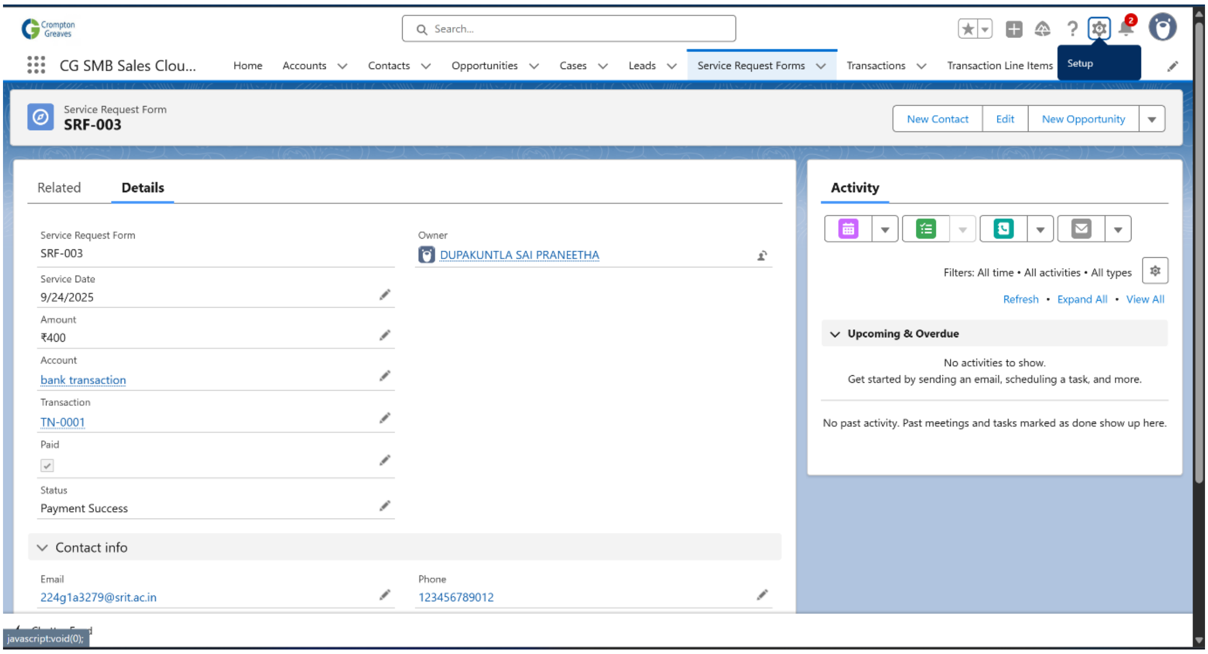
CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization

Phase 6: User Interface Development

1. Lightning App Builder

- Used **Lightning App Builder** to create custom pages and apps in Salesforce.
- Designed pages to provide a user-friendly interface for managing **Service Request Forms**, **Transactions**, and **Transaction Line Items**.
- Enabled drag-and-drop components to customize the layout without coding.



