

Simple Create & Edit Page

Interaction updated June 16, 2020 | Visuals updated June 11, 2020

Usage

This page template is used for:

- Creating or editing a business transaction.
- Saving as a draft before submitting.

Do

Creating or editing business objects using explicit save.

Don't

Creating or editing very complex business object or implicit save

Default Create and Edit Page template

This is the simplest variation of this template.

Personal Information

Name

First Name John	Middle Name Mains	Last Name Doe
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Address

Street 1234 5th Ave	City Seattle
State WA	Zip Code 98102

Contact Info

Phone Number <small>Required</small>	Email <small>Required</small>
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Contract Duration

Start Date <small>Required</small>	End Date <small>Required</small>
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Schedule Summary

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Create and Edit Page template with more complex header



Personal Information

Name

First Name John	Middle Name Mains	Last Name Doe
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Address

Street 1234 5th Ave	City Seattle ▾
State WA ▾	Zip Code 98102

Contact Info

Phone Number <small>Required</small>	Email <small>Required</small>
---	----------------------------------

Contract Duration

Start Date <small>Required</small>	End Date <small>Required</small>
---------------------------------------	-------------------------------------

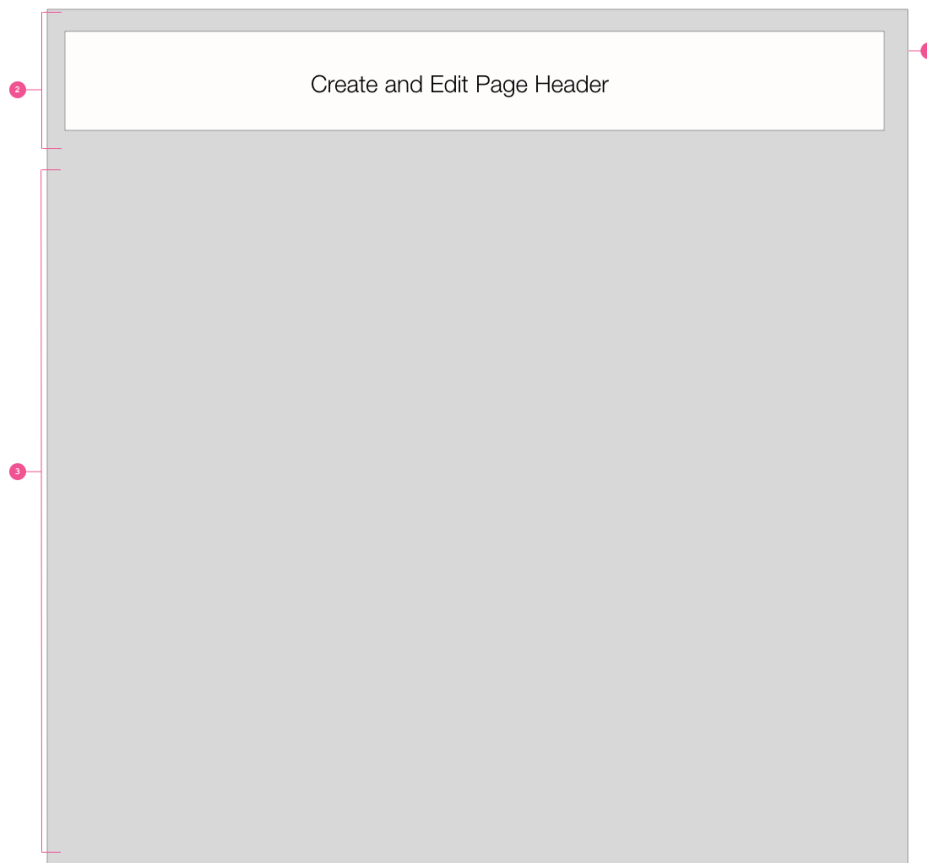
Schedule Summary

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

Anatomy

Anatomy



1. Page template

This is the boundaries of the page.

2. Page Header

This is create and edit page header component for explicit save.

3. Page content

by default it includes dynamic form. Developers can add other components such as table, attachment, summary tab; however this will not be part of the first verions.



