

## *Phase 6: User Interface Development*

### **Objective:**

Create an intuitive interface for support agents and managers to manage multi-channel cases efficiently. Build a **Unified Inbox**, dashboards, and utility tools using Salesforce **Lightning App Builder** and **Lightning Web Components (LWC)**.

### **1. Lightning App Builder – OmniChannel Support Console**

#### **Purpose:**

Provide agents and managers a **central interface** to view and respond to cases from all channels.

#### **Implementation Steps:**

##### **1. Open App Builder:**

- Go to **Setup** → **App Manager** → **New Lightning App**

##### **2. App Details:**

- **App Name:** OmniChannel Support Console
- Optional: Add **description** and icon
- Click **Next**

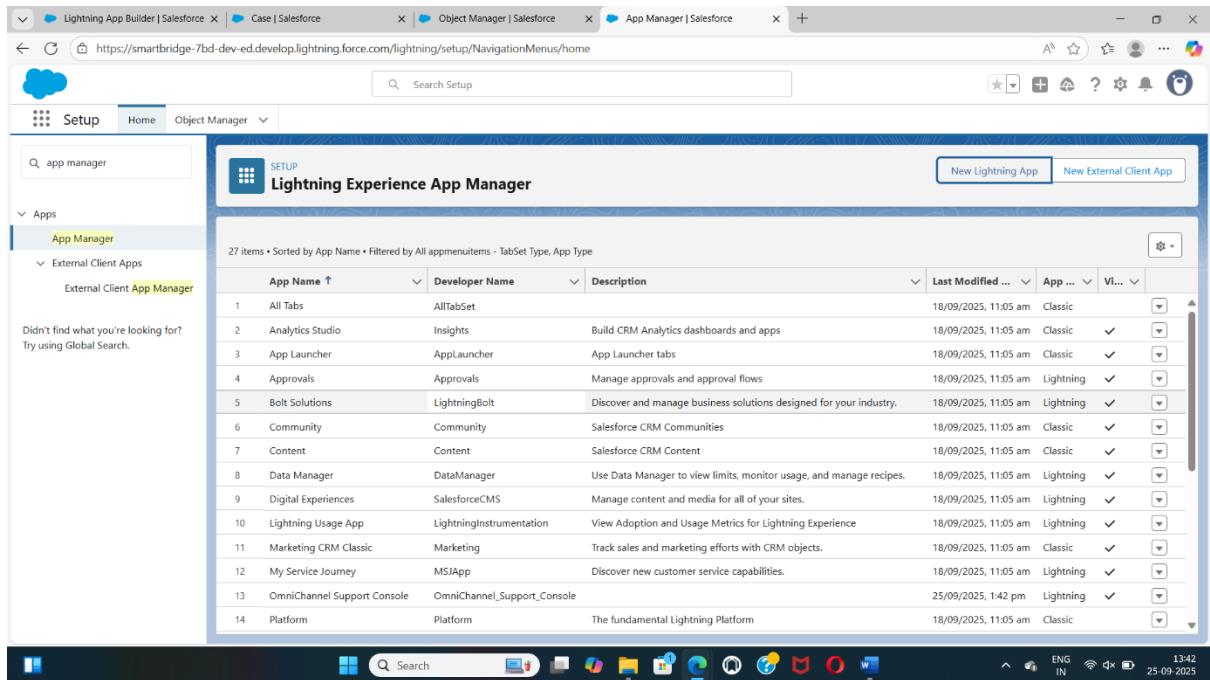
##### **3. Configure Navigation Items (Navigation Bar):**

- Select from **Available Items** → **Add:**
  - Cases
  - Queues
  - Reports / Dashboards
  - Knowledge Articles
- Arrange order using **Up/Down arrows**
- Click **Next**

##### **4. Assign Profiles:**

- Select **Support Agents** and **Support Managers**
- Click **Next** → **Finish**

 Now the app is created. Open it from the **App Launcher** to see the **Navigation Bar** with all tabs.



## 2. Case Record Pages

### Purpose:

Customize Case pages for **agents** and **managers** to show relevant information.

#### A. Agent Layout

1. Go to **Setup** → **Object Manager** → **Case** → **Lightning Record Pages** → **New**
2. Select **Record Page**, Name: Case Page – Agent
3. Add components:
  - **Record Details:** Channel, Priority, SLA, Sentiment
  - **Related Lists:** Notes & Attachments
  - **Custom LWCs (if used):** Unified Inbox, SLA Countdown
4. Save → Activation → Set as Org Default for Support Agents

#### B. Manager Layout

1. Create another Record Page → Name: Case Page – Manager
2. Add components:
  - SLA Breach Flag (highlight overdue cases)
  - Case Age
  - Agent Assigned

- Optional: Dashboard component for KPIs

### 3. Save → Activation → Set as Org Default for Support Managers

NAME	TYPE	OBJECT
Case Page-Agent	Lightning Page	
CloseCaseLightning	Action	Case
OmniChannel Support Console	Lightning Page	
OmniChannel Support Console	Custom Tab Definition	
Priority	Custom Field Definition	Case
Sentiment_C	Custom Field Definition	Case
Ammu sunkara	User	
aa	Email Alert	Case
Entitlement Process	Entitlement Process	Case

### 3. Lightning Web Components (LWC) (Optional)

#### Purpose:

Enhance app with **dynamic features** like Unified Inbox, SLA countdown, and sentiment alerts.

#### Implementation Steps:

1. Use **VS Code + SFDX** to create LWC components (UnifiedInbox, SLACountdown, SentimentAlert)
2. Deploy to Salesforce using:  
→ sfdx force:source:deploy -p force-app/main/default/lwc
3. Add LWC components to **Case Record Page** or **Home Page** via **App Builder**

### 4. Utility Bar

#### Purpose:

Add **quick tools** for agents to save time.

#### Steps:

1. Setup → App → Utility Bar → Add Components
2. Recommended components:
  - Macros (Standard WhatsApp/Email replies)

- Quick Create Case button
- Knowledge Article Lookup

## 5. Dashboard for Managers

### Purpose:

Provide **real-time overview** of case volumes, SLA compliance, and sentiment breakdown.

### Implementation Steps:

1. Setup → **Dashboards** → New Dashboard
2. Components:
  - Bar Chart → Cases per Agent
  - Pie Chart → Sentiment distribution (Positive/Neutral/Negative)
  - Metric → SLA Breaches
3. Assign dashboard to **Manager Profile**
4. Add filters: Channel, Priority, Date Range

### Expected Output

- Agents see **all cases from multiple channels in one place**.
- SLA countdown timers help agents **resolve cases on time**.
- Negative sentiment cases are **highlighted automatically**.
- Managers get **dashboards showing team performance and SLA compliance**.
- Agents save time using **Utility Bar shortcuts and macros**.