

Project Title: Event Venue CRM

Phase 6 — Lightning App & UI Setup (Developer)

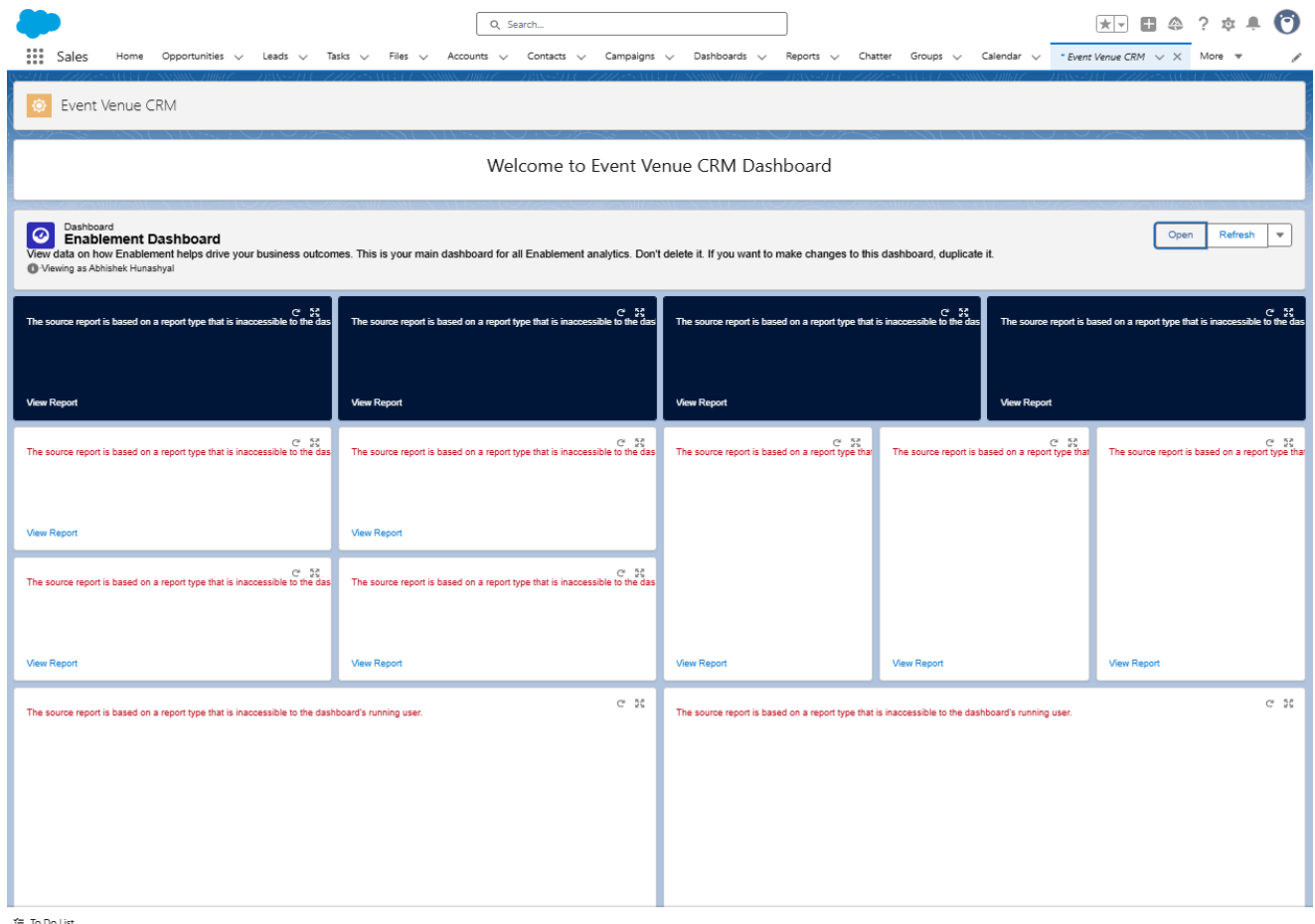
6.1 Lightning App

Purpose: Provide a dedicated workspace for Venue Managers and other users.

Setup:

- Setup → App Manager → New Lightning App
- App Name: Event Venue CRM
- Navigation Items: Venues, Bookings, Booking Payments, Contacts
- Save → Assign to profile

Outcome: Users can access the Event Venue CRM app in the App Launcher.



