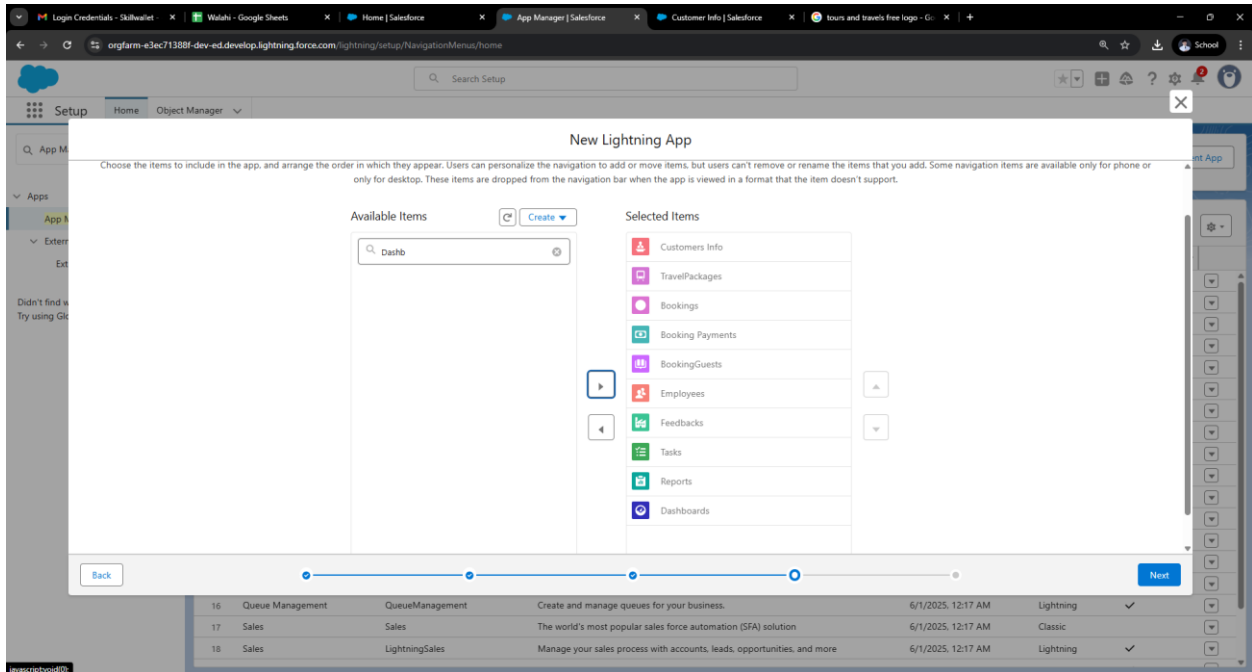


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AUF

Phase 3: UI/UX Development & Customization

Milestone 13: The Lightning App



Milestone 14: Editing Page Layouts

The screenshot shows the Salesforce Setup interface for editing the 'Customer Info' page layout. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area is titled 'Customer Info' and includes a 'Layout Properties' window at the top. Below this, there's a section for 'Customer Info Detail' with standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. The layout is divided into sections: Information (header visible on edit only), System Information (header visible on edit only), and Custom Links (header visible on edit only). The Information section contains fields like Customer ID, Customer Name, Email, Phone, Country, and City. The System Information section contains fields like Date Of Birth, Age, and Owner. The Custom Links section contains fields like Last Modified By. Below these sections is a 'Mobile Cards (Salesforce mobile only)' section with a note: 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.'

The screenshot shows the Salesforce Setup interface for editing the 'BookingGuest' page layout. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area is titled 'BookingGuest' and includes a 'Layout Properties' window at the top. Below this, there's a section for 'BookingGuest Detail' with standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, and Edit Labels. The layout is divided into sections: Information (header visible on edit only), System Information (header visible on edit only), and Custom Links (header visible on edit only). The Information section contains fields like Booking, BookingGuest Name, Age, Age Category, Country, City, and Passport Number. The System Information section contains fields like Date Of Birth, Age, and Owner. The Custom Links section contains fields like Last Modified By. Below these sections is a 'Mobile Cards (Salesforce mobile only)' section with a note: 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.'

orgfarm-e3ec7138bf-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl0000015QvXv/PageLayouts/00hgl000004MVRQAG/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Employee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Field Name	
Blank Space	
Availability Status	
City	
Country	
Assigned Region	
Created By	
Department	
Employee ID	
Employee Name	
Employment Type	
Joining Date	
Language Spoken	
Last Modified By	
Owner	
Phone	
Profile Picture	
Role	
Salary	

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Employee Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels

Custom Buttons

Information (Header visible on edit only)

Employee ID: GEN-2004-001234

Employee Name: Sample Text

Email: sarah.sample@company.com

Phone: 1-415-555-1212

Role: Sample Text

Department: Sample Text

Employment Type: Sample Text

Salary: \$123.45

Joining Date: 7/8/2025

Availability Status: Sample Text

Language Spoken: Sample Text

Assigned Region: Sample Text

Address Details

Country: Sample Text

City: Sample Text

Address: Sample Text

orgfarm-e3ec7138bf-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl0000015QvXv/PageLayouts/00hgl0000041pfQAW/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Booking

