

Phase 6 – User Interface Development

1. Lightning App Builder

- Created a custom Lightning App called “Lead Scoring System”.

The screenshot shows the 'App Settings' sidebar on the left with 'App Details & Branding' selected. The main content area is titled 'App Details & Branding' and includes a description: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section contains fields for 'App Name' (Lead Scoring System), 'Developer Name' (Lead_Scoring_System), and 'Description' (App for viewing and prioritizing leads using AI scores). The 'App Branding' section shows an uploaded image of the app icon and a 'Primary Color Hex Value' of #0070D2. Below this, the 'Org Theme Options' section has a checked checkbox for 'Use the app's image and color instead of the org's custom theme'. At the bottom, the 'App Launcher Preview' shows the app icon and name.

App Settings

- App Details & Branding**
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Lead Scoring System

* Developer Name ⓘ
Lead_Scoring_System

Description ⓘ
App for viewing and prioritizing leads using AI scores

App Branding

Image ⓘ
[Image of Lead Scoring System app icon]

Primary Color Hex Value ⓘ
#0070D2

Clear

Org Theme Options

☒ Use the app's image and color instead of the org's custom theme

App Launcher Preview

[Image of Lead Scoring System app icon] Lead Scoring System
App for viewing and prioritizing leads using AI scores

- Tabs included:
 - **Leads** → to view and manage lead records.
 - **Lead Engagements** → to track customer interactions (emails, calls, visits).
 - **Reports** → quick access to lead score and agent performance reports.
 - **Dashboards** → visualization of lead funnel and high-intent leads.

The screenshot shows the 'App Settings' sidebar on the left with 'Navigation Items' selected. The main content area is titled 'Navigation Items' and includes a description: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' The 'Available Items' section lists various items, including 'Account Brands', 'Accounts', 'Activation Targets', 'Activations', 'All Sites', and 'Alternative Payment Methods'. The 'Selected Items' section shows the items that have been added to the navigation bar: 'Leads', 'Lead Engagements', 'Reports', and 'Dashboards'.

App Settings

- App Details & Branding
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- Utility Items (Desktop Only)
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Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Search: Type to filter list...

- Account Brands
- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods

Selected Items

- Leads
- Lead Engagements
- Reports
- Dashboards

2. Record Pages

- Customized the **Lead Record Page**:
 - Added **Lead Score, Interest Score, Engagement Score** fields to highlights panel.
 - Added **Related List – Lead Engagements** (to see activity history).

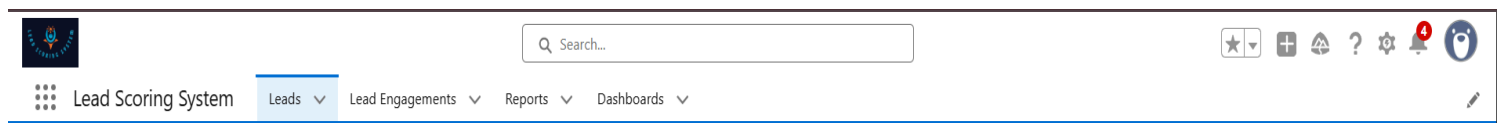
The screenshot displays the Lead Record Page for 'Mr. katik umale'. The top navigation bar includes 'Lead Scoring System' and tabs for 'Leads', 'Lead Engagements', 'Reports', and 'Dashboards'. The lead's name 'Mr. katik umale' is prominently displayed with a star icon. Below the name, a summary bar shows 'Lead Score: 70', 'Interest Level: High', 'Lead Status: Open - Not Contacted', 'Company: PRMITR', and 'Phone: (123) 456-7890'. The main content area is divided into two columns. The left column, titled 'Lead Information', contains a table with fields such as 'Lead Owner' (Aanya Badoniya), 'Name' (Mr. katik umale), 'Company' (PRMITR), 'Title', 'Lead Source' (Web), 'Industry', 'Education', 'Annual Revenue', 'Interest Level', 'Phone' ((123) 456-7890), 'Mobile' (07020756912), 'Fax', 'Email' (kartikumale@gmail.com), 'Website', 'Lead Status' (Open - Not Contacted), 'Rating', and 'No. of Employees' (1500). The right column features two sections: 'Lead Scores (1)' showing 'LS-0000' and 'Lead Engagements (3+)' showing 'ENG-0001', 'ENG-0003', and 'ENG-0004'. At the bottom, there are buttons for '+ Follow', 'New Case', 'New Note', and 'Submit for Approval'. A footer bar includes 'Top Leads by Score' and 'History' links.

