Phase 6: User Interface Development

Objective:

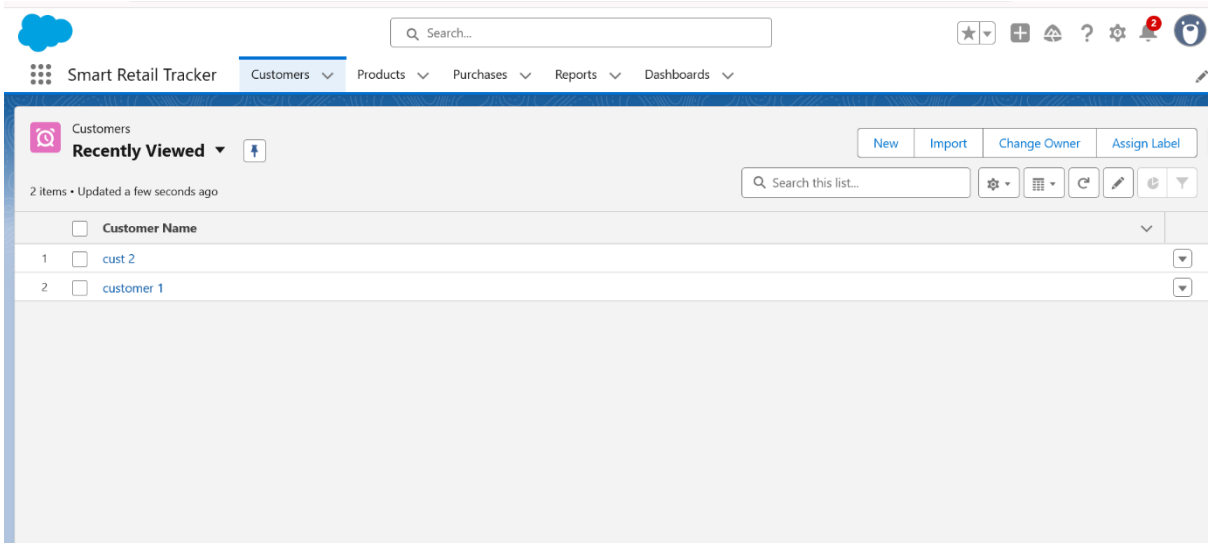
The objective of Phase 6 is to develop a user-friendly interface that enables users to efficiently manage purchase records, while seamlessly supporting the automation of Loyalty Points and Tier updates.

1. Creation of Custom App – Smart Retail Tracker

Purpose:
To centralize all project components in a single, accessible workspace, improving navigation and usability for users managing Customers and Purchases.

Steps Taken:

1. Open Salesforce Setup → App Manager.
2. Click New Lightning App → Enter App Name: Smart Retail Tracker.
3. Configure branding, colour theme, and app logo to make it professional.
4. Select navigation items → Add Customer, Purchase, Reports, Dashboards tabs.
5. Assign profiles to control access for relevant users.
6. Save and publish the app.

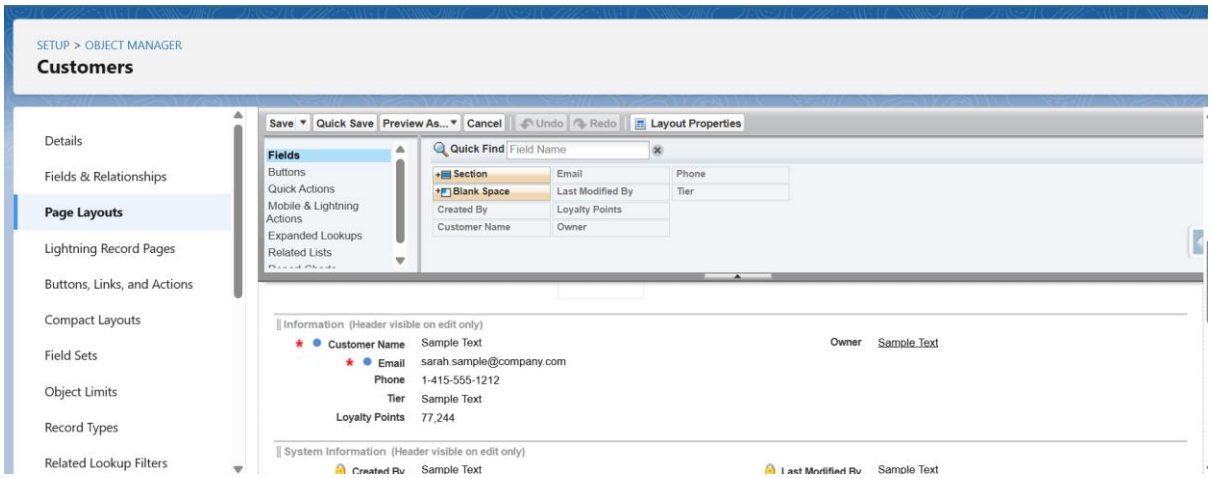


2.Customer Page Layout

Purpose:
To display all essential customer information clearly, making it easy to monitor loyalty points, tier, and other details.