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Field Name	
Blank Space	
Booking Date	
Cancellation Date	
Customer Email	
Membership Chosen	
Preferred Accommodation	
Total Accommodation Amount	
Travelling End Date	
Travelling Start Date	
Travelling Package	
Travelling Type	
Booking Status	
Cancellation Reason	
Created By	
Include Travel Insurance	
Last Modified By	
Number of Travelers	
Require Tour Guide	
Require Visa Assistance	
Travel Cost Per Person	
Travel Package	
Travel Type	

Information (Header visible on edit only)

Booking Number: GEN-2004-001234

Customer: Sample Text

Customer Email: sarah.sample@company.com

Travel Package: Sample Text

Booking Date: 7/8/2025

Travelling Start Date: 7/8/2025

Travelling End Date: 7/8/2025

Travelling Package: Sample Text

Membership Chosen: Sample Text

Preferred Accommodation: Sample Text

Include Travel Insurance: ✓

Require Visa Assistance: ✓

Require Tour Guide: ✓

Guide Assigned: Sample Text

Preferred Guide Language: Sample Text

No of Booking Guests: 87,210

Number of Travelers: 5,985

Booking Status: Sample Text

Approval Status: Sample Text

Cancellation Date: 7/8/2025

Cancel Confirmation: ✓

Travel Cost Per Person: \$123.45

Total Travel Amount: \$123.45

Accommodation Amount per Person per Day: \$123.45

Cancellation Reason: Sample Text

Total Accommodation Amount: \$123.45

Total Billing Amount: \$123.45

Owner: Sample Text

System Information (Header visible on edit only)

Sample Text

Milestone 15: Dynamic Forms

SKILLWALLET

Dashboard

Skill Bank

Skill Wallet

Skill Card

Skill Credits

Tours & Travels Platform Development Using CRM-Salesforce

OverviewWorkspaceKanban

Field: Booking Status

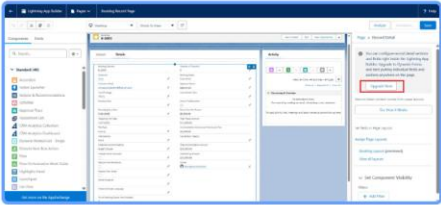
Operator: Equal

Value: Cancelled

Click on Done

8. Click on Save and Click on Activate.

9. Click on Org as Default, select Desktop and Phone, click Next and Click Save.



Lightning App Builder

Pages

Booking Record Page

Help

Desktop

Shrink To View

Components

Fields

Search...

Standard (42)

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

Launchpad

List View

LWC CRM Analytics Dashboard

My Labels

Path

Quip Associated Documents

Quip Document

Quip Notifications

Recent Items

Recommendations

Booking BN-0003

New Contact Edit New Opportunity

Related

Details

Information

Booking Number

Booking Number

Customer

Customer

Customer Email

Customer Email

TravelPackage

TravelPackage

Booking Date

Booking Date

Travelling Start Date

Travelling Start Date

Travelling End Date

Travelling End Date

Trip Type

Trip Type

Number of Travelers

Number of Travelers

Booking Status

Booking Status

Approval Status

Approval Status

Cancellation Date

Cancellation Date

Cancellation Confirmation

Cancellation Confirmation

Travel Cost Per Person

Travel Cost Per Person

Total Travel Amount

Total Travel Amount

Accommodation Amount per Person per Day

Accommodation Amount per Person per Day

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Page > Cancel Confirmation

Object

Booking

API Name

Cancel_Confirmation_c

UI Behavior

None

Read-Only

Required

Conditional Formatting

Select a ruleset...

