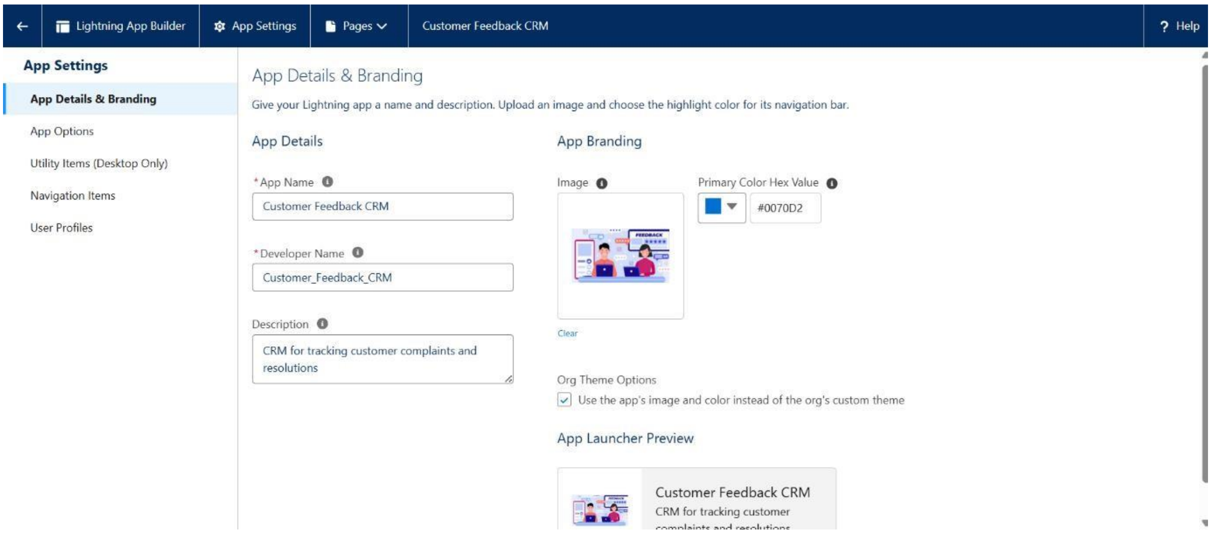
Phase 6: User Interface Development

Purpose: Develop a user-friendly interface for the Customer Feedback CRM, including record pages, home page, tabs, utility bar, and plan for future enhancements with LWCs and Apex.

Lightning App Builder

Goal: Design and customize pages (Home Page, Record Pages) for better user experience.
Steps Done:

1. Opened Lightning App Builder.
2. Created Home Page using 3-region layout.
3. Created Customer Feedback CRM with Tabs.
4. Added components to regions (Rich Text, List Views, Tabs).
5. Saved and activated pages.