Service Request Form
SRF-003

Service Request Form: SRF-003

Owner: DUPAKUNTLA SAI PRANEETHA

Service Date: 9/24/2025

Amount: ₹400

Account: bank transaction

Transaction: TN-0001

Paid: ☑

Status: Payment Success

Contact info

Email: 224g1a3279@srit.ac.in

Phone: 123456789012

Filters: All time • All activities • All types

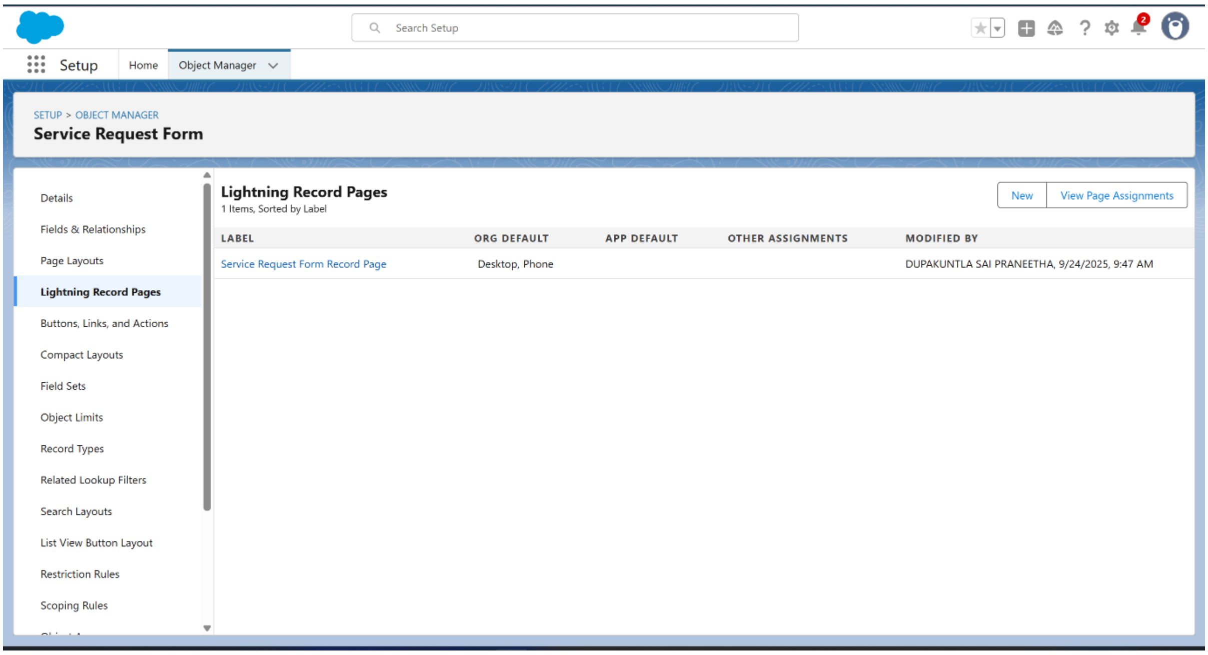
Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

2. Record Pages

- Created **custom record pages** for **Service Request Form** and **Transaction** objects.
- Configured page layouts to display important fields, related lists, and actions.
- Ensures users can view and manage records efficiently.



