

Phase 6: User Interface Development

Introduction

This phase focuses on creating a **user-friendly interface** in Salesforce that enables managers, agents, and support staff to easily interact with the EcoCart Logistics CRM. Using **Lightning App Builder, Record Pages, Tabs, Utility Bar, and Lightning Web Components (LWCs)**, we'll make it simple to track, update, and manage orders and shipments in real-time.

A good UI ensures that **agents work efficiently, managers get actionable insights**, and **customers receive quick updates** through portal or LWC components.

Objectives

- Create a dedicated **EcoCart Logistics CRM Lightning App**.
- Configure **Record Pages and Tabs** for Orders and Shipments.
- Design **Home Page and Utility Bar** for quick actions.
- Build **LWC Components** for shipment tracking and updates.
- Integrate **Apex with LWC** for real-time data handling.
- Use **Navigation Services** to streamline the workflow.

1. Create EcoCart Logistics CRM App

- Path: **Setup → App Manager → New Lightning App.**
- App Name: **EcoCart Logistics**
- Added Tabs: Orders, Shipments, Reports, Dashboards.
- Assigned App visibility to Managers, Agents, Support Staff.

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two sections: 'App Details' and 'App Branding'. In 'App Details', the 'App Name' and 'Developer Name' fields are both set to 'EcoCart Logistics', and the 'Description' field is empty with the placeholder 'Enter a description...'. In 'App Branding', an image of a blue truck is uploaded, and the 'Primary Color Hex Value' is set to '#0070D2'. Below these sections, there are 'Org Theme Options' (a checkbox to use the app's image and color instead of the org's custom theme) and an 'App Launcher Preview' showing the app icon and name.

The screenshot shows the 'App Options' configuration page in the Lightning App Builder. The left sidebar is the same as the previous screenshot, with 'App Options' now selected. The main content area is titled 'App Options' and is divided into two sections: 'Navigation and Form Factor' and 'Setup and Personalization'. In 'Navigation and Form Factor', the 'Navigation Style' is set to 'Standard navigation' and the 'Supported Form Factors' are set to 'Desktop and phone'. In 'Setup and Personalization', the 'Setup Experience' is set to 'Setup (full set of Setup options)' and the 'App Personalization Settings' (checkboxes for disabling end user personalization, disabling temporary tabs, and using Omni-Channel sidebar) are all unchecked.

2. Tabs Setup

- Created **Custom Tabs** for:
 - Orders
 - Shipments
- Added to **Navigation Bar** of the EcoCart App.

The screenshot shows the 'New Custom Object Tab' setup page in Salesforce. The left sidebar includes a search bar with 'tabs' and a navigation menu with 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'New Custom Object Tab' and includes a 'Step 1. Enter the Details' section. It prompts the user to 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there are fields for 'Object' (set to '--None--'), 'Tab Style' (set to 'Form'), and 'Splash Page Custom Link' (set to '--None--'). A 'Description' field is also present. A 'Required Information' indicator is visible on the right side of the form.

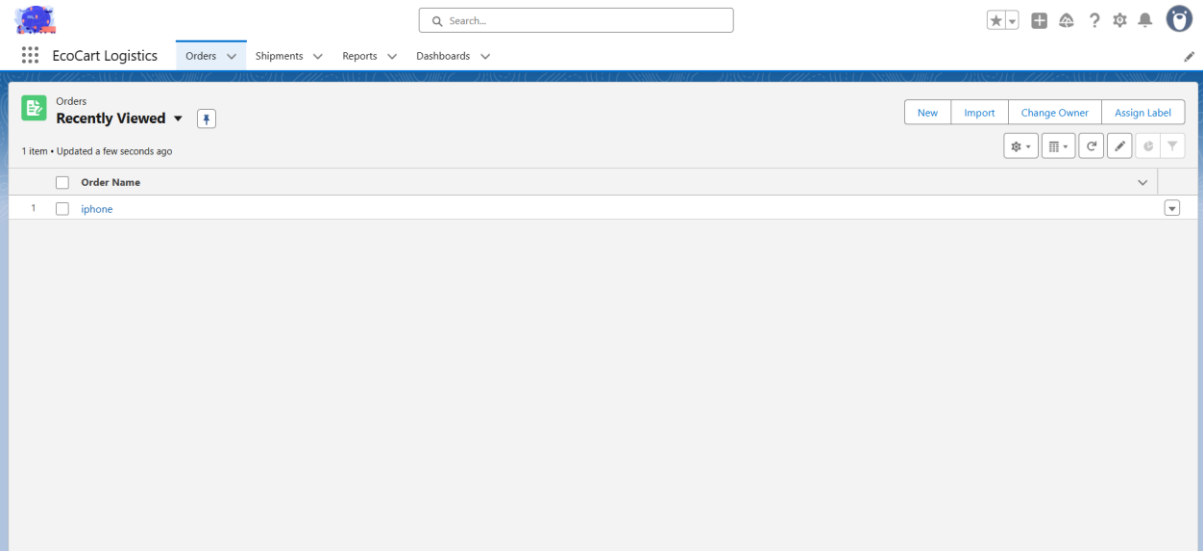
The screenshot shows the 'Custom Tabs' overview page in Salesforce. The left sidebar is identical to the previous screenshot. The main content area is titled 'Custom Tabs' and includes a description of custom tabs. Below the description, there are three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Each section has a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section contains a table with two rows of tabs.