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: Customer Feedback CRM

*Developer Name: Customer_Feedback_CRM

Description: CRM for tracking customer complaints and resolutions

App Branding

Image

Clear

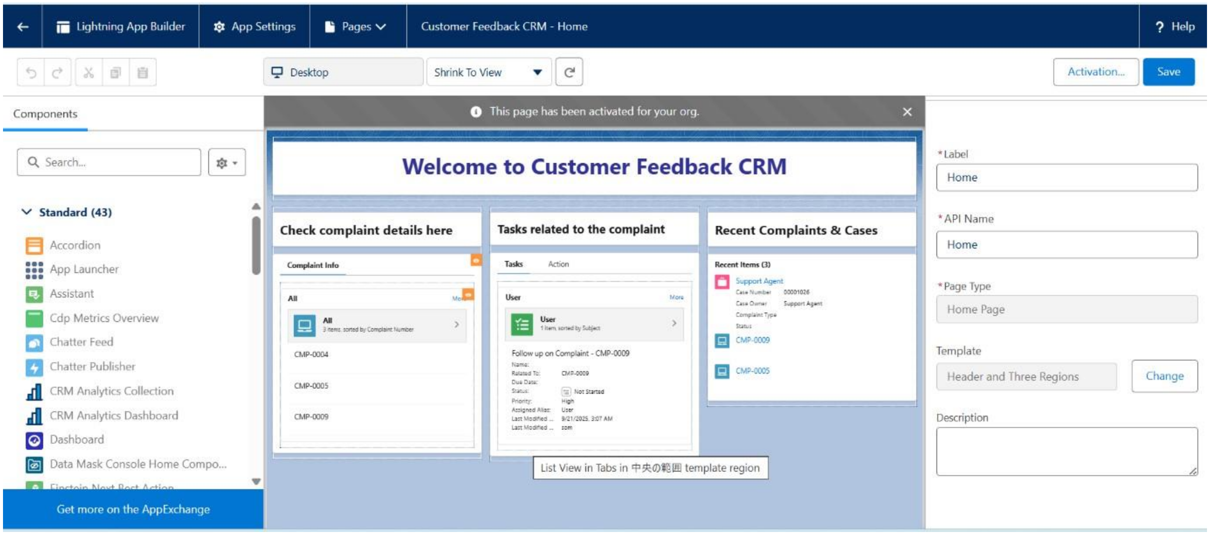
Primary Color Hex Value: #0070D2

Org Theme Options

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

App Launcher Preview

Customer Feedback CRM
CRM for tracking customer
complaints and resolutions



This page has been activated for your org.

All
3 items, sorted by Complaint Number
CMP-0004
CMP-0005
CMP-0009

User
1 item, sorted by Subject
Follow up on Complaint - CMP-0009
Name:
Related To: CMP-0009
Due Date:
Status: Not Started
Priority: High
Assigned Alias: User
Last Modified ... 9/21/2025, 3:07 AM
Last Modified ... som

Recent Items (3)
Support Agent
Case Number 00001026
Case Owner Support Agent
Complaint Type
Status
CMP-0009
CMP-0005

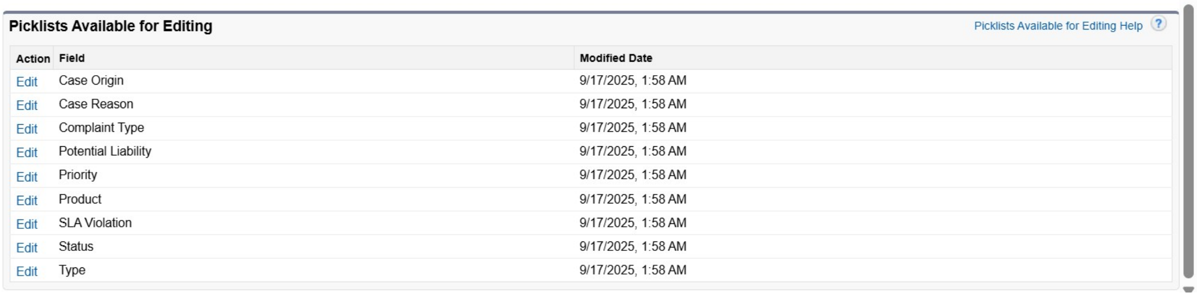
*Label: Home
*API Name: Home
*Page Type: Home Page
Template: Header and Three Regions
Description:

Record Pages

Goal: Control what users see when they open a single Complaint record.

Steps Done:

1. Opened Customer Feedback CRM in Lightning App Builder.
2. Added Tabs component with two tabs:
   - Tab 1: Complaint Info
     - Tab Label: Complaint Info
     - Component: List View of Complaints
     - Filter: Owner/User = Current User (or Active = True) to show only the current user's active complaints.
   - Tab 2: Task & Action
     - Tab Label: Task & Action
     - List View: Object = Task, Filter = User = Current User, Number of Records = 3 to show latest tasks.
     - Action Component: Object = Task, Filter = Recently Completed Tasks to allow users to review recently completed tasks.
3. Activated the page as Org Default / App Default so it is visible to all users in the org.



Picklists Available for Editing

Picklists Available for Editing Help ?

