

Project Title: Venue Connect 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: Venue Connect CRM
- Navigation Items: Venues, Bookings, Booking Payments, Contacts
- Save → Assign to profile

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

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Venue Connect CRM'. A left sidebar lists 'App Settings' (with a 'Back' button), 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' with the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two columns: 'App Details' and 'App Branding'. The 'App Details' column contains three text input fields: 'App Name' (filled with 'Venue Connect CRM'), 'Developer Name' (filled with 'Venue_Connect_CRM'), and 'Description' (filled with 'Demo app for Booking Management'). The 'App Branding' column contains an 'Image' upload area (showing a 'venue' logo), a 'Primary Color Hex Value' dropdown (set to '#0070D2'), a 'Clear' link, and an 'Org Theme Options' checkbox (unchecked) with the text 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows a card with the 'venue' logo, the app name 'Venue Connect CRM', and the description 'Demo app for Booking Management'.

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 creating 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 Record Page Layout title. Below the navigation bar, there are tabs for Components and Fields, and a search bar. The main workspace shows a preview of the Record Page Layout for Booking__c, which includes a Highlights Panel, Booking Payments (0), Activity History (0), and a Bookings by Status report chart. The right sidebar contains the Page configuration panel, which includes fields for Label, API Name, Page Type, Object, Template, and Description. The Template is set to Header and Left Sidebar. There is also a checkbox to 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 layout with three sections: 'Bookings by Venue' (a report chart placeholder), 'Recent Items (0)' (a list view placeholder), and 'Today's Events' (a calendar placeholder). 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.