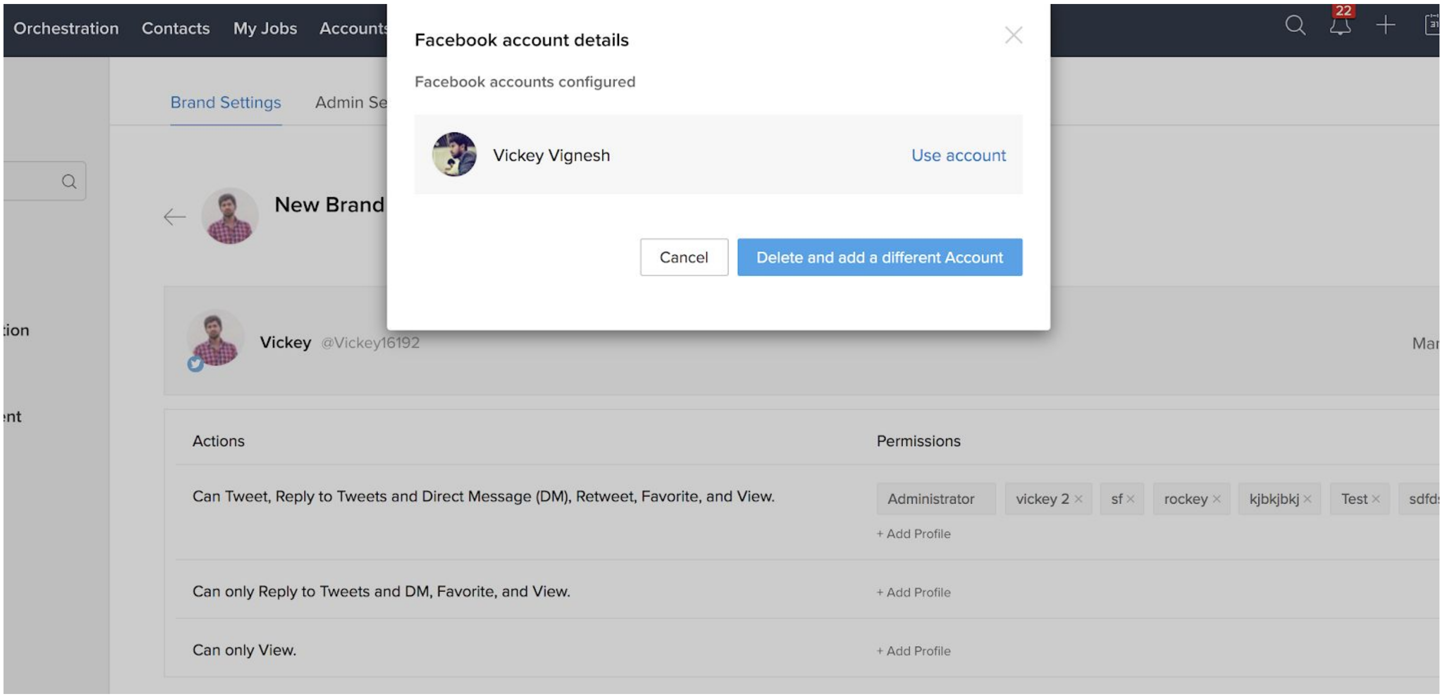


Pain Points: Different color for primary actions with different messages.

Solution: We should change the buttons as primary blue with common action name like “Enable” so that all looks consistent.

Conclusion:

Page Name : Social - Branding

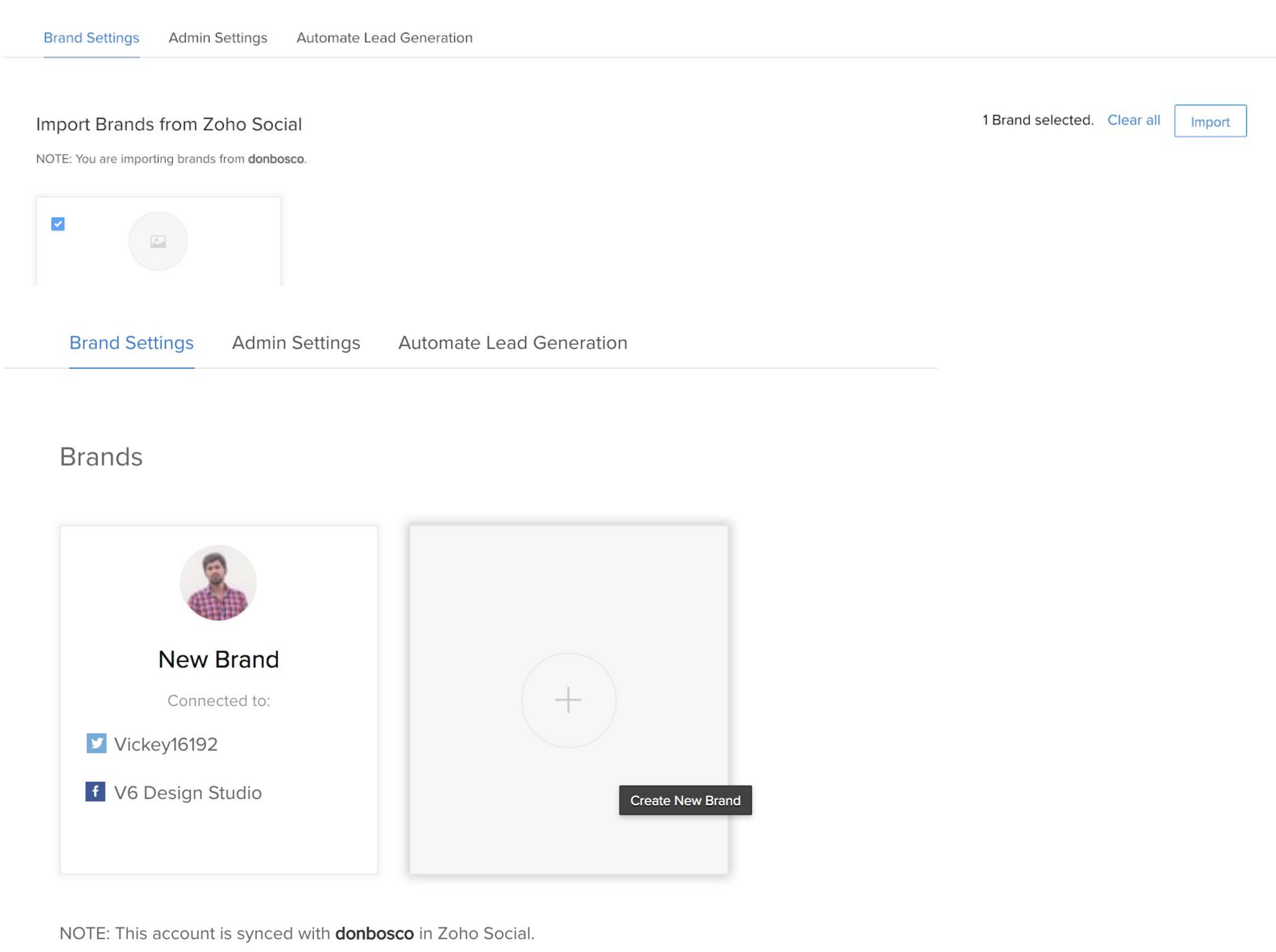


Pain Points: This is totally a different approach for adding the account. This popup comes once I logged into my account and unfortunately not mapped my page. Again I'm clicking the add account it comes. It suggest me to delete my account and add a different account.

Solution: Add Account/Use account is relevant to this action and it should be Primary here. Delete should not come as a primary and it will be an option to be shown nearby profile.

Conclusion:

Page Name : Social - Branding



Pain Points:

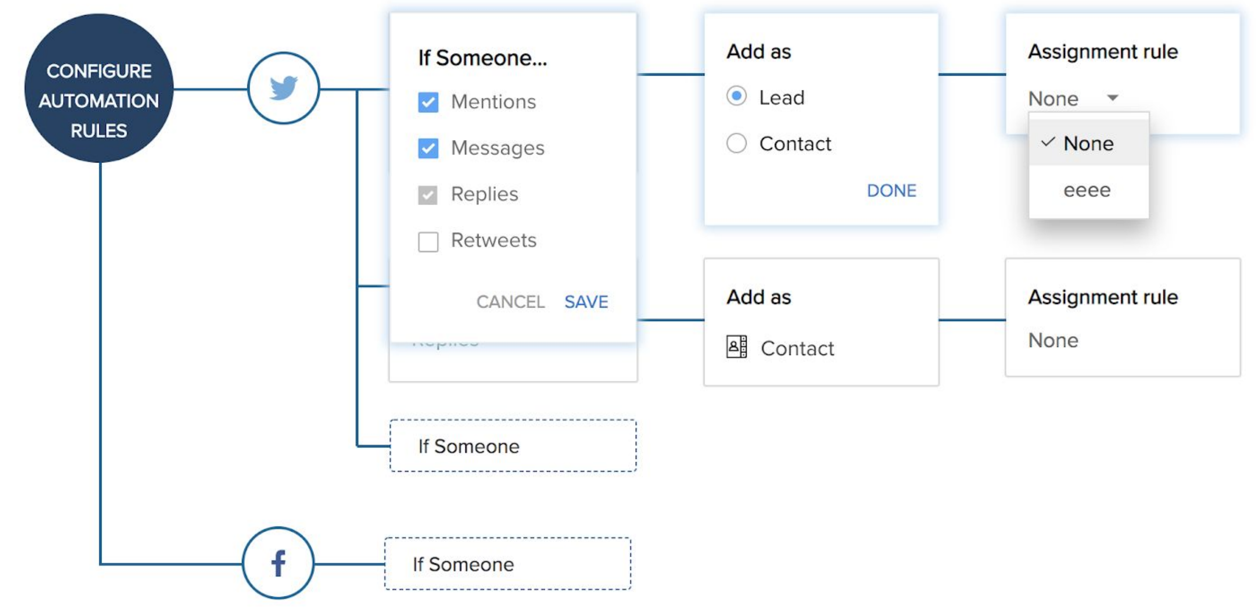
1. For import the brand I have to select the brand and then I have to import. Do we really need this import for the first time?
2. Once I add my social media it will be visible in a card and the “create new brand” is in a different style.

Solution:

1. No need of import for the first time, We have to place the import on the brand card/we have to place the button for Create New brand as common.
2. Create New brand should be common. We have to follow the button style on the right cornor.

Conclusion:

Page Name : Social - Automate lead generation



Pain Points:

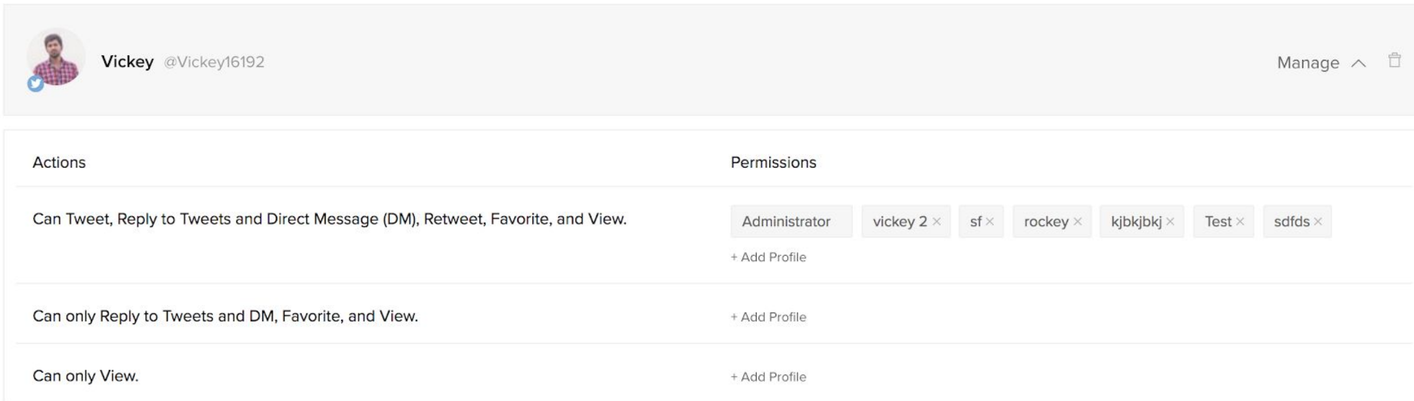
1. We have two different approach here, we have (cancel,save) and then (done) to save the actions.

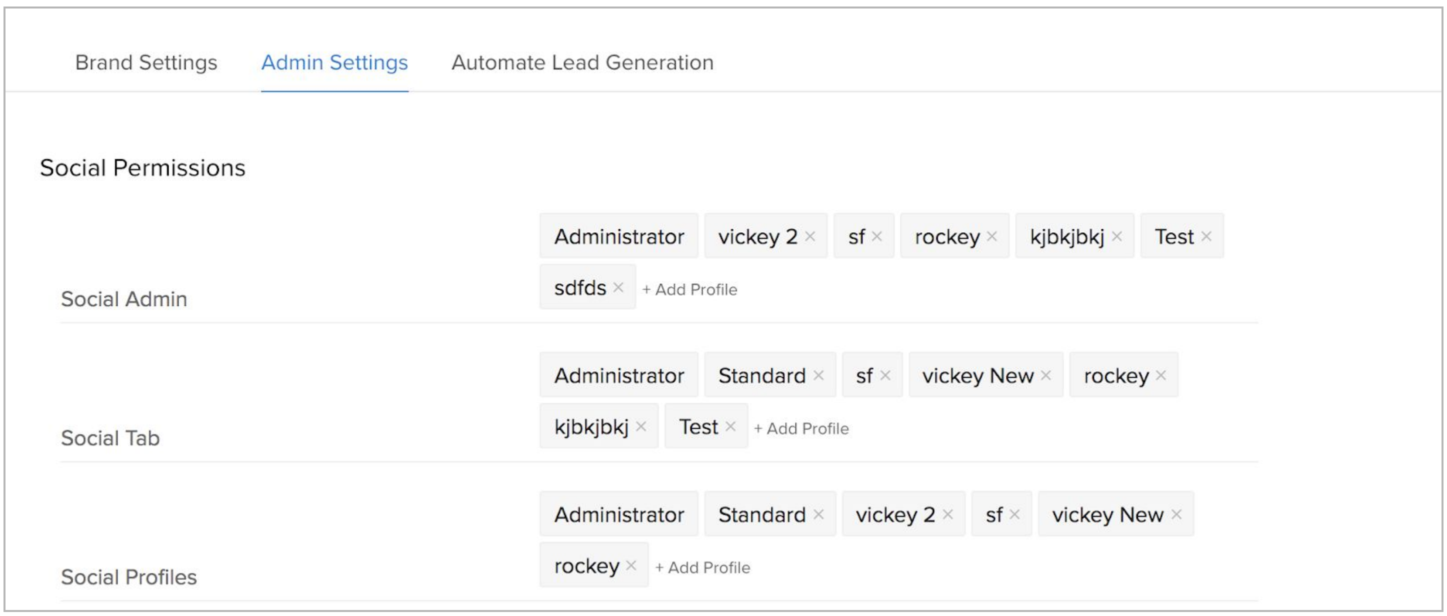
Solution:

1. Have to follow one style for all the places. Here we don’t have common save for this configuration so need to follow the “Save/Cancel” in all the places instead of done. And need to follow the left alignment.

Conclusion:

Page Name : Social - Admin settings



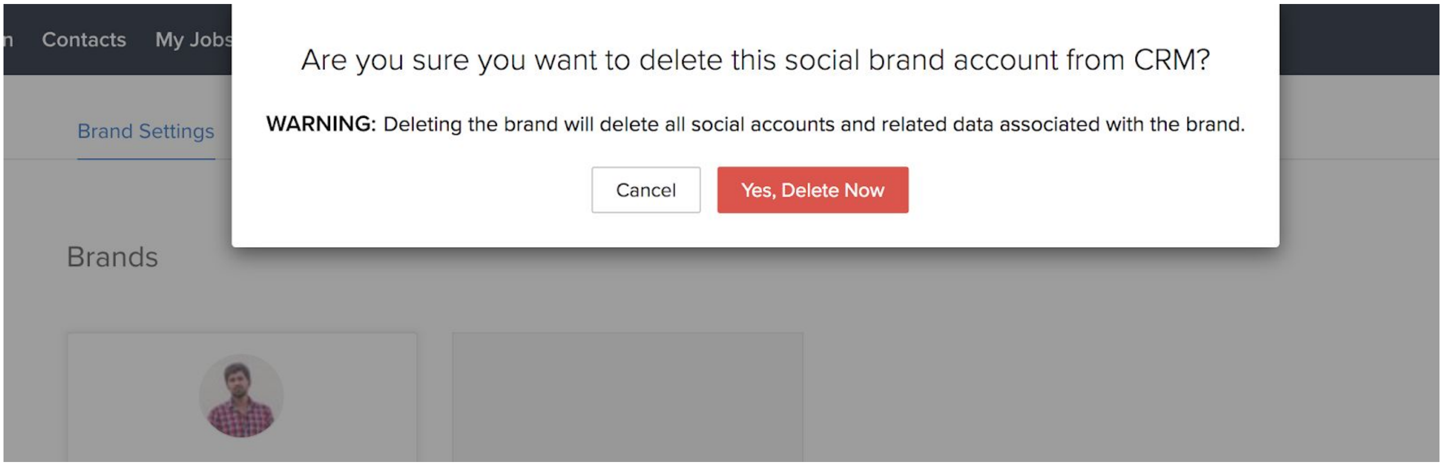


Pain Points: “+Add Profile used in all the places.