Steps Taken:

1. Navigate to Setup → Object Manager → Customer → Page Layouts.
2. Click New Layout or edit existing layout.
3. Organize fields into sections for clarity:
    - Customer Details: Name, Email, Phone
    - Loyalty Info: Loyalty Points, Tier
4. Mark important fields as required if necessary.
5. Adjust field order for intuitive scanning.
6. Assign layout to relevant profiles.

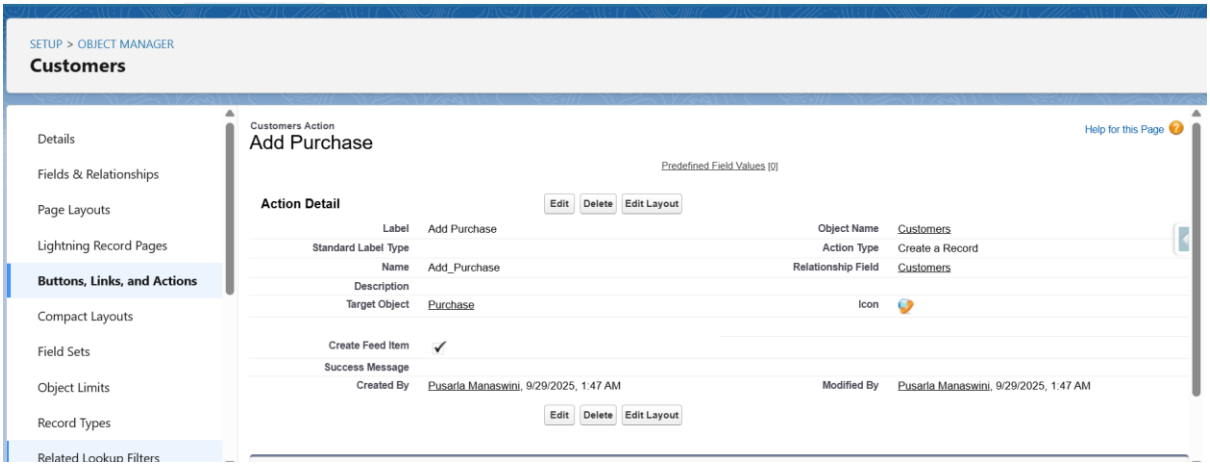


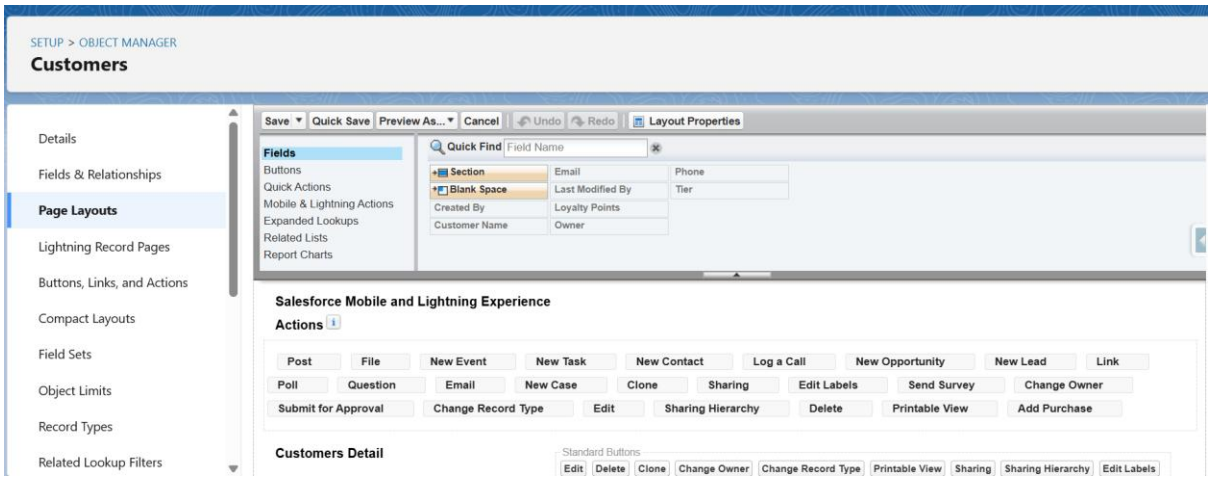
3. Custom Button: Add Purchase

Purpose:
To simplify the creation of new purchase records and support real-time automation.

Steps Taken:

1. Navigate to Setup → Object Manager → Purchase → Buttons, Links, and Actions.
2. Click New Button or Link → Detail Page Button.
3. Enter Label: “Add Purchase” → Select Behavior: Display in new window.
4. Configure the button to open a new purchase record form, optionally pre-filling some fields.
5. Add the button to the Purchase page layout → Custom Buttons section.
6. Save and verify functionality.





4. Verification and Integration with Flows

Steps Taken:

1. Open Flow Builder → Loyalty Points & Tier Automation Flow.
2. Create a test Purchase record using the Add Purchase button.
3. Verify that Loyalty Points and Tier are updated correctly on the associated Customer record.
4. Ensure that multiple purchase records can be created without errors.

Summary Outcome

- The Smart Retail Tracker app centralizes project components for easy access.
- The Purchase page layout ensures critical information is visible and editable.
- The Add Purchase button reduces manual steps and supports automated processes.