Service Request Form

Lightning Record Pages

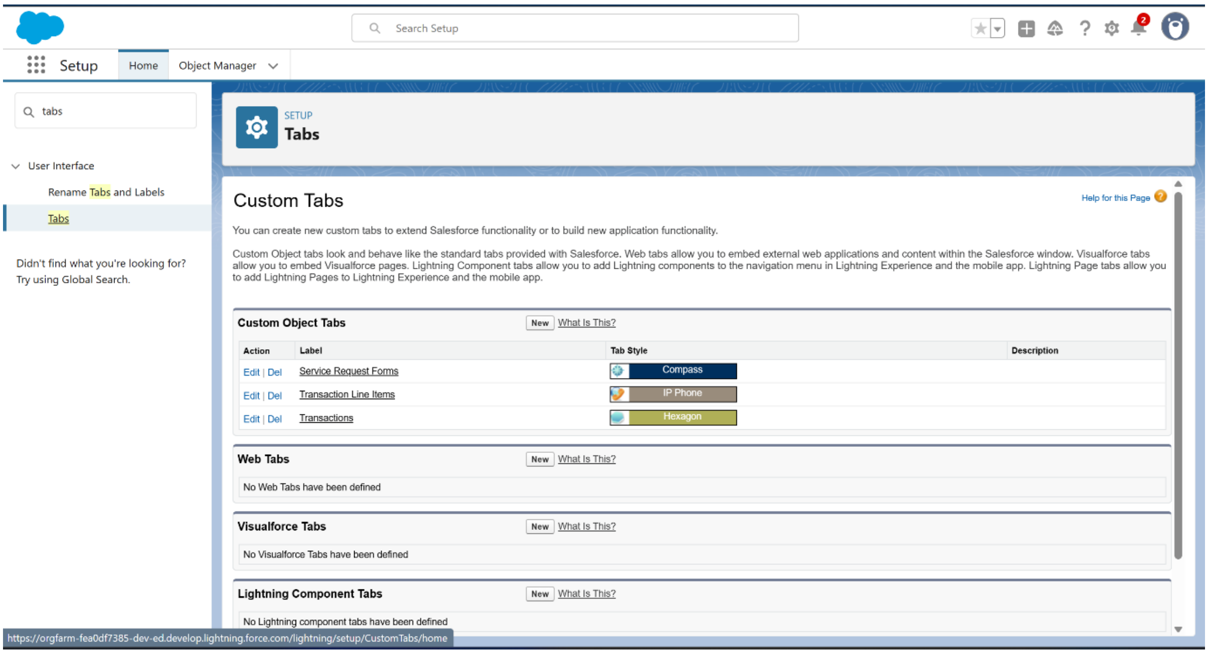
1 Items, Sorted by Label

LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNMENTS	MODIFIED BY
Service Request Form Record Page	Desktop, Phone			DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 9:47 AM

---

3. Tabs

- Created custom **tabs** for **Service Request Form**, **Transaction**, and **Transaction Line Item** objects.
- Tabs provide easy navigation and quick access to relevant records.



Didn't find what you're looking for? Try using Global Search.

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs New What Is This?

Action	Label	Tab Style	Description
Edit | Del	Service Request Forms	Compass	
Edit | Del	Transaction Line Items	IP Phone	
Edit | Del	Transactions	Hexagon	

Web Tabs New What Is This?

No Web Tabs have been defined

Visualforce Tabs New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs New What Is This?

No Lightning component tabs have been defined

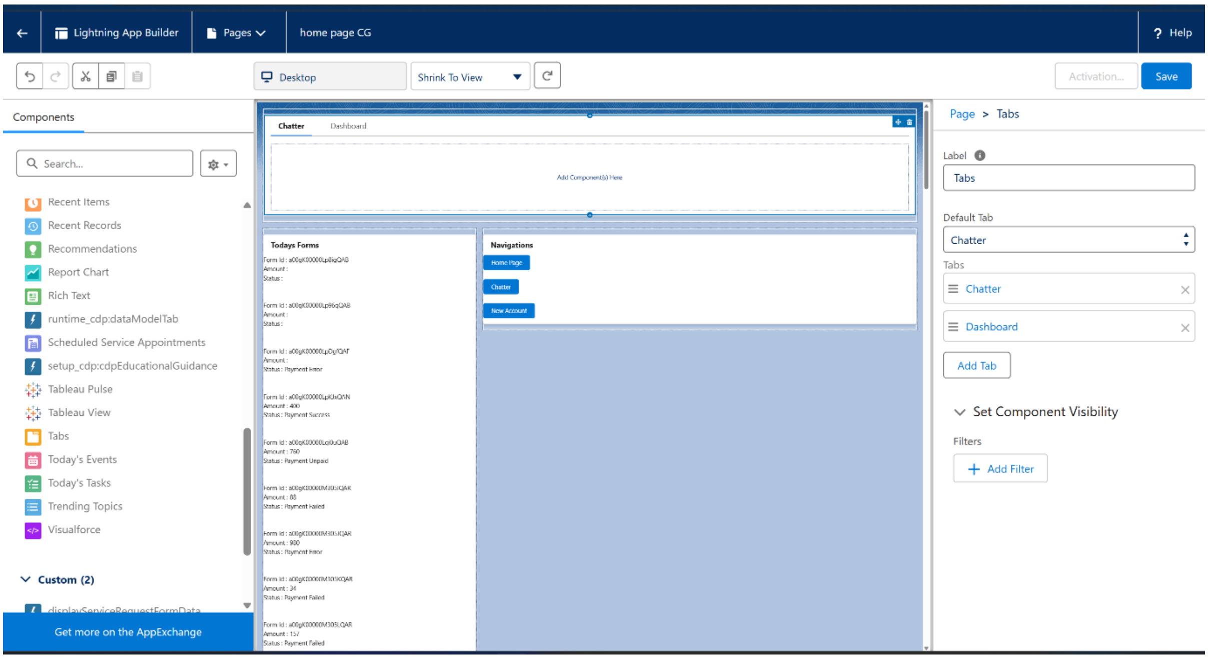
https://orgfarm-fea0df7385-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

---

4. Home Page Layouts

- Customized **Home Page Layouts** using Lightning App Builder.