Solution: Need to remove “+” and make the add profile as clickable so that user can easily understand its clickable.

Conclusion:

Page Name : Social - Brand

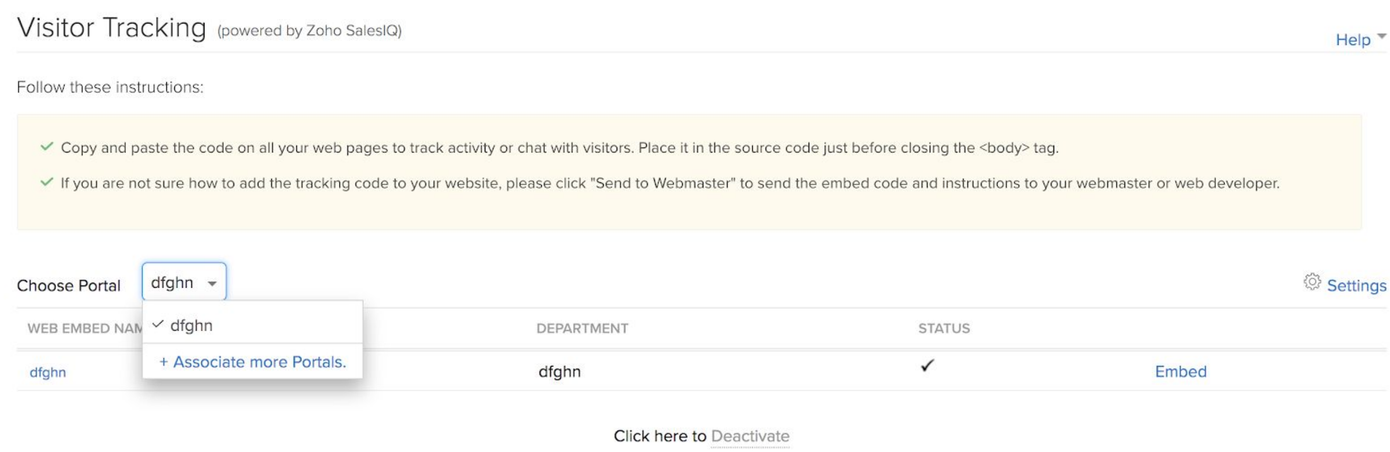


Pain Points: Used different popup style here.

Solution: Need to follow the similar style for delete/alert popup.

Conclusion:

Page Name : Chat

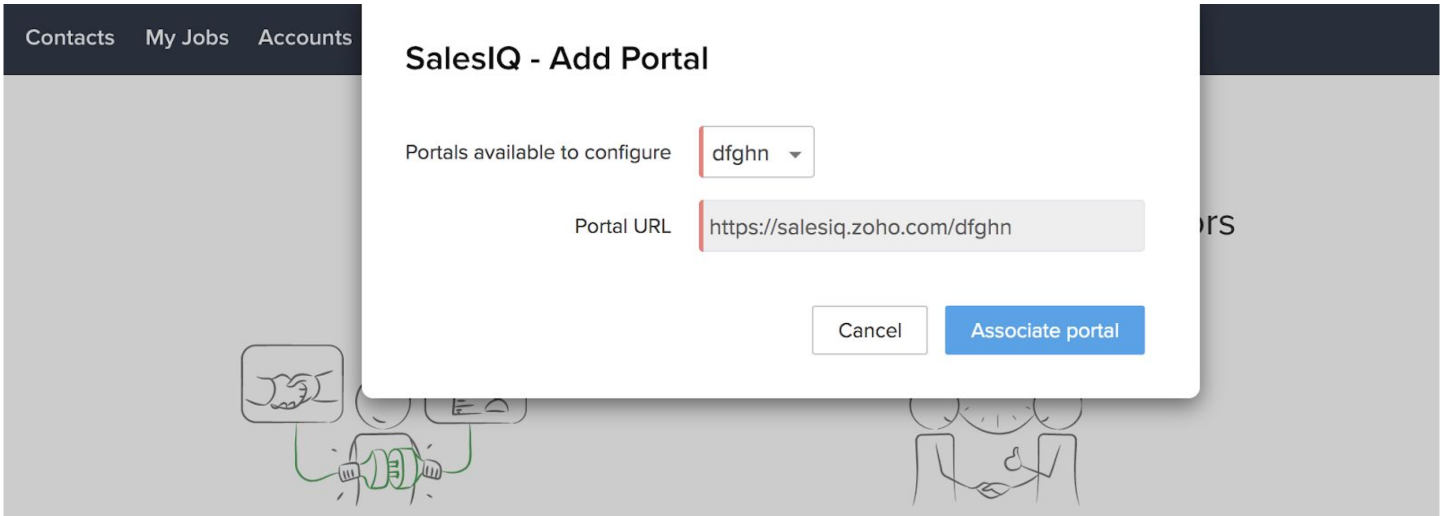


Pain Points: “+ Associate more portals” Here I’m actually Associate new portal but used the “+” gives diffent meaning.

Solution: Need to remove the “+” from the beginning.

Conclusion:

Page Name : Chat - Integration

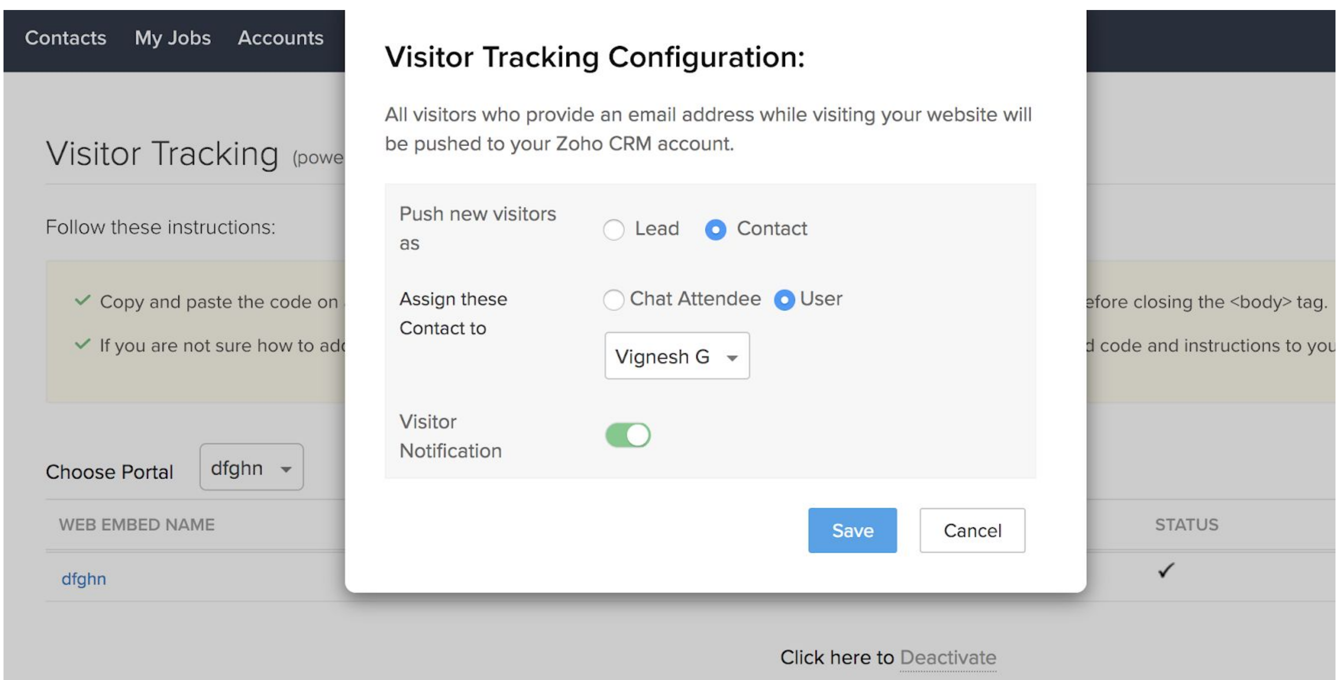


Pain Points: Here the title and the description is different. Are we adding the portal or associate the portal?

Solution: Need to follow the same literal for title or the button. Here we have existing portal so the title should be associate portal.

Conclusion:

Page Name : Chat - Visitor Tracking

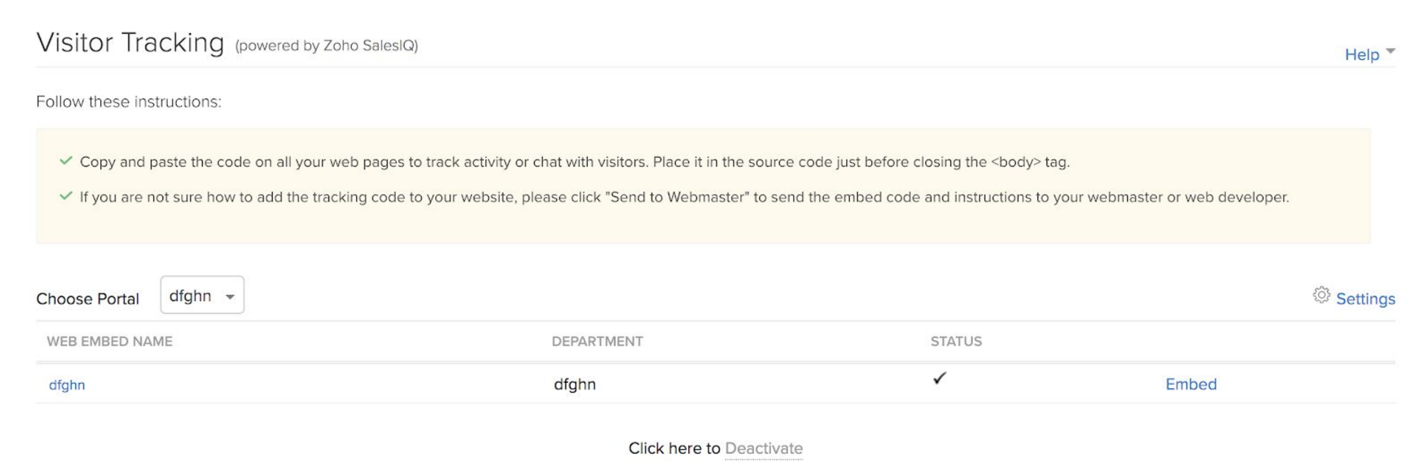


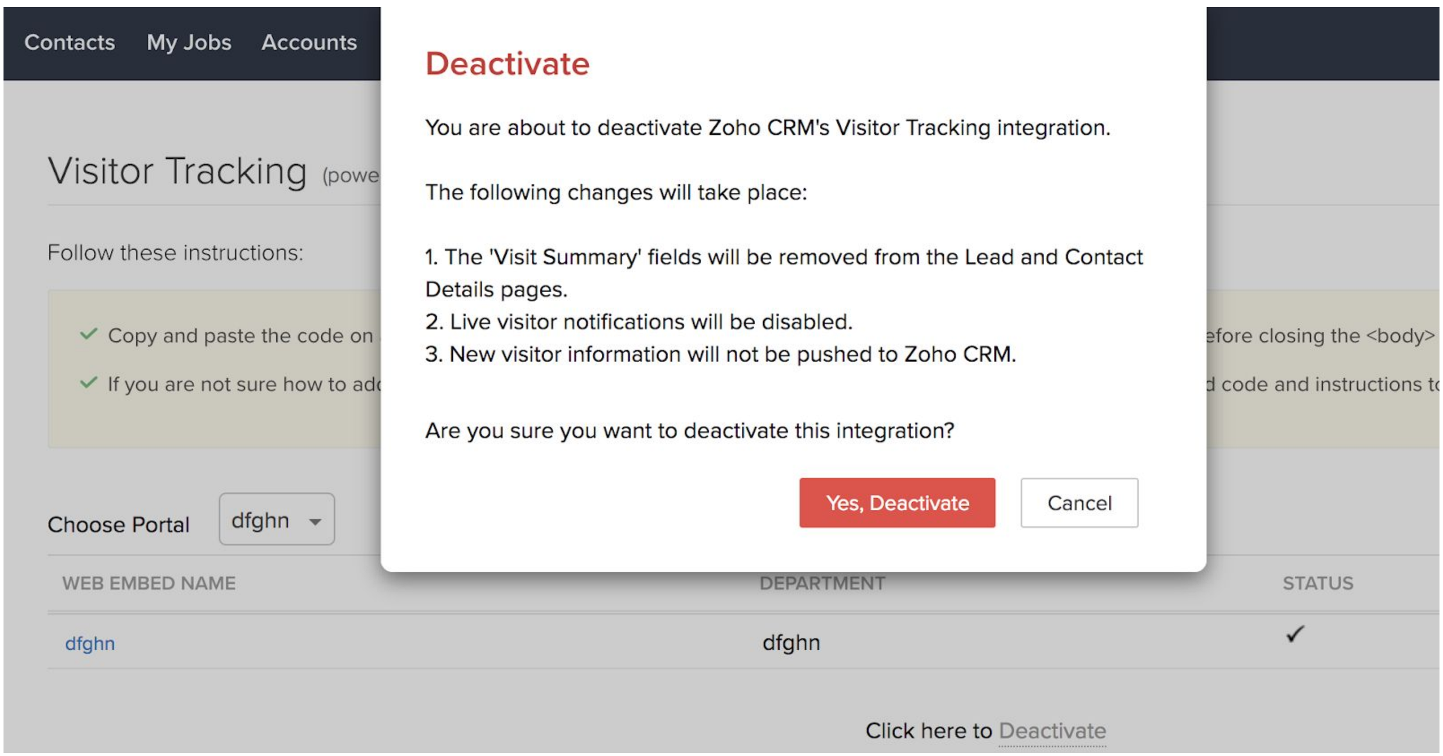
Pain Points: Button alignment is different.

Solution: Primary should be on the right side and the cancel should be on the left side.

Conclusion:

Page Name : Chat - Visitor Tracking





Pain Points:

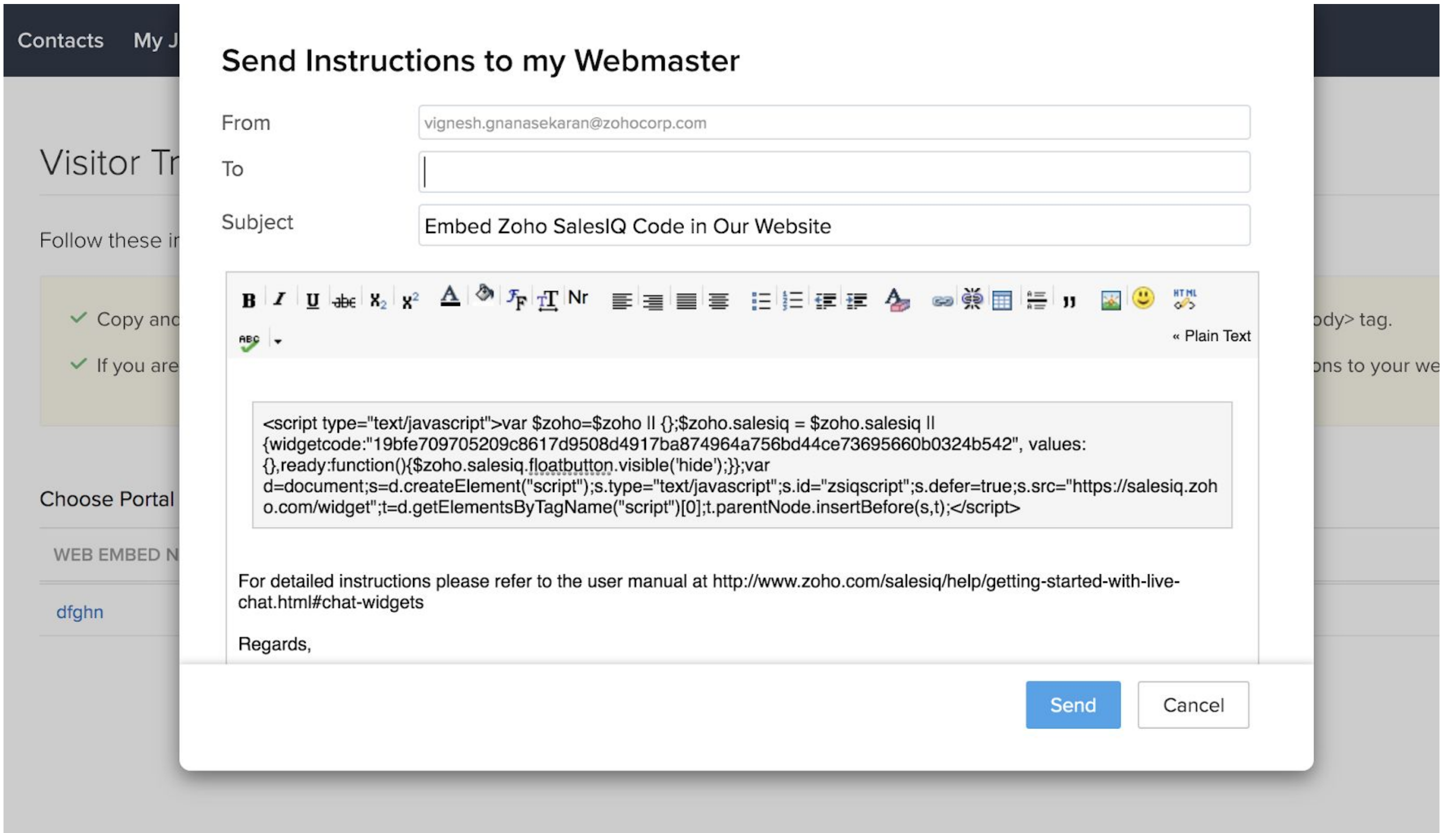
1. For deactivate the integration we used switch button in all the places. Here we use the different style.
2. Button alignment is different.