Action	Field	Modified Date
Edit	Case Origin	9/17/2025, 1:58 AM
Edit	Case Reason	9/17/2025, 1:58 AM
Edit	Complaint Type	9/17/2025, 1:58 AM
Edit	Potential Liability	9/17/2025, 1:58 AM
Edit	Priority	9/17/2025, 1:58 AM
Edit	Product	9/17/2025, 1:58 AM
Edit	SLA Violation	9/17/2025, 1:58 AM
Edit	Status	9/17/2025, 1:58 AM
Edit	Type	9/17/2025, 1:58 AM

Tabs

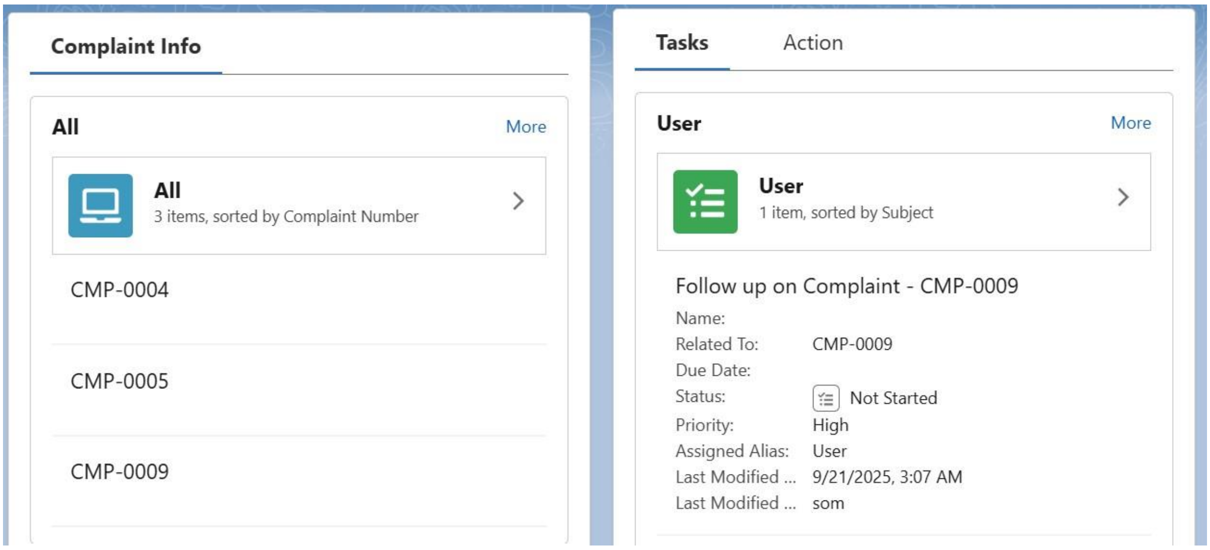
Goal: Separate sections inside the Record Page for easy navigation.
Steps Done:

- Tab 1: Complaint Info → displays all complaints for the logged-in user.
- Tab 2: Task & Action → shows pending and recently completed tasks for the user.

Home Page Layouts

Goal: Create main dashboard view for the app.
Steps Done:

1. Opened Home Page in Lightning App Builder.
2. Selected 3-region layout for better component organization.
3. Added components:
    - Rich Text: Welcome for guidance. ○ List View: Recent Complaints filtered for current user to see latest complaints.
    - List View: Tasks / Actions filtered for current user to track actions.
4. Used Tabs component to combine multiple List Views in one region.
5. Saved and activated the page.



Complaint Info

All More

All
3 items, sorted by Complaint Number

CMP-0004

CMP-0005

CMP-0009

Tasks Action

User More

User
1 item, sorted by Subject

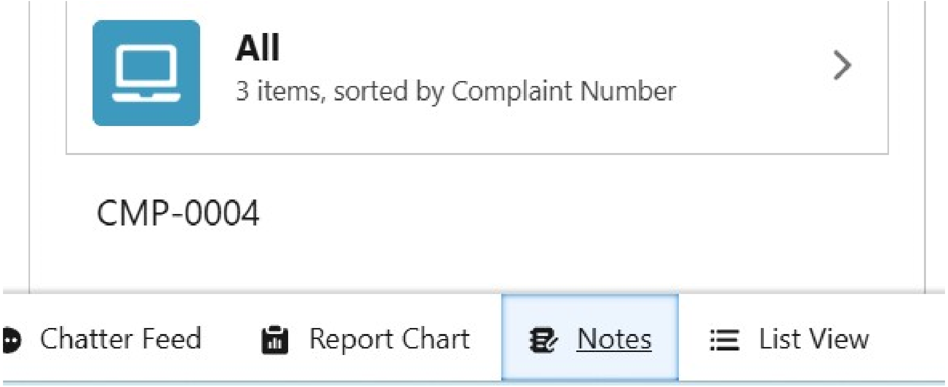
Follow up on Complaint - CMP-0009

Name:
Related To: CMP-0009
Due Date:
Status: Not Started
Priority: High
Assigned Alias: User
Last Modified ... 9/21/2025, 3:07 AM
Last Modified ... som

