



# ***INTERFACE GUIDE***

**ADAPTIVE PAYMENTS**

**EDITION 1.0**

## INTRODUCTION

This interface guide, Edition 1.0, includes user interface recommendations for Adaptive Payment, one of the new services being launched on PayPal X, guidelines related to using PayPal brand assets and, basic design principles to help you create a good user interface.

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*ADAPTIVE APIs*

1.0

**INTERFACE GUIDE**

EDITION 1.0

## ADAPTIVE PAYMENTS

Adaptive payments is a service that provides a flexible way to make payments with PayPal using an API. This API enables you to develop applications that move money between PayPal accounts. The adaptive payments service was designed to empower developers and to provide flexible support for the multiple real world payment scenarios.

Adaptive payments handles payments between a sender of a payment and one or more receivers of the payment. Application owner is the person who owns the website or widget that enables movement of money from the sender to the receiver(s). The payment sender, receiver(s), and application owner must each have a PayPal account. Senders and receivers may have personal accounts; however, application owners must have business accounts. In some cases, an application owner may also be a receiver; for example, as the owner of a website, you are the receiver of payments from the senders who are your customers.

### ***INCLUDED IN THIS SECTION:***

- 1.1 Adaptive payments overview
- 1.5 Person to person model
- 1.6 Digital goods model
- 1.8 Service plans model
- 1.11 Disbursements and payouts model
- 1.12 ECommerce model

## ADAPTIVE PAYMENTS

### TYPES OF PAYMENTS

The number of receivers, and their relationship to the sender and to each other, determine the type of payment.

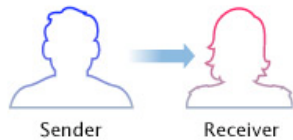
01

#### SIMPLE PAYMENTS

Simple payments enable a sender to send a single payment to a single receiver.

This is the traditional way that payments are made.

For example, your website might implement a customized checkout flow using adaptive payments to transfer money from a sale from your customer's PayPal account to your own account.

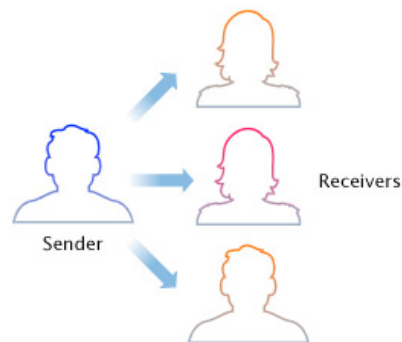


02

#### PARALLEL PAYMENTS

Parallel payments enable a sender to send a single payment to multiple receivers.

For example, you are a seller of electronic equipment, and you partner with another business to provide accessories or warranties. When a customer purchases items through your application, the payment would be split between you and your partner appropriately.

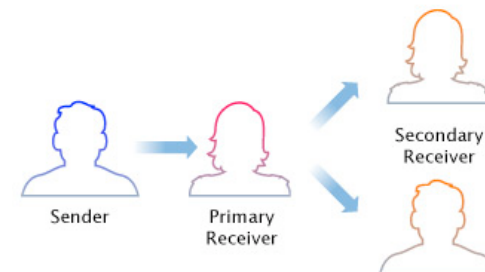


03

#### CHAINED PAYMENTS

Chained payments enable a sender to send a single payment to a primary receiver who may keep part of the payment and pays other, secondary, receivers with the remainder.

For example, your application might be an online travel agency that handles bookings for airfare, hotel reservations, and car rentals. The sender sees only you as the primary receiver. You would allocate the payment for your commission and the actual cost of services provided by other receivers. PayPal then deducts money from the sender's account and deposits it in both your account and the secondary receivers' accounts.



## ADAPTIVE PAYMENTS

### TYPES OF APPROVAL FLOWS

The kind of approval required by the sender of a payment within your application will determine the type of approval flow.

01

#### EXPLICIT APPROVAL

Explicit approval payments refer to the payments in which the sender logs on to PayPal to approve each payment. Explicit approval payments is the traditional way to make a payment using PayPal and it is the only option unless the sender has set up a preapproval agreement or you are also the sender.



02

#### IMPLICIT APPROVAL

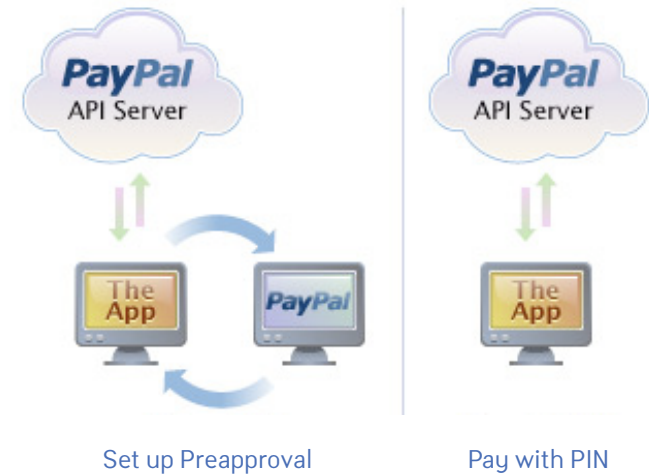
Implicit approval payments are the ones in which your application is both the sender of a payment and the caller of an adaptive payments API operation that makes the payment. This kind of payment is automatic because your application is the sender and is implicitly authorized to make payments from your own account without logging in to PayPal.



03

#### PREAPPROVED PAYMENTS

Preapproved payments require the sender to log in to PayPal to approve future transfer of funds. The preapproval key that is returned can be used to send money with implicit approval. The sender logs in to PayPal only to set up the preapproval and does not need to log in to PayPal for payments covered by the preapproval.



## ADAPTIVE PAYMENTS

### COMMON APPLICATION MODELS

The models below describe the common categories of applications that benefit from the flexibility of adaptive payments. Select the model that most closely matches your application to review the interface guidelines, although we recommend a brief review of each model.

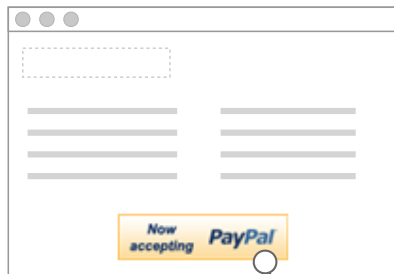
<b>PERSON TO PERSON</b>	<b>DIGITAL GOODS</b>	<b>SERVICE PLAN</b>	<b>DISBURSEMENTS AND PAYOUTS</b>	<b>ECOMMERCE</b>
<p>The "person to person" model refers to applications that enable the transfer of money between friends and family. This model also extends to applications that enable non-profits to manage charity campaigns. Another idea that fits into this model is allowing individuals or groups to raise funds for a neighborhood event, school game or team event.</p> <p><b>Examples</b></p> <ul style="list-style-type: none"><li>- An application that powers wedding or graduation gifts</li><li>- An application that manages group/ team events and the costs associated</li><li>- An application that streamlines the splitting of restaurant checks</li></ul>	<p>The "digital goods" model refers to applications that involve the purchase of goods that can be downloaded or used online. The application may enable purchase of digital goods either directly from a merchant or through a third party marketplace like an app store.</p> <p><b>Examples</b></p> <ul style="list-style-type: none"><li>- Buying points in an online game</li><li>- A marketplace that allows merchants to sell songs and ringtones</li><li>- A tool that consolidates and organizes your software or plug-in purchases</li></ul>	<p>The "service plan" model refers to applications that enable payment for a recurring service. This model also extends to one-time payment for a service.</p> <p><b>Examples</b></p> <ul style="list-style-type: none"><li>- Paying rent</li><li>- Subscription to web analytics service</li><li>- Paying child's tuition</li></ul>	<p>The "disbursements or payouts" model includes applications where payments originate through a business. Payments could be either B2B- business to business, B2E- business to employee, B2C- business to consumer.</p> <p><b>Examples</b></p> <ul style="list-style-type: none"><li>- A payroll application</li><li>- A CRM app or plug-in to an existing CRM app</li><li>- Payouts in an affiliate marketing app</li></ul>	<p>We recommend using Adaptive Payments for eCommerce when you are developing non traditional checkout flows, i.e. payment during checkout needs to be split between multiple receivers.</p> <p><b>Examples</b></p> <ul style="list-style-type: none"><li>- Referral widget that gives most of the sale to the merchant but a small commission to the referrer/ affiliate</li><li>- Marketplace applications where multiple merchants are involved in a single sale</li><li>- The sale of a camera when the consumer also bought an extended warranty from a different provider</li></ul>



## PERSON TO PERSON MODEL

Most of the "person to person" applications will use explicit payments. For example, team members who use your application to contribute to a colleague's gift will log in with their own PayPal account as a part of the process. However, there are a few cases where preapproved payments may be used e.g. scheduled donations to an animal shelter.