Solution:

1. Need to follow the same style for activate/deactivate action.
2. Button alignment should be left side.

Conclusion:

Page Name : Chat - Code to embed

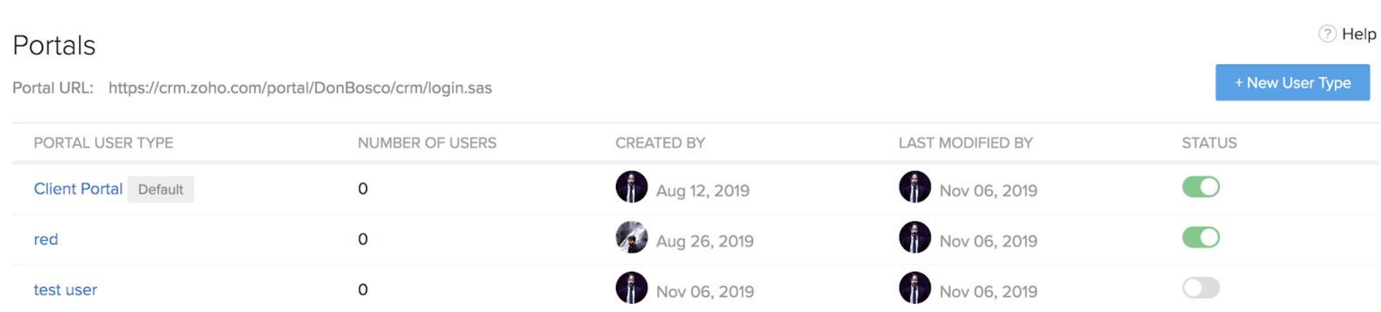


Pain Points: Button alignment is different.

Solution: Primary should be on the right side and the cancel should be on the left side.

Conclusion:

Page Name : Portals

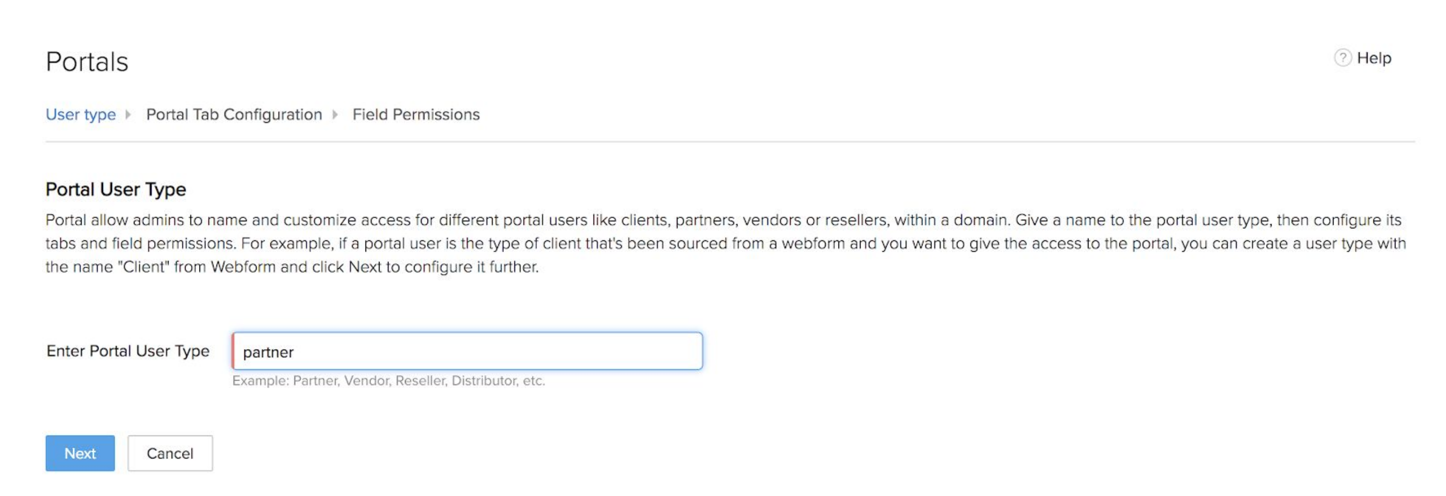


Pain Points: "+" added before primary call to action. And the CTA name should be relevant to the action.

Solution: Button should be "Create Portal User".

Conclusion:

Page Name : Portals - User Type

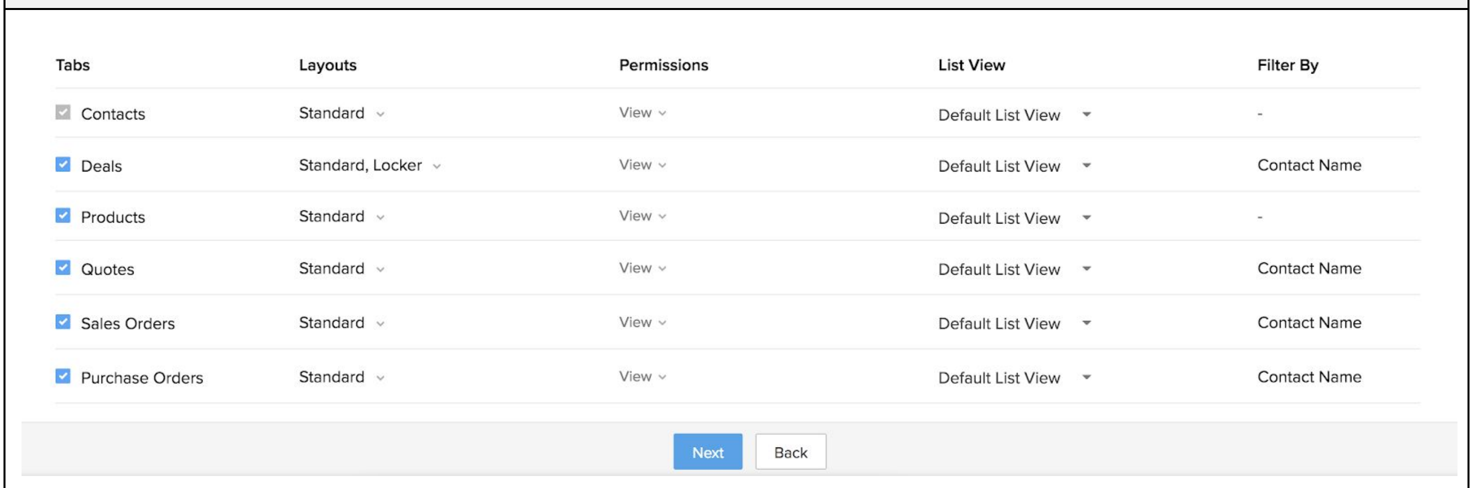


Pain Points: Button alignment is different.

Solution: Need to follow the right side alignment for the buttons.

Conclusion:

Page Name : Portals

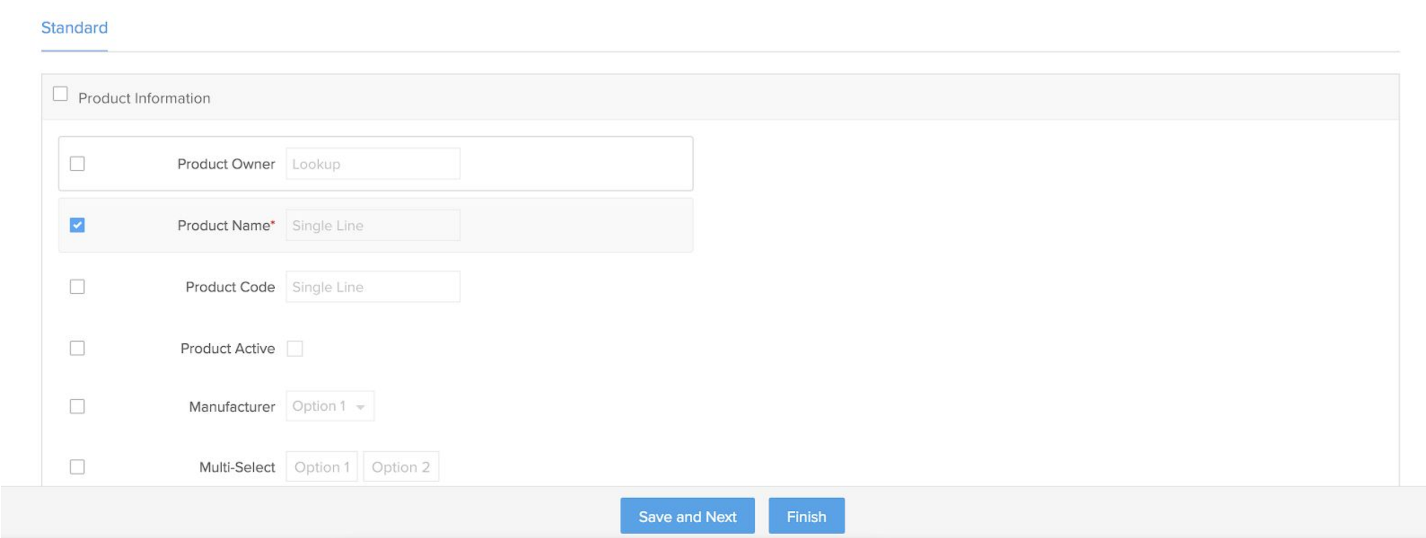


Pain Points: Button alignment is different.

Solution: Need to follow the right alignment for the call to actions.

Conclusion:

Page Name : Portal - Configuration



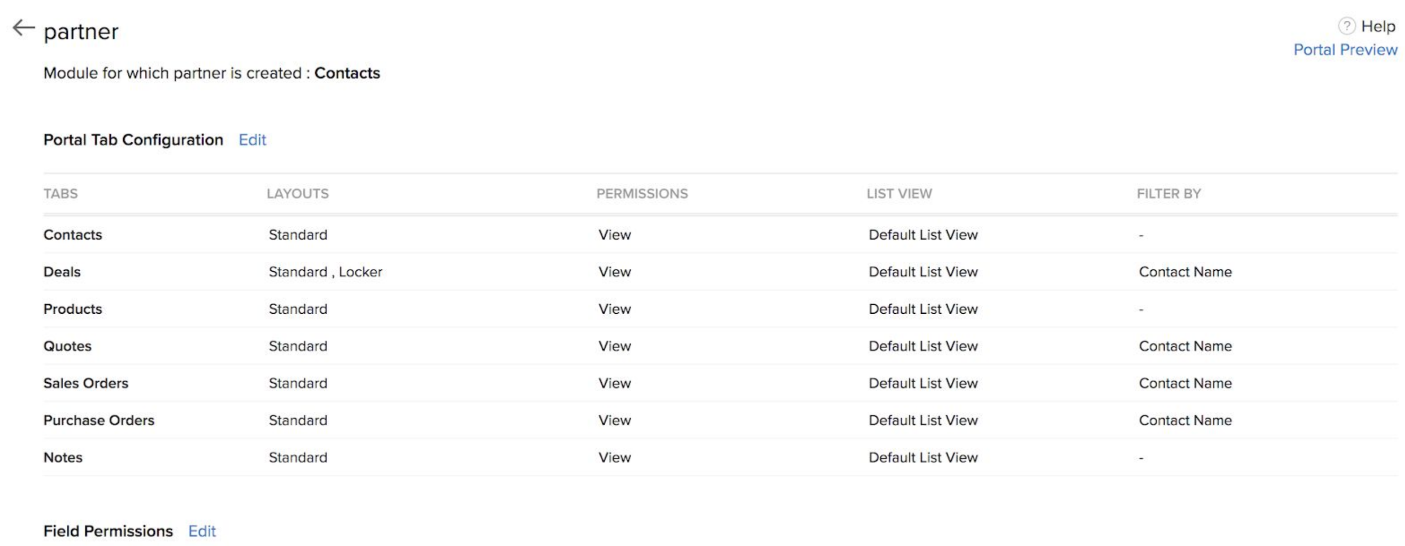
Pain Points: Two primary buttons are placed in the same place.

Solution: Here the user need to configure each and every tabs so we don’t need finish button for all the pages. We can keep the “Next” for moving from one page to another page and in the last page we have “Finish” button alone as primary.

In edit mode we need to give “save changes” button instead of these two primary buttons.

Conclusion:

Page Name : Portal - user portal



← partner

Module for which partner is created : **Contacts**

Help

Portal Preview

Portal Tab Configuration Edit

TABS	LAYOUTS	PERMISSIONS	LIST VIEW	FILTER BY
Contacts	Standard	View	Default List View	-
Deals	Standard , Locker	View	Default List View	Contact Name
Products	Standard	View	Default List View	-
Quotes	Standard	View	Default List View	Contact Name
Sales Orders	Standard	View	Default List View	Contact Name
Purchase Orders	Standard	View	Default List View	Contact Name
Notes	Standard	View	Default List View	-

Field Permissions Edit

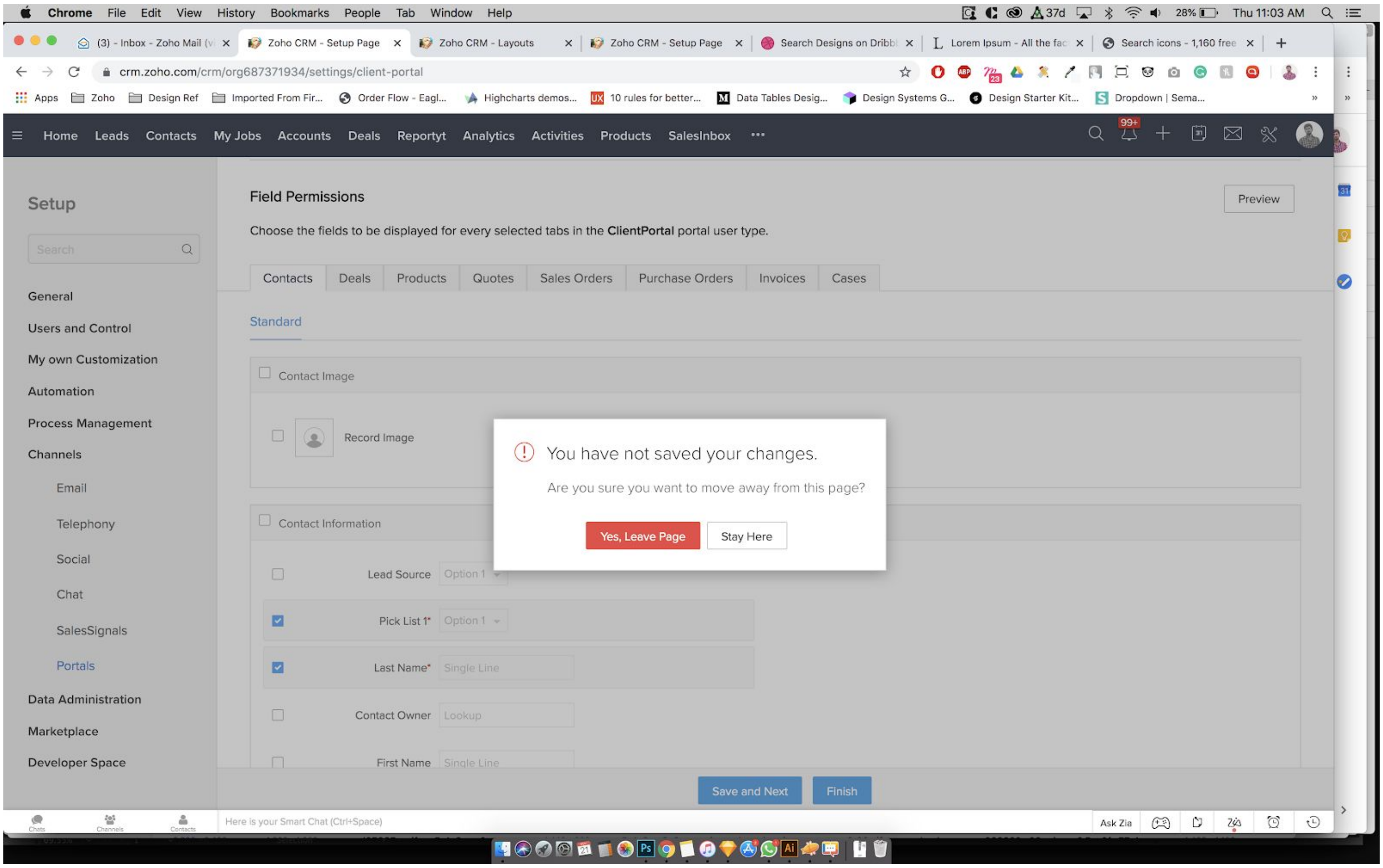
Pain Points: Primary action is missing and there is no data in field permission then what is the purpose of having it separately and having edit button here?

