

Phase 6: User Interface Development

Project:GoldenEra Enterprises CRM

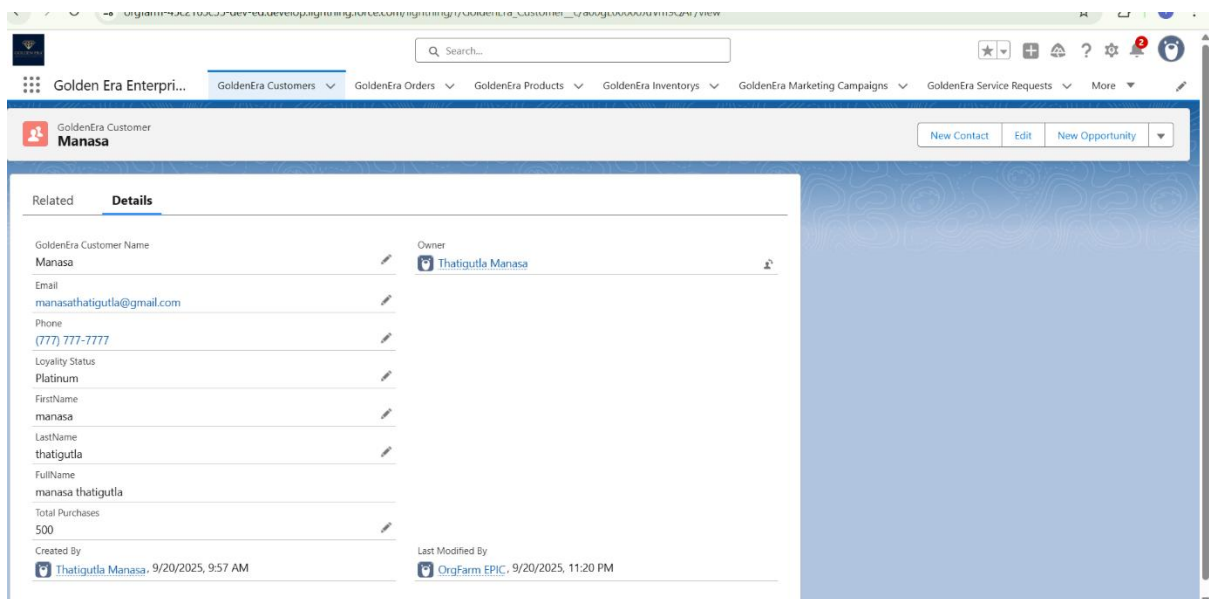
This phase focuses on creating a user-friendly interface that allows GoldenEra employees, managers, and customers to easily interact with Salesforce.

1. Lightning App Builder

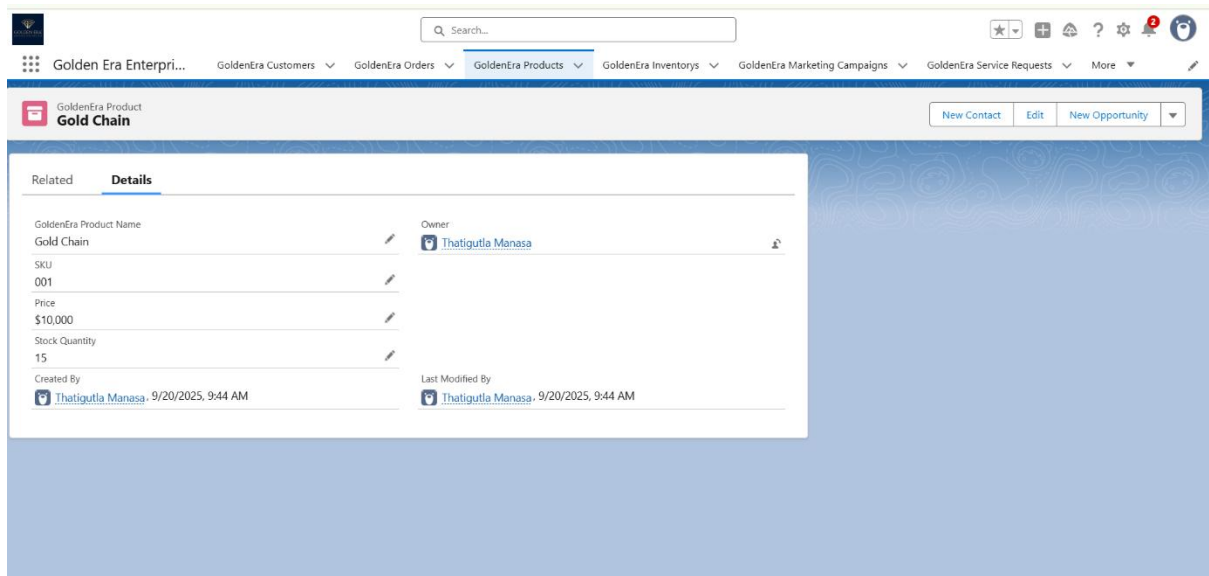
- A drag-and-drop tool used to build custom applications without writing code.
- Admins can design apps by combining standard and custom components.
- **GoldenEra Enterprises Example:** Build a “GoldenEra Enterprises CRM” that combines customers, orders, inventory, and loyalty programs into one central app for staff.