- Embedded a **Report Chart** showing lead status distribution.

This screenshot shows the same Lead Record Page for 'Mr. katik umale', but with a different layout. The 'Lead Information' table is now a single row with 'Last Engagement Date: 9/22/2025'. The right column features a 'No past activity. Past meetings and tasks marked as done show up here.' message. Below this, a 'Top 5 Leads by Score' report is displayed. The report is a horizontal bar chart titled 'Sum of Lead Score' with a y-axis labeled 'First Name' and an x-axis with values 0, 20, 40, 60, and 80. A single blue bar for 'katik' extends to approximately 55 on the x-axis. At the bottom right, it says 'View Report' and 'As of Today at 10:58 AM'. The footer bar remains the same with 'Top Leads by Score' and 'History' links.

3. Tabs

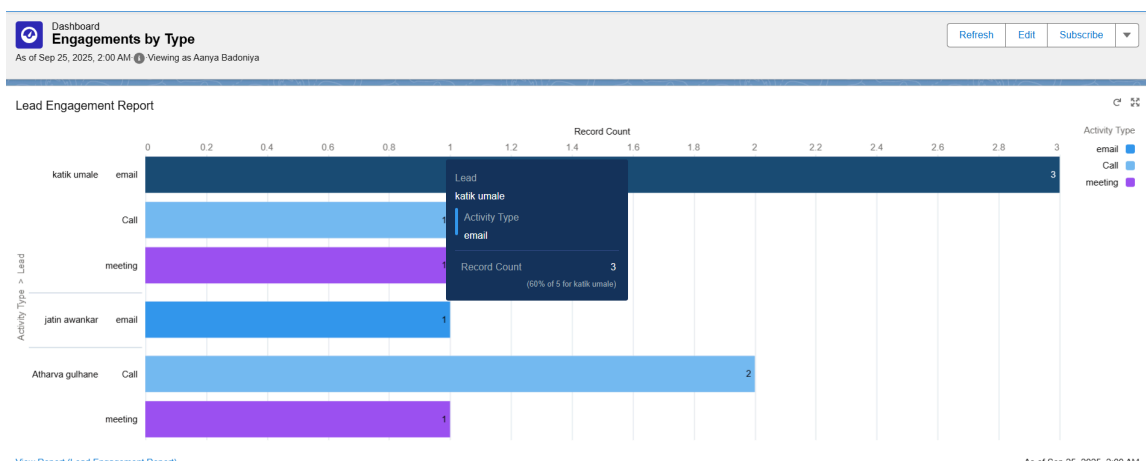
- Separate navigation tabs for:
 - Leads
 - Lead Engagements
 - Reports
 - Dashboards



