PHASE - 6

USER INTERFACE DEVELOPMENT
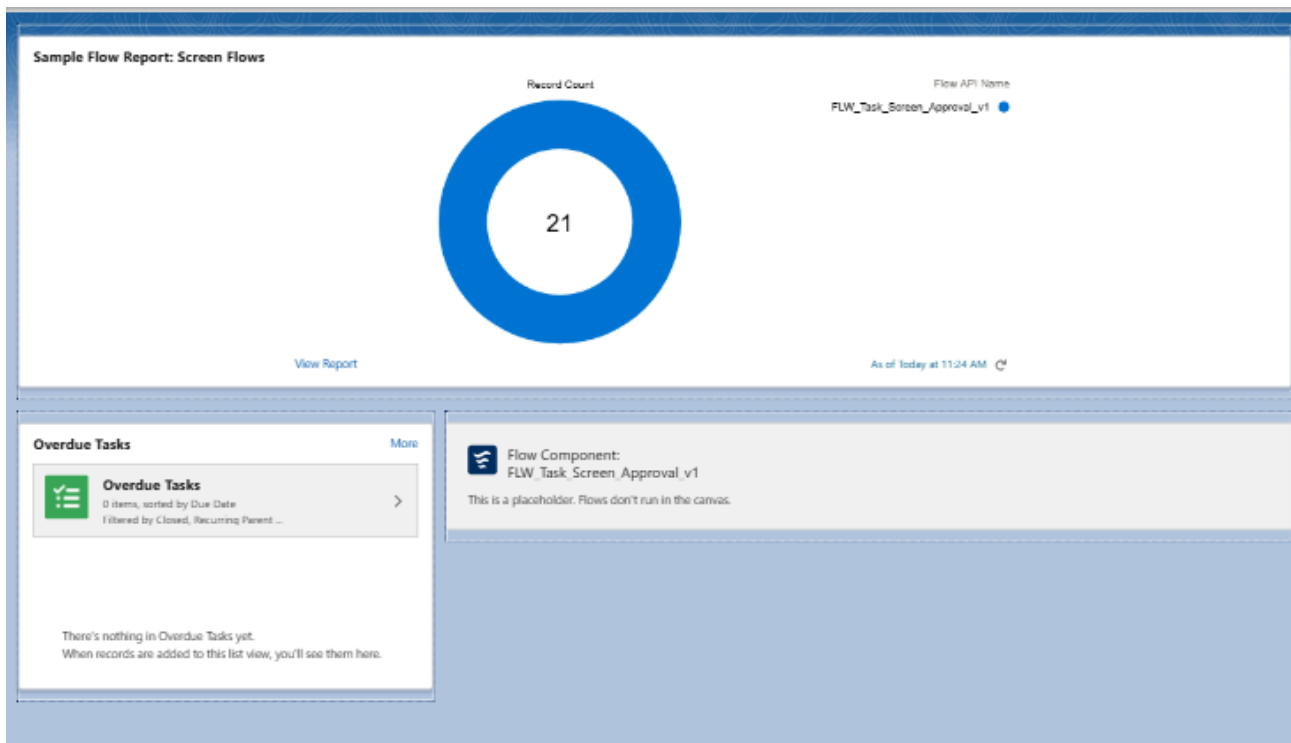
Introduction

Phase 6 of the project focused on enhancing the User Interface (UI) in Salesforce Lightning. The goal was to make the automated Task Manager features (reminders, escalations, approvals) easily accessible and user-friendly for end users such as managers, trainers, and staff.
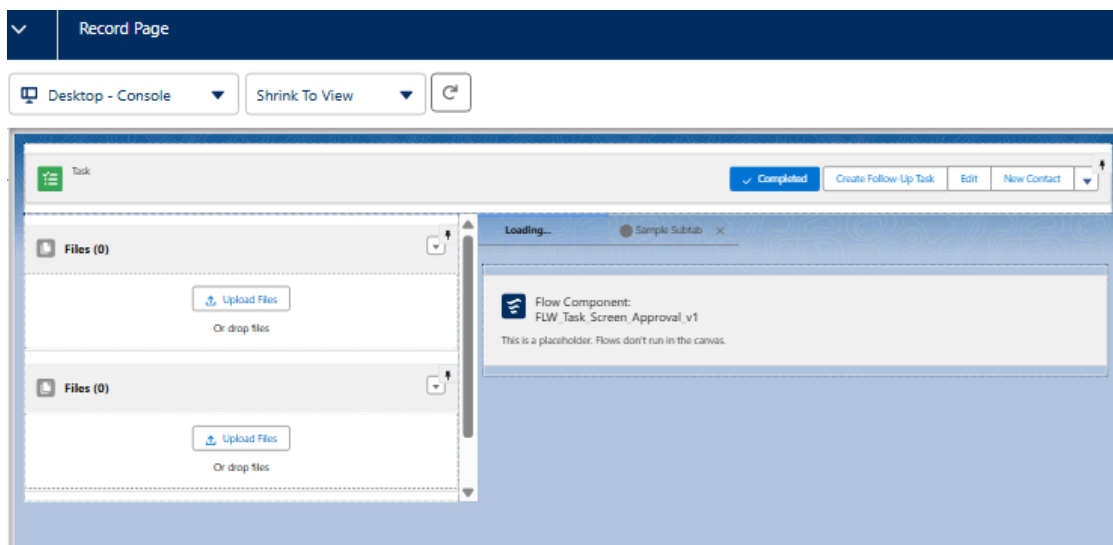
Features Implemented

1. Lightning App Builder

   ○ Built a custom Task Record Page.

   ○ Embedded the Approve/Reject Screen Flow (`FLW_Task_Screen_Approval_v1`) directly into the Task page.