### YOUR APPLICATION



#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

Acceptance mark optimal size is 150 x 40 pixels.

### YOUR APPLICATION

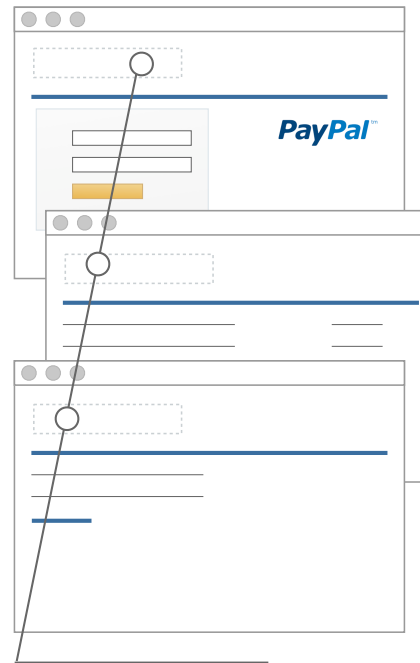


#### USE THE PAY WITH PayPal BUTTON

Place the Pay with PayPal button in a visible and accessible location, so users will know they should click on this button to make their payment.

Pay with PayPal button comes in one size: 150 x 60 pixels.

### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APPLICATION NAME

PayPal will display your application name when your customers are redirected to the PayPal site.

### DIRECTED BACK TO YOUR APP



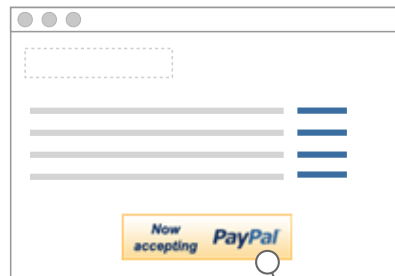
#### LIMIT THE NUMBER OF PAGES

Limit the number of pages after returning from PayPal, best practice 1-2 pages.

## DIGITAL GOODS MODEL- Preapproved Payments

The primary approval flow for the digital goods model is preapproved payments. Preapproved payments allow your user to stay within your application environment for purchases. The application can be developed to allow users to set up a PIN for additional security. Once set up, users will have to enter this PIN for all future purchases through your application.

### YOUR APPLICATION



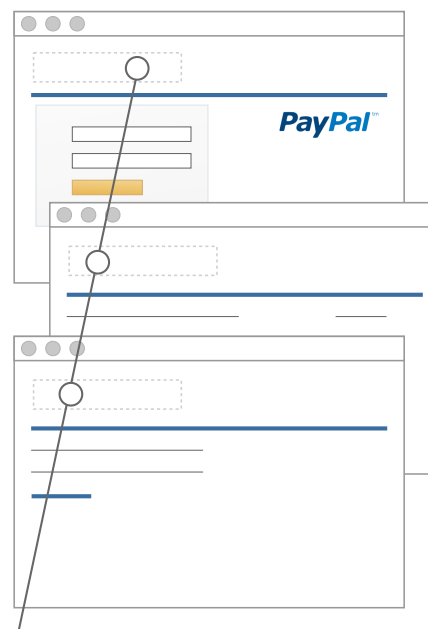
#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

Acceptance mark optimal size is 150 x 40 pixels.

Use your standard buttons or links to allow customers to make a purchase on the product page.

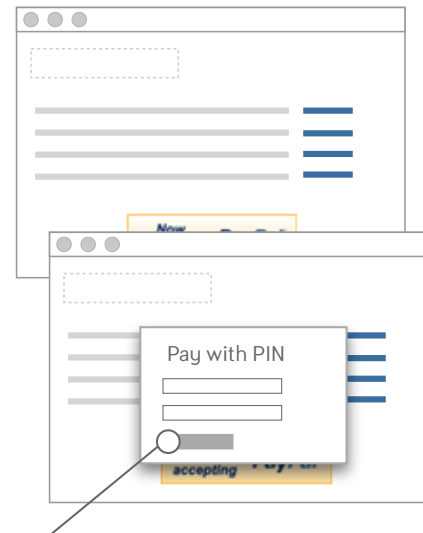
### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APP NAME

PayPal will display your application name when your customers are redirected to the PayPal site to set up preapproved billing agreement.

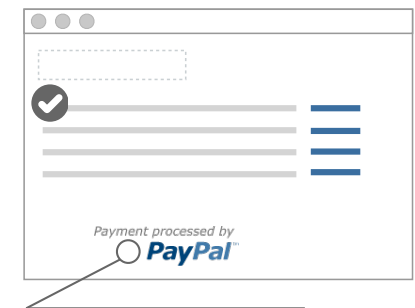
### PAY WITH PIN DIALOG



#### AFTER PREAPPROVAL SET UP

If you asked your customers to create a PIN for security of future payments, they can pay with PIN in your application environment without redirecting to the PayPal site.

### POST PAYMENT



#### USE A PAYMENT PROCESSED BY MARK

Place the payment mark on your page to let customers know PayPal processed their payment.

If the payment was not successfully processed, then we recommend displaying an appropriate error message. The technical documentation for Adaptive Payments API provides more details.

Payment Processed by PayPal mark optimal size is 222 x 36 pixels.

## DIGITAL GOODS MODEL- Explicit Payments

Explicit payments could be the approval type used for one-time purchase of digital goods like buying shareware.

### YOUR APPLICATION

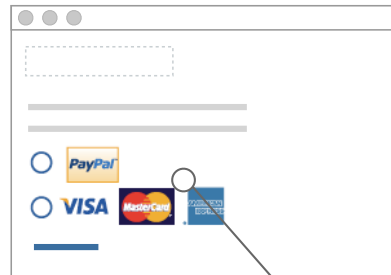


#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

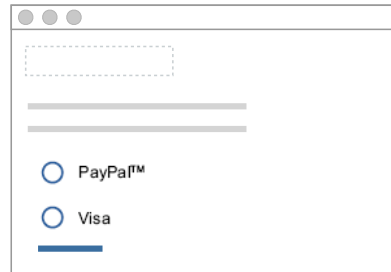
Acceptance mark optimal size is 150 x 40 pixels.

### PAYMENT OPTION PAGE

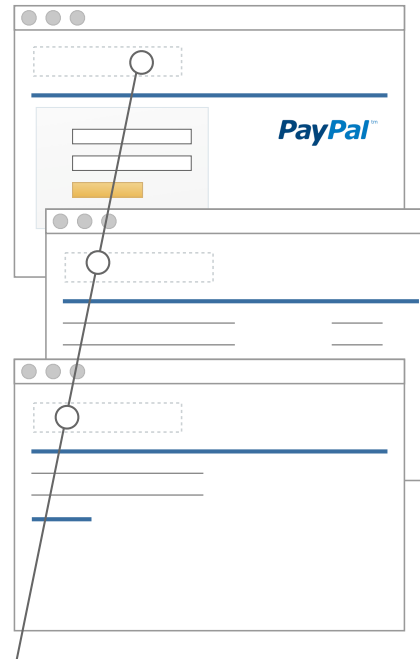


#### USE THE SMALL PayPal ACCEPTANCE MARK

Use the PayPal acceptance mark when other payment options display logos. Or, use text if the other payment options are also displayed as text.