Action	Label	Tab Style	Description
Edit Del	Orders	Form	
Edit Del	Shipments	Shopping Cart	

The 'Web Tabs' and 'Visualforce Tabs' sections both indicate that no tabs have been defined.

3. Home Page Layouts

- Used **Lightning App Builder** → **New Home Page**.
- Components added:
 - **Dashboard:** “Delivery Performance Dashboard.”
 - **List View:** Pending Shipments.
 - **Key Metrics:** Number of Deliveries Today.



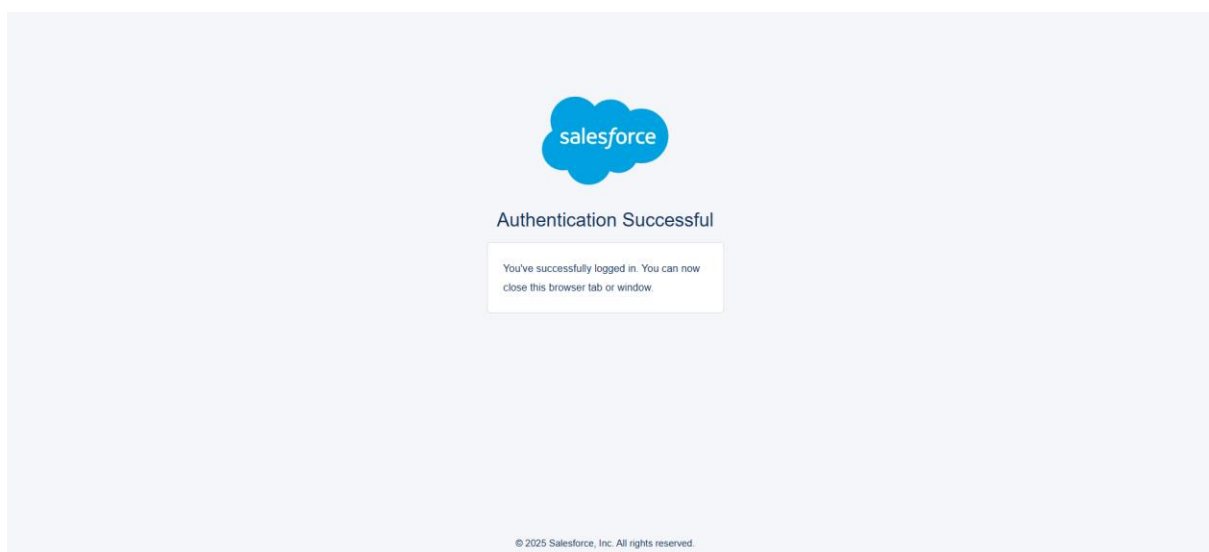
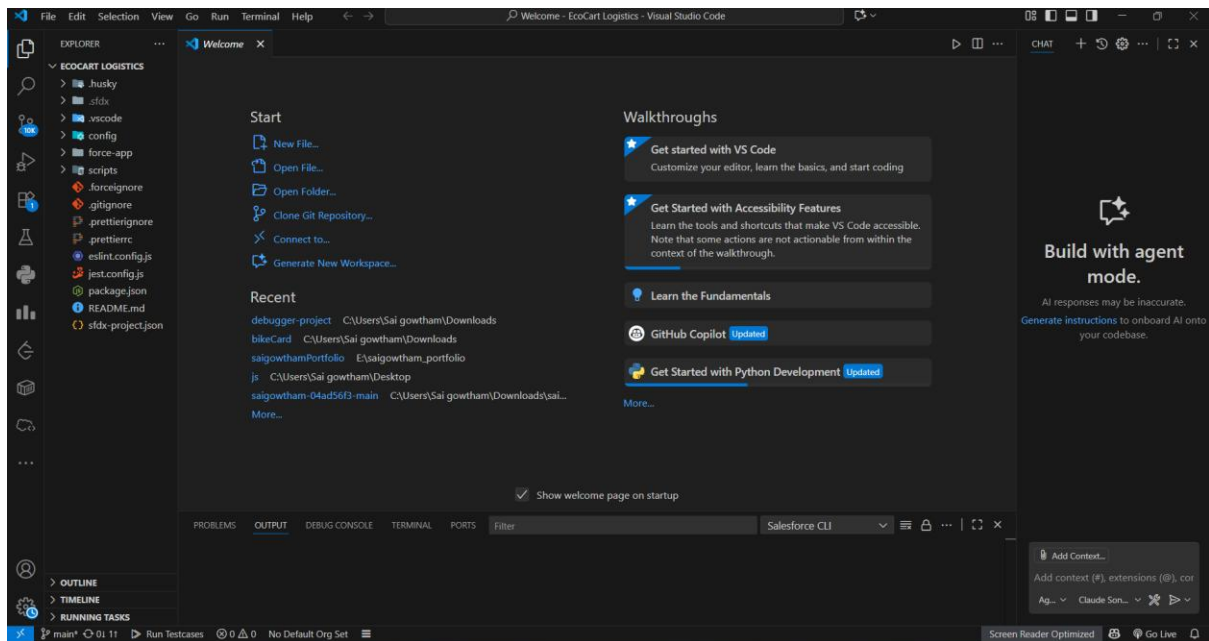
The screenshot displays the 'Reports' section of the EcoCart Logistics application. The interface shows a table of reports with the following columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists several reports related to exercise completion status and progress.

