

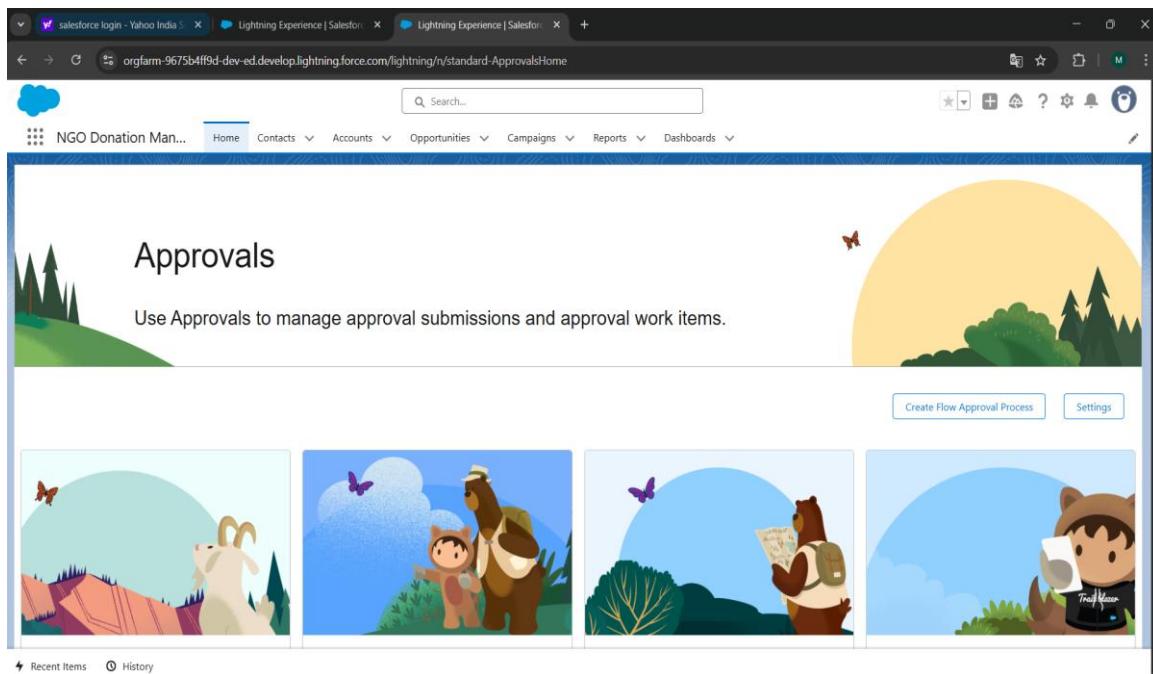
Phase 6 — User Interface Development (Lightning App & LWC)

Objective: Build a user-friendly interface for NGO Staff and donors to view and manage campaigns, donors, and donation.

A. Lightning App Creation

Steps (Click by Click):

1. Go to **Setup** → **App Manager**.
2. Click **New Lightning App** → **Next**.
3. Enter **App Name**: NGO Donation Management → Click **Next**.
4. Upload **App Logo** (optional) → Click **Next**.
5. Select **Navigation Style**: Standard → Click **Next**.
6. Add **User Profiles**: Admin, Fundraising staff, Volunteer → Click **Next**.
7. Choose **Utility Items** (optional: Notes, Recent Items, etc.) → Click **Next**.
8. Click **Save & Finish**.



A new Lightning App is now ready in Salesforce.