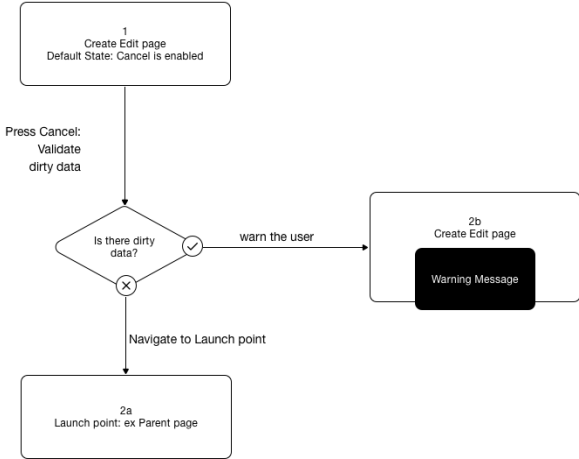
Behavior: Optional Actions

Cancel

New Employee Cancel Submit

First Name Required

Last Name Required



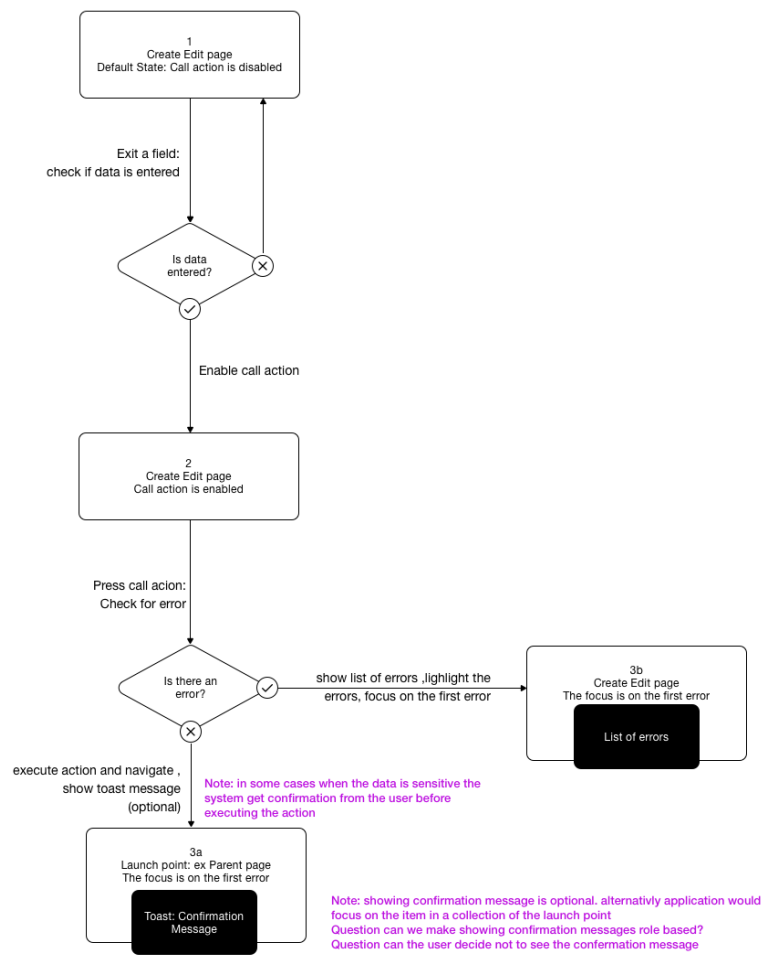
Call Action

New Employee

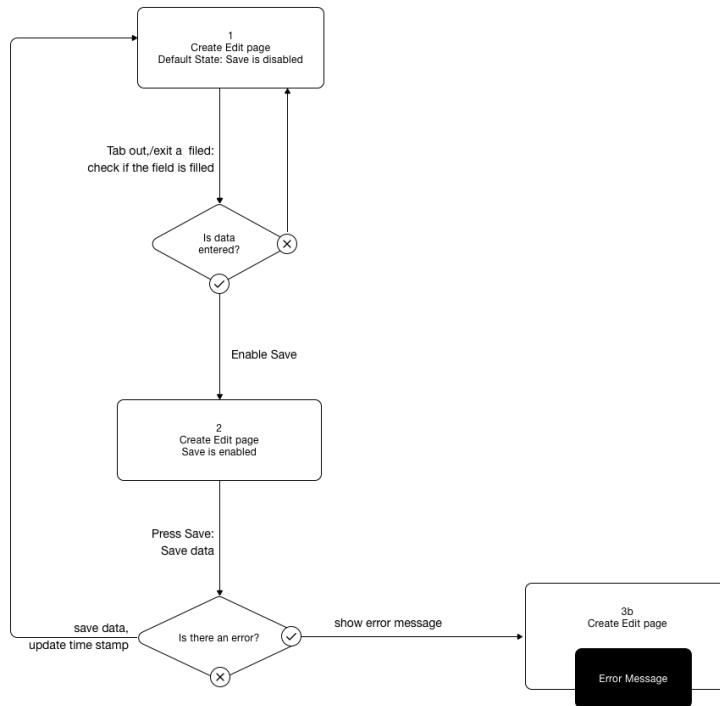
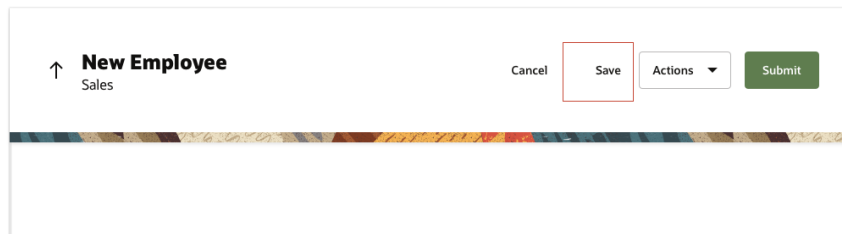
Cancel
Submit

Sam Required