Utility Bar

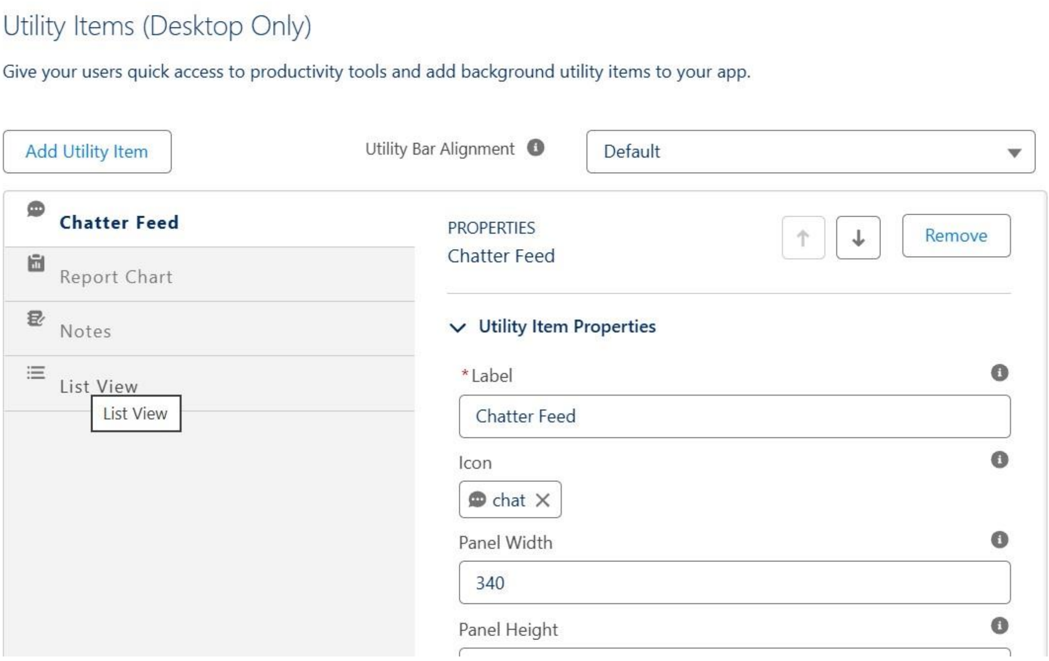
Goal: Provide quick access to tools (Notes, Flow, Reports, Chatter) at the bottom of the app.
Steps Done:

1. Go to Setup → App Manager → Customer Feedback App → Edit.
2. Click Utility Bar in left menu.
3. Click Add → select utility type (Notes, Chatter ,Report Chart ,List View).
4. Set Label, Icon, Height, and arrange order.
5. Save the app.



All
3 items, sorted by Complaint Number

CMP-0004



Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Utility Bar Alignment: Default

Chatter Feed

Report Chart

Notes

List View

PROPERTIES

Chatter Feed

Utility Item Properties

*Label: Chatter Feed

Icon: chat

Panel Width: 340

Panel Height

LWC (Lightning Web Components)

Goal: Create custom, interactive components for dynamic data display.

Will implement in future: For dynamic charts, complaint summaries, or quick action buttons.

Apex with LWC

Goal: Use Apex methods to provide data or actions for LWCs.

Will implement in future: To fetch complaint counts, tasks, or perform automated actions.

Events in LWC

Goal: Enable communication between LWCs for interactive features.

Will implement in future: To make tabs, charts, and components interact dynamically.

Wire Adapters

Goal: Fetch Salesforce data reactively in LWCs.

Will implement in future: To show live updates of complaints and tasks.

Imperative Apex Calls

Goal: Call Apex methods on-demand from LWCs.

Will implement in future: For actions like assigning tasks, updating records, or triggering automation.

Navigation Service

Goal: Programmatically navigate users to records or pages from LWCs.

Will implement in future: To enhance user experience with quick navigation between records and dashboards.