View All Rulesets

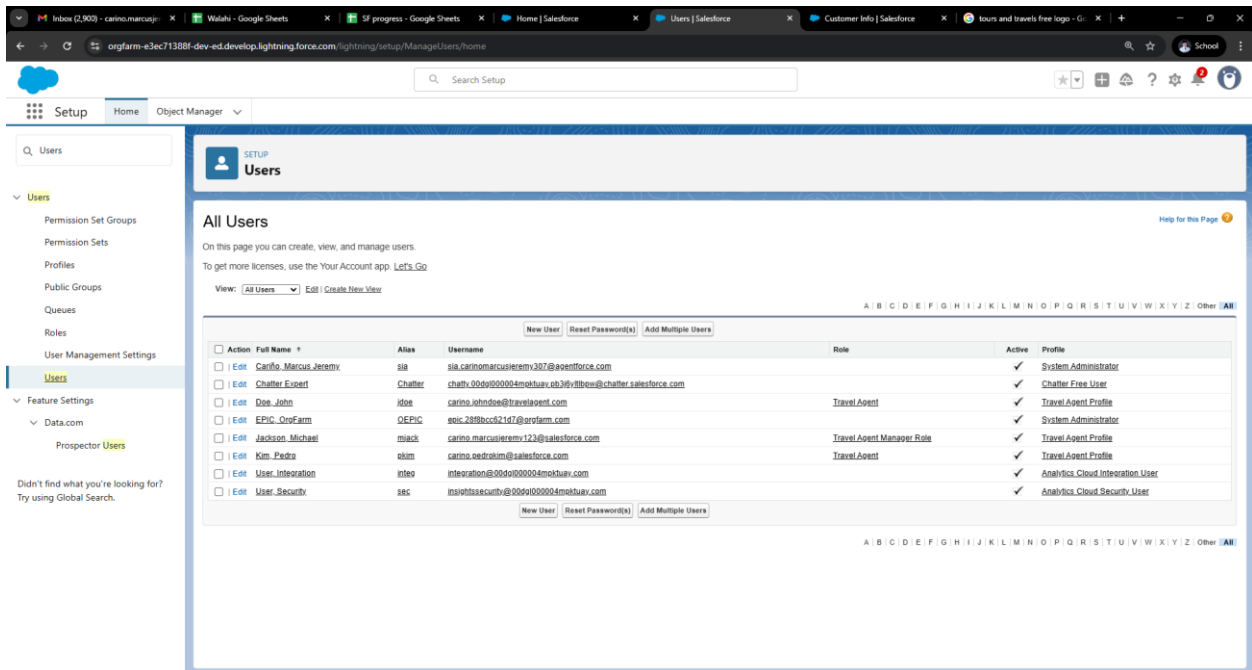
Set Field Visibility

Filters

1 Record > Booking Status Equal Cancelled

Add Filter

Milestone 16: Users

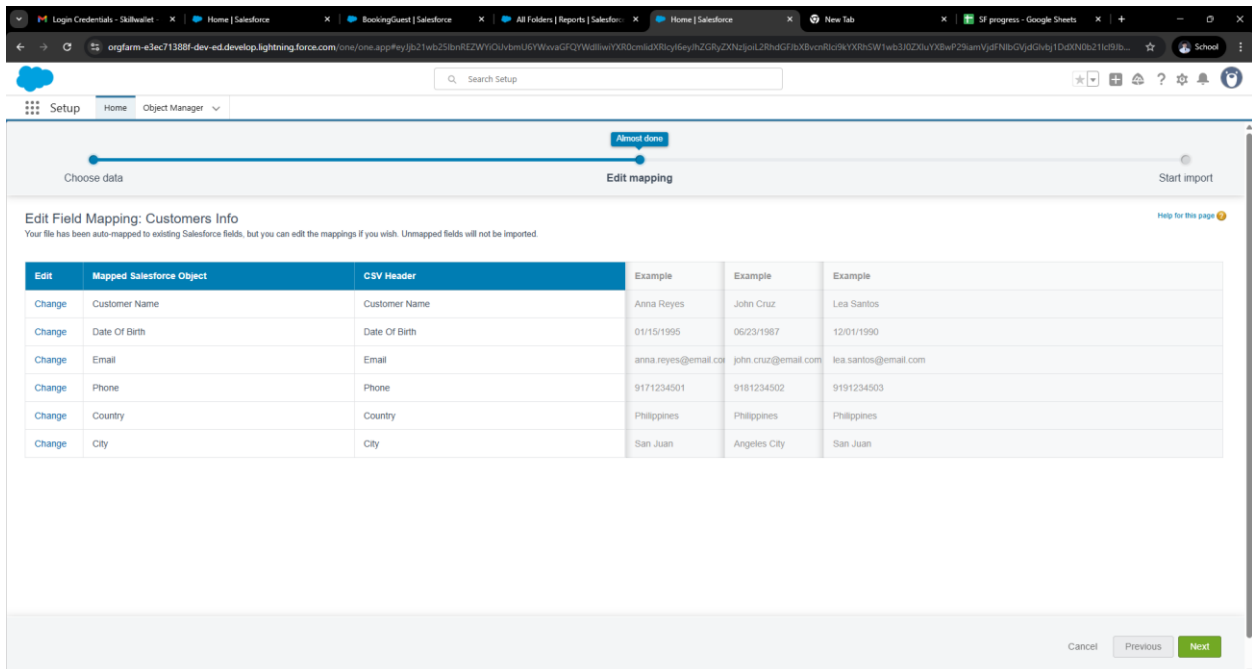


The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled "All Users" and includes a sub-header "On this page you can create, view, and manage users." Below this, there are tabs for "View: All Users" and "Edit: Create New User". A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table includes users like Carlos, Marcus, Jeremy, Chatter, Expert, Doe, John, EPIC, OrgFarm, Jackson, Michael, Kim, Pedro, User, Integration, and User, Security. At the bottom, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Carlos, Marcus, Jeremy	sia	sia.carlosmarcusjerem307@apexforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter, Expert	chatter	chatter.0000000044mokuuab36v8t8v@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Doe, John	ldoe	carlos.johndoe@travelagent.com	Travel Agent	✓	Travel Agent Profile
<input type="checkbox"/> Edit	EPIC, OrgFarm	OEPIG	epic.28f8cc62147@orgfarm.com		✓	System Administrator
<input type="checkbox"/> Edit	Jackson, Michael	miack	carlos.marcusjerem323@salesforce.com	Travel Agent Manager Role	✓	Travel Agent Profile
<input type="checkbox"/> Edit	Kim, Pedro	ekim	carlos.vedrolim@salesforce.com	Travel Agent	✓	Travel Agent Profile
<input type="checkbox"/> Edit	User, Integration	inteo	integration@0000000044mokuuab36v8t8v@chatter.salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	int@intosecurity@0000000044mokuuab36v8t8v@chatter.salesforce.com		✓	Analytics Cloud Security User

Note: cannot create 4 users

Milestone 17: Reports