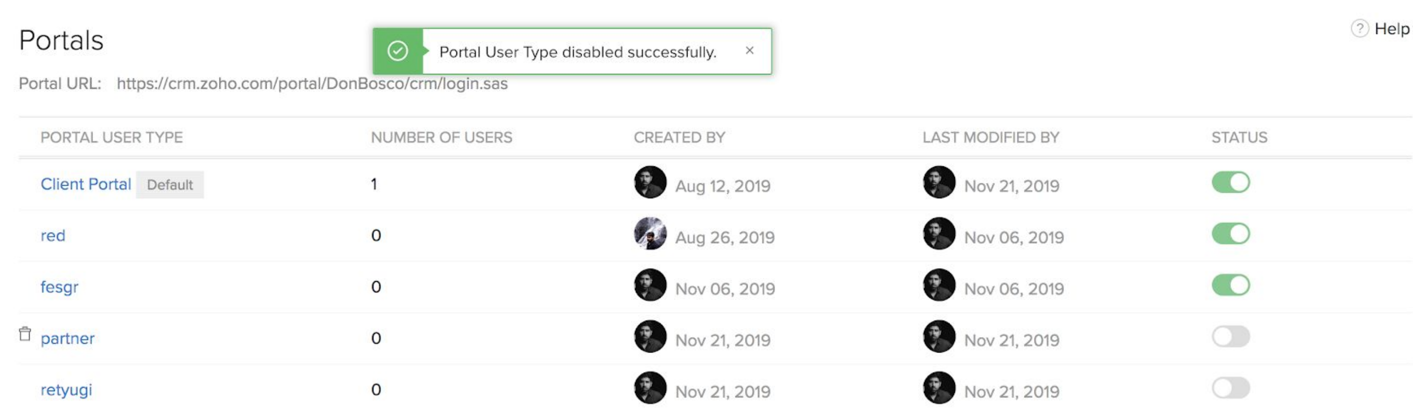
Solution:

1. Portal preview is the primary action here.
2. Do we really need this list view? We have two list view here. Instead of showing the title only we can keep both in a single edit.

Conclusion:

Page Name : Portal - Alert Popup



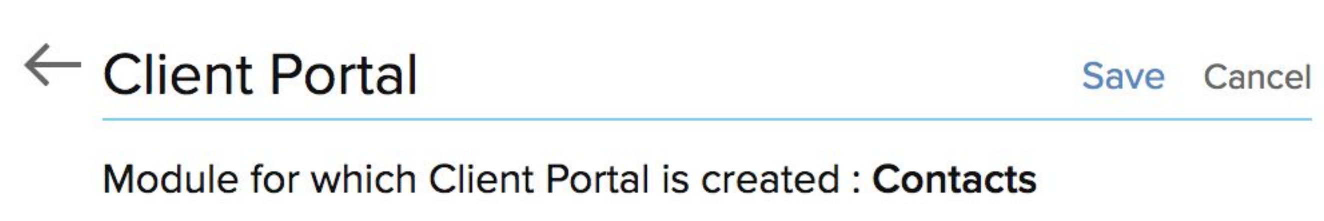


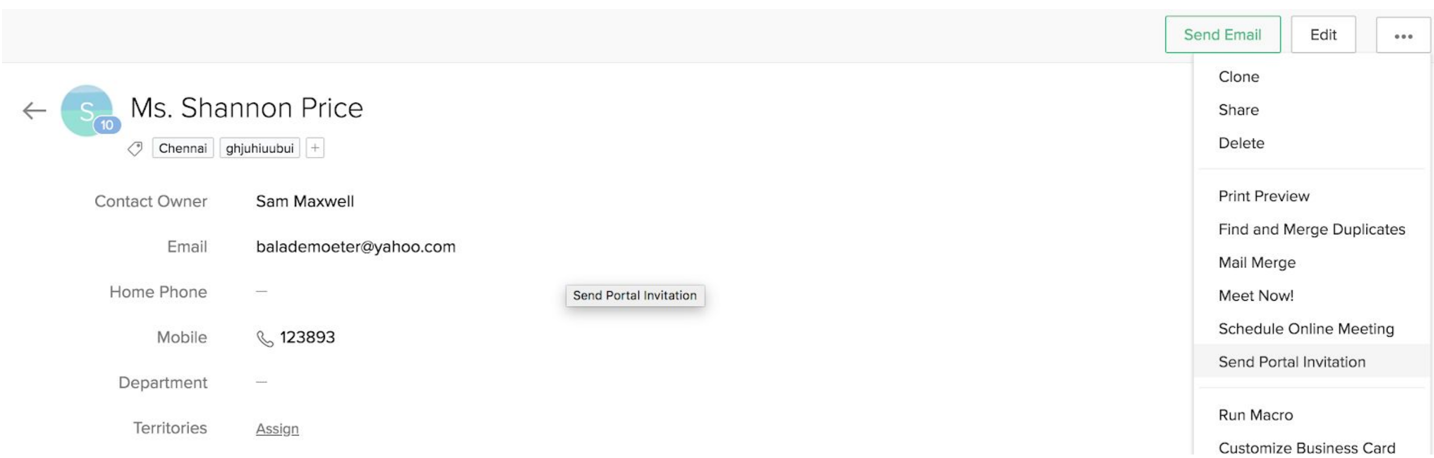
Pain Points:

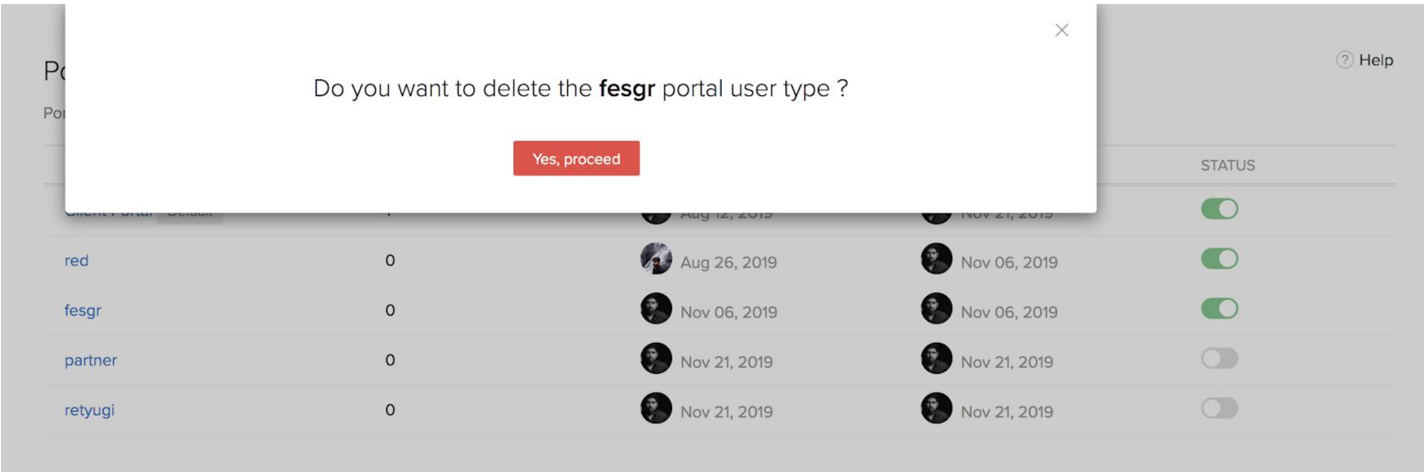
1. Alert popup is used in different positions.
2. For deactivation there is no confirmation before disable the portal.

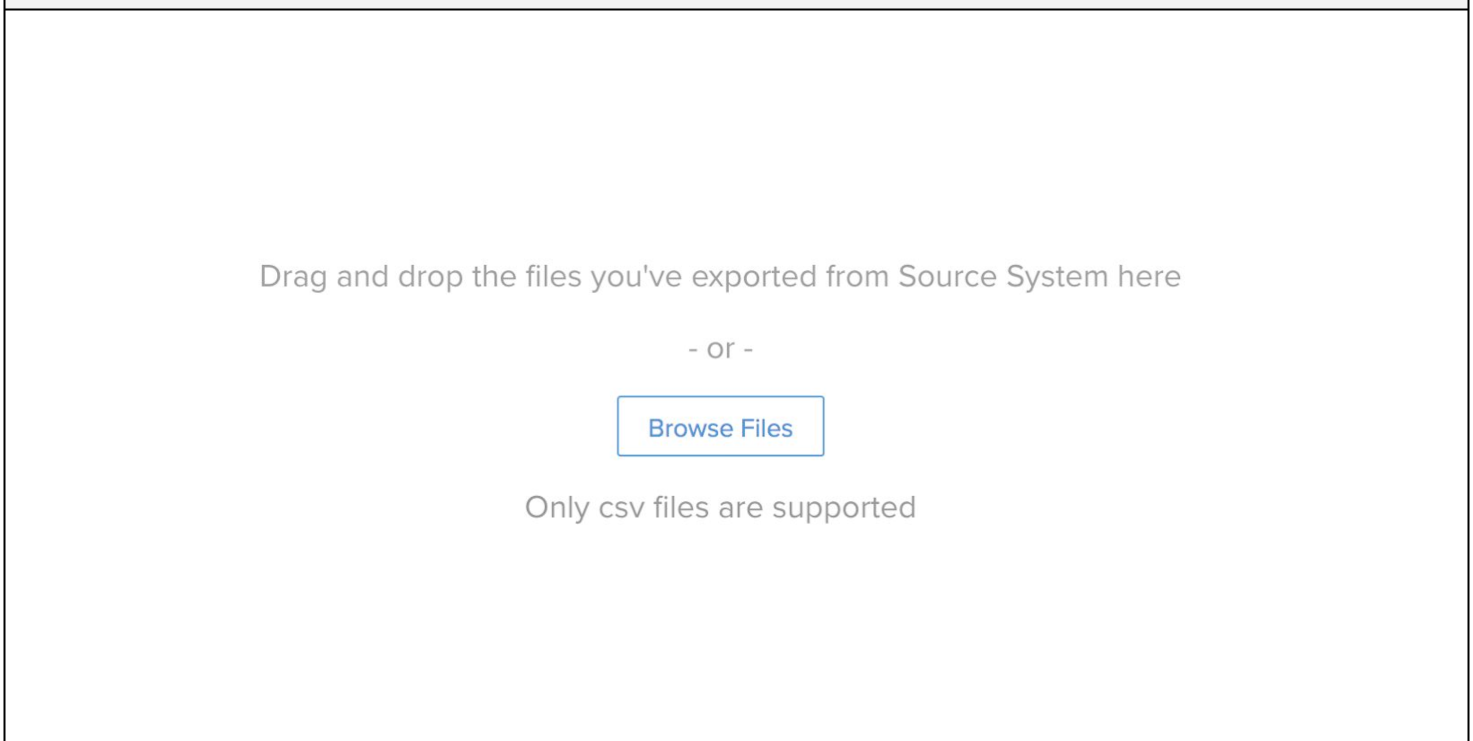
Solution: Need to follow the similar style for alert/info style.

Conclusion:

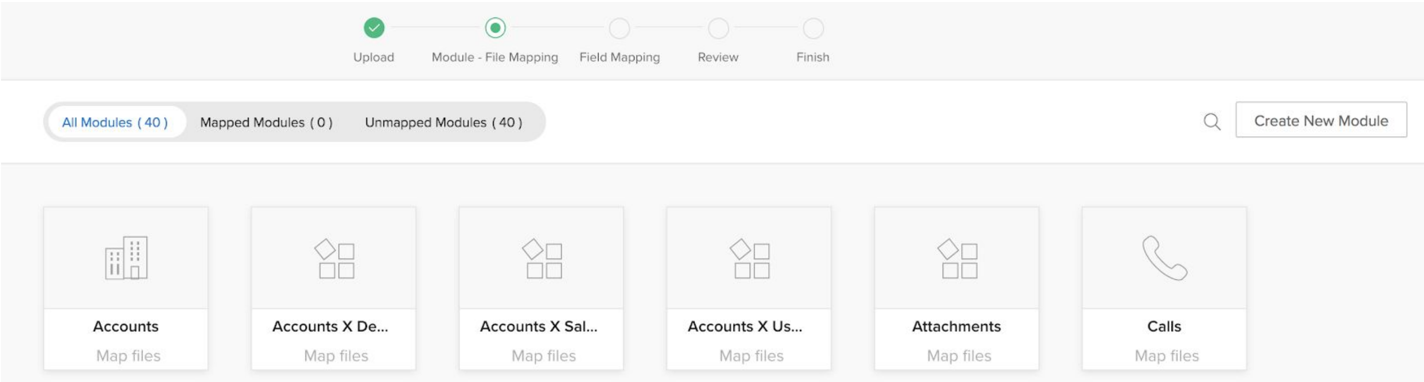
Page Name : Portal - Edit name

Pain Points: While editing the name we used different style here.
Solution: Need to change the style that having tick with green and close icon.
Conclusion:

Page Name : Portal - User Invite

Pain Points: We may not invite the user to the portal in configuration area. Instead of that we need to invite the user from detail page more option. And there is no bulk invite to the portal.
Solution: We need an option to invite the user to the particular portal. So we need that insite of particular portal.
Conclusion:

Page Name : Portal - Delete Portal

Pain Points: Delete popup style is different than other styles.
Solution: Need to follow the similar style for alert/delete popup.
Conclusion:

Page Name : Data Administration - Import

Pain Points: Here the button is the primary action. But it showed in secondary style/
Solution: Need to follow primary button style for browse file.
Conclusion:

Page Name : Data Administration - Import

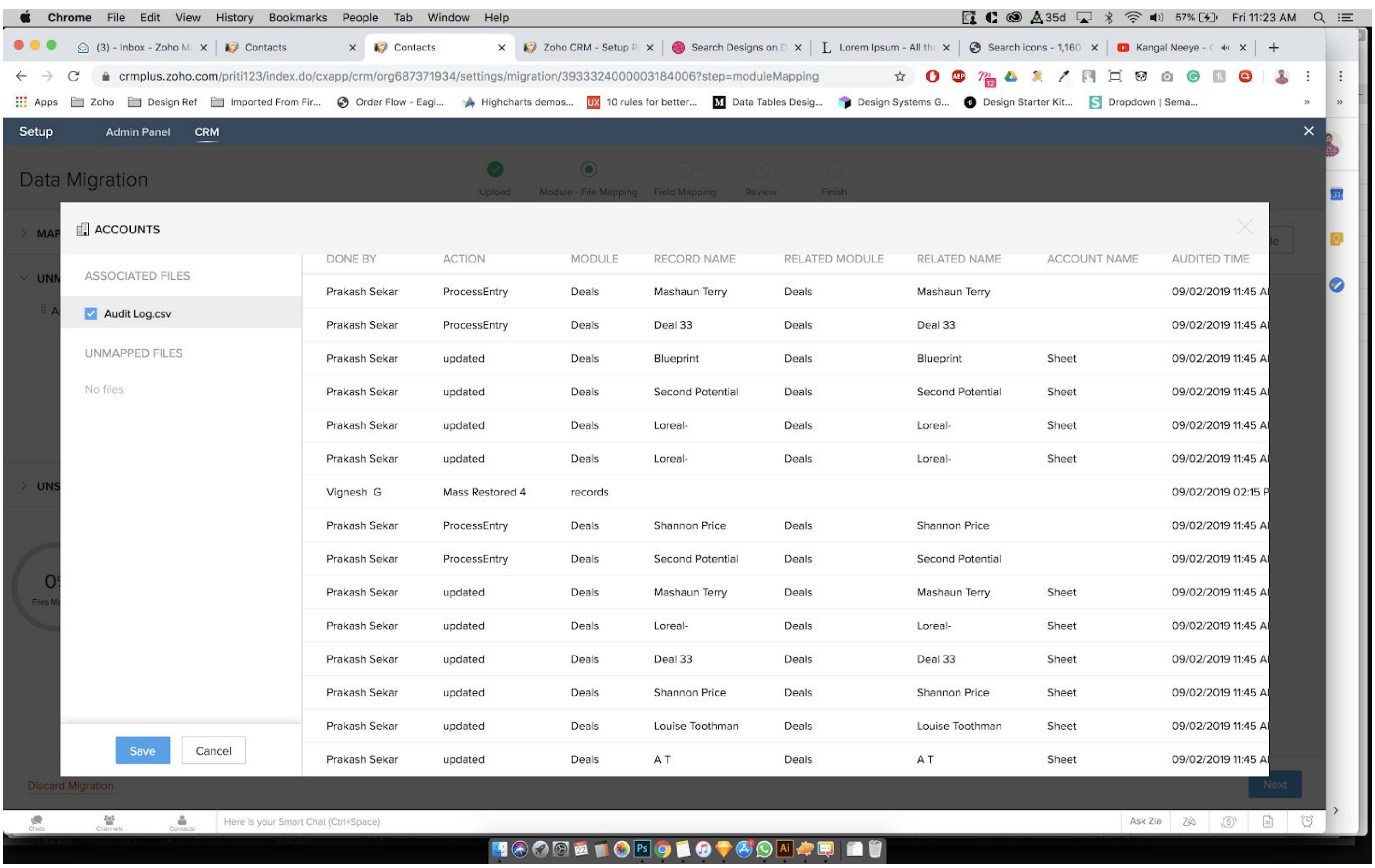


Pain Points: This is not look like a button.

Solution: Need to follow the secondary button style.

