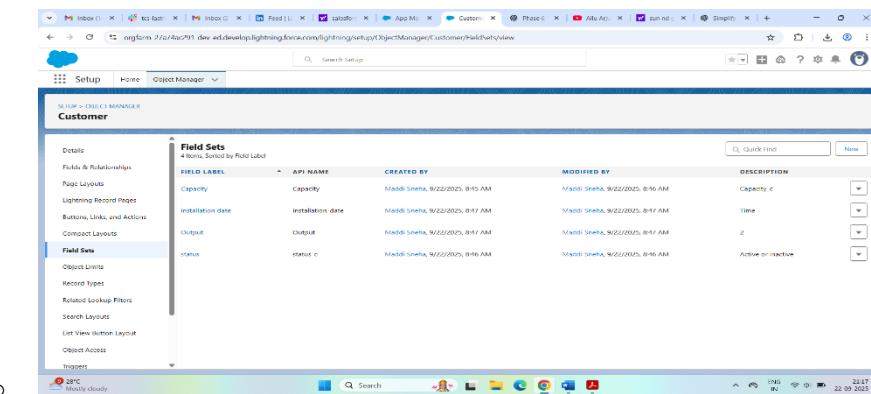


Phase 6: User Interface Development (Elaborate Version)

👉 **Goal:** Make the system easy for Solar Agents, Managers, and Customers to use by designing clear pages, dashboards, and components.

◆ Step 1: Create the Solar Energy CRM App

1. Go to **Setup** → **App Manager** → **New Lightning App**.
2. Enter:
 - o App Name: Solar Energy CRM
 - o Description: Manage Solar Projects, Panels, Customers, and Maintenance.



3. Choose **Standard Navigation (Lightning Experience)**.
4. Add utility bar if needed (quick shortcuts).
5. Select **Navigation Items** → add:
 - o Solar Projects
 - o Solar Panels
 - o Maintenance
 - o Customers
 - o Reports
 - o Dashboards
6. Save → App appears in **App Launcher**.

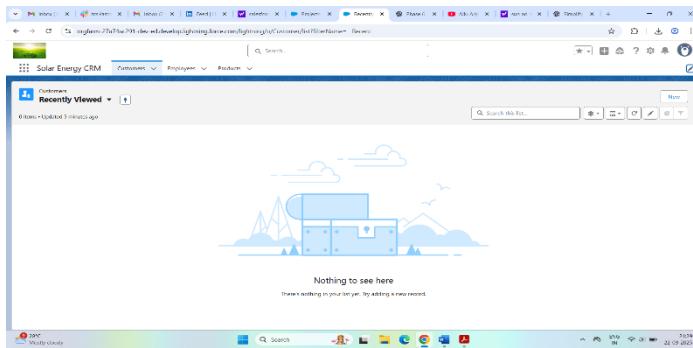
28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visible
15 Platform	Platform	The fundamental Lightning Platform	7/17/2025, 6:14 AM	Classic	✓
16 Queue Management	QueueManagement	Create and manage queues for your business.	7/17/2025, 6:14 AM	Lightning	✓
17 Sales	Sales	The world's most popular sales force automation (SFA) solution	7/17/2025, 6:14 AM	Classic	✓
18 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	7/17/2025, 6:14 AM	Lightning	✓
19 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	7/17/2025, 6:14 AM	Lightning	✓
20 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one...	7/17/2025, 6:14 AM	Lightning	✓
21 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	7/17/2025, 6:14 AM	Classic	✓
22 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	7/17/2025, 6:14 AM	Lightning	✓
23 Service	Service	Manage customer service with accounts, contacts, cases, and more	7/17/2025, 6:14 AM	Classic	✓
24 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records a...	7/17/2025, 6:14 AM	Lightning	✓
25 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com...	7/17/2025, 6:14 AM	Classic	✓
26 Solar Energy CRM	Solar_Energy_CRM		9/22/2025, 8:50 AM	Lightning	✓
27 Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	7/17/2025, 6:14 AM	Lightning	✓
28 TCS_LM_SF	Sneha	This is used to handle TCS Session.	7/30/2025, 6:05 AM	Lightning	✓

API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
capacity	Maddi Sneha, 9/22/2025, 8:45 AM	Maddi Sneha, 9/22/2025, 8:46 AM	Capacity_c
installation_date	Maddi Sneha, 9/22/2025, 8:47 AM	Maddi Sneha, 9/22/2025, 8:47 AM	Time
output	Maddi Sneha, 9/22/2025, 8:47 AM	Maddi Sneha, 9/22/2025, 8:47 AM	2
status	Maddi Sneha, 9/22/2025, 8:46 AM	Maddi Sneha, 9/22/2025, 8:46 AM	Active or Inactive