Required



Save



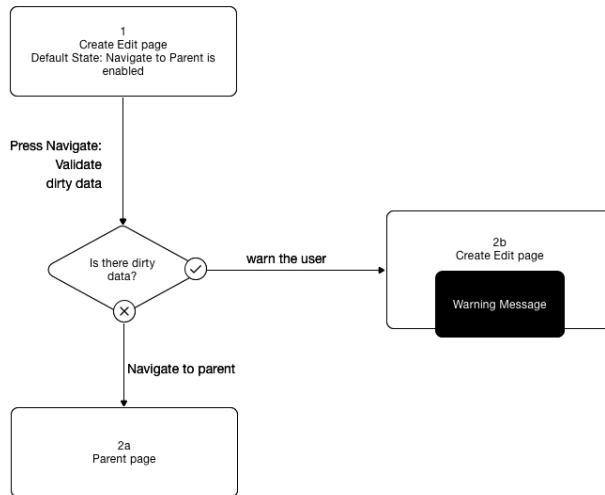
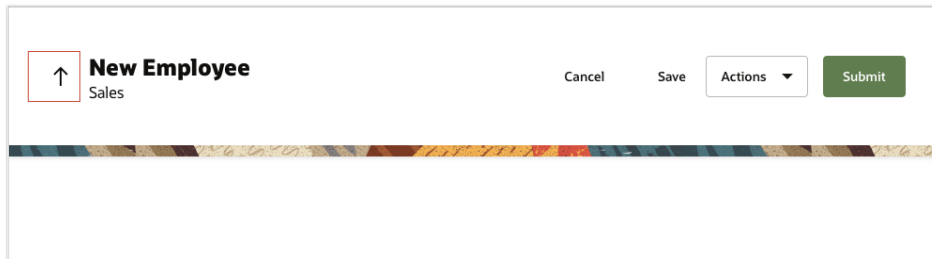
Use

Do use save button to save it as a draft. also add time stamp (part of header)

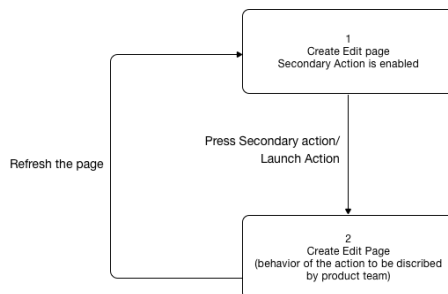
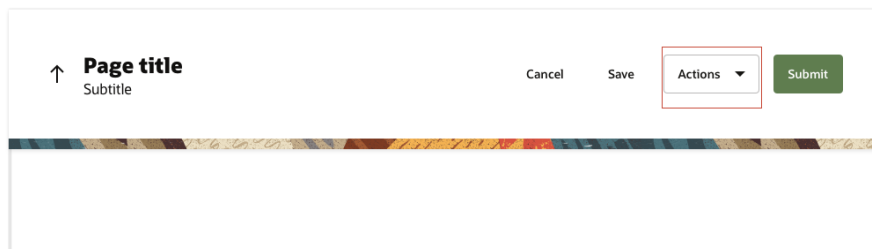
Don't

Don't use this save button as a call action.