Conclusion:

Page Name : Data Administration - Import

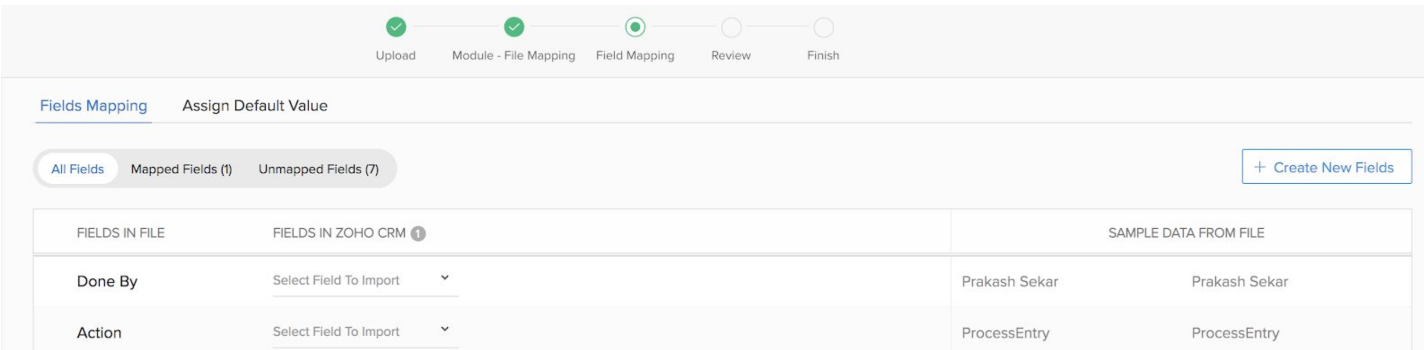


Pain Points: Action button is placed in a different position.

Solution: Need to follow the right alignment for the button here. (Right alignment and the position should be right side.

Conclusion:

Page Name : Data Administration - Import

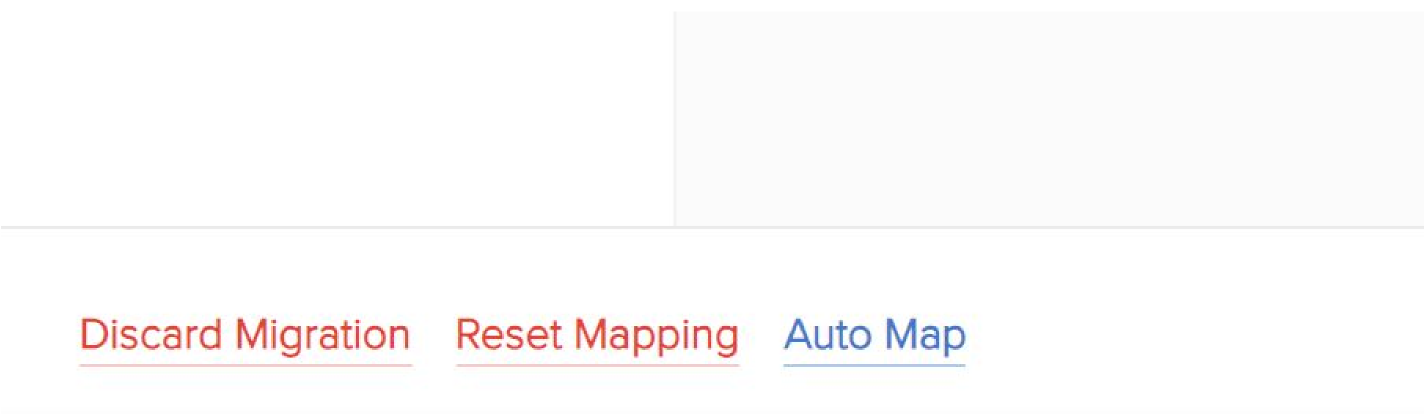


Pain Points: There is no purpose of having “+” in the button.

Solution: Need to remove the “+” button.

Conclusion:

Page Name : Data Administration - Import

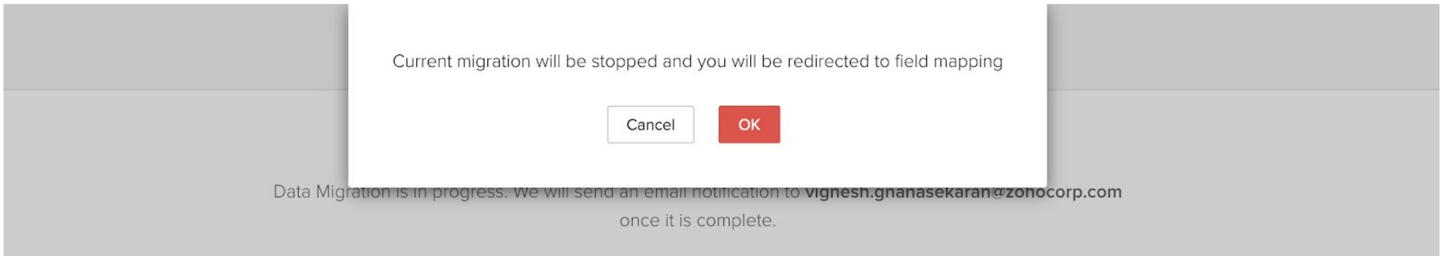


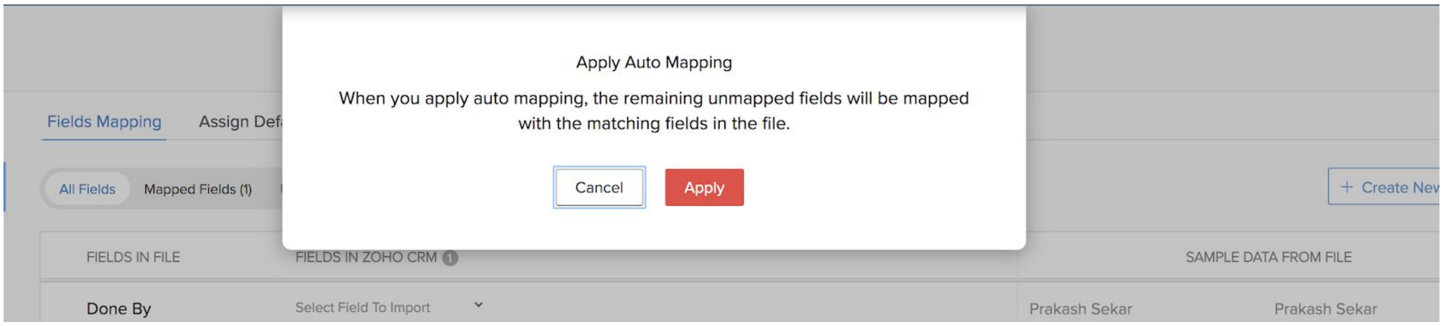
Pain Points: This is totally a different style for call to actions. And both positive and negative actions are placed in the same place.

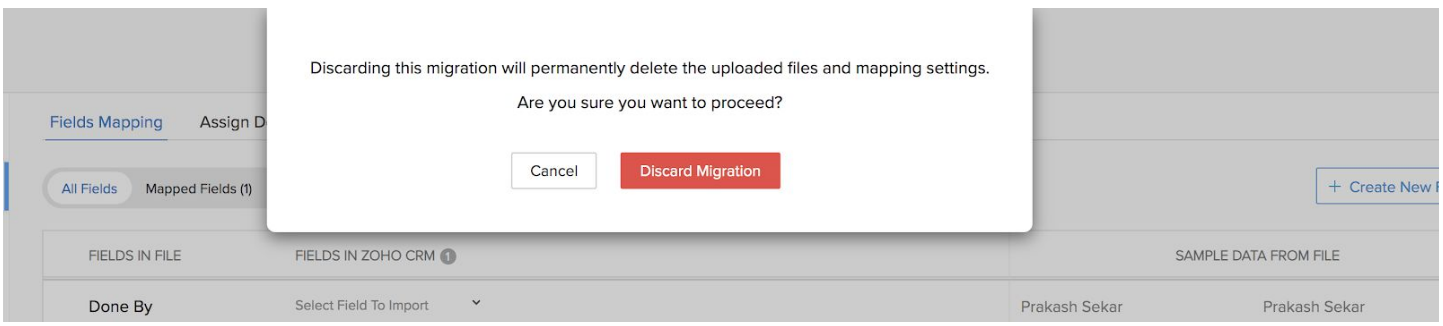
Solution: We used box style for primary and secondary buttons. We should change this as a button style instead of link style.

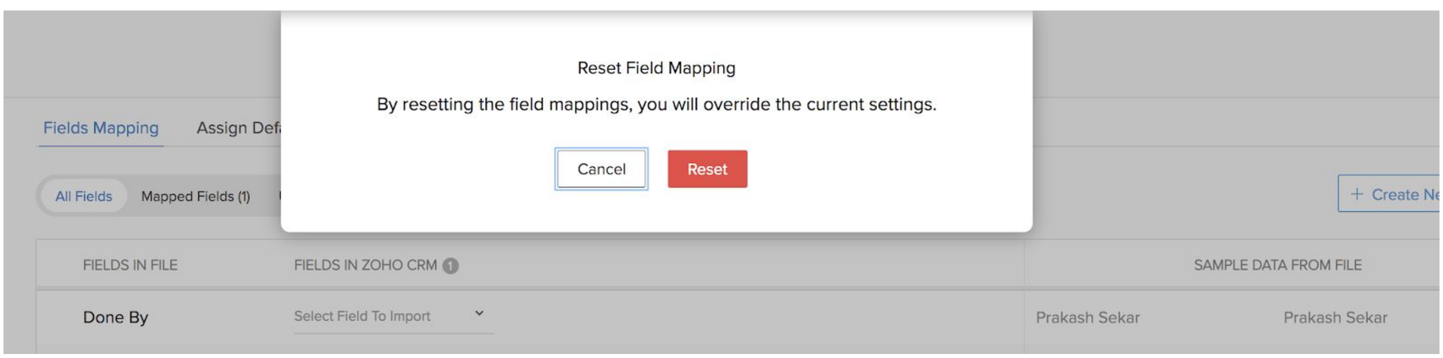
Conclusion:

Page Name : Data Administration - Import - alert







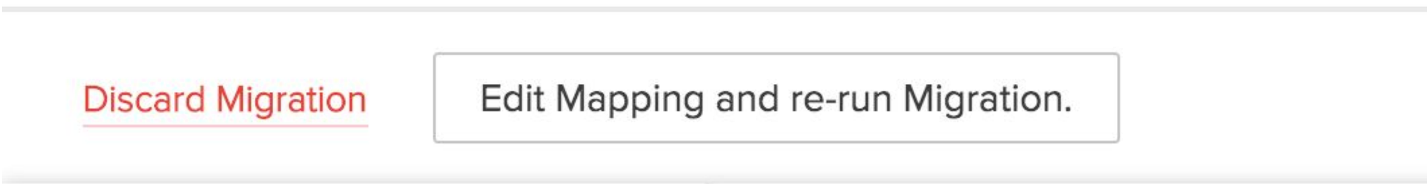


Pain Points: Alert popup style is different and it’s totally not readable for the user.

Solution: Need to follow the similar style for alert/delete/info popup.

Conclusion:

Page Name : Data Administration - Import

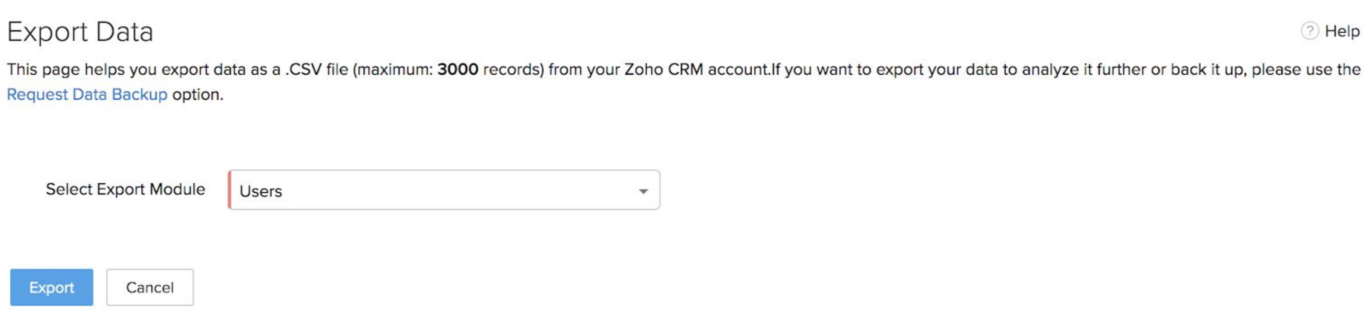


Pain Points: Need to follow the button style instead of link. Edit and discard should be in a different place.

Solution: Edit map button should be on a different place. Discard button should be button style instead of link style.

Conclusion:

Page Name : Data Administration - Export

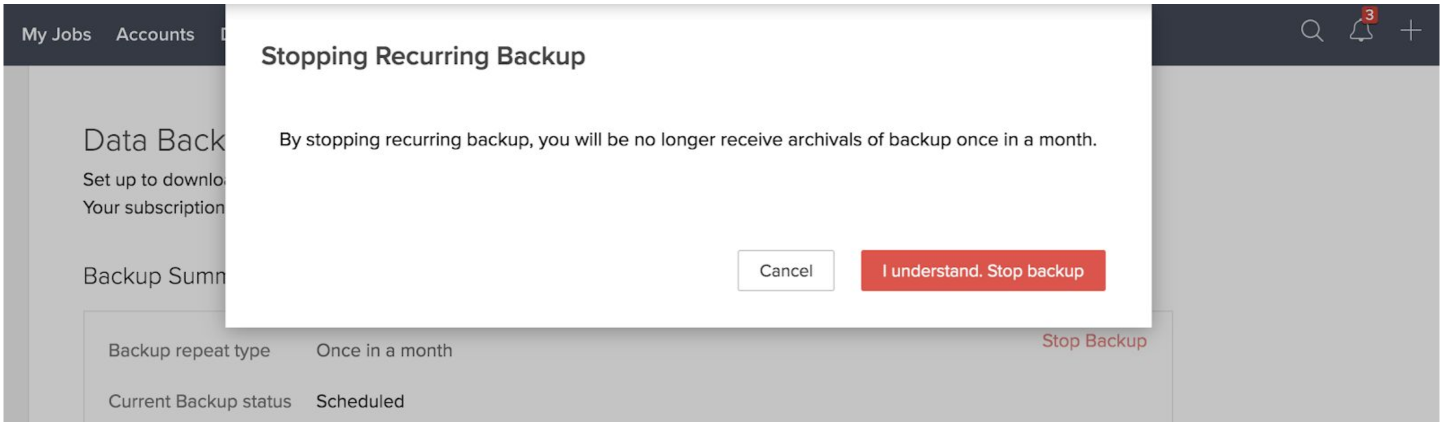


Pain Points: Button alignment and field alignment is different.

Solution: Need to follow the right side alignment for the buttons.

Conclusion:

Page Name : Data Administration - Backup

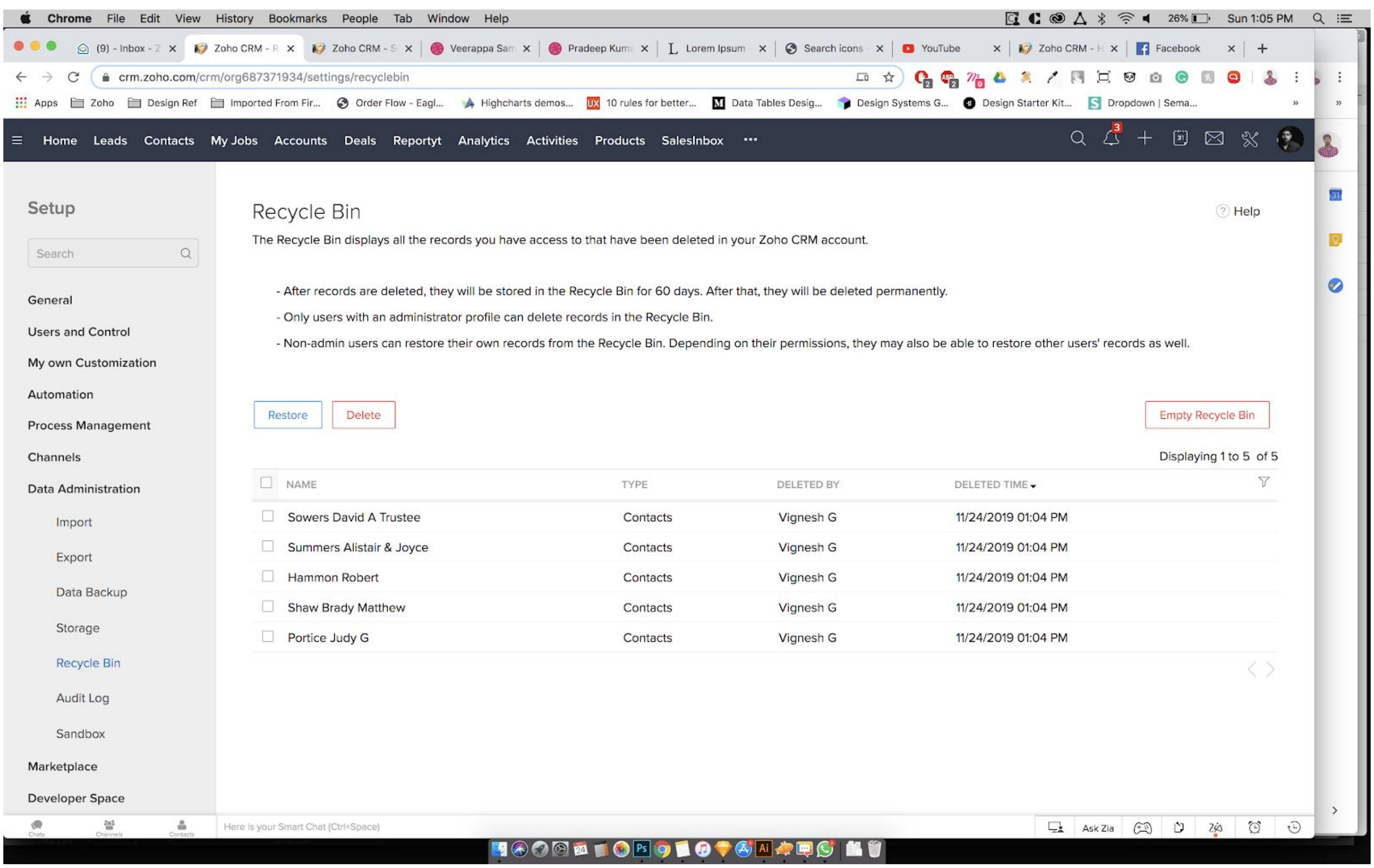


Pain Points: Alert popup is different style.