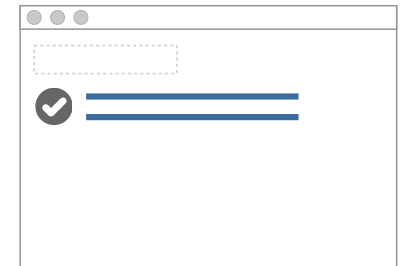
### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APPLICATION NAME

PayPal will display your application name when your customers are redirected to the PayPal site.

### DIRECTED BACK TO YOUR APP



#### LIMIT THE NUMBER OF PAGES

Limit the number of pages after returning from PayPal, best practice 1-2 pages.

## SERVICE PLAN MODEL- Preapproved Payments, Multiple Payment Options

The primary approval flow for any application that falls in to the service plan model is preapproved payments. Preapproved payments allow your user to schedule future payments. Illustrated below are the guidelines for preapproved payments within applications that offer multiple payment choices.

### YOUR APPLICATION

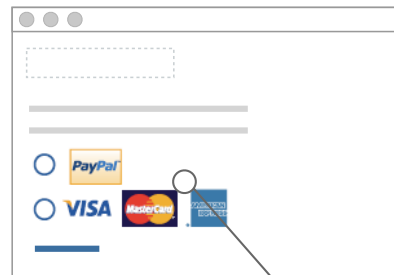


#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

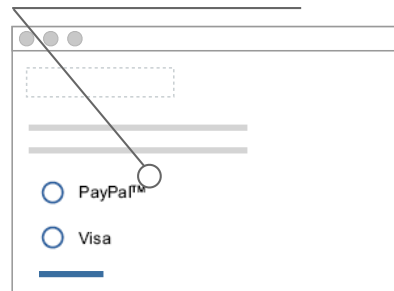
Acceptance mark optimal size is 150 x 40 pixels.

### PAYMENT OPTION PAGE

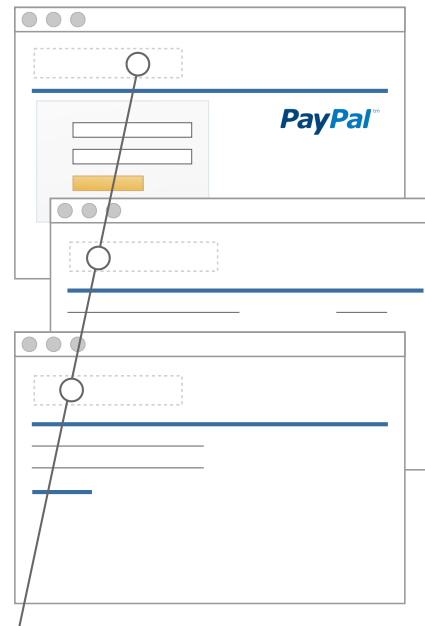


#### USE THE SMALL PayPal ACCEPTANCE MARK

Use the PayPal acceptance mark when other payment options display logos. Or use text if the other payment options are also displayed as text.



### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APP NAME

PayPal will display your application name when your customers are redirected to the PayPal site to set up preapproved billing agreement.

### DIRECTED BACK TO YOUR APP



#### LIMIT THE NUMBER OF PAGES

Limit the number of pages after returning from PayPal, best practice 1-2 pages.

For recurring payments, we recommend that you send advance notification to your customer 1-2 days before the payment is scheduled to be processed.

## SERVICE PLAN MODEL- Preapproved Payments, PayPal Only

This example shows the guidelines for preapproved payments in applications that only accept PayPal payments.

### YOUR APPLICATION



#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

Acceptance mark optimal size is 150 x 40 pixels.

### PAYMENT OPTION PAGE



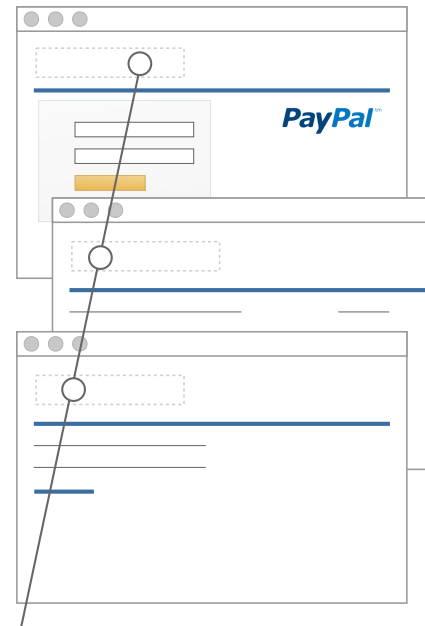
#### USE THE PAY WITH PayPal BUTTON

Place the Pay with PayPal button in a visible and accessible location for paying.

Pay with PayPal button comes in one size: 150 x 60 pixels.

You can add an option for customers to "Use PayPal for all future payments in this application".

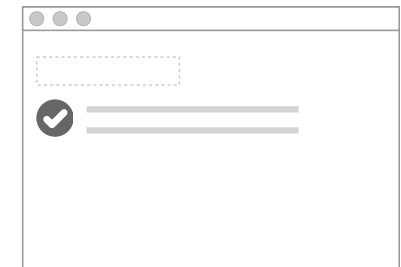
### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APP NAME

PayPal will display your application name when your customers are redirected to the PayPal site to set up a preapproved agreement.

### DIRECTED BACK TO YOUR APP



#### LIMIT THE NUMBER OF PAGES

Limit the number of pages after returning from PayPal, best practice 1-2 pages.

## SERVICE PLAN MODEL- Preapproved and Explicit Payment Options

Depending upon your use case, you may implement both preapproved and explicit payments, not just one or the other. For example, a rent app could allow a renter to make scheduled monthly rent payments, but also enable one off incidental payments for damages.

### YOUR APPLICATION

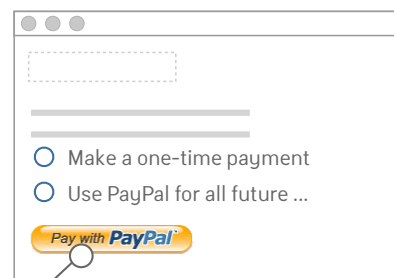


#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

Acceptance mark optimal size is 150 x 40 pixels.

### PAYMENT OPTION PAGE



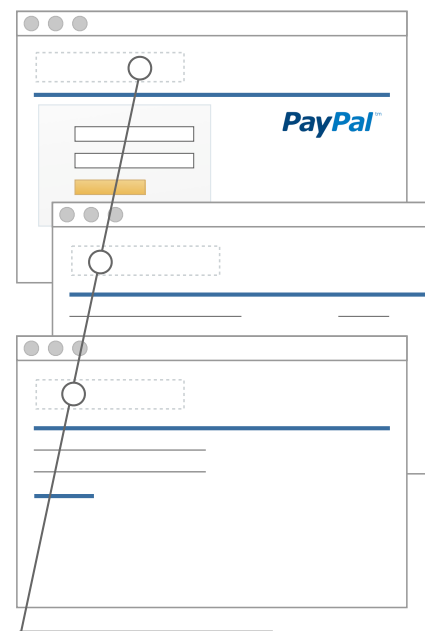
#### OFFER OPTIONS

Offer the choice of a one-time payment or using PayPal for all future transactions.

Place the Pay with PayPal button in a visible and accessible location, so users will know they should click on this button to make their payment.