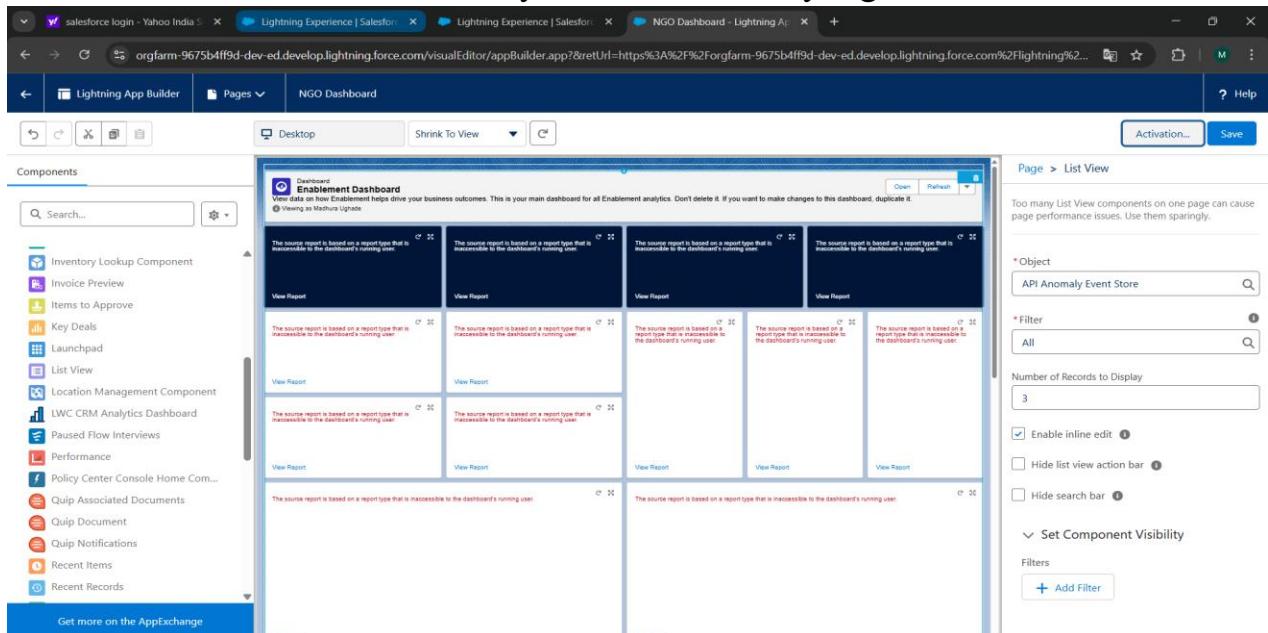
B. Home Page Setup

Objective: Display key metrics like total donations, active campaigns, and top donors.

Steps (Click by Click):

1. Go to **Setup → Lightning App Builder**.
2. Click **New → Home Page**.
3. Select **Standard Home Page Template** → Click **Next**.
4. Enter **Page Name: NGO Dashboard** → Click **Next**.
5. Drag **Components** from the left panel onto the canvas:
 - o **Report Chart**
 - o **Recent Records**
 - o **List View**
6. Click **Activation** → Set as **Org Default Home Page** for relevant profiles → Save & Activate.

Now users see an overview of key metrics when they log in.

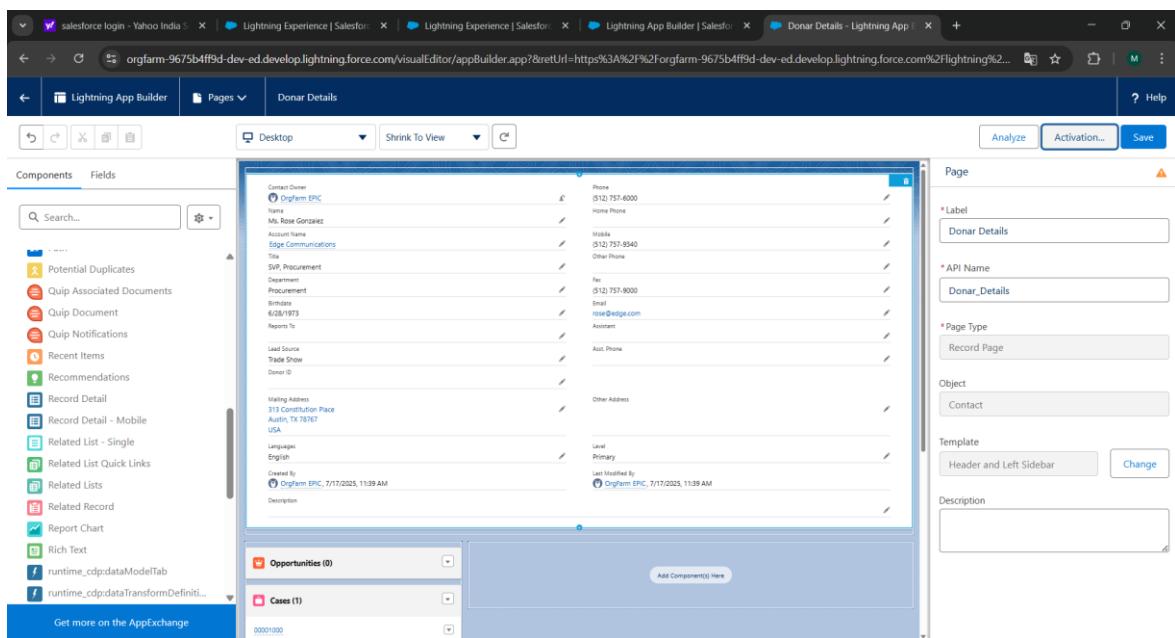


C. Record Pages Customization

Objective: Improves donor and campaign record pages for better clarity and usability.

