

# 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.

Field	Value
HandsMen Order Number	O-0007
HandsMen Product	T-shirt
HandsMen Customer	ARSHIA MOHAMAD
Status	Pending
Quantity	100
Total Amount	10,000
Customer Email	arshiambu@gmail.com
Created By	Arshia Nooraien Mohamad, 11/4/2025, 11:40 PM
Last Modified By	Arshia Nooraien Mohamad, 11/4/2025, 11:40 PM

## 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.

The screenshot shows a product detail page for a 'T-shirt'. The product name is 'T-shirt'. The owner is 'Arshia Noorain Mohamad'. The last modified by is 'Arshia Noorain Mohamad' on 11/4/2025, 11:39 PM. The page includes a search bar and various navigation links at the top.

Field	Value
HandsMen Product Name	T-shirt
SKU	10
Price	\$100
Stock Quantity	1,000
Created By	Arshia Noorain Mohamad, 11/4/2025, 11:39 PM
Last Modified By	Arshia Noorain Mohamad, 11/4/2025, 11:39 PM

## 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)

The screenshot shows the Salesforce interface for editing an inventory item. The title bar says "Edit I -0002". The main area contains fields for "Inventory Name" (I-0002), "HandsMen Product" (T-shirt), "Stock Quantity" (1000), and "Stock Status" (Available). A note states "This field is calculated upon save". The "Warehouse" field is empty. The "Created By" field shows "Arshia Noorain Mohamad, 11/4/2025, 11:39 PM". The "Last Modified By" field also shows "Arshia Noorain Mohamad, 11/4/2025, 11:39 PM". At the bottom are "Cancel", "Save & New", and "Save" buttons.

## Marketing Manager Home Page

- Active campaigns
- Campaign performance charts
- Target customer lists

Custom dashboards enhance business visibility.

The screenshot shows the Marketing Campaigns dashboard with a "Recently Viewed" section. It lists "1 item • Updated a few seconds ago" and shows a single entry: "1 ARSHIA MOHAMAD". The top navigation bar includes links for Customers, Orders, Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts. The utility bar at the bottom includes "New", "Import", "Change Owner", and "Assign Label" buttons.

## 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.