Pay with PayPal button comes in one size: 150 x 60 pixels.

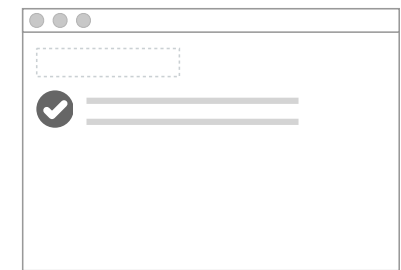
### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APP NAME

PayPal will display your application name when your customers are redirected to the PayPal site to either make an explicit payment (if they selected a one-time payment) or to set up a preapproval agreement.

### DIRECTED BACK TO YOUR APP



#### LIMIT THE NUMBER OF PAGES

Limit the number of pages after returning from PayPal, best practice 1-2 pages.

## DISBURSEMENTS AND PAYOUTS MODEL

These applications will mostly rely on implicit payments, meaning your application user will not be redirected to the PayPal website to complete a payment. The transfer of money in your application could be triggered by another system like a time-scheduled reconciliation event, or when a manager approves a timesheet for a contractor.

### YOUR APPLICATION

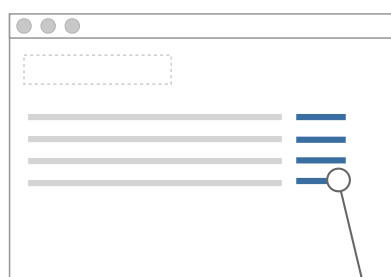


#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

Acceptance mark optimal size is 150 x 40 pixels.

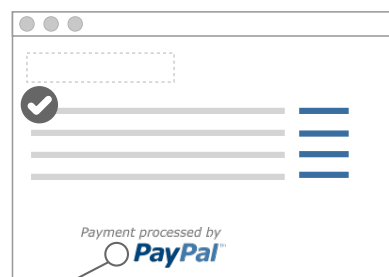
### YOUR APPLICATION



#### USE YOUR BUTTONS

Use your standard buttons or links to allow customers to make a purchase.

### POST PAYMENT



#### USE A PAYMENT PROCESSED BY MARK

Place the payment mark on your page to let customers know PayPal processed their payment.

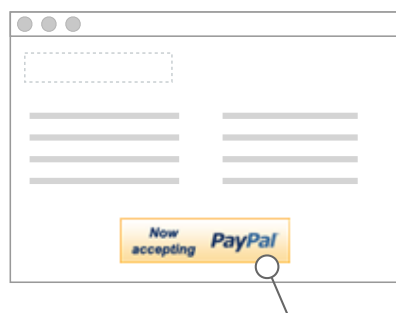
If the payment was not successfully processed, then we recommend displaying an appropriate error message. The technical documentation for Adaptive Payments API provides more details.

Payment Processed by PayPal mark optimal size is 222 x 36 pixels.

## ECOMMERCE MODEL

These apps will mostly use split payments, either chained or parallel. You might use parallel when running a marketplace where your consumer wants to see all three merchants she's buying from. You would use chained payments in any situation where you need to pass most of the payment to a third party provider, but you need to take a small percentage of the payment as your commission - so, in the front end checkout flow, the buyer is only aware of the third party provider that they're buying from. Follow PayPal's Express Checkout guidelines.

### YOUR APPLICATION

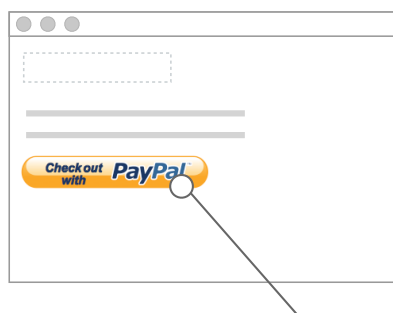


#### PLACE AN ACCEPTANCE MARK

Use the acceptance mark on the home page and product detail pages to let customers know they can select PayPal as their payment option.

Acceptance mark optimal size  
150x40 pixels.

### YOUR APPLICATION

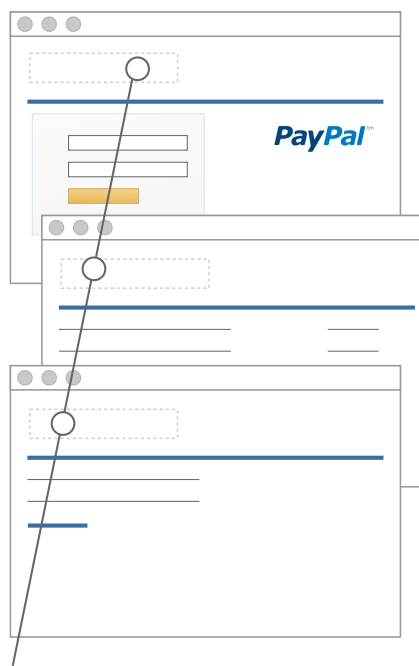


#### USE THE PayPal EXPRESS CHECKOUT BUTTON

Place the PayPal Express Checkout button in a visible and accessible location for paying. Placing the Express Checkout button to the left of the default checkout button (if applicable), increases conversion rates by ~30% over alternate placements.

Express Checkout button comes in one size: 145x42 pixels.

### REDIRECT TO PayPal SITE



#### PROVIDE YOUR APPLICATION NAME

PayPal will display your application name when your customers are redirected to the PayPal site.

### DIRECTED BACK TO YOUR APP





*BRAND GUIDELINES*

2.0

**INTERFACE GUIDE**

EDITION 1.0

## COMMUNICATING PAYPAL X

Protecting the integrity of both the PayPal master brand and the PayPal X brand through consistent and correct logo and icon usage is essential to building and maintaining a strong, global brand. It ensures our position as a reliable and relevant business, which in turn builds credibility.

This document provides guidelines on the correct use of the PayPal X identity and should be used for both internal and external applications of all PayPal X names and marks.

### ***INCLUDED IN THIS SECTION:***

- 2.1 Communicating PayPal X
- 2.2 PayPal X brand partnerships
- 2.3 Naming PayPal X applications
- 2.4 PayPal name in text
- 2.5 PayPal brand assets
- 2.8 The PayPal trademark statement

## NAMING PayPal X APPLICATIONS

Follow these guidelines for naming your applications built on PayPal X.

### DO

Make sure the name you choose is pleasing to the ear, is easy to say, easy to spell, and easy to remember.

Make sure it works globally – unless there are geographic limitations built into the company or product.

### DON'T

Don't use the words PayPal, PayPal X or X in your product name

Don't use the PayPal X brand logo in your product

Don't use a modification of the PayPal name when naming your product

Don't incorporate PayPal and PayPal X brand features into your own product name, service names, trademarks, logos or company names

Don't use names that are confusingly similar to PayPal and PayPal X names and/or product features

Don't use any acronym that directly relates to PayPal or PayPal X

## THE PayPal NAME IN TEXT

Apply simple typographic principles to preserve the integrity of the PayPal brand and service names.

**Always spell PayPal using two capital "P"s**

**Always spell PayPal using upper and lower case letters**

**Never hyphenate the PayPal name or write it on two lines**

**Never use the PayPal logo in body copy**

**Treat typography of the entire name of a service/offer consistently.**

### REQUIRED

Select PayPal when checking out at online stores worldwide.  
Or use PayPal to send money to friends across town or on another continent.

Do more than just buy. With PayPal, you can send money to friends, family, or anyone with a PayPal account.

Do more than just buy. With PayPal, you can send money to friends, family, or anyone with a PayPal account.

Do more than just buy. With PayPal, you can send money to friends, family, or anyone with a PayPal account.

**TRY  
PayPal  
MOBILE**

### AVOID

Select ~~Paypal~~ when checking out at online stores worldwide.  
Or use PayPal to send money to friends across town or on another continent.















