

Phase 6: User Interface Development

This phase focused on refining the user experience for the **Security Staff**, ensuring that the new objects and the automated **Verification Case** workflow were presented logically and efficiently within the Lightning Experience. The goal was to minimize clicks and provide agents with maximum context on a single screen.

Concept	Project Goal
UI Strategy	Build a dedicated, secure, and intuitive Lightning App that consolidates the work queue, item inventory, and reporting dashboards, minimizing navigation effort for the Security Staff.

6.1 Lightning App Builder (Application Customization)

Concept	Implementation in Lost & Found Portal	Value Added
App Creation	Created a custom Lightning App named " Lost & Found Manager "	Provides a single, focused point of entry for the Security Staff team, separating them from standard CRM clutter.
Navigation	The App's navigation bar was configured to include: Verification Cases, Lost Items, Found Items, and Dashboards.	Ensures all necessary tools and records are accessible from a single bar, promoting efficiency.
Utility Bar	The Utility Bar was configured to include History and Notes components.	Allows agents to quickly access recently viewed records and take essential notes without leaving the current screen.

6.2 Record Pages (Layout Optimization)

The standard record pages were customized using the **Lightning App Builder** to support the specific workflow required for item verification.

6.2.1 Verification Case Record Page

This was the most crucial customization, as this is the agent's primary working screen.

- **Layout:** Implemented a two-column layout. The left column focuses on the verification details (Status, Owner, etc.), while the right column provides immediate context.
- **Fields:** The custom **Lost Item Summary** and **Found Item Summary** Formula Fields (from Phase 3) were pinned to the **Highlights Panel** or the top of the details section.
- **Related Records:** The Related Lost Item and Related Found Item were displayed as **separate components** in the right column, using a condensed view, enabling the agent to visually compare key details (e.g., location, date, color) side-by-side without opening multiple tabs.

6.2.2 Lost/Found Item Record Pages

- **Layout:** Layouts were simplified, prioritizing the Category, Date Reported, and Location Details fields for quick review.
- **Compact Layouts:** The Compact Layouts for both objects were configured to show the Item Number and Category in the mobile/highlights panel, providing essential context instantly.

6.3 Home Page Layouts

- **Custom Home Page:** A custom **Home Page** was created for the **Security Staff Profile** using the Lightning App Builder.
- **Components:** The page includes the standard **Quarterly Performance** component (if applicable) and a filtered **Report Chart** component displaying the number of '**New**' **Verification Cases** (the agent's pending workload), directly linking to the core automation.

6.4 Developer Components (LWC/Aura)

- **LWC:** No Lightning Web Components (LWC) or Aura components were required for this Minimum Viable Product (MVP). The solution achieved high efficiency using exclusively declarative UI tools (Lightning App Builder and standard components).
- **Future Scope (LWC):** A potential future enhancement would be an **LWC** on the Case Record Page to display a simple map visualization of the Location Lost versus Location Found, aiding the agent in geographic verification.

Optimized Case Record Page

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Search...

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Lost and Found Ma...

Home

Reports

Dashboards

Verification Cases

Lost Items

Found Items

Cases

Verification Case

VCASE-0002

New Contact

Edit

New Opportunity

Related

Details

Verification Case Number

VCASE-0002

Owner

Gaurav Kotecha

Lost Item

LOST-0004

Found Item

FOUND-0003

Status

Pending Verification

Related Lost Item

LOST-0004

Created By

Gaurav Kotecha, 9/26/2025, 1:04 AM

Last Modified By

Gaurav Kotecha, 9/26/2025, 1:04 AM

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Search...

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Lost and Found Ma...

Home

Reports

Dashboards

Verification Cases

Lost Items

Found Items

Cases

Cases

All Open Cases

New

Change Owner

Printable View

Assign Label

10 items • Sorted by Case Number • Filtered by Date/Time Opened. Closed • Updated a few seconds ago

Q Search this list...

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<input type="checkbox"/>	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Ow...
<input type="checkbox"/>	00001002	Stella Pavlova	Seeking guidance on electrical wiring installation for GC5060	New	Low	8/29/2025, 11:39 AM	OEPIC
<input type="checkbox"/>	00001016	Edna Frank	Maintenance guidelines for generator unclear	New	Low	8/29/2025, 11:39 AM	OEPIC
<input type="checkbox"/>	00001024	Lauren Boyle	Design issue with mechanical rotor	New	Low	8/29/2025, 11:39 AM	OEPIC
<input type="checkbox"/>	00001026		Potential Match: Wallet Verification	New	Medium	9/25/2025, 3:56 AM	gau
<input type="checkbox"/>	00001027		LOST-0004	New	Medium	9/25/2025, 11:28 AM	gau
<input type="checkbox"/>	00001028		LOST-0004	New	Medium	9/25/2025, 11:30 AM	gau
<input type="checkbox"/>	00001029		LOST-0005	New	Medium	9/25/2025, 11:30 AM	gau
<input type="checkbox"/>	00001030		LOST-0004	New	Medium	9/26/2025, 1:06 AM	gau
<input type="checkbox"/>	00001031		LOST-0005	New	Medium	9/26/2025, 1:06 AM	gau
<input type="checkbox"/>	00001032		LOST-0006	New	Medium	9/26/2025, 1:06 AM	gau

