



Phase 6: User Interface Development

🎯 Objective

Design and build the user interface that sales executives, managers, and support agents will use daily. The goal is to provide easy access to critical data and tools inside a custom Salesforce Lightning App.

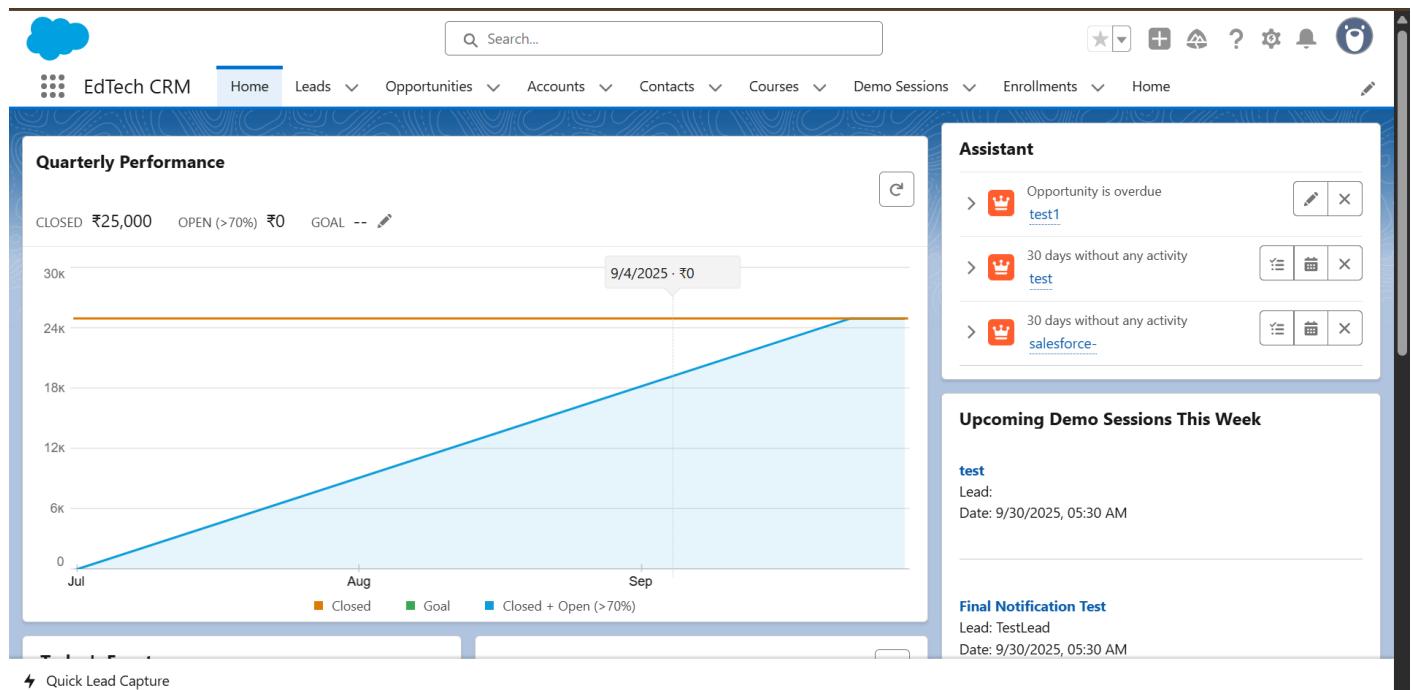
1. Creation of Lightning App: EdTech CRM

- **Problem:** Users had to switch between different objects and apps, which was inefficient.
- **Solution:** Built a **custom Lightning App** to centralize all objects and tools.

Configuration:

- **App Name:** *EdTech CRM*
- **Tabs Added:** Leads, Opportunities, Accounts, Contacts, Courses, Demo Sessions, Enrollments
- **Profiles with Access:** Sales Executive, Manager, Support, System Administrator

Outcome: A single unified app where users can manage the entire student journey (Lead → Demo → Enrollment).



2. Custom Component: Upcoming Demo Sessions

- **Problem:** Sales reps lacked visibility of upcoming demo sessions.
- **Solution:** Developed a **custom Aura Component** (`upcomingDemos`) with Apex Controller (`DemoSessionController`).

Features:

- Fetches demo sessions scheduled within the next 7 days.
- Displays session details: Name, Related Lead, Date & Time.
- Added to the **Home Page** of EdTech CRM.