Navigate to Parent page



Secondary Action



Use

Use drawer or pop-up depending on the nature of the action.

Don't

Don't navigate to another page.

Behavior: UX Fundamentals

Scrolling Behavior

The header animates and stick to the top and the content area scroll down.

Responsiveness

Page Header spec

The page occupies the whole browser width until it reaches the max of 1440 px (Large). For browser greater than 1440 px the page will be centered aligned. The header and form layout follow header and form layout responsiveness.

Page Header spec

Form Layout spec

Keyboard Interaction

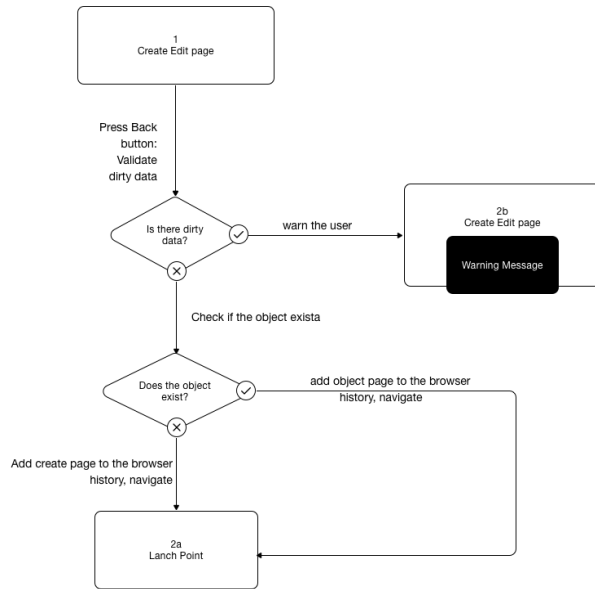
There are 2 section: the Header and the form layout. The initial focus is on the first field of the form and follows the form layout Keyboard navigation. When reaching the end of the form layout, the focus then moves to the call action of header and follow header order.

The screenshot shows a 'New Employee' form with the following elements and annotations:

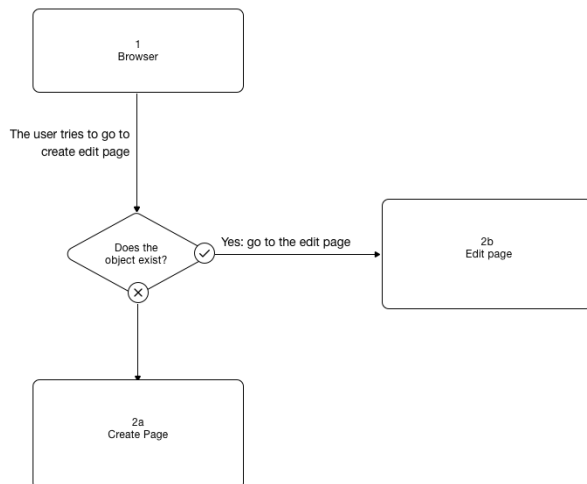
- Header:** 'New Employee' title with an up arrow icon, 'Sales' subtitle, 'Cancel' and 'Save' buttons, an 'Actions' dropdown menu, and a 'Submit' button. A red box highlights the 'Submit' button, labeled with a red '5'.
- Form Fields:** Four input fields arranged in a 2x2 grid:
 - Top-left: 'First Name' field with a vertical cursor and a red box around it, labeled with a red '1'.
 - Top-right: 'Last Name' field with a red box around it.
 - Bottom-left: 'Job Title' field with a red box around it.
 - Bottom-right: 'Department' field with a red box around it, labeled with a red '4'.Each field has a 'Required' label at the bottom right.



Browser Back button



Book markable



Human Readable URL

f a page is related to an business object and one of the parameters is the ID of the object, it is

recommended to include a Label parameter to include a human readable attribute of the object as well the value can be for example object's name, title, etc.

example <https://.../insidesales/leads?leadId=384598&name=Colin+Wu>

If a page is related to create page it is recommended to have human readable action as the name of the page

example <https://.../insidesales/leads/createlead?>