The screenshot shows the Salesforce Setup interface for editing field mappings for a report. The top navigation bar includes links for Setup, Home, Object Manager, and a search bar. The main content area is titled "Edit Field Mapping: Customers Info" and includes a sub-header "Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported." Below this, there is a table with columns for Edit, Mapped Salesforce Object, CSV Header, and Example. The table lists mappings for Customer Name, Date Of Birth, Email, Phone, Country, and City. At the bottom, there are buttons for "Cancel", "Previous", and "Next".

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer Name	Customer Name	Anna Reyes	John Cruz	Lea Santos
Change	Date Of Birth	Date Of Birth	01/15/1995	06/23/1987	12/01/1990
Change	Email	Email	anna.reyes@email.com	john.cruz@email.com	lea.santos@email.com
Change	Phone	Phone	9171234501	9181234502	9191234503
Change	Country	Country	Philippines	Philippines	Philippines
Change	City	City	San Juan	Angeles City	San Juan

I use the import para mapabilis paggawa ng customer info

New Booking

* = Required Information

Information

Booking Number: [Field]

*Number of Travelers: 2

*Customer: Anna Reyes

*Customer Email: anna.reyes@email.com

*TravelPackage: Tropical Trio Delight

*Booking Date: 7/9/2025

*Travelling Start Date: 8/1/2025

Travelling End Date: [Field]

Trip Type: --None--

*Membership Chosen (Req): --None--

*Booking Status: Pending

Travel Cost Per Person: \$0.00

Total Travel Amount: \$0.00

Accommodation Amount per Person per Day: \$0.00

Cancellation Reason: [Field]

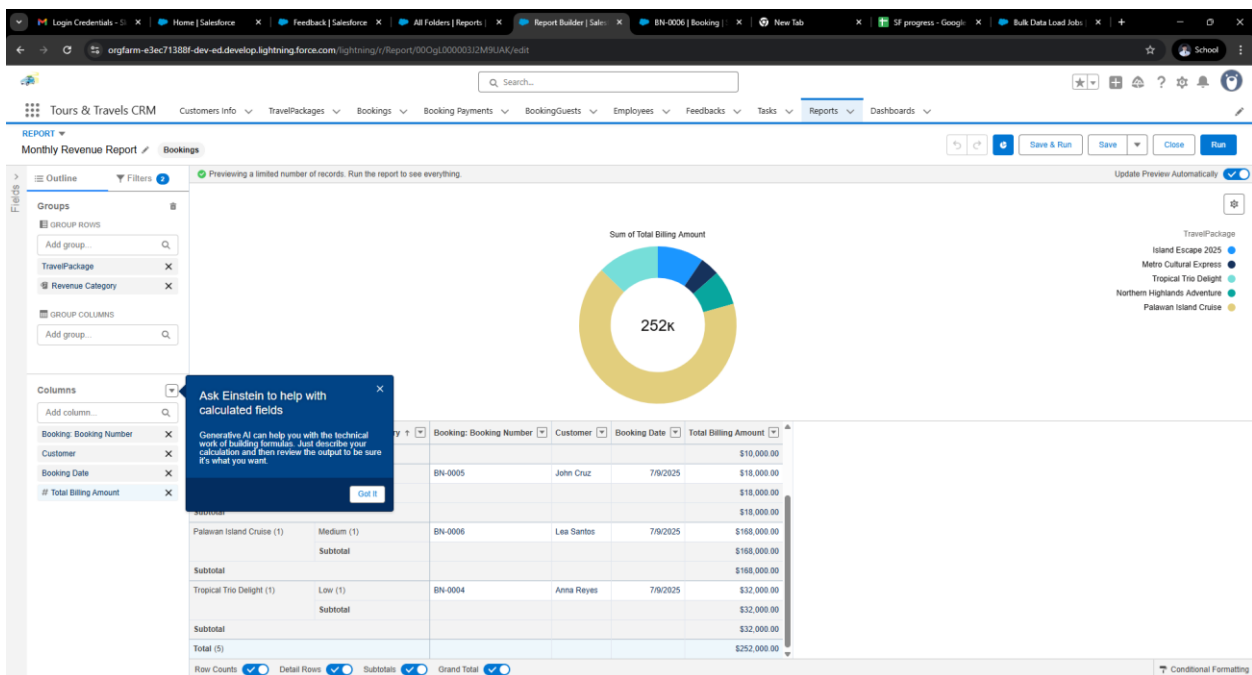
Total Accommodation Amount: \$0.00

Total Billing Amount: \$0.00

Buttons: Cancel, Save & New, Save, Cancel

Manual insertion on Booking Object

Milestone 18: Dashboard



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Tours & Travels CRM

Customers info Travelpackages Bookings Booking Payments BookingGuests Employees Feedbacks Tasks Reports Dashboards