Steps (Click by Click):

1. **Setup → Object Manager → Donor → Lightning Record Pages → Click New.**
2. Select **Record Page Template** → Enter Name: Donor Details Page.
3. Drag sections:
 - **Highlights Panel**
 - **Related Lists**
 - **Tabs**
4. Click **Save → Activate → Assign to All Profiles or selected ones.**



Donation and Campaign pages now show all relevant information in one place.

D. Tabs Configuration

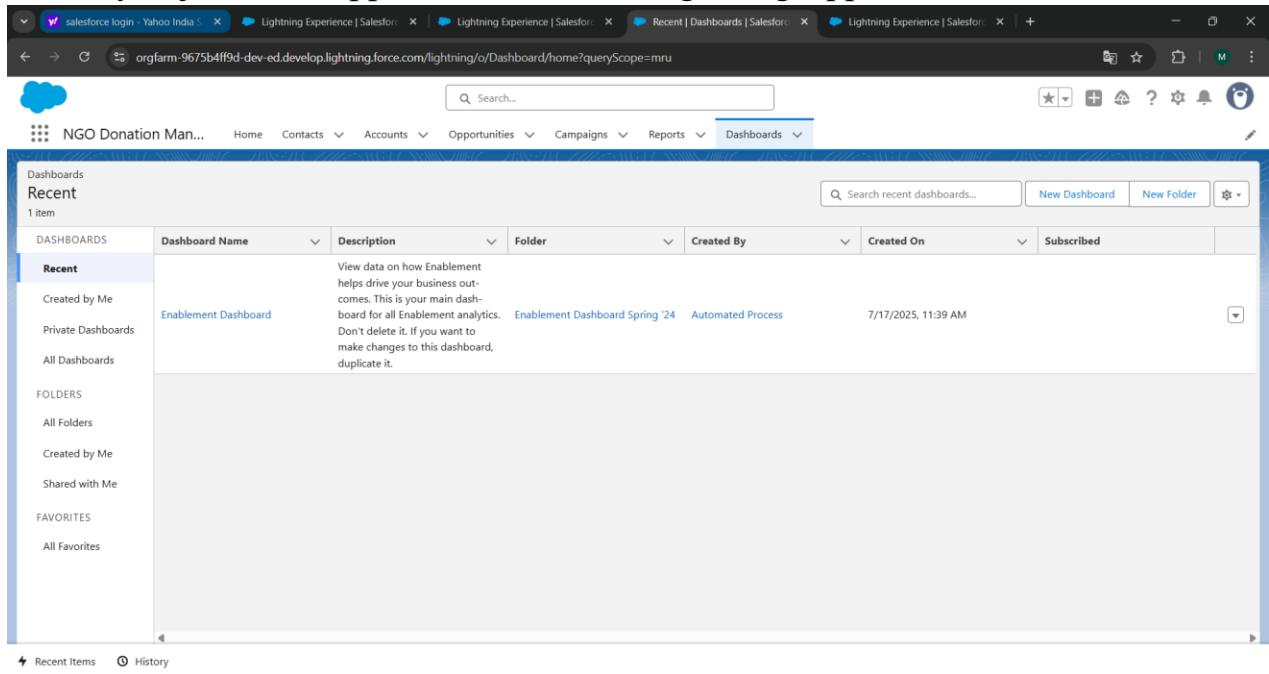
Objective: Quick access to all important objects.

Steps (Click by Click):

1. **Setup → App Manager → NGO Donation Management → Edit.**
2. Click **Navigation Items** → Add objects:
 - donor
 - report

3. Click Save.

All key objects now appear as tabs in the Lightning App.



The screenshot shows the Salesforce Lightning App interface. At the top, there are several tabs: Home, Contacts, Accounts, Opportunities, Campaigns, Reports, and Dashboards. The 'Dashboards' tab is currently selected. Below the tabs, there is a search bar and a toolbar with various icons. The main content area is titled 'Dashboards' and 'Recent'. It displays a table with one item: 'Enablement Dashboard'. The table columns are: DASHBOARDS, Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The 'Description' column contains a detailed description of the dashboard. The 'Created On' column shows the date and time it was created. The 'Subscribed' column has a checkbox which is unchecked. On the left side, there is a sidebar with sections for Recent, Folders, and Favorites, each with a list of items. At the bottom, there are links for 'Recent Items' and 'History'.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Enablement Dashboard Spring '24 Automated Process		7/17/2025, 11:39 AM		<input type="checkbox"/>

E. Summary of Phase 6

- **Lightning App:** Centralized interface for NGO Staff.
- **Home Page:** Key metrics at a glance.
- **Record Pages:** Easy-to-read donor & campaign details.
- **Tabs:** Quick navigation to all objects.
- **LWC Components:** Interactive dashboards and widgets.