Do more than just buy. With ~~PAYPAL~~, you can send money to friends, family, or anyone with a PayPal account.

Do more than just buy. With ~~Pay-Pal~~, you can send money to friends, family, or anyone with a PayPal account.

Do more than just buy. With ~~PayPal™~~, you can send money to friends, family, or anyone with a PayPal account.

~~TRY  
PAYPAL  
MOBILE~~

## PayPal BRAND ASSETS

BRAND ASSET	PayPal logo	PayPal acceptance marks including "Now accepting" version and additional options	PayPal processed mark and additional options	PayPal acceptance mark	PayPal Express Checkout button  Pay with PayPal button
ROLE	To indicate that PayPal provides the payment solution. The PayPal logo only appears on "About PayPal" pages on a white background, and also appears in promotional materials such as banner ads.	To indicate you accept PayPal on your website. You can choose from two different styles and four messages to suit your needs.	To indicate that PayPal handled the processing of the implicit, explicit or pre-approved payment flow .	Developers should use this mark on their checkout pages to reflect that PayPal is a payment option, or on their payment confirmation page to remind customers they have selected PayPal as their payment option. When displayed with other payment options such as credit cards, it should be displayed at parity.	Use the express Checkout button to encourage checking out with PayPal.  Use the Pay with PayPal button in Adaptive Payment applications.
USAGE	Integration ("About PayPal" pages only) and promotion	Integration and promotion	Integration only	Integration only	Integration only
VISUAL		       	 		 

## PayPal BRAND ASSETS: Dos and Don'ts

### DOS

The PayPal brand assets presented here are the versions merchants use most frequently. The principles presented here apply to all variations of PayPal brand assets.



The PayPal logo should always be presented on a white background.



The PayPal acceptance mark is designed to perform well on any background color.



All PayPal acceptance marks are designed to perform well on any background color.



All PayPal processed marks should be presented on a white background.



The safer, easier way to pay



The PayPal Express Checkout button and Pay with PayPal button should stand out from the background color.

### DON'Ts

Don't modify the horizontal or vertical proportion of any PayPal brand asset to fit a space.



The safer, easier way to pay

Don't add a drop shadow behind a PayPal brand asset.



The safer, easier way to pay

Don't slant or tilt a PayPal brand asset.



The safer, easier way to pay












Don't alter the color or reverse colors of a brand asset. Always ensure a sufficient contrast with the background color.



The safer, easier way to pay

### OPTIMAL SIZE AND CLEAR SPACE

Consistently using the brand assets at the optimal size ensures they are legible and easily visible whenever they are placed on your site. These marks should always be surrounded by a clear space, free of any text or imagery. The size of the clear space is equal to the height of the letter "P" in the PayPal logo.

<p><b>OPTIMAL SIZE</b> 100 X 28 pixels</p>  <p>12 pixels / Height of "P"</p>	<p><b>AVAILABLE SIZES</b> 37 X 23 pixels 50 X 34 pixels 60 X 38 pixels 180 X 113 pixels</p>  <p>4 pixels / Height of "P"</p>  <p>5 pixels / Height of "P"</p>  <p>6 pixels / Height of "P"</p>  <p>19 pixels / Height of "P"</p>	<p><b>OPTIMAL SIZE</b> 150 X 60 pixels</p>  <p>12 pixels / Height of "P"</p>	<p><b>OPTIMAL SIZE</b> 150 X 60 pixels</p>  <p>7 pixels / Height of "P"</p>	<p><b>OPTIMAL SIZE</b> 222 X 36 pixels</p>  <p>26 pixels / Height of "p"</p>
		<p><b>OPTIMAL SIZE</b> 150 X 40 pixels</p>  <p>8 pixels / Height of "P"</p>	<p><b>OPTIMAL SIZE</b> 145 X 42 pixels</p>  <p>7 pixels / Height of "P"</p>	<p><b>OPTIMAL SIZE</b> 154 X 22 pixels</p>  <p>19 pixels / Height of "p"</p>

## *The PayPal TRADEMARK STATEMENT*

When you use the PayPal name in your communications, the brand name is always protected by a PayPal trademark statement that appears at least once in the communication piece. The trademark statement is placed in the legal note of the document produced.

### **OFFICIAL TRADEMARK STATEMENT**

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*INTERFACE DESIGN  
PRINCIPLES*

3.0

**INTERFACE GUIDE**

EDITION 1.0

## CREATING A GREAT INTERFACE

A well organized, logical and consistent user interface makes it easy for people to accomplish tasks quickly. To help you design a good user interface, these guidelines will cover basic usability principles, examples of standard screen layouts, and form design basics.

### ***INCLUDED IN THIS SECTION:***

- 3.1 Creating a Great Interface
- 3.2 Usability Best Practices
- 3.7 Standard Screen Layouts
- 3.8 Form Design Basics

## USABILITY BEST PRACTICES

These are ten general best practices for user interface design as outlined by Jacob Nielsen, one of the leading authorities on usability issues. They are more in the nature of rules of thumb than specific guidelines. It is worthwhile to periodically review your application to see if it reflects these practices.

### FEEDBACK

#### Visibility of System Status

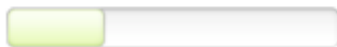
Your application should always keep customers informed about what is going on, through appropriate feedback within reasonable time.



Loading theme...

This will just take a few moments, we promise.

picnik



Fluffing clouds....

#### PROVIDE FEEDBACK





Scrapblog and Picnik both use feedback to reassure customers that the system is working.

### METAPHOR

#### Match between your application and the real world

The application should speak the customers' language, with words, phrases and concepts that are familiar, rather than system-oriented terms. Follow real-world conventions, making information appear in a natural and logical order.

## Your shopping bag

Item		
		Fitted two-pocket shirt #6489340020001
		The low rise bell jeans #5905250021018

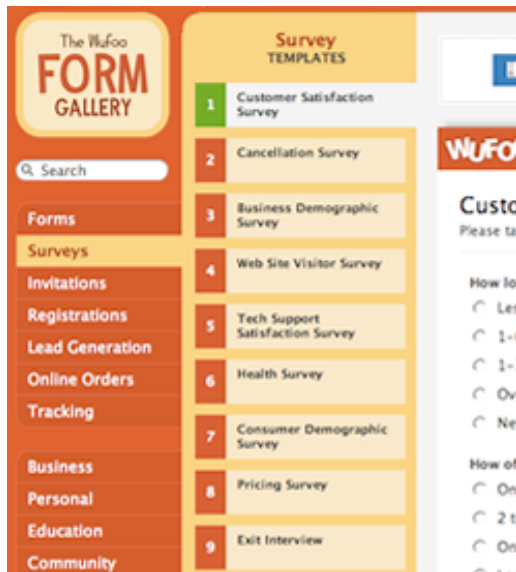
#### MATCH THE REAL WORLD

GAP and many retailers use the familiar shopping bag, or shopping cart metaphor for holding items until checkout.

### NAVIGATION

#### Control and freedom

Customers need to see where they can go and how to get there. Clearly mark "you are here" and provide "emergency exits" to leave an unwanted state without having to go through an extended dialogue.



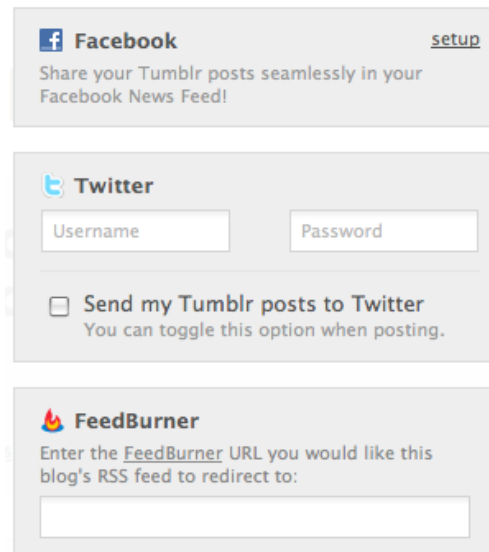
#### PROVIDE CONTEXT

Wufoo clearly marks which section and subsection the customer is in, and shows the other available paths.