REPORT New Bookings with Customer Report Bookings with Customer

Previewing a limited number of records. Run the report to see everything.

Customer: Customer Name Booking: Booking Number

Mira Lopez (1)	BN-0007
Subtotal	
Marcus Carino (1)	BN-0003
Subtotal	
Lea Santos (1)	BN-0006
Subtotal	
John Cruz (1)	BN-0005
Subtotal	
Anna Reyes (1)	BN-0004
Subtotal	
Total (5)	

Subtotals Grand Total

orgfarm-e3ec7138bf-dev-ed.develop.lightning.force.com/lightning/r/Report/000GL00000333jptUAK/edit

Tours & Travels CRM

Customers info Travelpackages Bookings Booking Payments BookingGuests Employees Feedbacks Tasks Reports Dashboards

REPORT Guest Count per Booking Bookings with BookingGuests

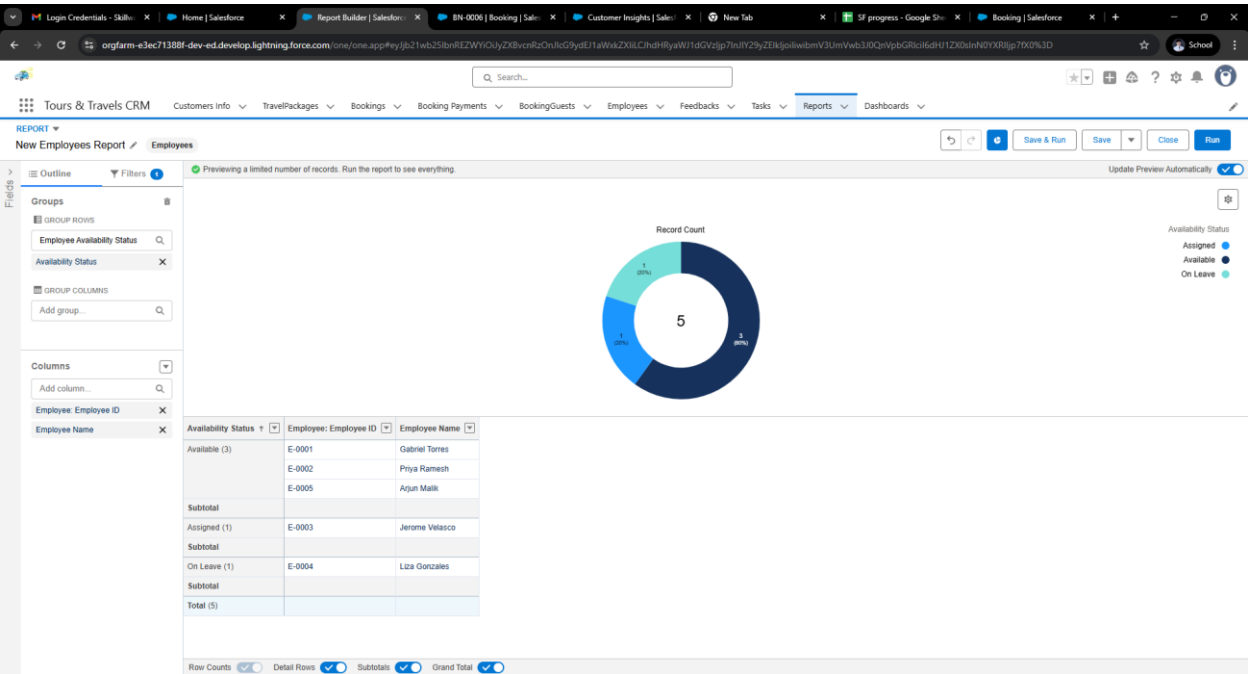
Previewing a limited number of records. Run the report to see everything.