- Displayed dashboards, reports, and important lists for quick insights into service requests and transactions.



Label: Tabs

Default Tab: Chatter

Tabs: Chatter, Dashboard

Todays Forms

Form Id : a00gK00000Lp8iqQAB
Amount :
Status :

Form Id : a00gK00000Lp96qQAB
Amount :
Status :

Form Id : a00gK00000LpDgfQAF
Amount :
Status : Payment Error

Form Id : a00gK00000LpKJxQAN
Amount : 400
Status : Payment Success

Form Id : a00gK00000Lqi0uQAB
Amount : 760
Status : Payment Unpaid

Form Id : a00gK00000M305lQAR
Amount : 88
Status : Payment Failed

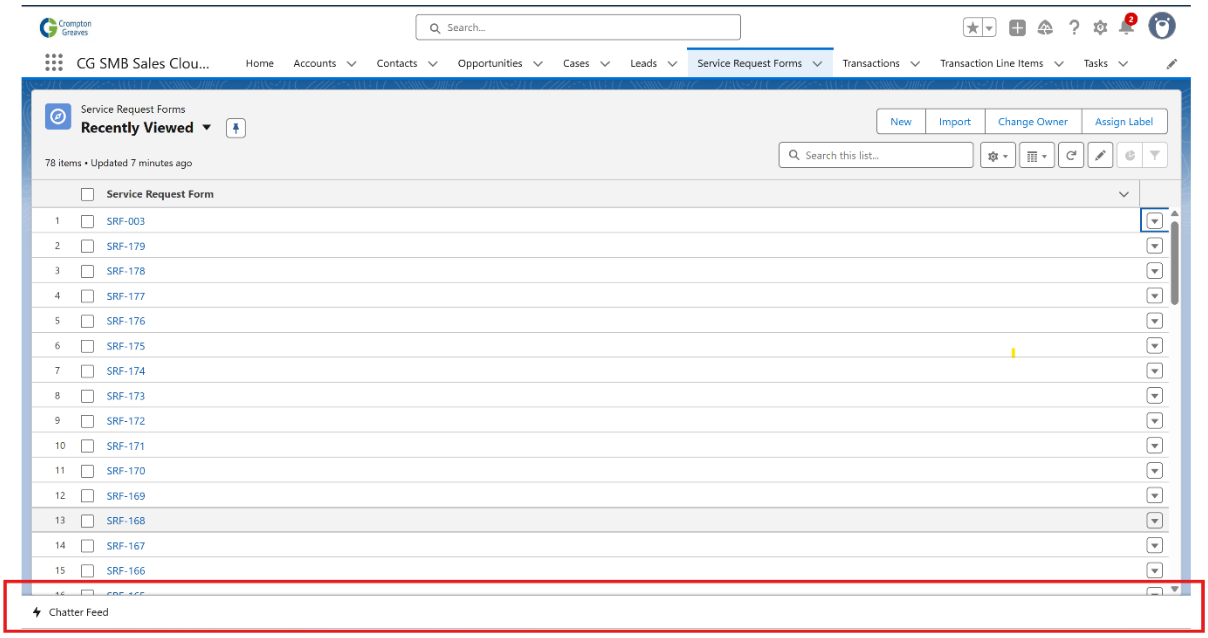
Form Id : a00gK00000M305JQAR
Amount : 900
Status : Payment Error

Form Id : a00gK00000M305KQAR
Amount : 34
Status : Payment Failed

Form Id : a00gK00000M305LQAR
Amount : 157
Status : Payment Failed

5. Utility Bar

- Configured a **Utility Bar** to provide quick access to common actions, such as creating a new service request or viewing recent transactions.
- Enhances productivity by keeping frequently used tools available on every page.