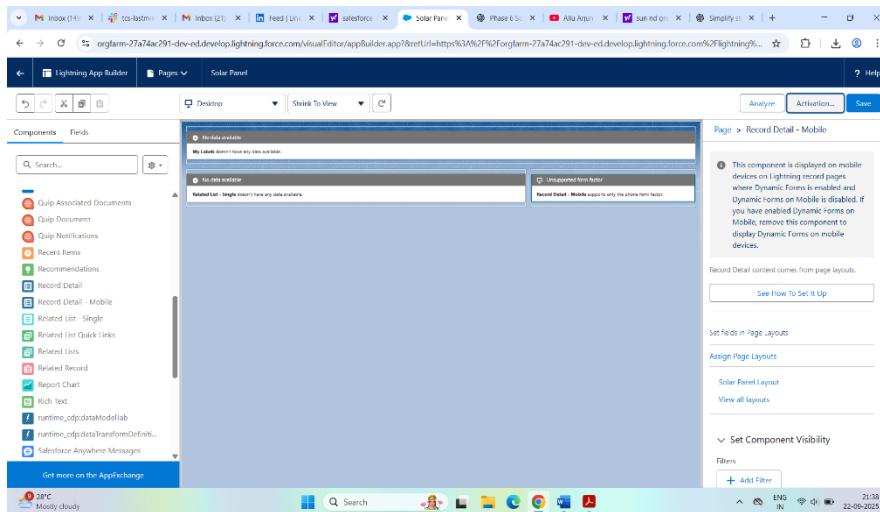
◆ Step 2: Add Tabs for Quick Navigation

- Ensure each custom object has a **Tab**.
- Setup → **Tabs** → **New Tab** → pick object → assign to Solar CRM app.
- Result: Agents and Managers can easily switch between Projects, Panels, Customers, and Maintenance.



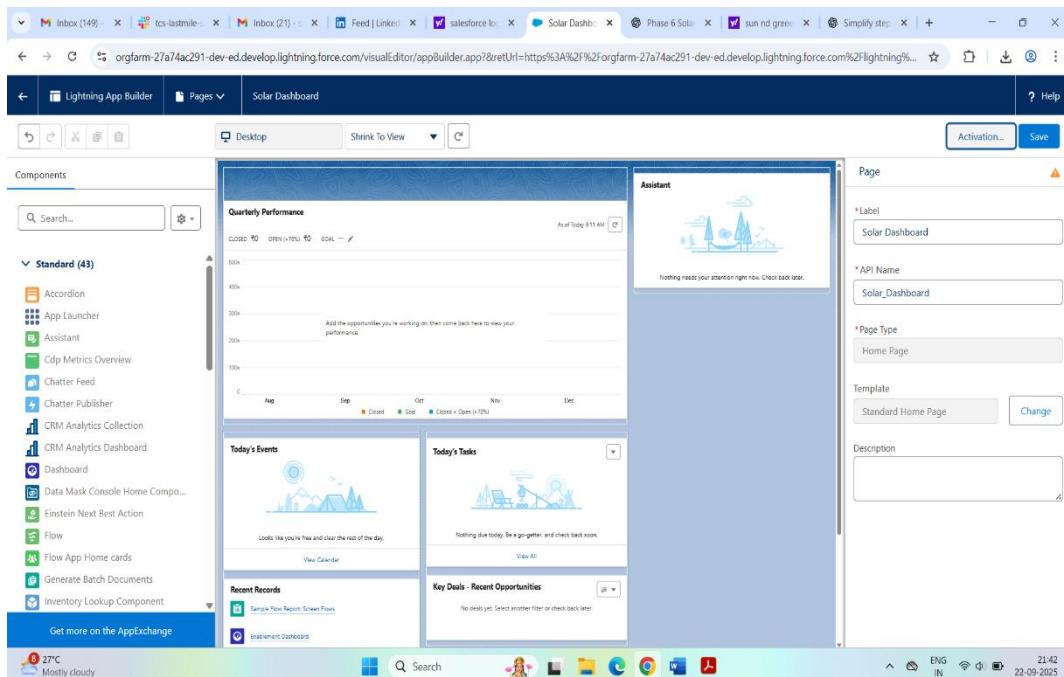
◆ Step 3: Design Record Pages (Lightning App Builder)

1. Go to **Setup** → **Lightning App Builder** → **New** → **Record Page**.
2. Example 1: **Solar Project Record Page**
 - o Components:
 - **Highlights Panel** → Project Name, Customer, Status, Capacity (kW).
 - **Related Lists** → Solar Panels, Maintenance Visits, Invoices.
 - **Report Chart** → Total Energy Output for this project.
 - o Save → Activate → Assign to **Solar CRM App Default**.
3. Example 2: **Solar Panel Record Page**
 - o Components:
 - **Record Detail** → Show Status, Capacity, Output, Installation Date.
 - **Related Lists** → Maintenance Logs.
 - **Custom LWC** → Energy Output (daily/weekly).
 - o Save → Activate.