Record Count

Booking: Booking Number

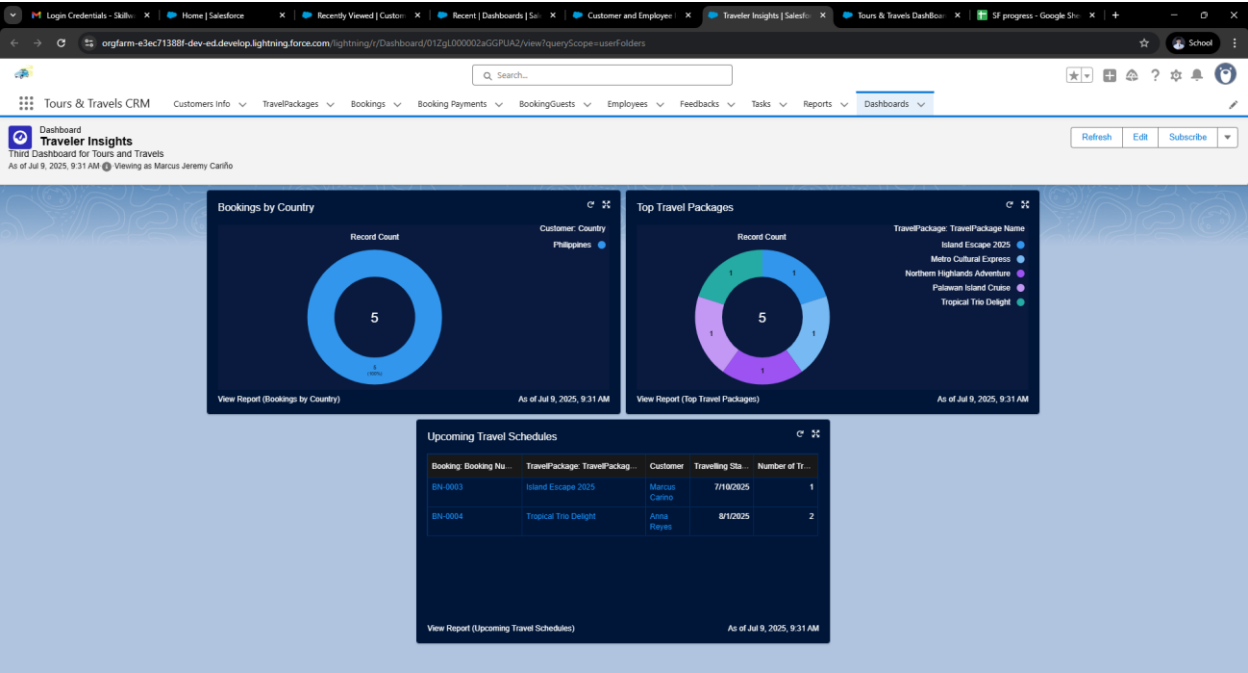
BN-0003 (1)	Guest 1	Marcus Carino
Subtotal		
BN-0004 (2)	Guest 1	Anna Reyes
	Guest 2	Anna Reyes
Subtotal		
BN-0005 (1)	Guest 1	John Cruz
Subtotal		
BN-0006 (4)	Guest 1	Lea Santos
	Guest 2	Lea Santos
	Guest 3	Lea Santos
	Guest 4	Lea Santos

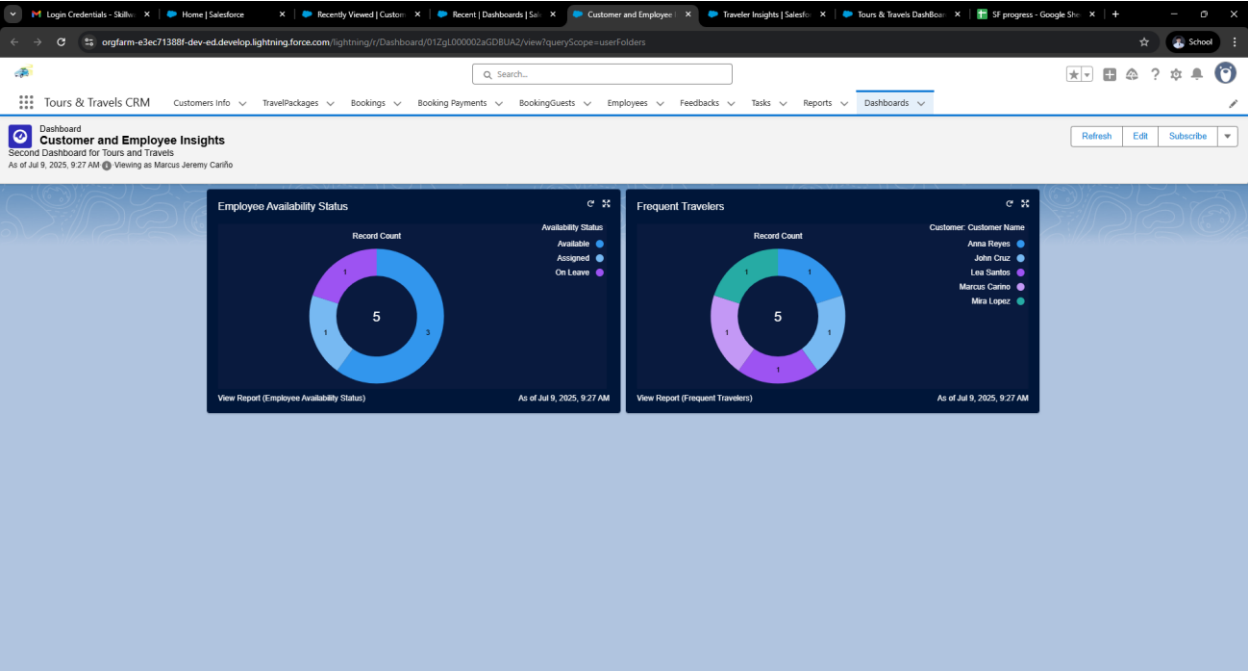
Row Counts Detail Rows Subtotals Grand Total