Service Request Forms
Recently Viewed

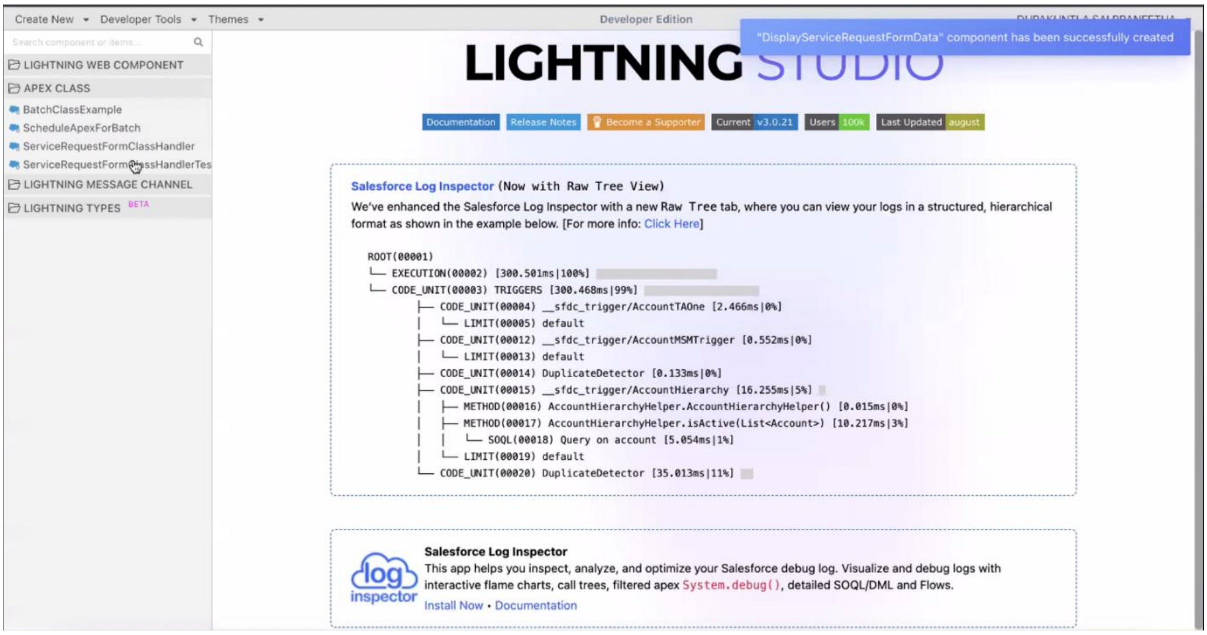
78 items • Updated 7 minutes ago

	Service Request Form
1	SRF-003
2	SRF-179
3	SRF-178
4	SRF-177
5	SRF-176
6	SRF-175
7	SRF-174
8	SRF-173
9	SRF-172
10	SRF-171
11	SRF-170
12	SRF-169
13	SRF-168
14	SRF-167
15	SRF-166
16	SRF-165

6. LWC (Lightning Web Components)

- Developed **Lightning Web Components** to create dynamic and responsive UI elements.

- Example: Created a component to display **Transaction Line Items** linked to a Service Request Form in a table format.
- LWC provides modern, fast, and reusable components for the Salesforce interface.



