

Phase 7: External Access / UI Enhancement

Objective

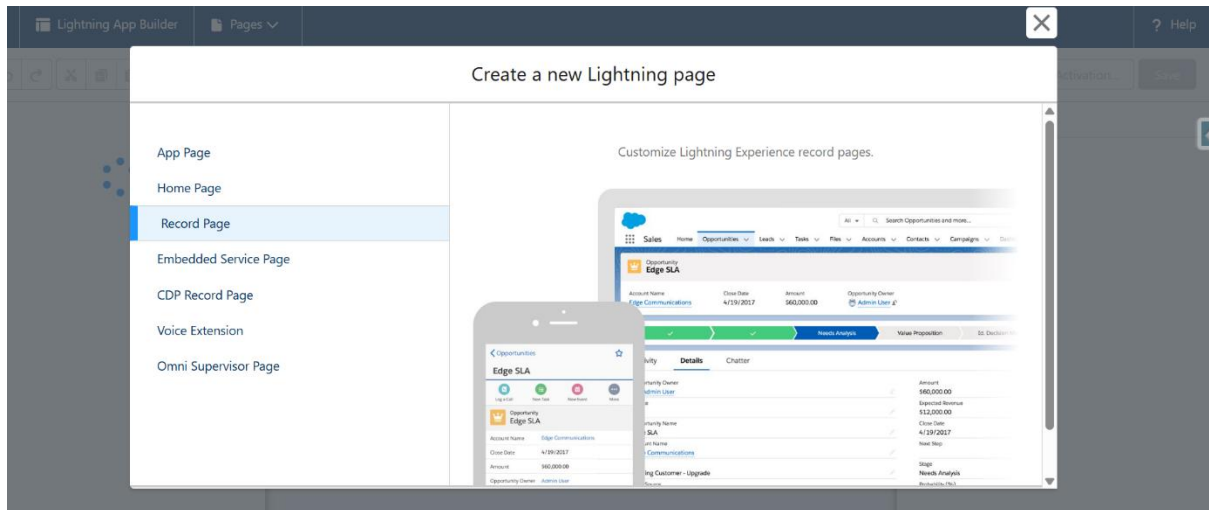
To provide a centralized and interactive interface for the *Customer* object, allowing users to view key customer details, related purchases, and loyalty information in one place.

This demonstrates record-level access, UI enhancements, and the integration of automation.

Steps to Create Lightning Record Page

Navigate to Setup

- Go to Setup → Object Manager → Customer.
- Click Lightning Record Pages from the sidebar.



Create New Record Page

- Click New → Record Page.
- Enter name: *Customer Record Page*.
- Click Next.

Select Layout Template

- Choose a layout template (e.g., Header + Tabs or 2-Column).
- Click **Finish**.

Lightning App Builder Pages

Create a new Lightning page

* Label
Customer Rec Page

* Object
Customers

Create a new Lightning page

CHOOSE PAGE TEMPLATE CLONE SALESFORCE DEFAULT PAGE

STANDARD (18)

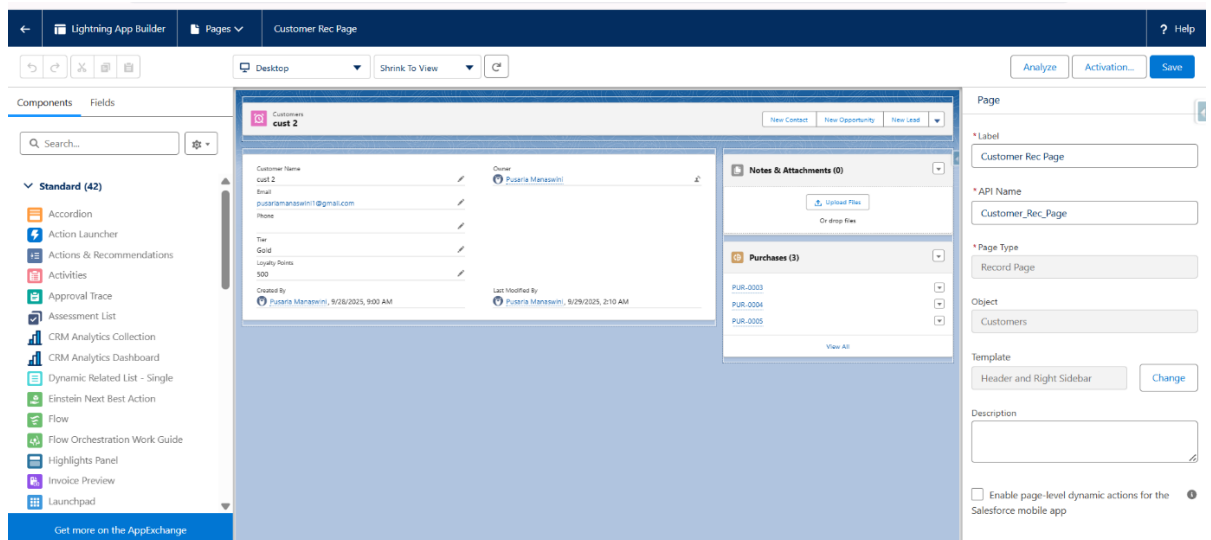
- Grouped Header and One Region
- Header and Left Sidebar
- Header and One Region
- Header and Right Sidebar**
- Header and Three Regions
- Header and Two Equal Regions
- Header, Subheader, Left Sidebar
- Header, Subheader, Right Sidebar