Outcome: Sales team can

The screenshot shows the Lightning App Builder interface with a custom home page layout. The left sidebar lists various components like Accordion, App Launcher, Assistant, etc. The main area displays a dashboard with sections for Quarterly Performance (a chart showing revenue over time), Today's Events, Today's Tasks, Recent Records, and Key Deals - Recent Opportunities. On the right, there is a configuration panel for the 'Home Page Default' page, showing fields for Label (Home Page Default), API Name (Home_Page_Default), Page Type (Home Page), Template (Standard Home Page), and Description.

view upcoming demo sessions immediately on login, improving preparation and follow-ups.

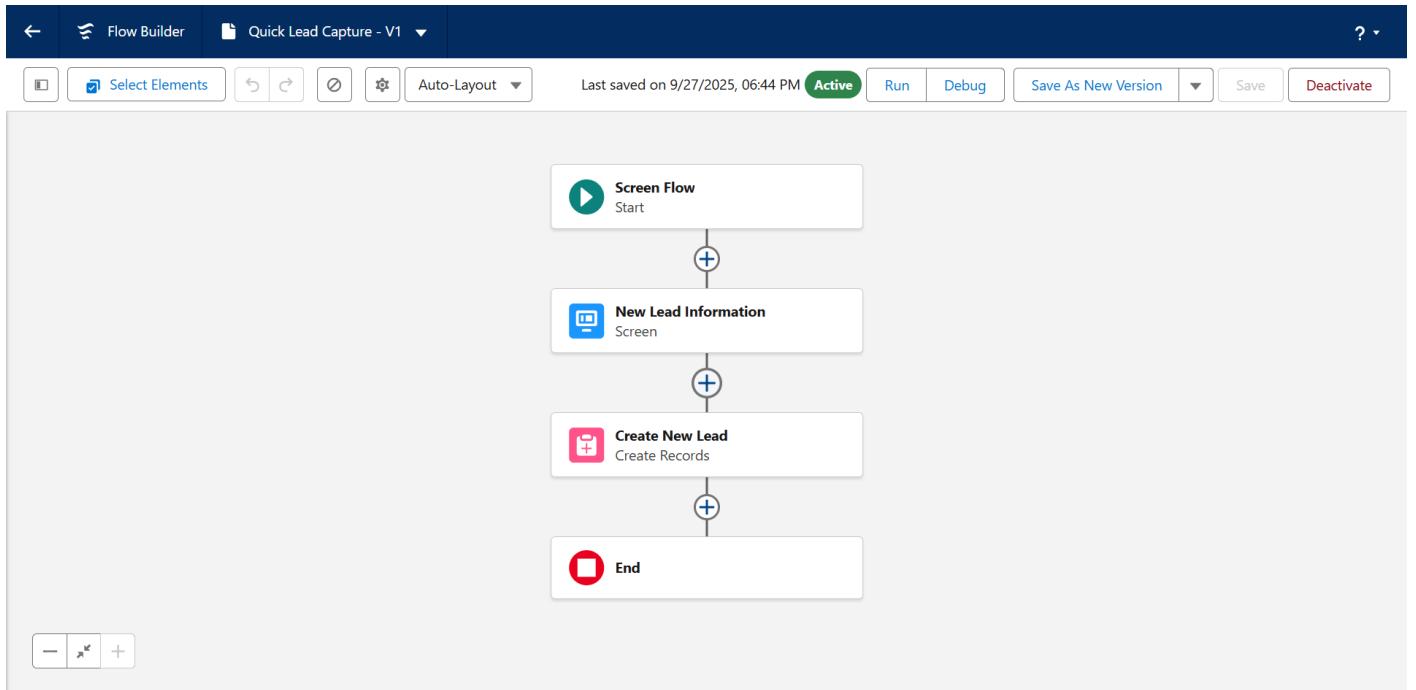
3. Quick Lead Capture (Utility Bar Tool)

- **Problem:** Adding new leads was time-consuming through the full Lead creation form.
- **Solution:** Built a **Screen Flow** for quick lead entry and added it to the Utility Bar.

Configuration:

- **Flow Name:** *Quick Lead Capture*
- **Inputs Collected:** First Name, Last Name, Company, Email
- **Action:** Automatically creates a new Lead record in Salesforce
- **Placement:** Utility Bar of the EdTech CRM app

Outcome: Sales reps can create leads instantly without leaving their current screen, boosting productivity.



Phase 6 Outcome

- A dedicated **EdTech CRM app** consolidates all sales and student management tools.
- A **custom demo session component** provides real-time visibility for reps and managers.
- The **Quick Lead Capture flow** makes lead entry faster and more efficient.
- Users now have a professional, intuitive interface that improves daily workflow.