2. Record Pages

- Custom layouts for specific object records (Customer, Order, Inventory, Product).
- You can decide what fields, related lists, and components appear.
- **GoldenEra Example:**
 - **Customer Record Page:** Show customer details, loyalty points, past purchases.

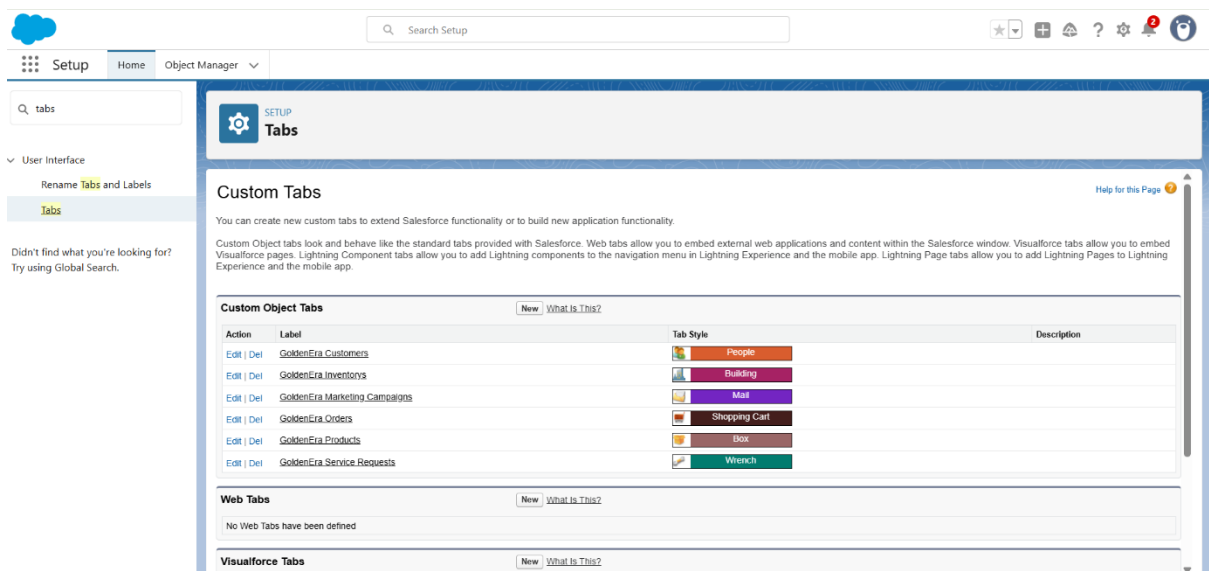


- **Product Record Page:** Show product details, stock quantity, and pricing.