Full-width header above a main region and right sidebar. On a phone, the regions stack vertically.

Supported form factors: desktop, tablet, and phone.

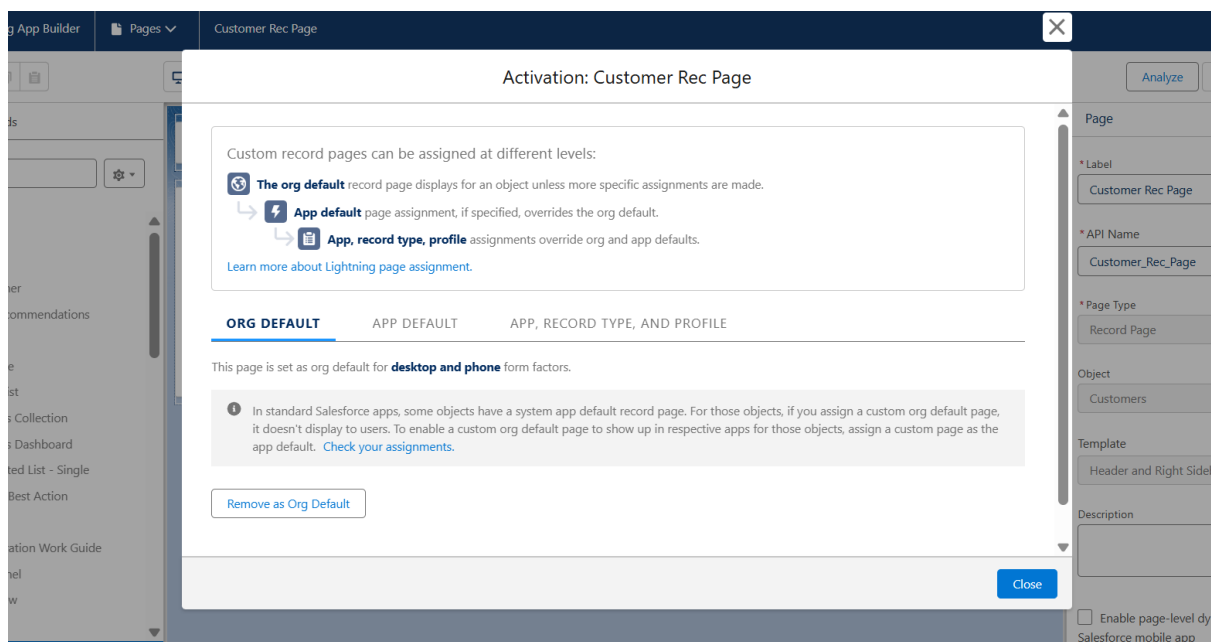
Add Components

- Record Detail: Displays key fields like Name, Email, Loyalty Points, Tier.
- Related Lists: Show connected Purchases for that customer.
- Highlights Panel: Quickly displays critical info like Loyalty Points and Tier.



Configure Access / Profiles

- Assign the page as Org Default or for specific profiles to control visibility.



Save & Activate

- Click Save → Activate.

Integration with Flows / Automation

- The Loyalty Points & Tier Flow can be viewed on this page.
- Buttons from Phase 6 are accessible for customer-specific actions.
- Ensures users can interact with customer data directly, with all automation visible.

Additional Considerations

Settings & Record Visibility

- Profiles and permissions control who can see or edit records.
- Demonstrates security best practices without complex external integrations.

Enhanced UX

Highlights Panel makes key info visible immediately.

Related Lists reduce clicks and improve navigation.

Page design is extensible for future enhancements like charts or dashboards.

Outcome

Users can quickly access customer details and purchase history in one interface.

Automation from Phase 4 is visible and functional.

Demonstrates professional UI design, record-level access, and integration with automation.

Provides a polished interface suitable for presentation and demo purposes.