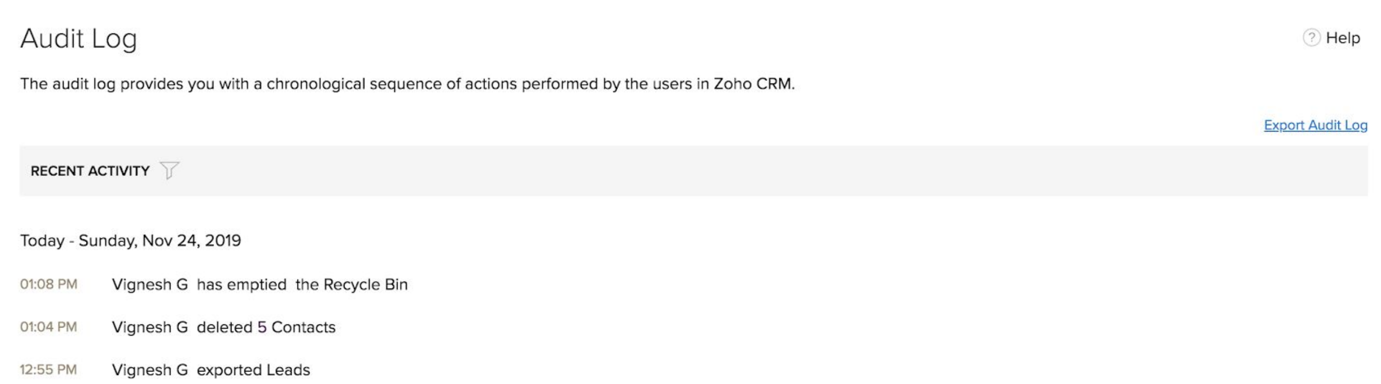
Solution: Need to follow the similar style for alert/info popup.

Conclusion:

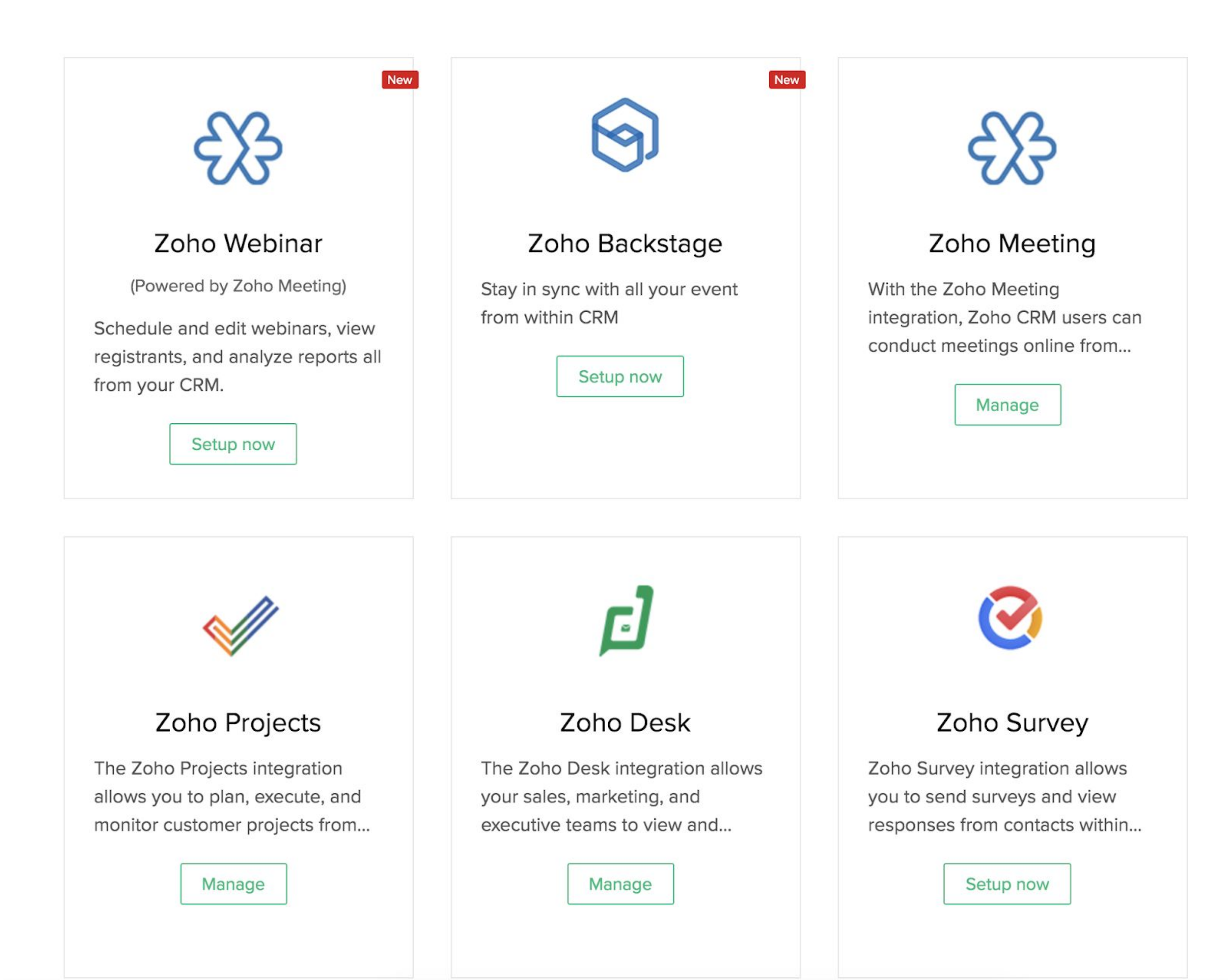
Page Name : Data Administration - Recycle bin



Pain Points: 1. Without select any record there is no need of showing restore and delete button at all the time. 2. Positive and negative buttons are used in the same place.
Solution: 1. Restore and delete button should be visible once any record is selected. And both button style should be secondary. Not in a different colors.
Conclusion:

Page Name : Data Administration - Export

Pain Points: CTA should be in a button style here.
Solution: Need to follow the primary button style to “Export” the audit logs.
Conclusion:

Page Name : Marketplace - Zoho

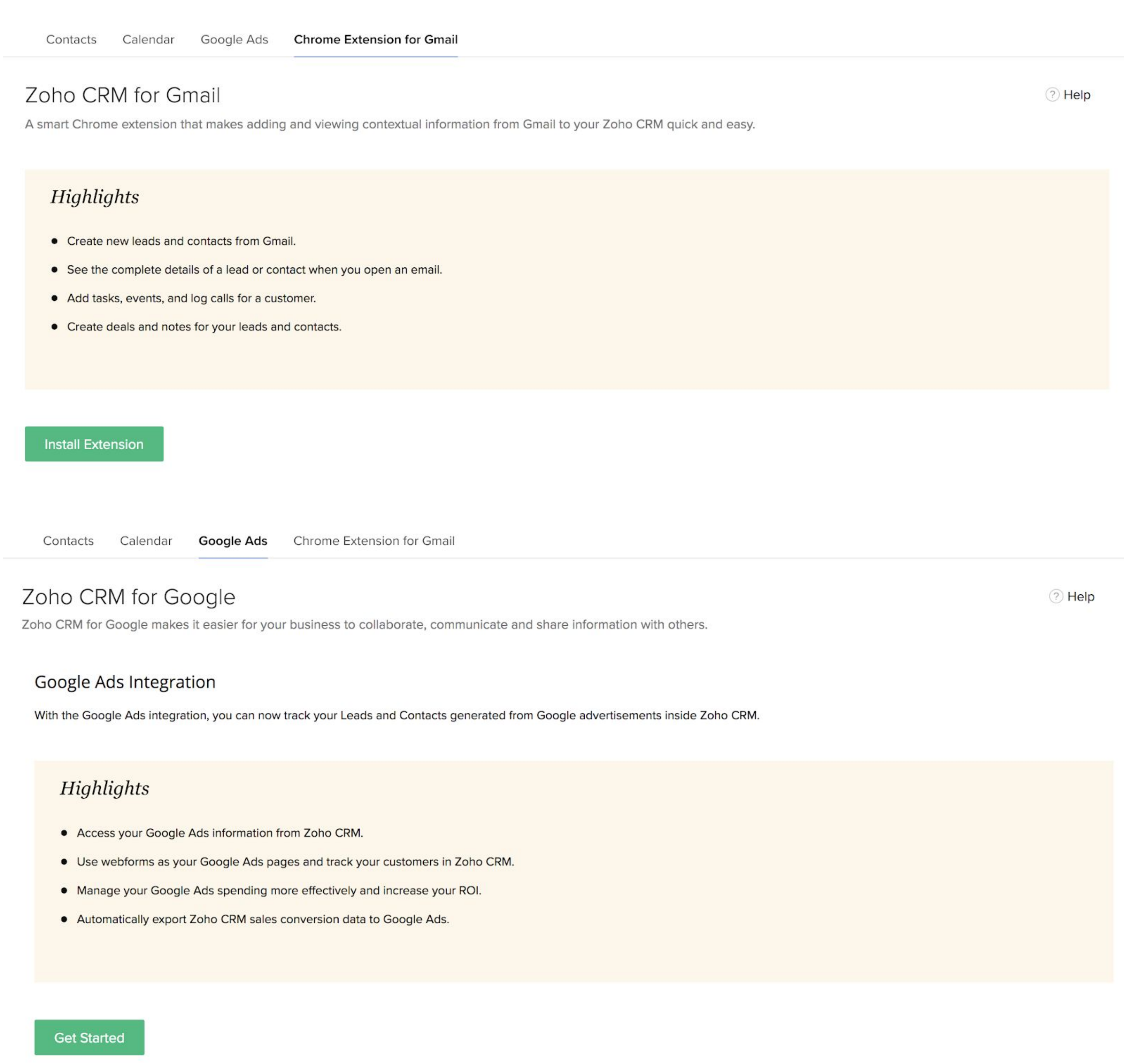


Pain Points: Call to actions are in different color.

Solution: CTA should be in primary blue color.

Conclusion:

Page Name : Marketplace - Google

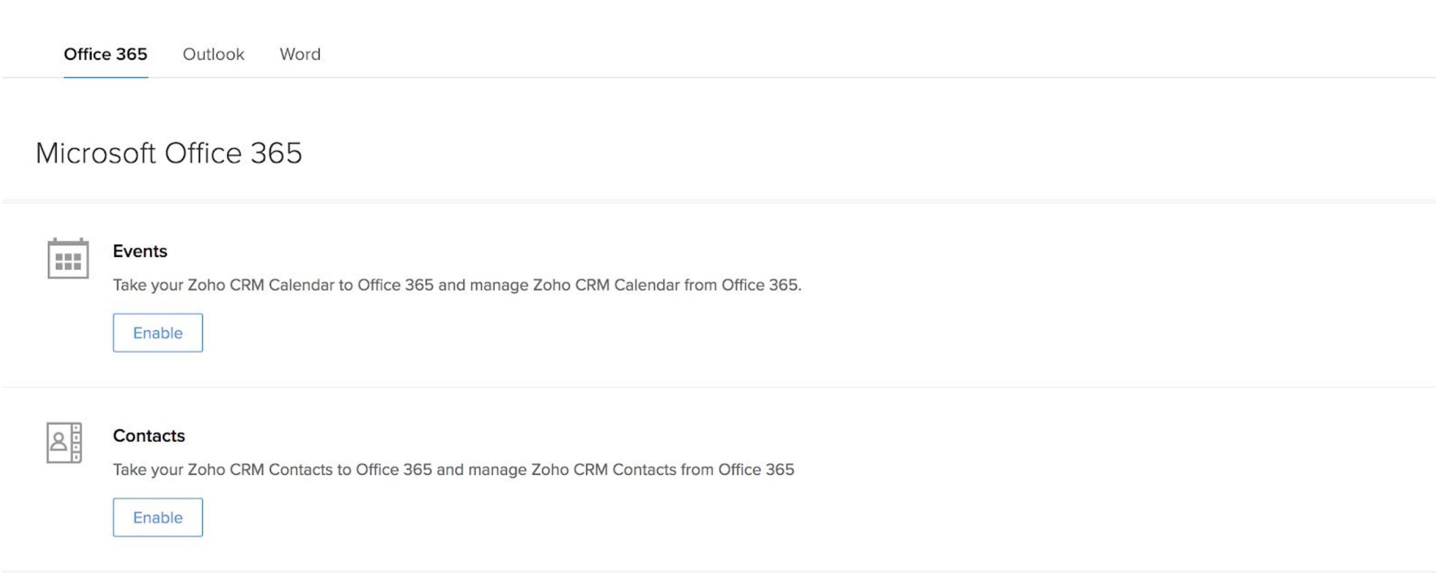


Pain Points: Call to actions are in different color.

Solution: CTA should be in primary blue color.

Conclusion:

Page Name : Marketplace - Microsoft



Pain Points: For the main action we use primary button in other places. But we used secondary style here.

Solution: CTA should be in primary blue color.

Conclusion:

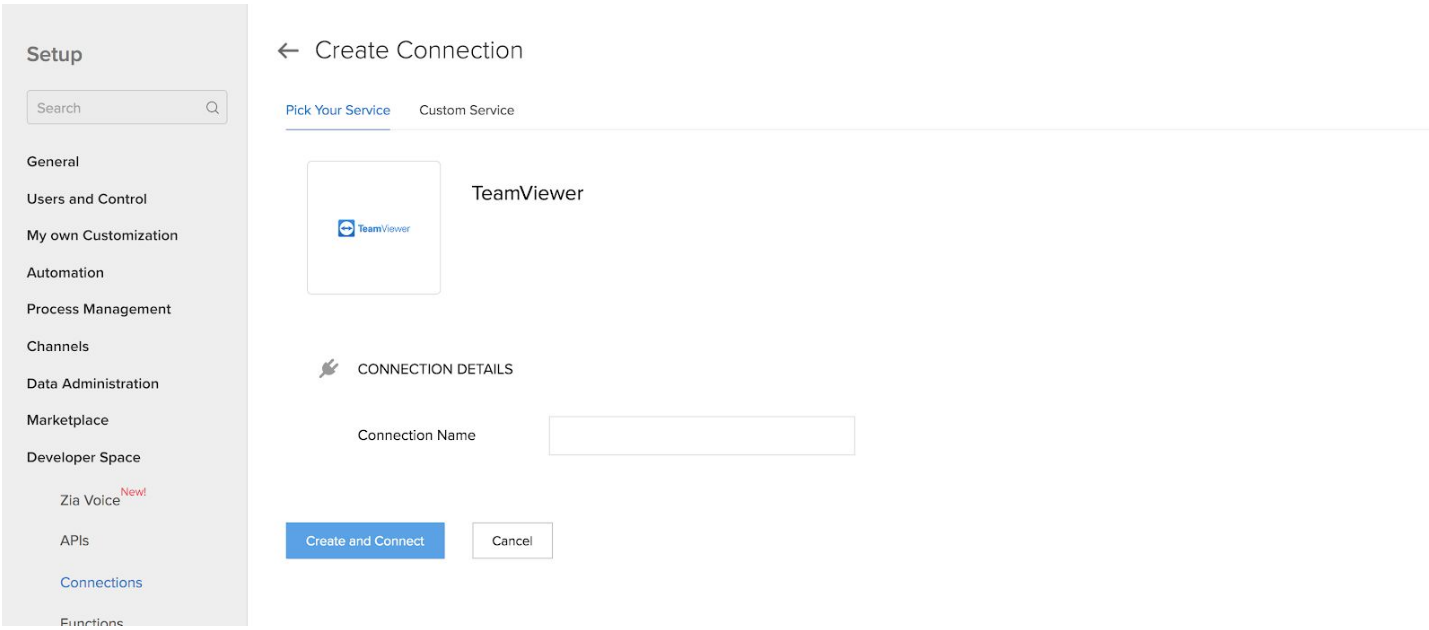
Page Name : Connections

Pain Points: “+” used at the last for add connections. What is the purpose of having “+” at last?

Solution: Need to remove “+” and the call to action should be Add connections.

Conclusion:

Page Name : Connections



Pain Points: Visually buttons and components are not aligned.

Solution: Need to align properly.