### CONSISTENCY

#### Common controls and standards

Customers should not have to wonder whether different words, situations or actions mean the same thing. Follow standard web conventions and remain consistent throughout your application.



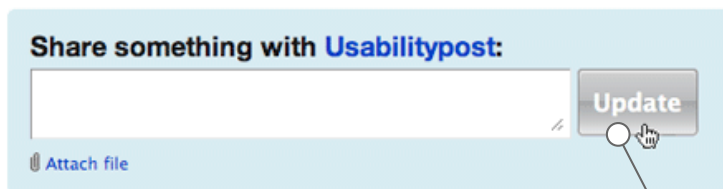
#### FOLLOW CONVENTIONS

Tumblr uses the conventional icons for Facebook, Twitter and Feedburner, which makes it easy to recognize and understand these options.

### PREVENTION

#### Prevention: Error prevention

Even better than good error messages is a careful design, which prevents a problem from occurring in the first place.



#### PREVENT RESUBMIT

Yammer disables the submit button and changes the text to 'update' while posting a comment.

Name the writeboard

Create a new writeboard or [Cancel](#)

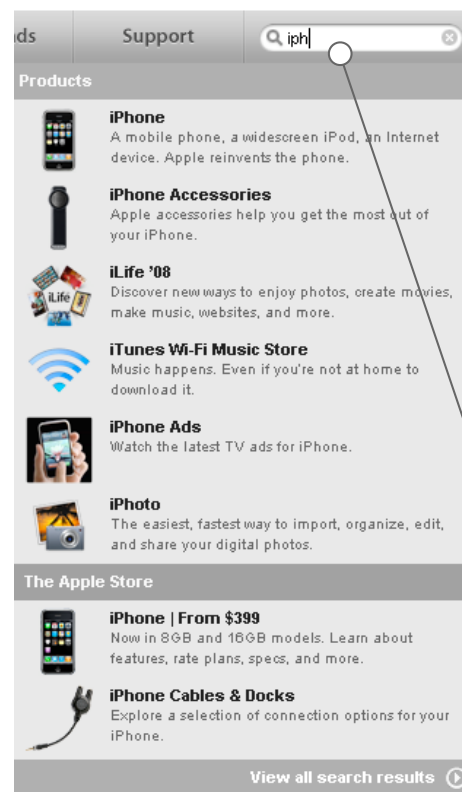
#### AVOID CONFUSION

BaseCamp uses big buttons for primary actions, and smaller red links for escape actions.

### MEMORY

#### Memory: Recognition rather than recall

Minimize the user's memory load. Make objects, actions, and options visible. The customer should not have to remember information from one part of the dialogue to another.



#### LIGHTEN THE LOAD

Apple uses a formatted autosuggest control to help customers select the best search criteria.

### EFFICIENCY

#### Efficiency: Flexibility and efficiency of use

Match the application flow to the customer's existing process.

Templates, quick start guides and tour invitations may often speed up the interactions for inexperienced customers. Allow all users to access advanced features and tailor frequent actions.



Welcome to netvibes, your personalized startpage!

Netvibes is a **free** web service that brings together your favorite media sources and online services.

Everything that matters to you — blogs, news, weather, videos, photos, social networks, email and much more — is automatically updated every time you visit your page.

The wizard is a tool to help you **easily create** your very own start page.

Learn more? Take a tour

Are you already registered?

Sign In

Not yet? Register for free

Sign up

Start with:

- ☒ News
- ☐ Business
- ☐ Sport
- ☐ TV, movies & music
- ☐ Tools & technology
- ☐ Fun & games
- ☐ Lifestyle
- ☐ Shopping
- ☐ Travel

Create my page now

[No thanks, let me try first](#)

#### EASY ENTRY

netvibes helps new customers set up a page quickly with a one-page wizard.

### DESIGN

#### Design: Aesthetic and minimalist design

Pages should not contain information, which is irrelevant or rarely needed. Every extra unit of information in a page competes with the relevant units of information and diminishes their relative visibility. Visual layout should respect the principles of contrast, repetition, alignment, and proximity.



#### CONTRAST, REPETITION, ALIGNMENT, PROXIMITY

TapTapTap applies all four principles to create a visually engaging screen that is easy to scan and navigate.

## USABILITY BEST PRACTICES

### RECOVERY

#### Help users recognize, diagnose, and recover from errors

Error messages should be expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution.

Choose a username (no spaces)

myname

! myname is already taken. Please choose a different username.

Choose a password

! A valid password is required.

#### INLINE ERROR MESSAGES

Digg displays error messages in proximity to the fields with issues. The messages are concise and clear.

Facebook Login

#### Incorrect Email/Password Combination

Facebook passwords are case sensitive. Please check your CAPS lock key. You may also try clearing your browser's cache and cookies by following [these instructions](#).

Make sure you are entering an email address associated with your account and that it is typed correctly.

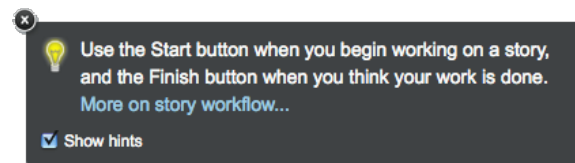
#### USE PLAIN LANGUAGE

Facebook clearly states the problem, possible causes, and some suggestions to resolve the error.

### HELP

#### Help and documentation

Even though it is better the system can be used without documentation, it may be necessary to provide help and documentation. Integrate contextual help into the product.



#### HELP TIPS

Pivotal Tracker offers help tips during key workflows to keep users moving forward efficiently.

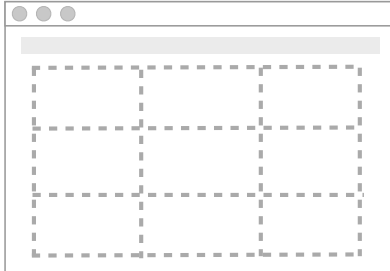


#### HELP IN CONTEXT

Picnik offers help integrated in the different modules, instead of one big help system.

## STANDARD SCREEN LAYOUTS

Choosing a screen layout that is proven and familiar will increase the perception of usability. Here are a number of standard layouts that may work for screens in your application.