"DisplayServiceRequestFormData" component has been successfully created

Salesforce Log Inspector (Now with Raw Tree View)

We've enhanced the Salesforce Log Inspector with a new Raw Tree tab, where you can view your logs in a structured, hierarchical format as shown in the example below. [For more info: Click Here]

```
ROOT(00001)
└─ EXECUTION(00002) [300.501ms|100%]
└─ CODE_UNIT(00003) TRIGGERS [300.468ms|99%]
      ├─ CODE_UNIT(00004) __sfdc_trigger/AccountTAOne [2.466ms|0%]
      │  └─ LIMIT(00005) default
      ├─ CODE_UNIT(00012) __sfdc_trigger/AccountMSMTrigger [0.552ms|0%]
      │  └─ LIMIT(00013) default
      ├─ CODE_UNIT(00014) DuplicateDetector [0.133ms|0%]
      ├─ CODE_UNIT(00015) __sfdc_trigger/AccountHierarchy [16.255ms|5%]
      │  ├─ METHOD(00016) AccountHierarchyHelper.AccountHierarchyHelper() [0.015ms|0%]
      │  ├─ METHOD(00017) AccountHierarchyHelper.isActive(List<Account>) [10.217ms|3%]
      │  │  └─ SOQL(00018) Query on account [5.054ms|1%]
      │  └─ LIMIT(00019) default
      └─ CODE_UNIT(00020) DuplicateDetector [35.013ms|11%]
```

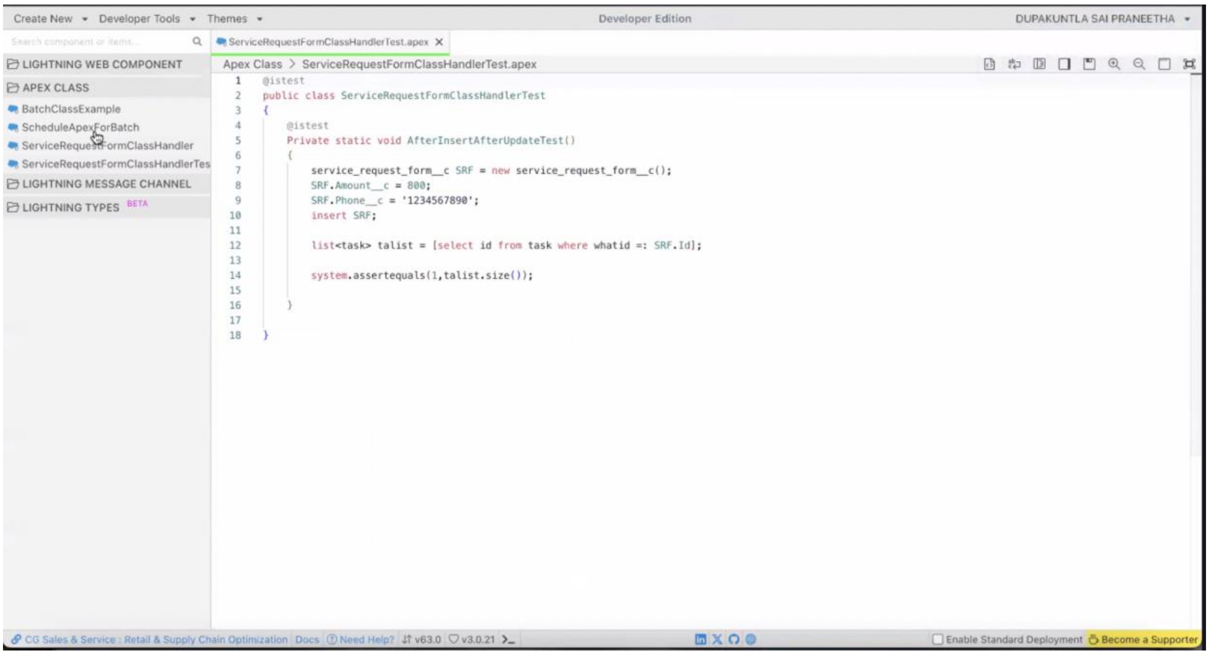
Salesforce Log Inspector

This app helps you inspect, analyze, and optimize your Salesforce debug log. Visualize and debug logs with interactive flame charts, call trees, filtered apex System.debug(), detailed SOQL/DML and Flows.

---

7. Apex with LWC

- Integrated **Apex classes** with LWCs to fetch, update, and process records dynamically.
- Example: Used Apex to retrieve **Transaction Line Items** for a selected **Service Request Form** and display them in an LWC.