4. Utility Bar (Optional)

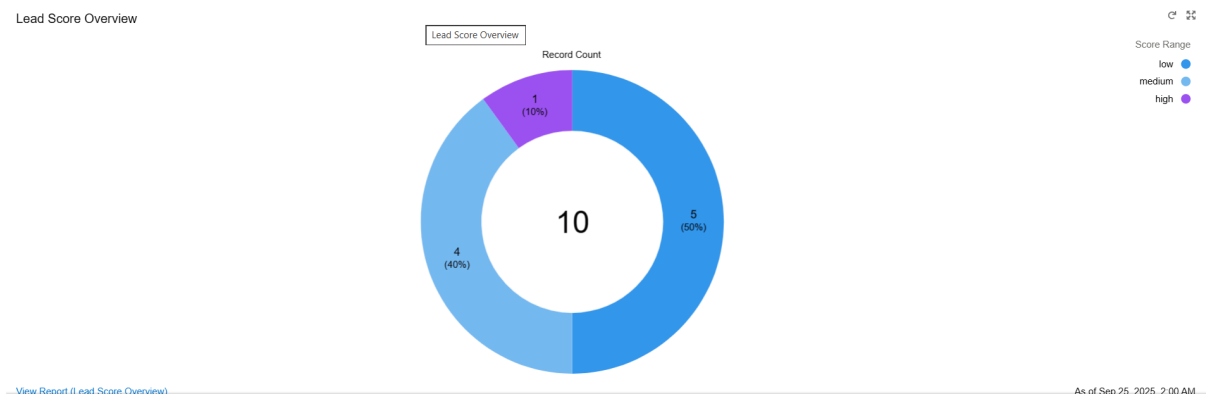
5. Reports & Dashboards (Linked to UI)

- Integrated Phase 7 reports & dashboards into navigation for real-time insights.
 - Reports: Top Leads by Score, Lead Engagement Report, Lead Score Overview.
 - Dashboards: Lead Scoring Dashboard, Engagements by Type, Top Leads.



Top Leads

First Name	Last Name	Lead Owner	Lead Score
katik	umale	Aanya Badoniya	70



Report: Lead Engagements

Lead Engagement Report

Total Records
8

Lead	Activity Type	Call	email	meeting	Total
<input type="checkbox"/> Atharva gulhane	Record Count	2	0	1	3
<input type="checkbox"/> jatin awankar	Record Count	0	1	0	1
<input type="checkbox"/> katik umale	Record Count	1	3	1	5
Total	Record Count	3	4	2	9

Details (9 Rows)

Click an intersection in the table above to filter details.

	Lead Engagement: Engagement ID	Lead Engagement: Owner Name
1	ENG-0007	Aanya Badoniya
2	ENG-0005	Aanya Badoniya
3	ENG-0002	Aanya Badoniya
4	ENG-0008	Aanya Badoniya
5	ENG-0006	Aanya Badoniya

Row Counts

Detail Rows

Grand Total

Stacked Summaries



Report: Leads Top Leads by Score

Total Records
1

Total Lead Score
70

	First Name ▾	Last Name ▾	Lead Owner ▾	Lead Score ↓ ▾
1	katik	umale	Aanya Badoniya	70
2				70



Report: Leads Lead Score Overview

Total Records
10

Total Interest Score
550

Total Engagement Score
105

Total Lead Score
283

<input type="checkbox"/> Score Range ↑ ▾	First Name ▾	Last Name ▾	Lead Owner ▾	Interest Score ▾	Engagement Score ▾	Lead Score ↓ ▾
<input type="checkbox"/> low (5)	Priya	Sharma	Aanya Badoniya	0	0	20
	Karan	Gupta	Aanya Badoniya	50	0	20
	Rahul	Mehta	Aanya Badoniya	0	0	0
	Sneha	Iyer	Aanya Badoniya	0	0	0
	Rohan	Singh	Aanya Badoniya	0	0	0
Subtotal				100	0	40
<input type="checkbox"/> medium (4)	Atharva	gulhane	Aanya Badoniya	50	50	50
	jatin	awankar	Aanya Badoniya	100	5	43
	Arjun	Verma	Aanya Badoniya	100	0	40
	Neha	Kapoor	Aanya Badoniya	100	0	40
Subtotal				350	55	173
<input type="checkbox"/> high (1)	katik	umale	Aanya Badoniya	100	50	70
Subtotal				100	50	70
Total (10)				550	105	283

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