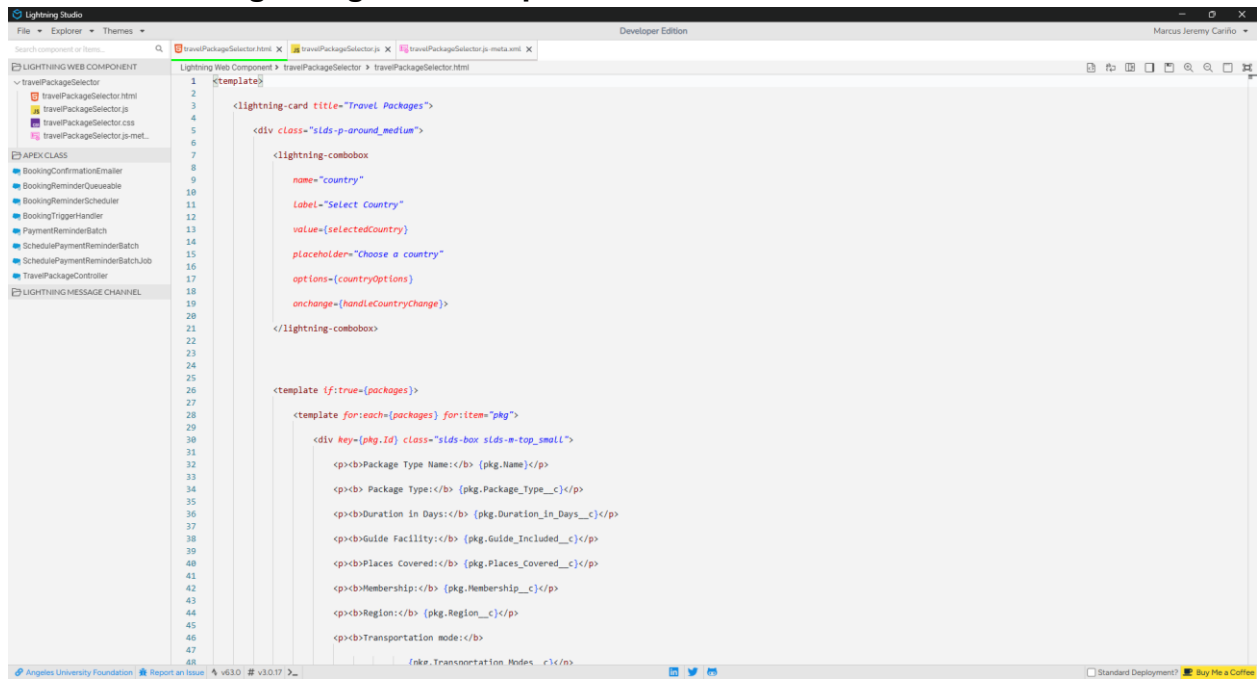
Add 5 reports

Report Name	Description	Folder	Created By	Created On	Subscribed
Upcoming Travel Schedules		Customer Insights	Marcus Jeremy Carifio	7/9/2025, 9:13 AM	
Top Travel Packages		Travel Packages Folder	Marcus Jeremy Carifio	7/9/2025, 8:38 AM	
Bookings by Country		Customer Insights	Marcus Jeremy Carifio	7/9/2025, 9:06 AM	
Frequent Travelers		Customer Insights	Marcus Jeremy Carifio	7/9/2025, 8:57 AM	
Employee Availability Status		Employee Folder	Marcus Jeremy Carifio	7/9/2025, 9:04 AM	