3. Tabs

- Tabs allow easy navigation across different objects in Salesforce.
- **GoldenEra Example:** Create separate tabs for Customers, Orders, Products, Inventory, and Loyalty Programs so store staff can quickly switch between them.



GoldenEra Customers:

This tab allows staff to view, create, and manage customer records, including details such as name, email, phone number, and loyalty status.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'SETUP Tabs' and 'Custom Object Tab GoldenEra Customers'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information:

Custom Tab Definition Detail		Tab Style
Tab Label	GoldenEra Customers	People
Object	GoldenEra Customer	Splash Page Custom Link
Description		
Created By	Thaigulita Manasa, 9/17/2025, 1:50 AM	Modified By
		Thaigulita Manasa, 9/17/2025, 1:50 AM

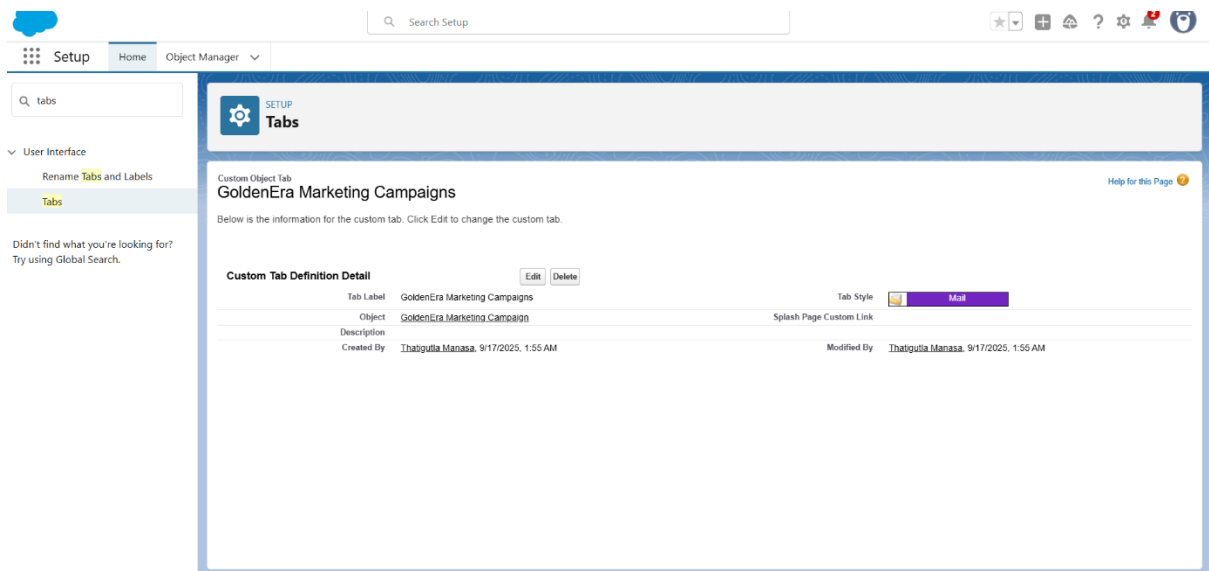
GoldenEra Inventories:

Staff can use this tab to check and manage the stock levels of jewelry products, helping to prevent stock shortages and ensuring smooth operations.