Conclusion:

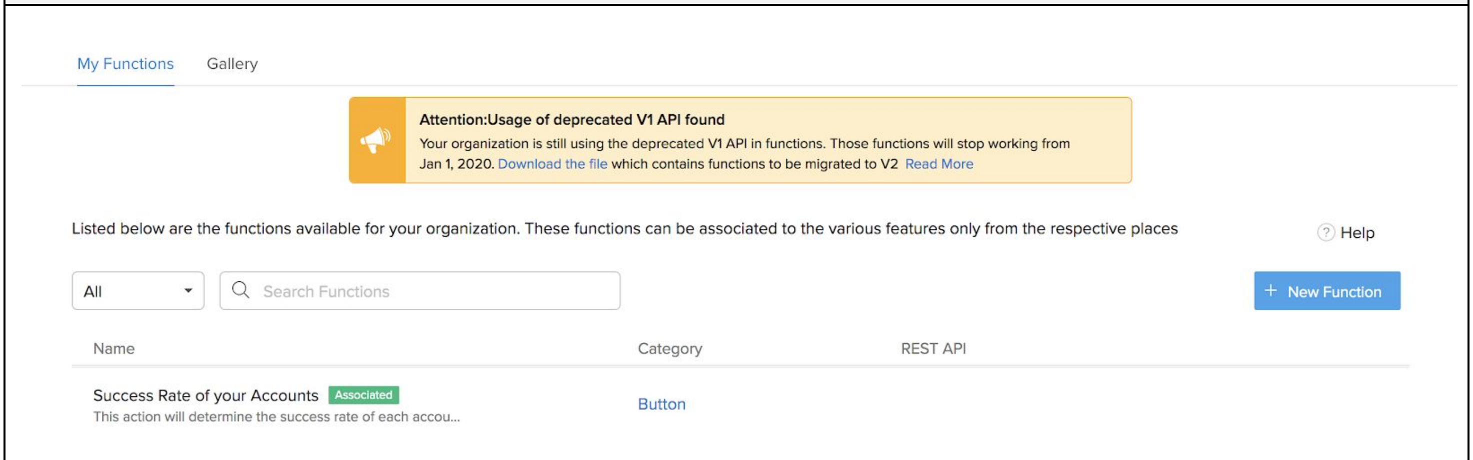
Page Name : Marketplace - Microsoft

Pain Points: Totally a different style for delete. And there is no confirmation before delete the connection.

Solution:

Conclusion:

Page Name : Functions

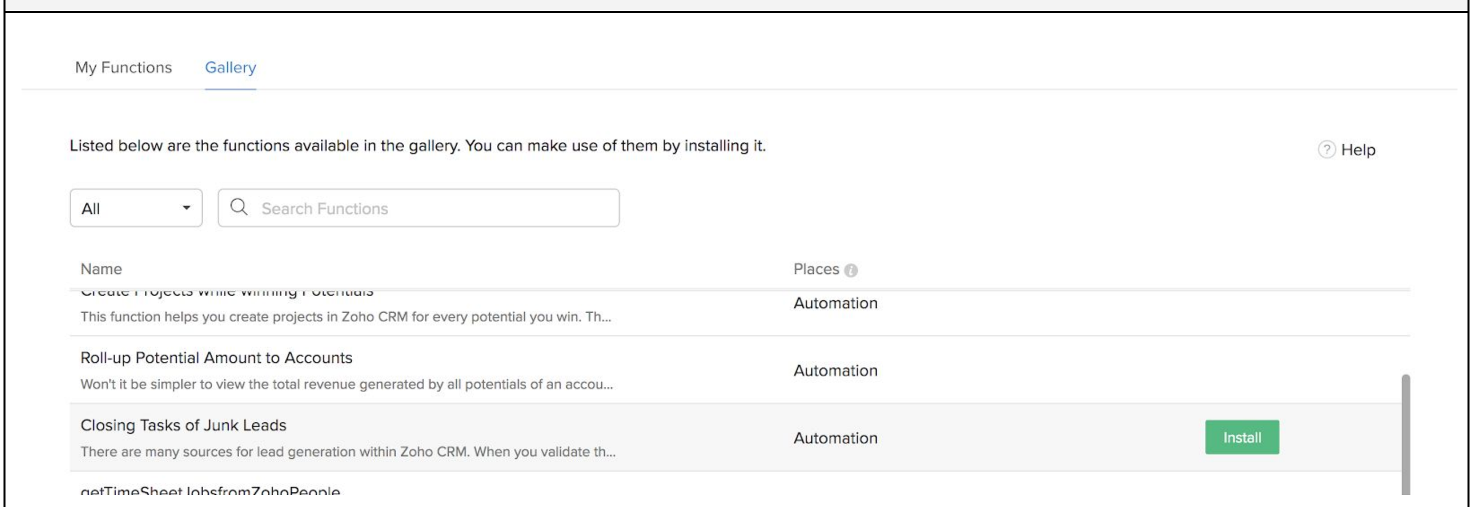


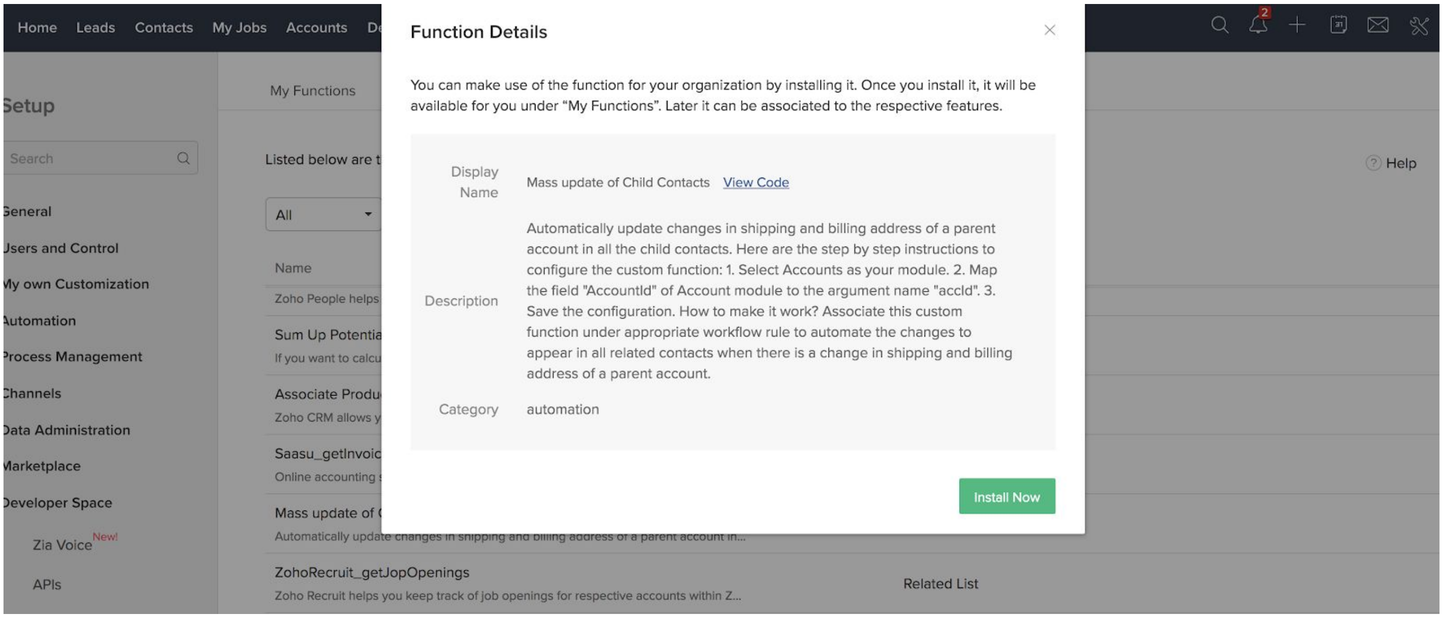
Pain Points: Here we actually creating a new function but here we have “+ new function”

Solution: CTA should be “Create New Function”

Conclusion:

Page Name : Functions - Gallery



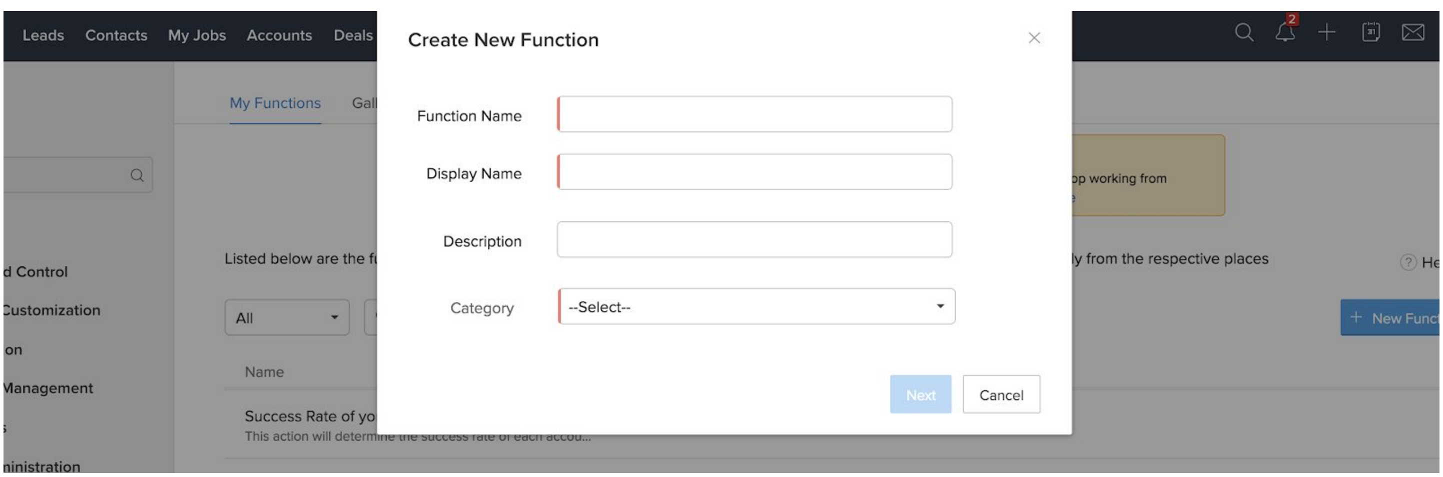


Pain Points: Button colors are different.

Solution: We should follow the Primary button (Fill Blue) color.

Conclusion:

Page Name : Functions - Create Function

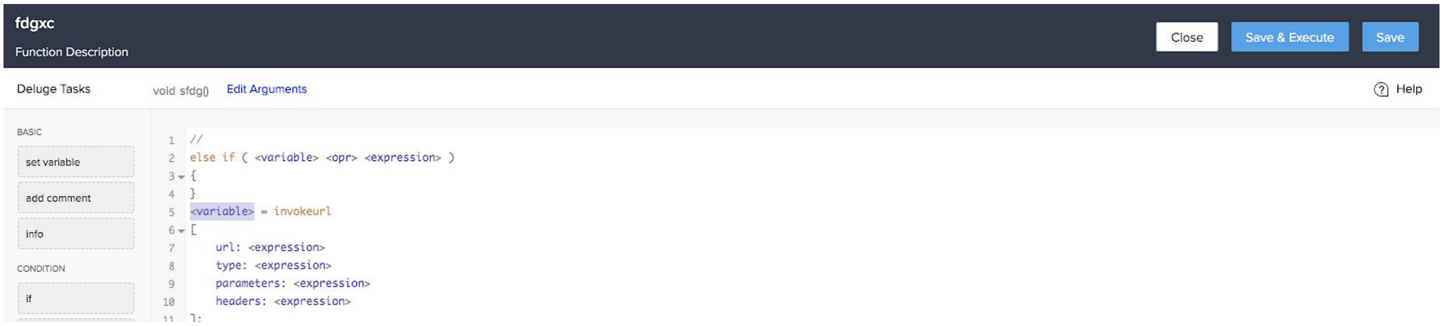


Pain Points: Button alignment is different than usual style.

Solution: Primary button should be on the right side and the cancel button should be left side. Both should be right alignment.

Conclusion:

Page Name : Function - Write

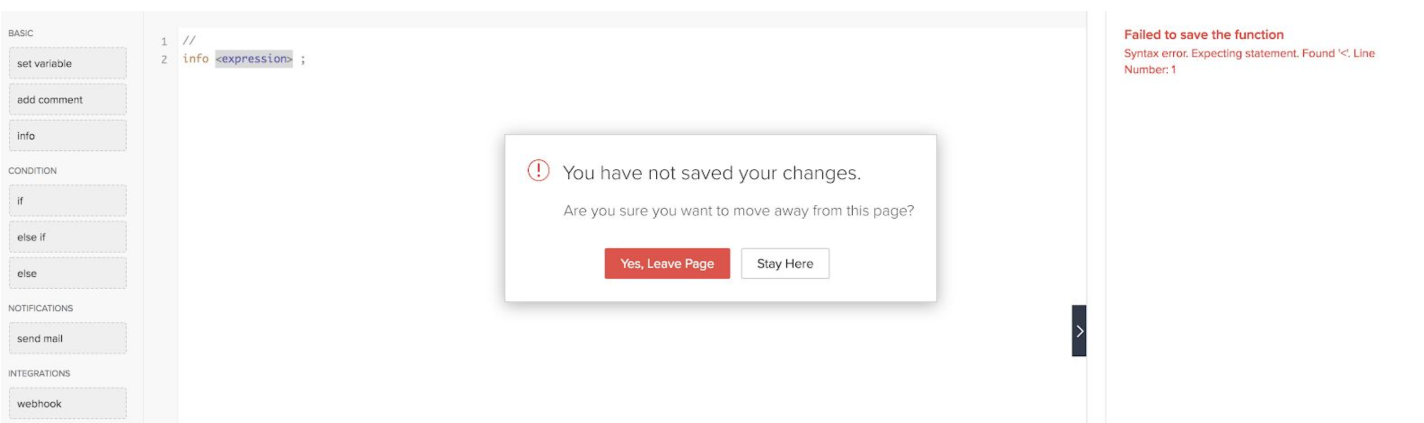


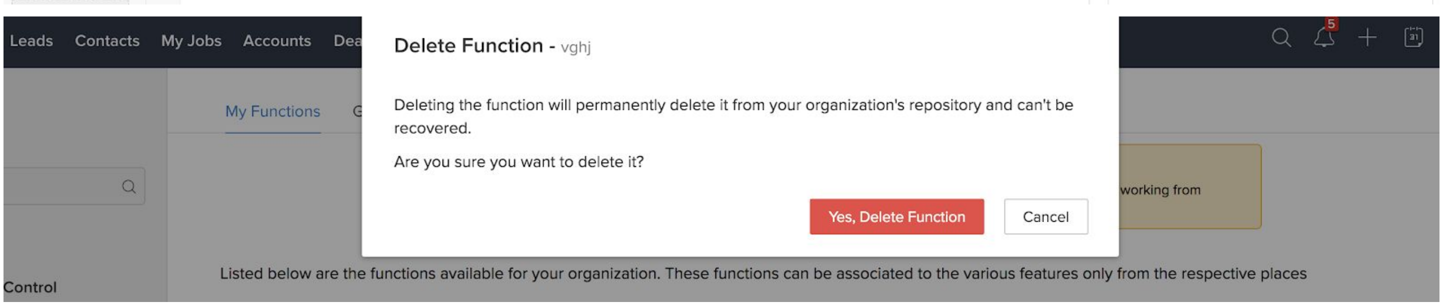
Pain Points: Two primary button placed in the same place. when I create something and click the save button it shows some error in the code. Same happens for save&Execute. We don't have draft option here, If something error I may not able to save this function. So it's unnecessary duplicate buttons placed here.

Solution: Primary button should be Save/Save&Execute. There is no need of both button here. Only one primary action is enough for this place.

Conclusion:

Page Name : Function - Alert



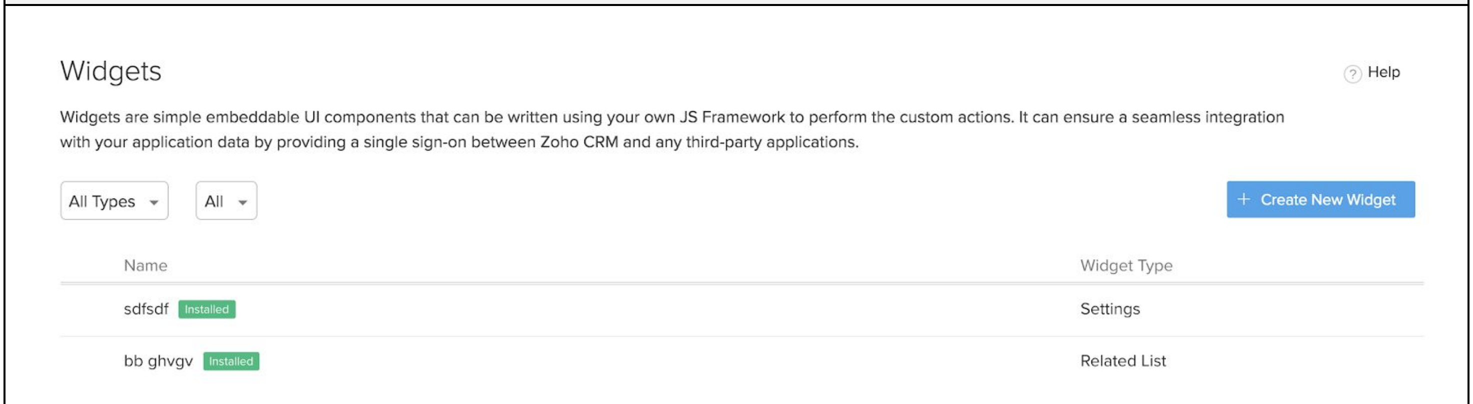


Pain Points: Popup style and positions are different than usual style. Two types of popup style used here.

Solution: Alert/popup/info should be same style in all the places.