GRID LAYOUT



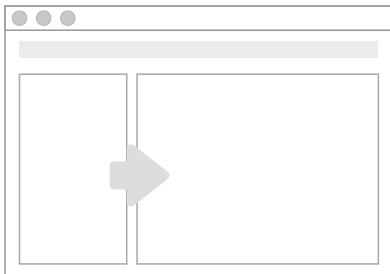
TWO COLUMN LAYOUT



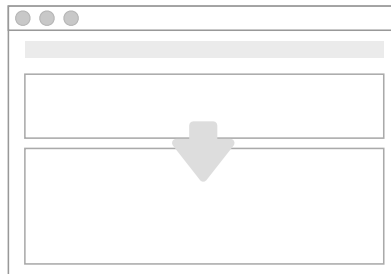
THREE COLUMN LAYOUT



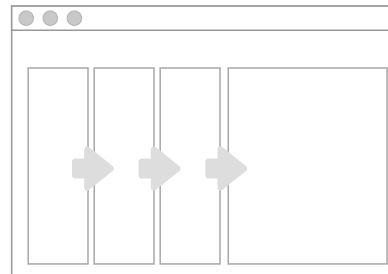
BLOG LAYOUT



MASTER/DETAIL LEFT TO RIGHT



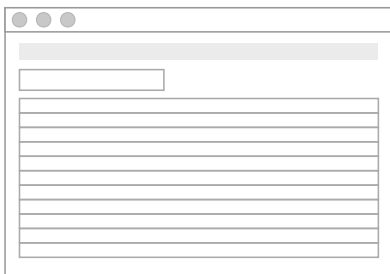
MASTER/DETAIL TOP TO BOTTOM



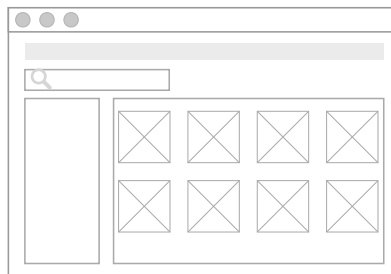
COLUMN BROWSE



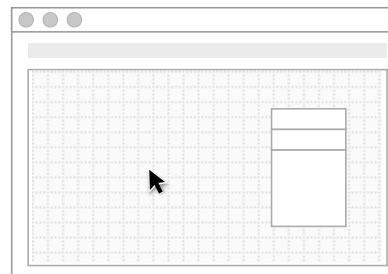
FORM LAYOUT



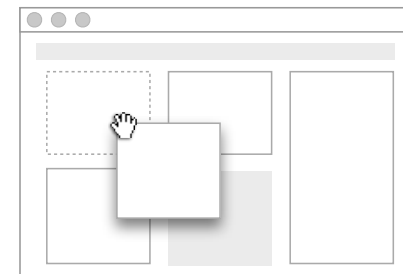
GRID LAYOUT



SEARCH AND REFINE



CANVAS



PORTAL

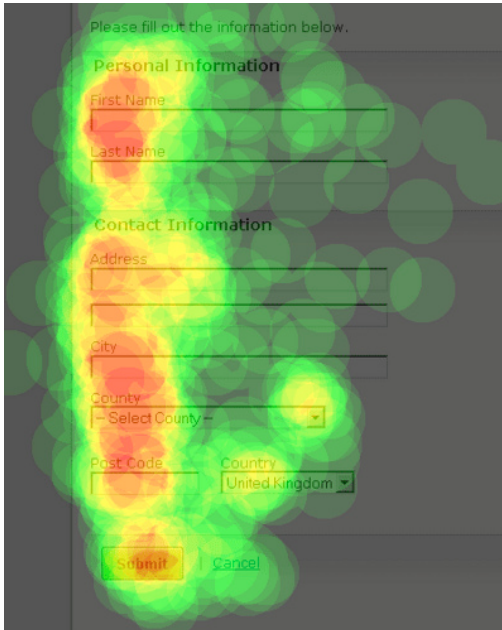


### ALIGNMENT

The alignment of a form's input elements provides a clear path to completion that helps people complete forms faster.

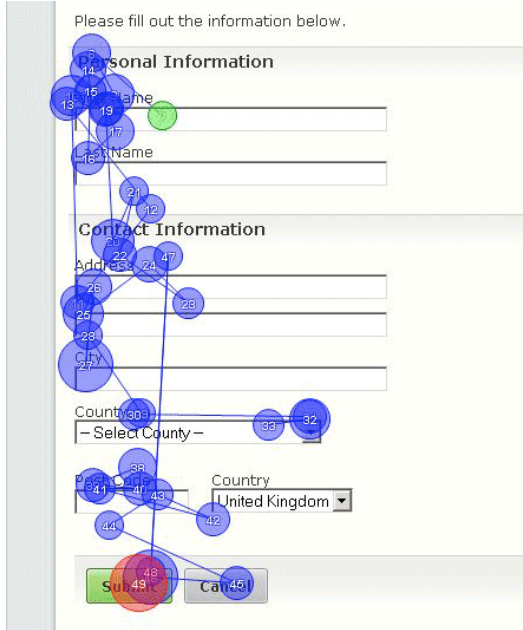
#### HEAT MAP

A composite eye-tracking image (heat map) from Etre ([www.etre.com](http://www.etre.com)) showing what people look at when filling in a simple Web form.



#### EYE TRACKING

Eye tracking study showing what people look at when filling in a simple Web form.



#### LEFT ALIGNED

eBay Express form left aligns the labels, fields and buttons.

A screenshot of the eBay Express 'Enter Your Information' form. The form is left-aligned, with labels, input fields, and buttons consistently aligned to the left margin. The form includes fields for First Name, Last Name, Street Address, City, State, ZIP Code, Country or Region, Phone Number, Email address, and Password. The 'Register' button is at the bottom left.

Wroblewski, Luke. 2008. Web Form Design: Filling In the Blanks. New York: Rosenfeld Media. [www.rosenfeldmedia.com/books/webforms/](http://www.rosenfeldmedia.com/books/webforms/)

### LABELS

Several considerations are applicable when deciding how to layout form labels online. As the question of top, right, or left aligned form labels comes up often for designers, here's a short overview of the pros and cons of each method.

#### VERTICAL LABELS

Vertical labels offer the advantage of rapid processing and are ideal for internationalization.

Label

Longer Label

Even Longer Label

One More Label  
☒ Value 1  
☐ Value 2

Primary Action

**Advantage:**  
Adjacent Label and corresponding Input field

**Advantage:**  
Rapid Processing

**Disadvantage:**  
Increased vertical space

Label

Longer Label

Even Longer Label

One More Label  
☒ Value 1  
☐ Value 2

Primary Action

#### LEFT JUSTIFIED HORIZONTAL LABELS

Left justified labels are easy to scan and reduce vertical space, but lack adjacency to the input field.

Label:

Longer Label:

Even Longer Label:

One More Label:  
☒ Value 1  
☐ Value 2

Primary Action

**Disadvantage:**  
Adjacency of Label and corresponding Input field

**Advantage:**  
Easy to scan labels

Label:

Longer Label:

Even Longer Label:

One More Label:  
☒ Value 1  
☐ Value 2

Primary Action

#### RIGHT JUSTIFIED HORIZONTAL LABELS

Right justified labels reduce readability, but are adjacent to the input fields and reduce vertical space.

Label

Longer Label

Even Longer Label

One More Label  
☒ Value 1  
☐ Value 2

Primary Action

**Advantage:**  
Adjacent Label and corresponding Input field

**Disadvantage:**  
Reduced readability

**Advantage:**  
Reduced vertical space

Label

Longer Label

Even Longer Label

One More Label  
☒ Value 1  
☐ Value 2

Primary Action

Wroblewski, Luke. 2008. Web Form Design: Filling In the Blanks. New York: Rosenfeld Media. [www.rosenfeldmedia.com/books/webforms/](http://www.rosenfeldmedia.com/books/webforms/)

### BUTTONS

Be conscious of where you place form actions as primary actions directly aligned with input fields tend to increase completion rates and the less time people have to spend on your forms, the happier they will be

#### PRIMARY AND SECONDARY ACTIONS

Overall, people respond well to designs that made "Cancel" stand out in some way. This suggests that they are more concerned about avoiding losing their data, than they are about submitting it quickly.

A form with three input fields: "County" (a dropdown menu with "-- Select County --"), "Post Code" (a text box), and "Country" (a dropdown menu with "United Kingdom"). Below the fields is a horizontal bar containing two buttons: a green "Submit" button and a blue "Cancel" button. Red lines point from the text "PRIMARY ACTION" to the "Submit" button and "SECONDARY ACTION" to the "Cancel" button.

#### NEXT AND PREVIOUS ACTIONS

The best solution is to think of these actions instead as "Continue" and "Go Back" to help people make forward progress.

Three examples of form action buttons are shown, each with a red prohibition sign or a green checkmark to the right. Each example has three input fields: "Label:" (text box), "Longer Label:" (dropdown menu with "-- Select Value --"), and "Even Longer Label:" (text box).  
1. Top example: Buttons are "Previous" and "Next". A red prohibition sign is to the right.  
2. Middle example: Buttons are "Previous" and "Next". A red prohibition sign is to the right.  
3. Bottom example: Buttons are "Continue" and "Go Back". A green checkmark is to the right.

Wroblewski, Luke. 2008. *Web Form Design: Filling In the Blanks*. New York: Rosenfeld Media. [www.rosenfeldmedia.com/books/webforms/](http://www.rosenfeldmedia.com/books/webforms/)

## DON'Ts

### DON'T OVER DESIGN A PAGE

Many distinct visual elements on this form get in the way of seeing the questions the form is asking.

#### ■資料送付先

- ☒ 現住所に送付する  
☐ その他住所（勤務先など）に送付する

#### ■現住所以外の資料送付先住所

氏名（漢字）	氏 <input type="text"/> 名 <input type="text"/> 例）かもめ 太郎
氏名（フリガナ）	氏 <input type="text"/> 名 <input type="text"/> （全角カタカナ） 例）カモメ タロウ
住所	郵便番号 <input type="text"/> - <input type="text"/> （半角） 例）000-0000
	都道府県 <input type="text"/> 選択して下さい
	市区郡 <input type="text"/> 選択して下さい
	字丁目以降 <input type="text"/> 例）銀座7-3-5
建物名	<input type="text"/> 例）かもめマンション203号室
電話番号	<input type="text"/> - <input type="text"/> - <input type="text"/> （半角）
FAX番号	<input type="text"/> - <input type="text"/> - <input type="text"/> （半角）

戻る

次へ

### DON'T OVER COMPENSATE

Although it may be tempting to use alternating background colors to group left-aligned labels and their corresponding inputs, these elements can add a lot of visual noise to a form.

#### 基本情報 ※は必須項目です

お名前（氏名）※	<input type="text"/> <input type="text"/> （全角）
フリガナ（氏名）※	<input type="text"/> <input type="text"/> （全角カタカナ）
Eメールアドレス※	<input type="text"/> （半角数字）
Eメールアドレス（確認）※	<input type="text"/> （半角数字）
携帯アドレス	<input type="text"/> 選択して下さい （半角数字）
携帯アドレス（確認）	<input type="text"/> 選択して下さい （半角数字）
郵便番号※	〒 <input type="text"/> - <input type="text"/> （半角数字） 住所表示 7桁の郵便番号を入力して「住所表示」ボタンを押して下さい。 ※市区町村名を郵便番号から自動検索し、入力されます。
都道府県※	<input type="text"/>
市区町村※	<input type="text"/> （全角）
それ以降の住所（丁目・番地など）※	<input type="text"/> （全角）※丁目・番地を必ずご入力ください
ビル・マンション名	<input type="text"/> （全角）
電話番号※	<input type="text"/> - <input type="text"/> - <input type="text"/> （半角数字）
メンバー登録※	<input type="radio"/> ゲスト購入する <input checked="" type="radio"/> 会員登録する

戻る

次へ進む

## FORM DESIGN BASICS: Dos and Dont's

### Dos

#### USE DIFFERENT FIELD LENGTHS

The different text box lengths on this eBay Express form provide an affordance that helps people understand how to answer questions.

##### Street Address

##### City

##### State

##### ZIP Code

##### Country or Region

United States

##### Phone Number

(  )  -  ext.:  Needed if there are questions about your order.

A valid email address is required to communicate with you.

##### Email address

##### Re-enter Email address

#### USE A THIN RULE TO SEPARATE SECTIONS

A subtle background color change or thin rule is often all you need to effectively group related content in a form.

First Name:

Last Name:

Email:  We don't spam

Password:  6 or more characters

Re-enter Password:

Country:

Postal Code:  Only your region will be public, not your postal code

I am currently: ☒ employed  
☐ a business owner  
☐ looking for work  
☐ working independently  
☐ a student

Company:

Title:

Industry:   
Choose the Industry that best describes your primary expertise

Education:  (optional)

Dates Attended:  to   
Current students: enter your expected graduation year

[Join LinkedIn](#)

#### MARK OPTIONAL FIELDS

On Wal-Mart, every input is required but one (Address Line 2). Instead of marking everything required, the one optional field has been clearly marked optional, thereby reducing the amount of information on the form.

#### Enter Shipping Address

Enter the name and address you'd like for us to ship your order.  
We do not currently ship to Canada or other destinations outside of the U.S. [Learn More](#)

##### First Name

##### Last Name

Address Line 1 (or company address)

Address Line 2 (optional)

##### City

[Address Instructions for APO/FPO](#)

##### State

##### ZIP Code

##### Phone Number

Is this address also your billing address?

☒ Yes  
☐ No (If not, we'll ask you for it in an moment.)

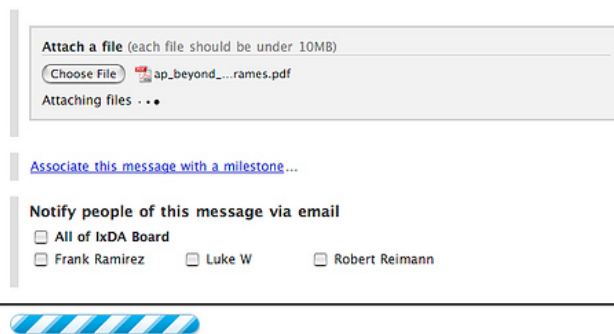
[Continue](#) to send all items to this address only

## FORM DESIGN BASICS: Dos and Dont's

### Dos

#### PROVIDE FEEDBACK

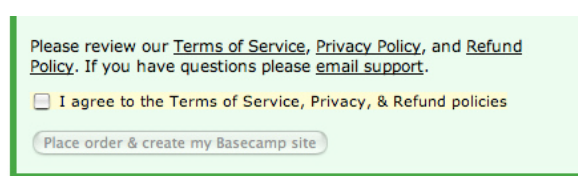
BaseCamp by 37signals provides progress indicators for form submission and file uploads using animated images.



The screenshot shows a file upload interface. At the top, it says "Attach a file (each file should be under 10MB)". Below this is a "Choose File" button and a file name "ap\_beyond\_...rames.pdf". Underneath the file name, it says "Attaching files ...". Below the file upload section, there is a link "Associate this message with a milestone...". At the bottom, there is a section "Notify people of this message via email" with checkboxes for "All of IxDA Board", "Frank Ramirez", "Luke W", and "Robert Reimann". A blue and white striped progress bar is visible at the bottom of the form.

#### DISABLE THE SUBMIT BUTTON AFTER SUBMIT

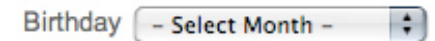
Basecamp's sign-up form disables the Submit button until all inputs have valid answers.



The screenshot shows a sign-up form. It includes links for "Terms of Service", "Privacy Policy", and "Refund Policy". Below these links is a checkbox labeled "I agree to the Terms of Service, Privacy, & Refund policies". At the bottom, there is a "Place order & create my Basecamp site" button. The entire form is highlighted with a green border.

#### BE OBVIOUS

Always ensure there is an obvious difference between labels and data. In this example, a set of dashes around a drop-down menu label distinguishes it from an actual answer.



The screenshot shows a form with a label "Birthday" followed by a drop-down menu. The drop-down menu has a label "- Select Month -" which is enclosed in a dashed box to distinguish it from the actual answer.

## REFERENCES

***Web Form Design: Filling In the Blanks. New York: Rosenfeld Media***

Wroblewski, Luke. 2008

[www.rosenfeldmedia.com/books/webforms/](http://www.rosenfeldmedia.com/books/webforms/)

***Ten Usability Heuristics***

Nielsen, Jakob

[http://www.useit.com/papers/heuristic/heuristic\\_list.html](http://www.useit.com/papers/heuristic/heuristic_list.html)

Developers Agreement

<http://www.x.com/platformoperatingrules>

Adaptive Payments Documentation

<http://www.x.com/documentation>