

Project: RenewSure – Smart Contract Expiry & Renewal Tracker

Phase 6: User Interface Development

Phase Overview

Phase 6 focuses on building the user interface for the RenewSure Salesforce app, making it user-friendly for Contract Managers, Legal Officers, and Admin users.

Sections Covered

1. **Record Pages**
2. **Tabs**
3. **Home Page Layouts**
4. **LWC (Lightning Web Components)**

1. Record Pages

Objective: Customize Contract record pages for user efficiency.

Steps Completed: - Navigation: Setup → Object Manager → Contract → Lightning Record Pages - Modified Default Page Layout: - Added Highlights Panel: Contract Number, Contract Name, Status - Added Contract Details Section: Account, Related Contact - Added Dates & Renewal Section: Start Date, End Date, Renewal Reminder Date, Renewal Type - Added Financials Section: Contract Value - Added Administration Section: Owner, Created/Modified Info - Added Notes / Terms Section

SETUP > OBJECT MANAGER
Contract

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Lightning Record Pages
1 Items, Sorted by Label

LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNMEN...	MODIFIED BY
Contract Record Page	Desktop			Runal Parlewar, 9/25/2025, 11:20 PM

2. Tabs

Objective: Create intuitive navigation via tabs.

Steps Completed: - Created Tabs for: - Contracts - FollowUps - Renewals - Navigation Order Configured for Default App

The screenshot shows the 'Custom Tabs' section of the Salesforce Setup. At the top, there's a header with a gear icon labeled 'SETUP' and 'Tabs'. Below the header, the title 'Custom Tabs' is displayed, followed by a sub-header: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' A note below explains that Custom Object tabs look like standard tabs and can embed external web applications or Visualforce pages. Lightning Component tabs allow adding Lightning components to the navigation menu, and Lightning Page tabs allow adding Lightning Pages to the Lightning Experience and mobile app. The main area is titled 'Custom Object Tabs' and contains a table with three rows. The first row has a 'Label' column with 'Contracts' and a 'Tab Style' column with a red bell icon and the word 'Bell'. The second row has a 'Label' column with 'FollowUps' and a 'Tab Style' column with an orange pencil icon and the word 'Pencil'. The third row has a 'Label' column with 'Renewals' and a 'Tab Style' column with a blue stopwatch icon and the word 'Stopwatch'. Each row also has 'Action' columns with 'Edit | Del' links.

3. Home Page Layouts

Objective: Design home page layouts specific to user roles.

Steps Completed: - Navigation: Setup → User Interface → Home Page Layouts - For Contract Manager Profile: - Wide Sidebar Components: Tasks, Today's Events, Dashboard Snapshot - Narrow Sidebar Components: Recent Items, Calendar - Layout assigned and activated

The screenshot shows the Salesforce Home Page for the 'RenewSure Contracts' user. The top navigation bar includes links for Accounts, Dashboards, Contracts, Reports, Files, Renewals, FollowUps, Contracts, Home, and a user icon. The main content area has a title 'Approvals' with the sub-instruction 'Use Approvals to manage approval submissions and approval work items.' Below this are four cards: 'Manage All Pending Approval Submissions' (with a goat icon), 'Manage All Flow Approval Processes' (with a bear and a person icon), 'Review My Approval Work Items' (with a bear icon), and 'Manage My Approval Submissions' (with a person icon). There are also buttons for 'Create Flow Approval Process' and 'Settings'. The background features a nature-themed illustration with a sun, trees, and butterflies.

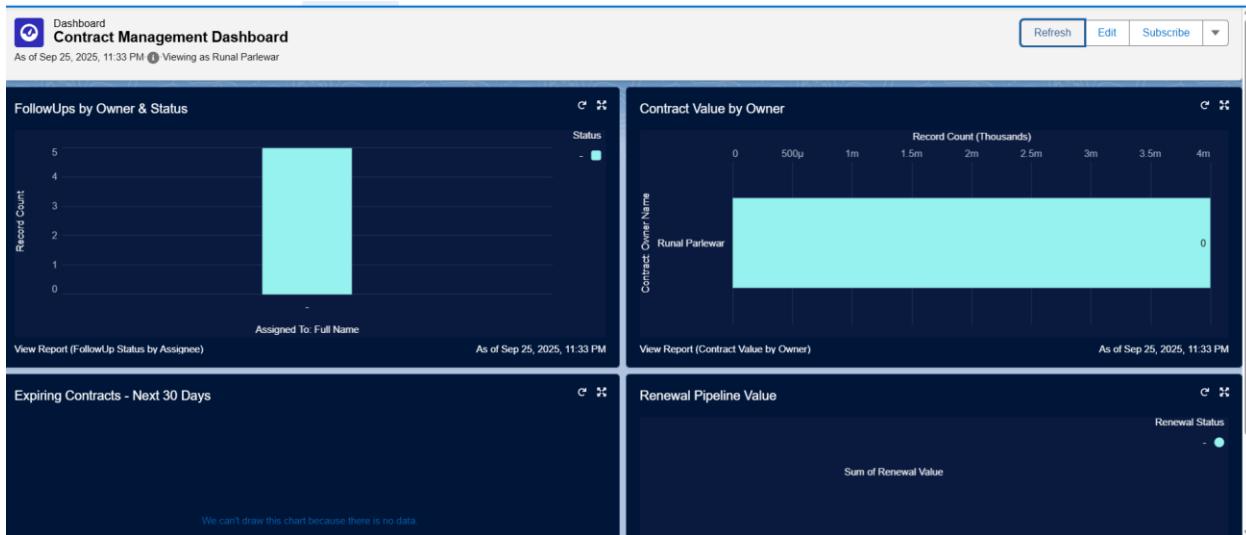
4. Lightning Web Components (LWC)

Objective: Display real-time dashboards for contracts.

LWC Created: contractsDashboard

Controller: ContractsDashboardController

Steps Completed: - Created LWC using VS Code - Added components to RenewSure App
- Bound Apex data to display: - Total Active Contracts - Expiring Contracts in 30 Days -
Upcoming Renewals - Tested on Developer org



Completion Status: Phase 6 Completed

This document includes screenshots of each step (placeholders provided) and details for uploading to GitHub.

Next Phase: Phase 7 – Integration & External Access