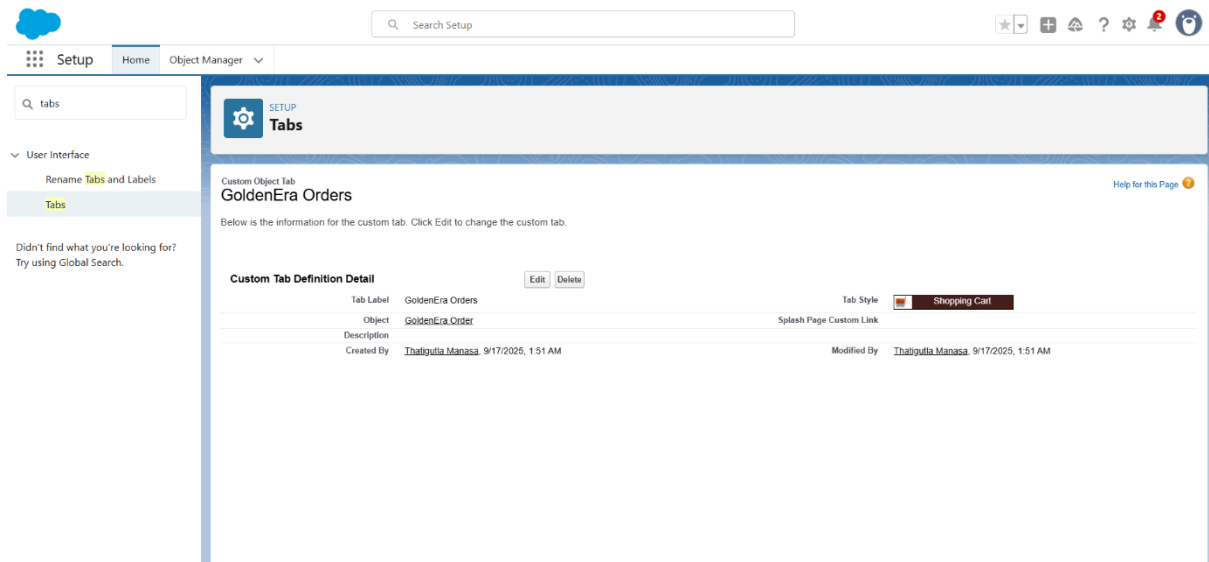
The screenshot shows the Salesforce Setup interface for the 'GoldenEra Inventories' custom tab. The left sidebar is the same as the previous screenshot. The main content area is titled 'SETUP Tabs' and 'Custom Object Tab GoldenEra Inventories'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information:

Custom Tab Definition Detail		Tab Style
Tab Label	GoldenEra Inventories	Building
Object	GoldenEra Inventory	Splash Page Custom Link
Description		
Created By	Thaigulita Manasa, 9/17/2025, 1:54 AM	Modified By
		Thaigulita Manasa, 9/17/2025, 1:54 AM

GoldenEra Marketing Campaigns: This tab is used by the marketing team to manage promotional campaigns, track their progress, and send loyalty program emails to customers.