6.2 Record Page Enhancement (Booking__c)

Purpose: Improve Booking__c UI to show relevant data and related records.

Setup:

- Setup → Object Manager → Booking → Lightning Record Pages → New
- Template: Header + Left Sidebar
- Components Added:
 - Highlights Panel → shows key fields (Booking Amount, Status, Start/End Dates)
 - Related Lists - Single → Booking Payments, Tasks
 - Report Chart → Bookings by Status or Upcoming Bookings
- Save → Activate for Desktop users

Outcome: Venue Manager sees booking details, related payments, and relevant reports in a single page.

The screenshot displays the Salesforce Lightning App Builder interface for configuring a Record Page Layout for the Booking__c object. The top navigation bar includes the Lightning App Builder logo, a Pages dropdown menu, and the current page name 'Record Page Layout'. On the right, there are buttons for 'Analyze', 'Activation...', and 'Save'.

The main workspace is divided into three sections:

- Components:** A list of standard components on the left, including Accordion, Action Launcher, Actions & Recommendations, Activities, Approval Trace, Assessment List, CRM Analytics Collection, CRM Analytics Dashboard, Dynamic Related List - Single, Einstein Next Best Action, Flow, Flow Orchestration Work Guide, Highlights Panel, Invoice Preview, Launchpad, List View, LWC CRM Analytics Dashboard, My Labels, Path, Quip Associated Documents, Quip Document, Quip Notifications, Recent Items, Recommendations, and Record Detail.
- Fields:** A search bar and a list of fields for the Booking__c object, including Booking Amount, Status, Start/End Dates, Booking Payments (0), and Activity History (0).
- Record Page Layout:** The main area showing the layout of the record page. It includes a header section with the Booking__c object name and a main content area with two sections: 'Booking Payments (0)' and 'Bookings by Status'. The 'Bookings by Status' section displays a message: 'We can't draw this chart because there is no data.' Below this message is a 'View Report' link and a timestamp 'As of Today at 6:40 AM C'.

On the right side, there is a configuration panel for the Record Page Layout, including fields for Label, API Name, Page Type, Object, Template, and Description. The 'Template' field is set to 'Header and Left Sidebar' with a 'Change' button. The 'Object' field is set to 'Booking'. The 'Page Type' field is set to 'Record Page'. The 'Label' field is set to 'Record Page Layout'. The 'API Name' field is set to 'Record_Page_Layout'. The 'Description' field is empty. There is also a checkbox for 'Enable page-level dynamic actions for the Salesforce mobile app'.

6.3 Home Page Dashboard

Purpose: Provide quick insights on bookings, tasks, and reports.

Setup:

- Setup → Lightning App Builder → New Home Page
- Components:
 - Report Chart → Bookings by Venue
 - Recent Items → quick access to recently opened records
 - Tasks → show conflict follow-ups
- Save → Assign to Event Venue CRM app

Outcome: Users see upcoming bookings and metrics immediately upon opening the app.

The screenshot displays the Salesforce Lightning App Builder interface for configuring a 'Home Page Layout'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Home Page Layout'. The main workspace shows a preview of the dashboard with three sections: 'Bookings by Venue' (a report chart placeholder with the message 'We can't draw this chart because there is no data.'), 'Recent Items (0)' (a list view placeholder), and 'Today's Events' (a calendar placeholder with the message 'Looks like you're free and clear the rest of the day.'). The left sidebar lists various components under the 'Standard (43)' category, including Accordion, App Launcher, Assistant, Cdp Metrics Overview, Chatter Feed, Chatter Publisher, CRM Analytics Collection, CRM Analytics Dashboard, Dashboard, Data Mask Console Home Compo..., Einstein Next Best Action, Flow, Flow App Home cards, Generate Batch Documents, Inventory Lookup Component, Invoice Preview, Items to Approve, Key Deals, Launchpad, List View, Location Management Component, LWC CRM Analytics Dashboard, Paused Flow Interviews, Performance, Policy Center Console Home Com..., Quip Associated Documents, Quip Document, Quip Notifications, Recent Items, Recent Records, and Recommendations. The right sidebar shows the 'Page' configuration, including the label 'Home Page Layout', API Name 'Home_Page_Layout', Page Type 'Home Page', Template 'Home Template One Region', and a description field.