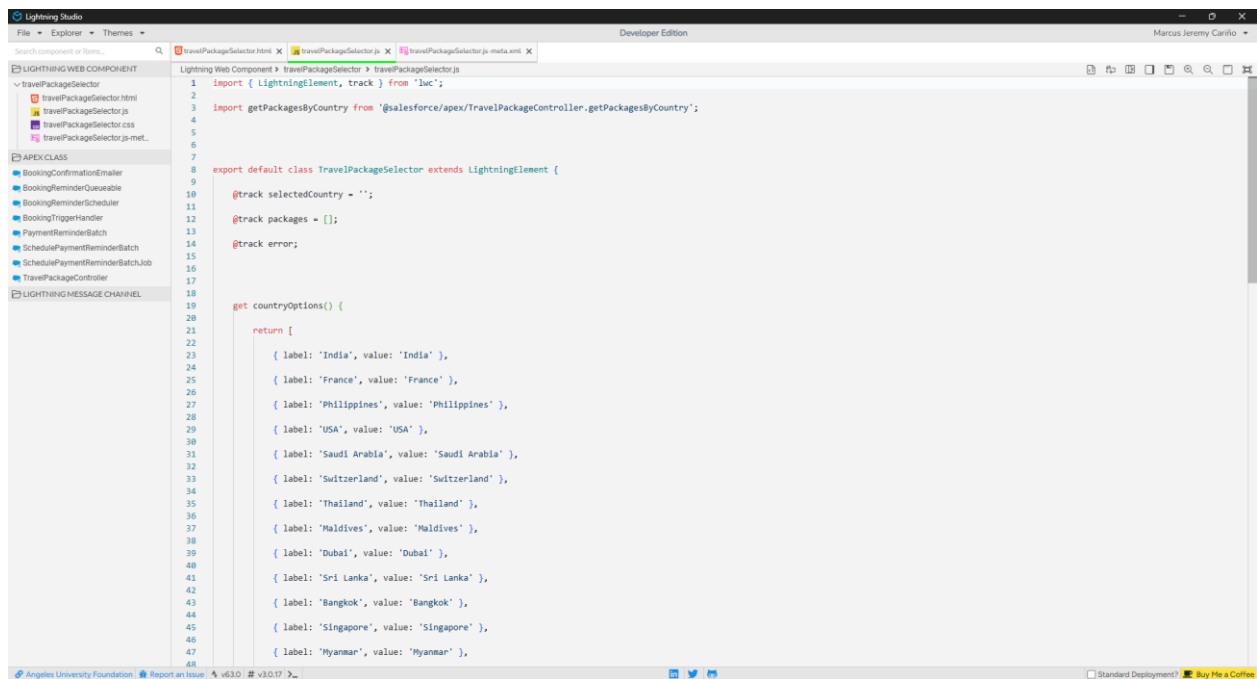


Milestone 19: Lightning Web Component Creation



The screenshot shows the Lightning Studio interface with the Explorer pane on the left displaying the project structure. The main editor shows the HTML template for the `TravelPackageSelector` component. The template includes a `lightning-card` with a title "Travel Packages" and a `lightning-combobox` for selecting a country. Below the combobox, a `template` block iterates over a list of packages, displaying their details in a list format.

```
1 <template>
2
3 <lightning-card title="Travel Packages">
4
5 <div class="slds-p-around_medium">
6
7 <lightning-combobox
8   name="country"
9   label="Select Country"
10  value={selectedCountry}
11  placeholder="Choose a country"
12  options={countryOptions}
13  onchange={handleCountryChange}>
14
15 </lightning-combobox>
16
17
18 <template if:true={packages}>
19
20 <template for:each={packages} for:item="pkg">
21
22 <div key={pkg.Id} class="slds-box slds-m-top_small">
23
24 <p><b>Package Type Name:</b> {pkg.Name}</p>
25
26 <p><b>Package Type:</b> {pkg.Package_Type__c}</p>
27
28 <p><b>Duration in Days:</b> {pkg.Duration_in_Days__c}</p>
29
30 <p><b>Guide Facility:</b> {pkg.Guide_Included__c}</p>
31
32 <p><b>Places Covered:</b> {pkg.Places_Covered__c}</p>
33
34 <p><b>Membership:</b> {pkg.Membership__c}</p>
35
36 <p><b>Region:</b> {pkg.Region__c}</p>
37
38 <p><b>Transportation mode:</b>
39
40 </p>
41
42 </div>
43
44 </template>
45
46 </template>
47
48 </lightning-card>
```



The screenshot shows the JavaScript logic for the `TravelPackageSelector` component. It includes imports for `LightningElement` and `getPackagesByCountry`. The component extends `LightningElement` and implements the `getCountryOptions` method, which returns a list of country options with labels and values.

```
1 import { LightningElement, track } from 'lwc';
2
3 import getPackagesByCountry from '@salesforce/apex/TravelPackageController.getPackagesByCountry';
4
5
6
7
8 export default class TravelPackageSelector extends LightningElement {
9
10   @track selectedCountry = '';
11
12   @track packages = [];
13
14   @track error;
15
16
17   getCountryOptions() {
18
19     return [
20
21       { label: 'India', value: 'India' },
22
23       { label: 'France', value: 'France' },
24
25       { label: 'Philippines', value: 'Philippines' },
26
27       { label: 'USA', value: 'USA' },
28
29       { label: 'Saudi Arabia', value: 'Saudi Arabia' },
30
31       { label: 'Switzerland', value: 'Switzerland' },
32
33       { label: 'Thailand', value: 'Thailand' },
34
35       { label: 'Maldives', value: 'Maldives' },
36
37       { label: 'Dubai', value: 'Dubai' },
38
39       { label: 'Sri Lanka', value: 'Sri Lanka' },
40
41       { label: 'Bangkok', value: 'Bangkok' },
42
43       { label: 'Singapore', value: 'Singapore' },
44
45       { label: 'Myanmar', value: 'Myanmar' },
46
47     ];
48   }
49 }
```

Milestone 20: Lightning App Page Creation