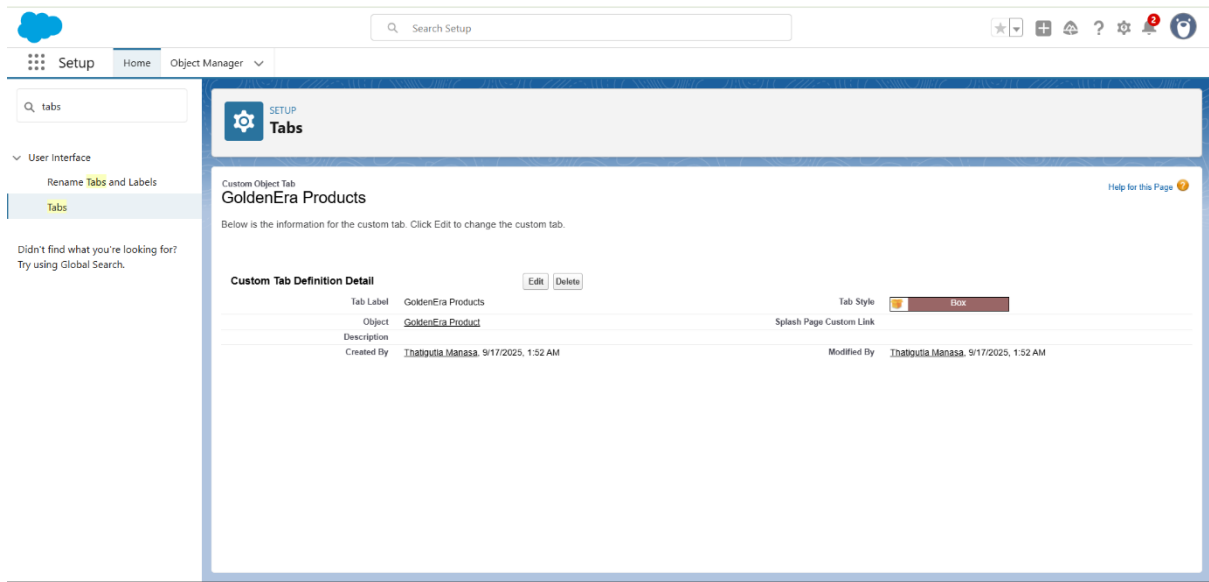


GodenEra Orders: Through this tab, sales staff can track all customer orders, including Pending, Confirmed, and Rejected statuses. It also allows easy creation and management of new orders.



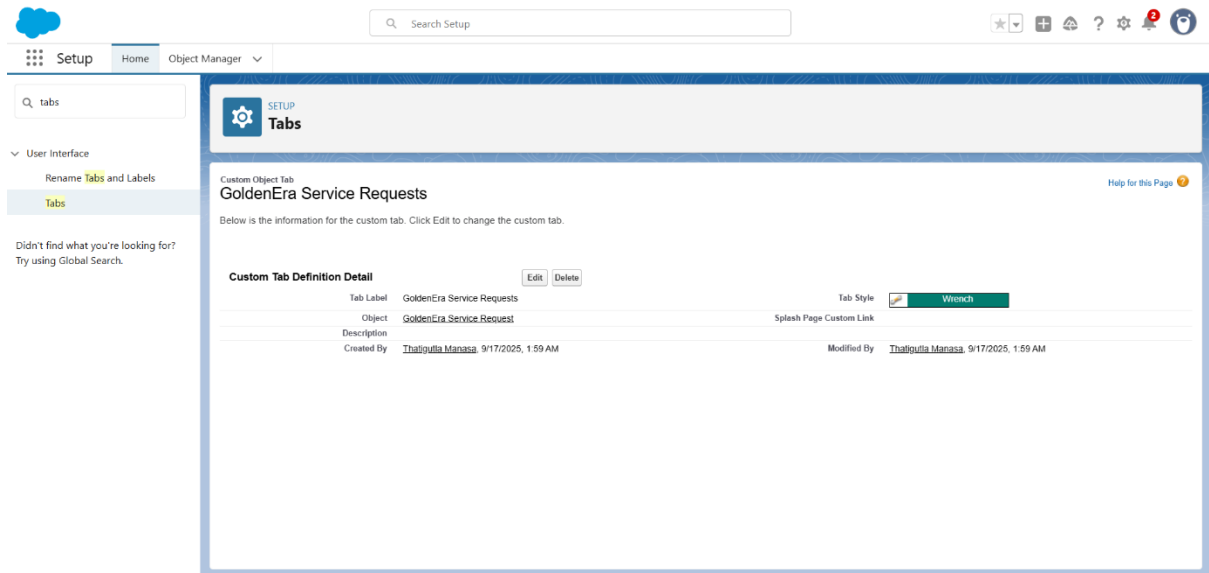
GoldenEra Products:

This tab contains the complete product catalog, allowing staff to view jewelry items, their prices, and stock information.



GoldenEra Service Requests:

This tab is designed for logging and tracking jewelry repair requests, ensuring after-sales services are handled efficiently and customers are updated on the progress.



4. Home Page Layouts

- The home page can be customized for different profiles (e.g., Sales Rep, Manager).
- Provides dashboards, tasks, and quick actions.
- **GodenEra Example:**
 - **For Sales Reps:** Show today's appointments, new leads, and pending orders.
 - **For Managers:** Display KPIs like daily revenue, low stock alerts, and customer complaints.



GoldenEra Customers

Recently Viewed



New

Import

Change Owner

Assign Label

2 items • Updated a few seconds ago

Search this list...



	<input type="checkbox"/>	GoldenEra Customer Name	
1	<input type="checkbox"/>	Manasa	
2	<input type="checkbox"/>	Varshitha	