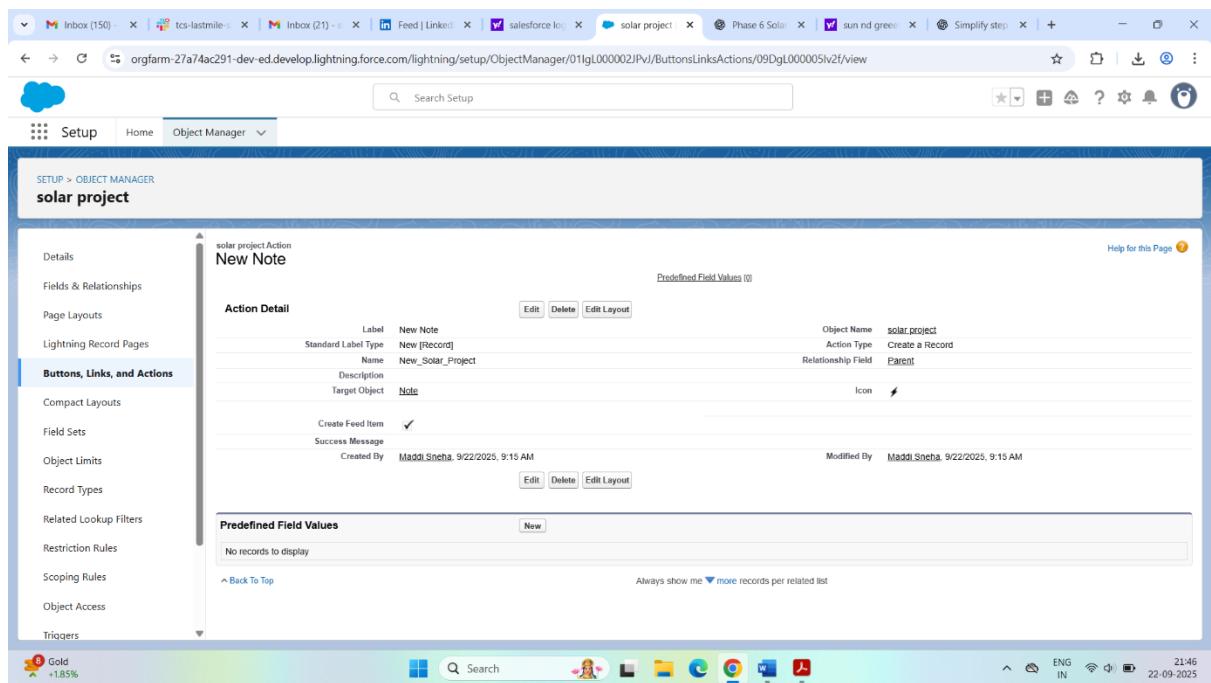
◆ Step 4: Build the Home Page Dashboard

1. Setup → Lightning App Builder → New → App Page → Home Page.
2. Add:
 - **Dashboard component** → Solar Dashboard (Active Projects, Total Capacity, Faulty Panels).
 - **List View component** → “Panels Needing Maintenance”.
 - **Rich Text** → Welcome message for users.
3. Save → Assign to Solar CRM App.



Step 5: Add Quick Actions (for fast data entry)

1. Setup → Object Manager → Solar Project → Buttons, Links, and Actions → New Action.
 - Action Type = Create a Record
 - Label = New Solar Project
 - Add fields: Project Name, Customer, Start Date, Capacity (kW).
 - Save.
2. Edit the Page Layout → Add the action to the Salesforce Mobile & Lightning Actions section.
3. Repeat for Maintenance Log: create a quick action “Log Maintenance”.



◆ Step 6: Create List Views for Panels & Projects

- Open Solar Panels Tab → List View → New.
- Create:
 - Active Panels → Filter: Status = Active.
 - Faulty Panels → Filter: Status = Faulty.
 - Needs Maintenance → Filter: Last Maintenance Date > 30 days ago.