Conclusion:

Page Name : Widgets

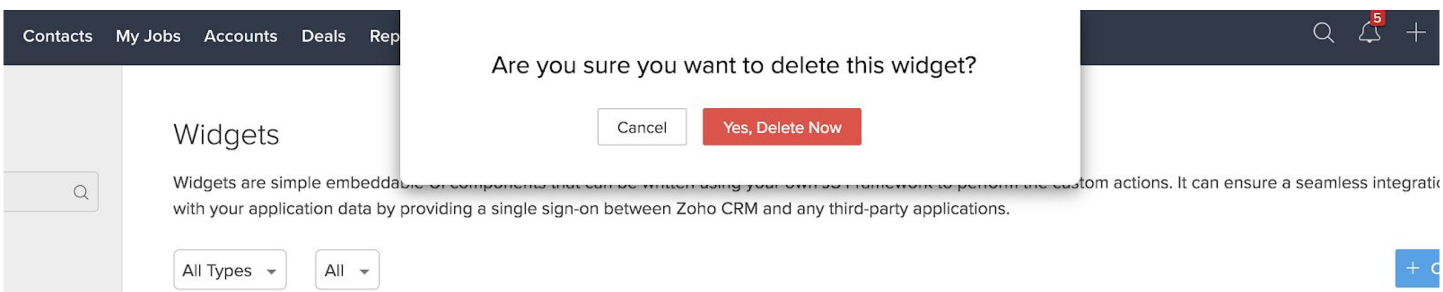


Pain Points: “+” is added before “Create”.

Solution: Need to remove “+” and the CTA should be “Create New Widget”

Conclusion:

Page Name : Widgets - popup

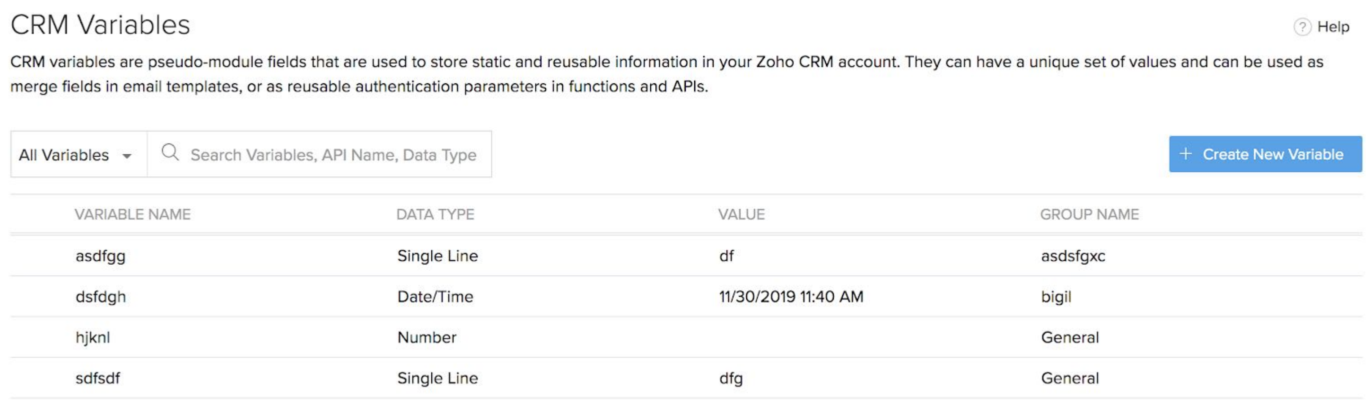


Pain Points: Popup style is different than usual style.

Solution: Alert/popup/info should be same style in all the places.

Conclusion:

Page Name : Variables

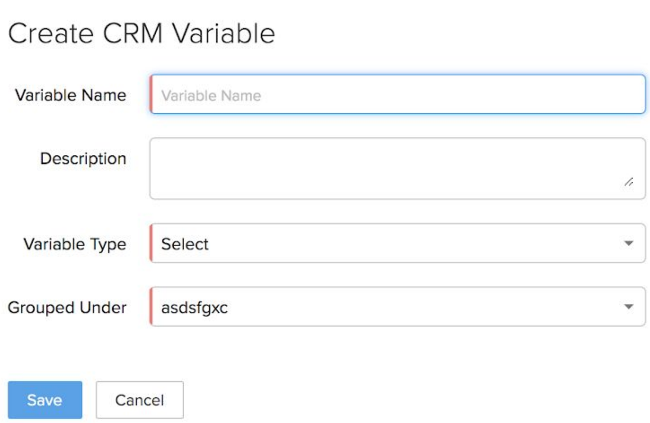


Pain Points: “+” is added before “Create”.

Solution: Need to remove “+” and the CTA should be “Create New Variables”

Conclusion:

Page Name : Variables - Create new

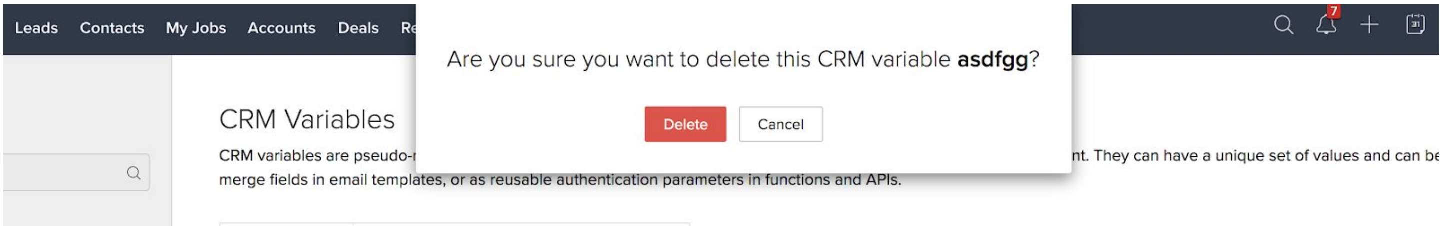


Pain Points: Button alignment is different. Here we create the new variable so the CTA should be Create instead of save.

Solution: Need to remove “+” and the CTA should be “Create New Variables”

Conclusion:

Page Name : Variables - Delete

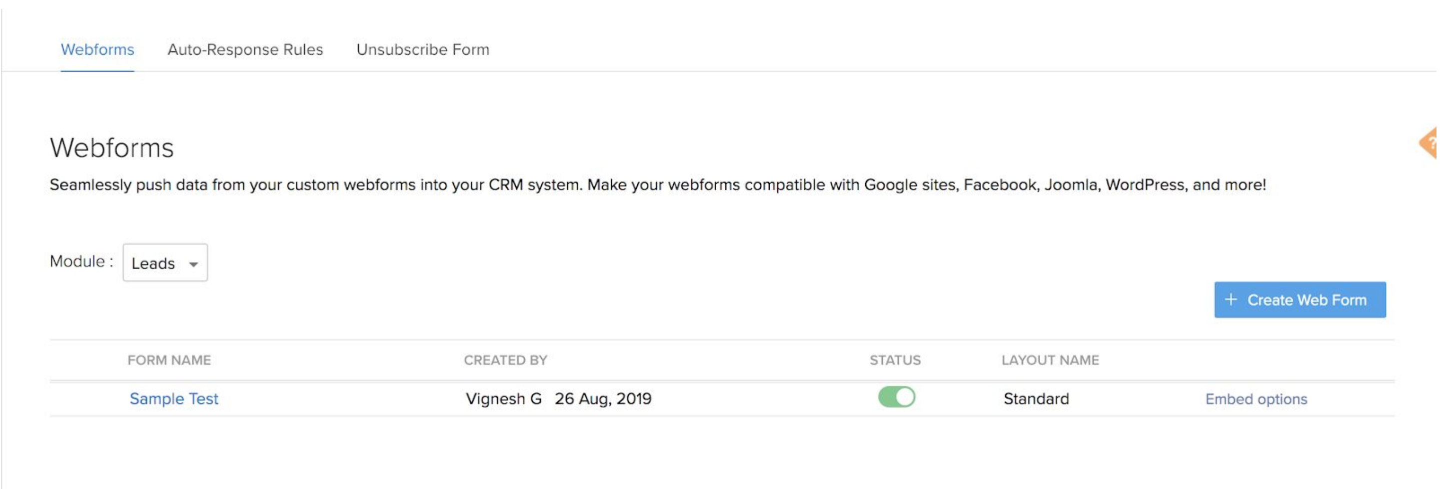


Pain Points: Delete popup is different style.

Solution: Need to remove “+” and the CTA should be “Create New Variables”

Conclusion:

Page Name : Webform

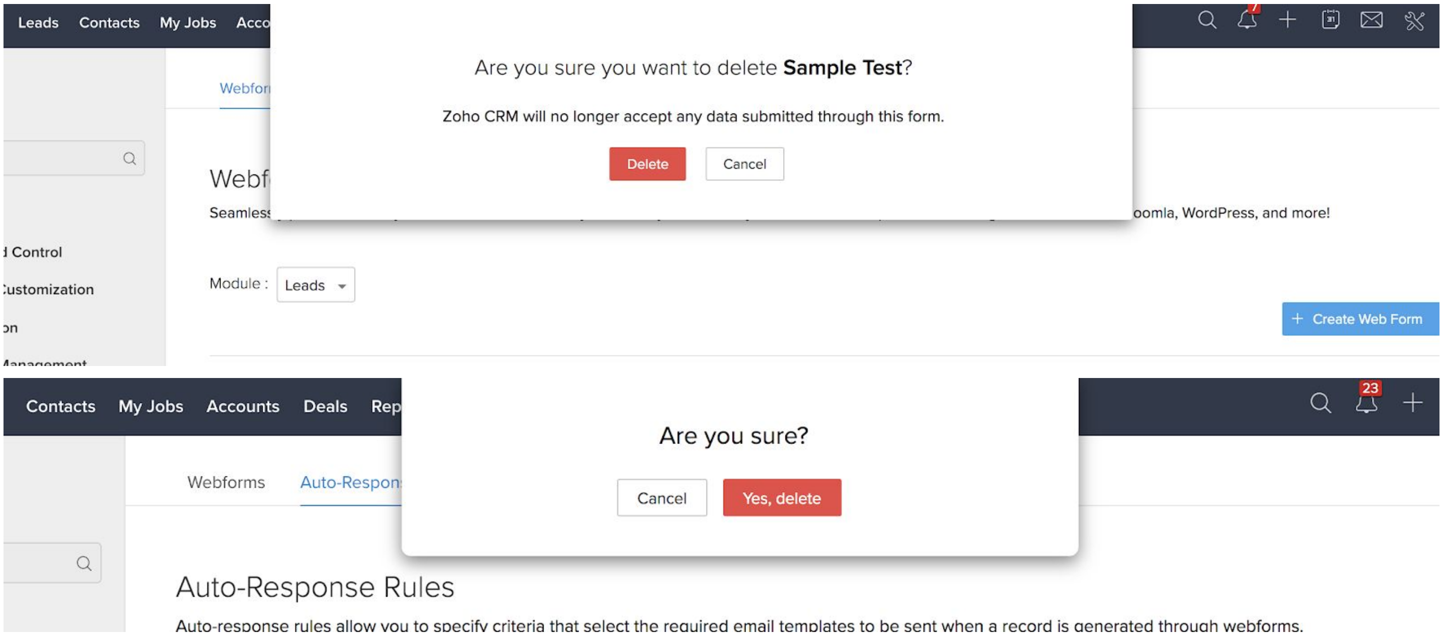


Pain Points: Here the functionality is creating a new webform. So “+” not needed here.

Solution: CTA should be “Create New Webform”

Conclusion:

Page Name : Webform - delete

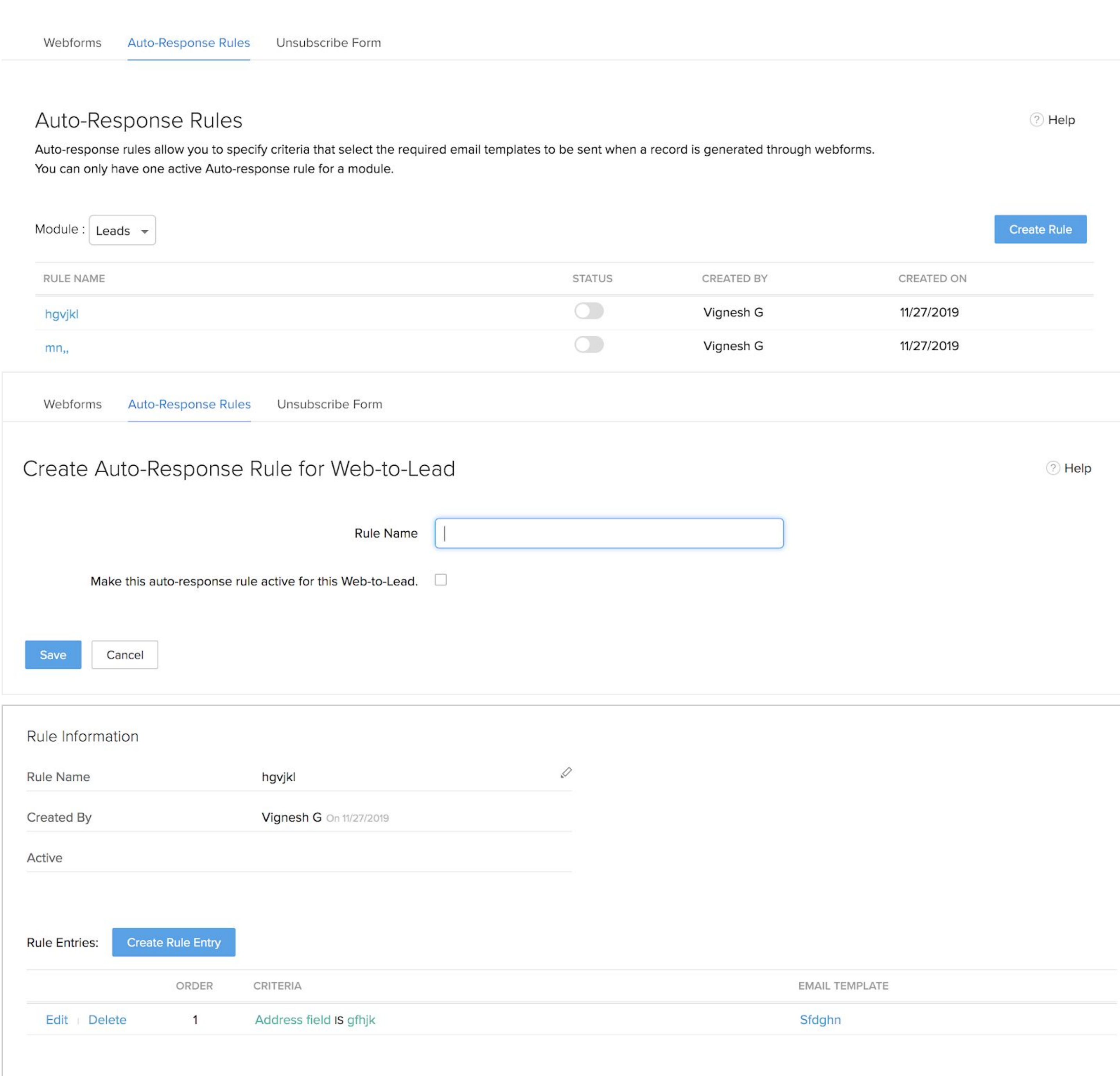


Pain Points: Popup style and positions are different than usual style. Two types of popup style used here.

Solution: Alert/popup/info should be same style in all the places.

Conclusion:

Page Name : Webform - auto response rules

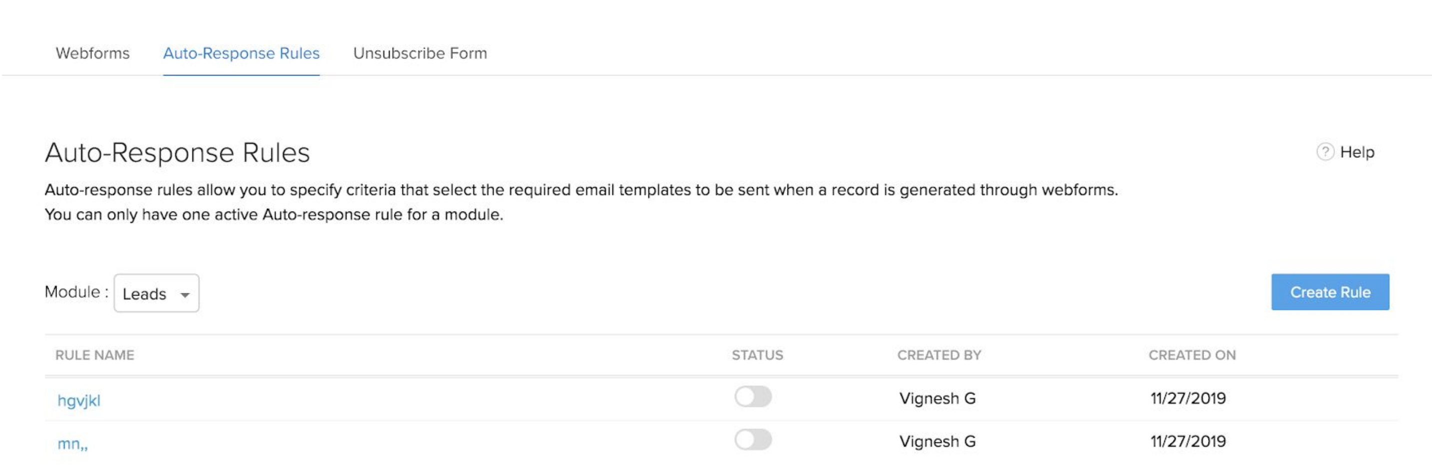


Pain Points: When I create new rule it asking name only. Once I save the name it come back to list page. Again I have to click the rule and give the rule entry.

Solution: Need to rework the feature.

Conclusion:

Page Name : Webform - auto response rules



Pain Points: When I create new rule it asking name only. Once I save the name it come back to list page. Again I have to click the rule and give the rule entry.

Solution: Need to rework the feature.

Conclusion: