

PHASE 6 – User Interface Development

Designing an Intuitive Retail Experience for CRM Users

1. Introduction

User Interface (UI) development transforms Salesforce from a backend system into a highly intuitive and efficient operational tool for HandsMenThreads' staff. Since users such as Sales Executives, Inventory Managers, and Marketing personnel interact with the system daily, UI customization enhances productivity, clarity, and accuracy. Salesforce Lightning App Builder, Dynamic Forms, and flexible layouts were utilized to create optimized user experiences.

This phase describes the design choices, page layouts, utility bar features, Lightning pages, list views, and UI components implemented.

2. Custom Lightning App: HandsMenThreads CRM

The app acts as a centralized hub for all CRM users. It contains custom-branded icons, an easily navigable tab bar, and a role-aligned layout.

Tabs Included

- Customers
- Products
- Orders
- Order Items
- Campaigns
- Reports
- Dashboards
- Low Stock Alerts

Each tab links users to relevant records and functions, reducing navigation time and improving task completion speed.

3. Custom Record Pages

Order Record Page

Order processing is one of the most frequently used sections. A custom record page was designed with the following components:

- **Highlights Panel:** Shows Customer, Order Status, Total Amount
- **Tabs for Clean Navigation:**

- Order Details
- Order Items
- Related Lists
- Delivery Info

- **Dynamic Visibility:** Certain fields appear only when the status is “Delivered” or “Shipped.”

This ensures the Sales Executive always sees relevant information and avoids clutter.

Customer Record Page

Displays a complete customer profile and summary:

- Contact details
- Loyalty Points
- Loyalty Tier with color-coded badges (Silver/Gold/Platinum)
- Total lifetime value
- Related Orders
- Open service requests (for future customer support module)

A snapshot panel displays recent purchases, improving service quality.

Product Record Page

Designed for inventory management.

Includes:

- Real-time stock visibility
- Price and category
- Sales history
- Supplier details
- Recent order usage

Dynamic alerts visually highlight low-stock conditions.

4. Custom Home Pages

Each user persona has a tailored home page.

Sales Executive Home Page

- "Create New Order" quick action

- List of pending orders
- Top-selling products widget
- KANBAN board for order statuses

Inventory Manager Home Page

- Low Stock Report
- Reorder Recommendations
- Recent product updates
- Shelf-age tracking (future enhancement)

Marketing Manager Home Page

- Active campaigns
- Campaign performance charts
- Target customer lists

Custom dashboards enhance business visibility.

5. Utility Bar Enhancements

The utility bar includes:

- **Quick Create Actions** (Add Customer, Add Product, Create Order)
- **Recent Items**
- **Notes**
- **Calculator for price adjustments**

These tools reduce the number of clicks required for daily tasks.

6. Customized List Views

To streamline workflows:

- Orders are displayed in a **KANBAN** view grouped by status.
- Products list includes a low-stock filter.
- Customers list includes segmentation options:
 - High Value
 - New Customers
 - Loyalty Tiers

Users can sort, filter, and save list views easily.

7. Page Performance Optimization

- Removed unnecessary fields from layouts
- Reorganized sections for clarity
- Converted long forms into tab-based layouts
- Used Lightning components instead of legacy layouts

This significantly improved loading times and usability.

8. Mobile Optimization

Salesforce Mobile App was configured so field staff can:

- Create orders
- Check inventory
- Access customer profiles
- Update statuses

Mobile layouts were simplified to match smartphone ergonomics.

Conclusion

UI Development in Phase 6 transforms the CRM from a back-office platform into a highly intuitive and productivity-focused system. With tailored pages, optimized layouts, custom dashboards, and mobile responsiveness, HandsMenThreads employees can work faster, more accurately, and more effectively than ever before.