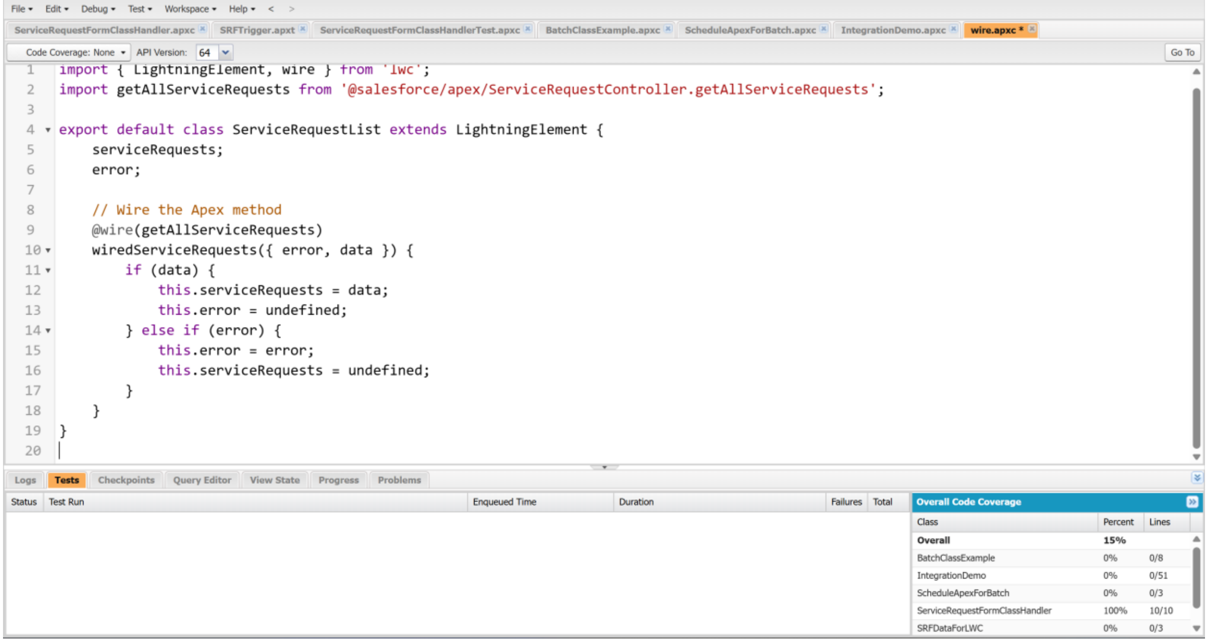

Create New ▾
Developer Tools ▾
Themes ▾
Developer Edition
DUPAKUNTLA SAI PRANEETHA ▾
Search component or items...
LIGHTNING WEB COMPONENT
APEX CLASS
BatchClassExample
ScheduleApexForBatch
ServiceRequestFormClassHandler
ServiceRequestFormClassHandlerTes
LIGHTNING MESSAGE CHANNEL
LIGHTNING TYPES BETA
ServiceRequestFormClassHandlerTest.apex ✕
Apex Class > ServiceRequestFormClassHandlerTest.apex
CG Sales & Service : Retail & Supply Chain Optimization
Docs
Need Help?
v63.0
v3.0.21
□ Enable Standard Deployment
Become a Supporter

```
@istest
public class ServiceRequestFormClassHandlerTest
{
    @istest
    Private static void AfterInsertAfterUpdateTest()
    {
        service_request_form__c SRF = new service_request_form__c();
        SRF.Amount__c = 800;
        SRF.Phone__c = '1234567890';
        insert SRF;

        list<task> talist = [select id from task where whatid =: SRF.Id];

        system.assertequals(1,talist.size());

    }

}
```

---

9. Wire Adapters

- Used **@wire adapters** to fetch Salesforce data reactively in LWCs.
- Ensures that components display up-to-date information without manual refresh.