   ○ Added related lists (Reminder Logs and Task Escalations) so users can see linked records in one place.

2. Record Pages

   ○ Customized the Task Record Page with:

      ■ Pinned header for task highlights.

      ■ Left sidebar with related lists.

      ■ Main region with approval flow.

   ○ This allows users to approve or reject tasks without leaving the record.
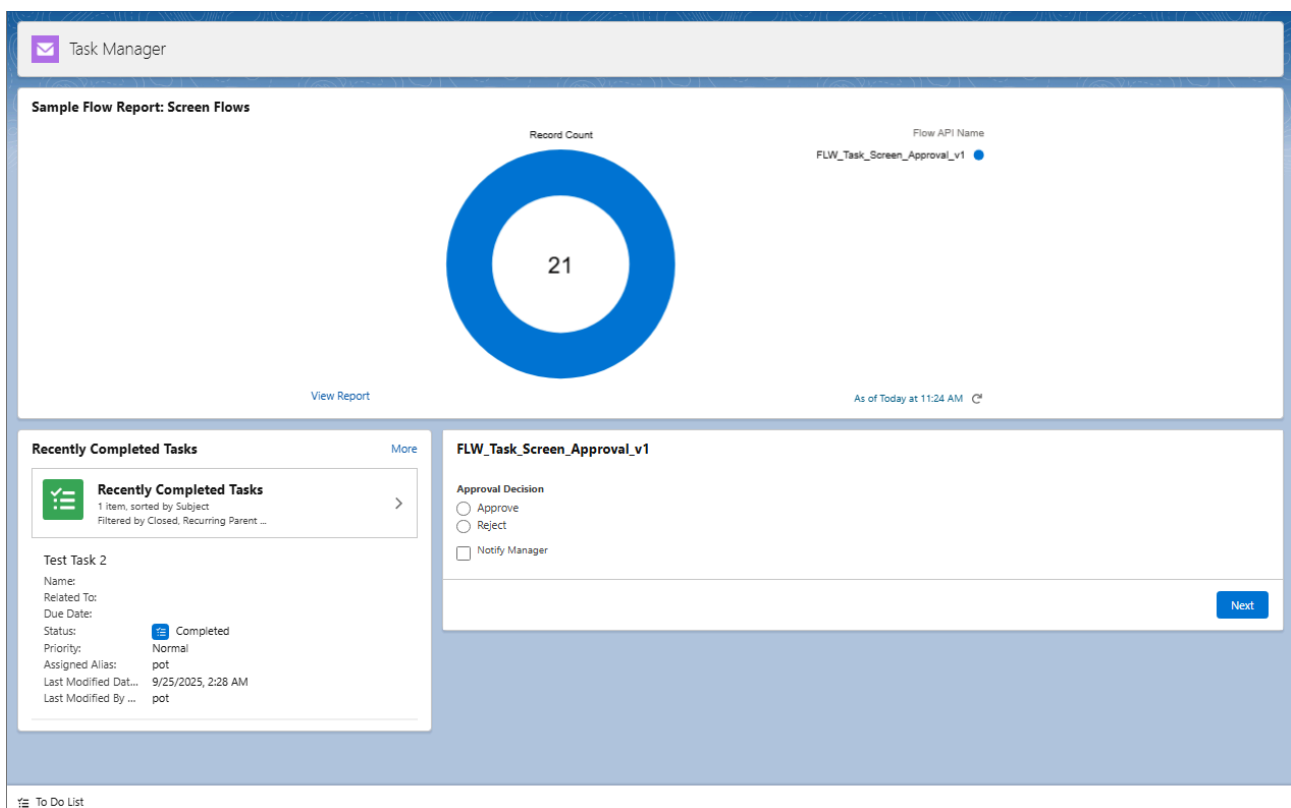

3. Tabs

   ○ Created custom navigation tabs for:

      ■ Reminder_Log__c (to track reminder history).

      ■ Task_Escalation__c (to track overdue task escalations).

   ○ Added tabs to the navigation bar of the Task Manager app → managers can directly access logs and escalations.
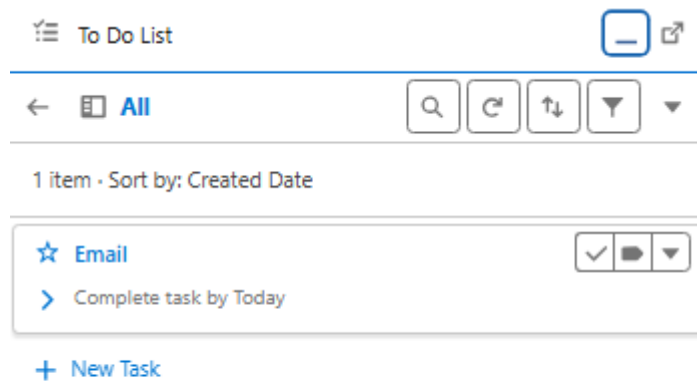
4. Home Page Layouts

   ○ Designed a custom Home Page ("Task Manager Home").

   ○ Components added:

      ■ List View → "My Overdue Tasks".

      ■ Flow Component → run approval flow quickly.

      ■ (Optional) Report Chart for task distribution.

   ○ Activated and assigned the page so all users see it when they log into the app.

5. Utility Bar

   ○ Added a Utility Bar to the app for quick access.

   ○ Example utility item: List View (My Tasks / Overdue Tasks) for fast navigation.

   ○ Appears at the bottom of the screen, improving usability.

Project Alignment

By completing Phase-6, the Task Manager app became demo-ready with a polished UI:

- Users can approve/reject tasks on record pages.

- Managers can track escalations and reminders directly from tabs.

- A dedicated Task Manager Home Tab shows overdue tasks at a glance.

- Utility Bar provides quick shortcuts for productivity.