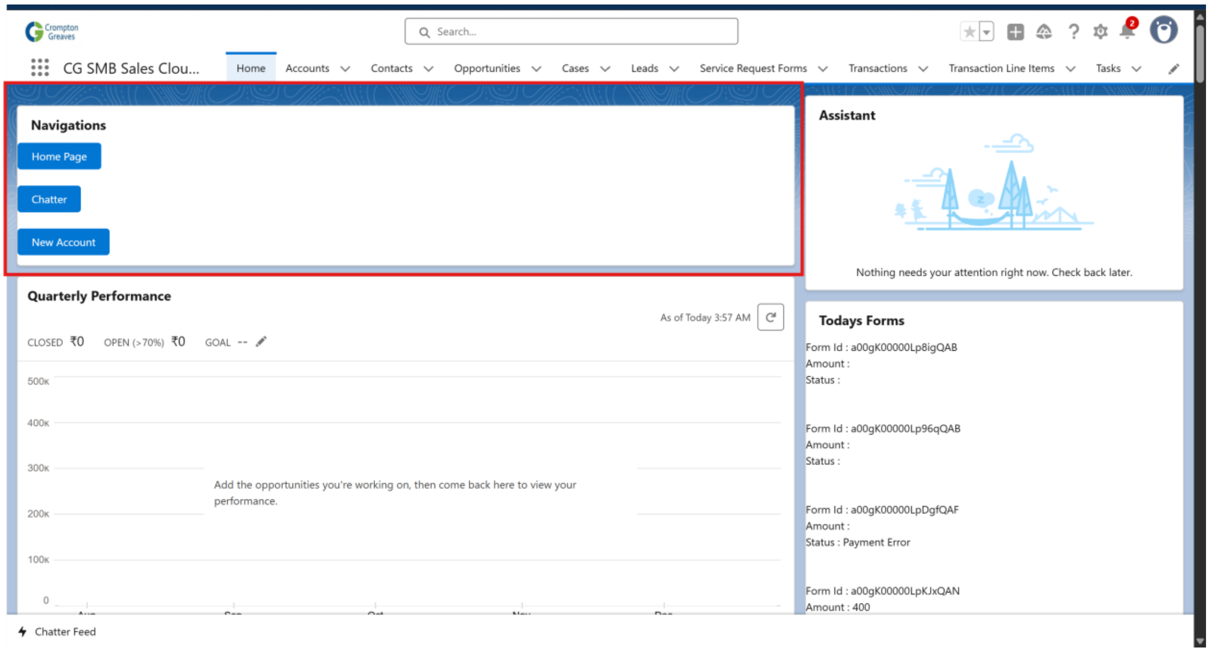
```
import { LightningElement, wire } from 'lwc';
import getAllServiceRequests from '@salesforce/apex/ServiceRequestController.getAllServiceRequests';

export default class ServiceRequestList extends LightningElement {
    serviceRequests;
    error;

    // Wire the Apex method
    @wire(getAllServiceRequests)
    wiredServiceRequests({ error, data }) {
        if (data) {
            this.serviceRequests = data;
            this.error = undefined;
        } else if (error) {
            this.error = error;
            this.serviceRequests = undefined;
        }
    }
}

```

Overall Code Coverage

Class	Percent	Lines
Overall	**15%**	
BatchClassExample	0%	0/8
IntegrationDemo	0%	0/51
ScheduleApexForBatch	0%	0/3
ServiceRequestFormClassHandler	100%	10/10
SRFDataForLWC	0%	0/3

10. Navigation Service

- Implemented **Navigation Service** to programmatically navigate between record pages, list views, and custom pages.
- Example: Clicking a line item in an LWC navigates the user to the related **Transaction** record page.



Nothing needs your attention right now. Check back later.

Add the opportunities you're working on, then come back here to view your performance.

Form Id : a00gK00000Lp8igQAB
Amount :
Status :

Form Id : a00gK00000Lp96qQAB
Amount :
Status :

Form Id : a00gK00000LpDgfQAF
Amount :
Status : Payment Error

Form Id : a00gK00000LpKJxQAN
Amount : 400