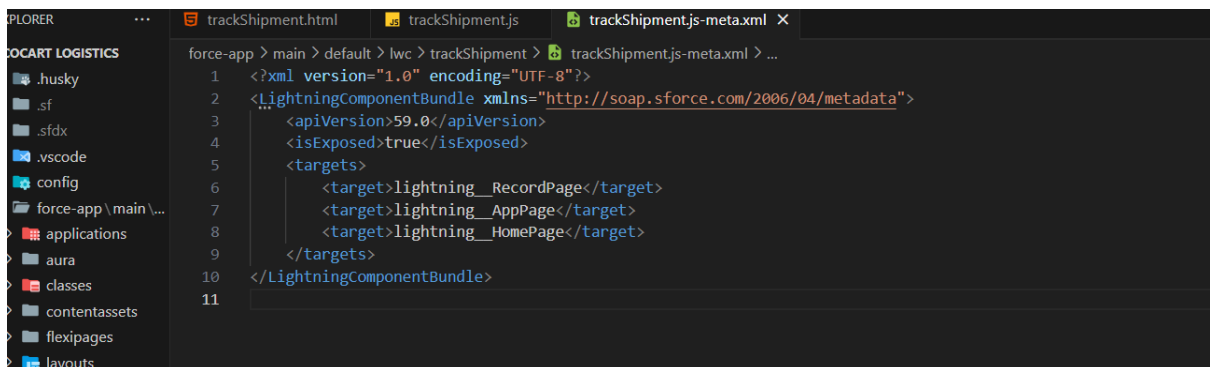
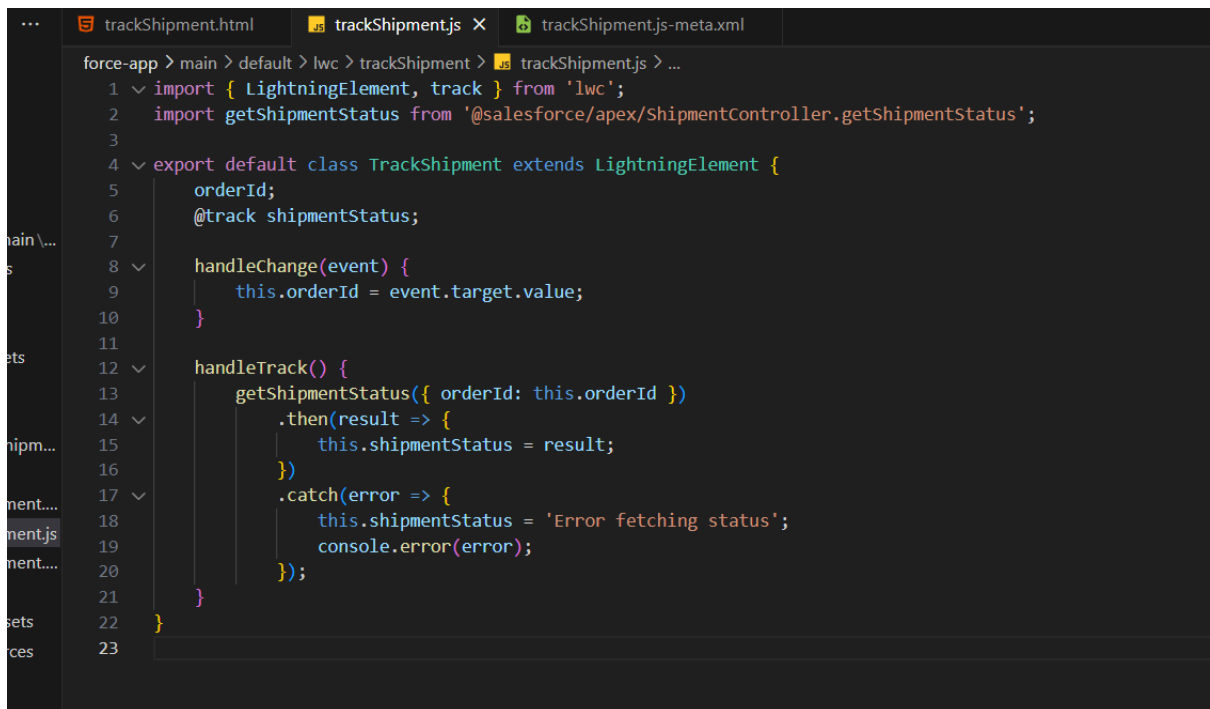
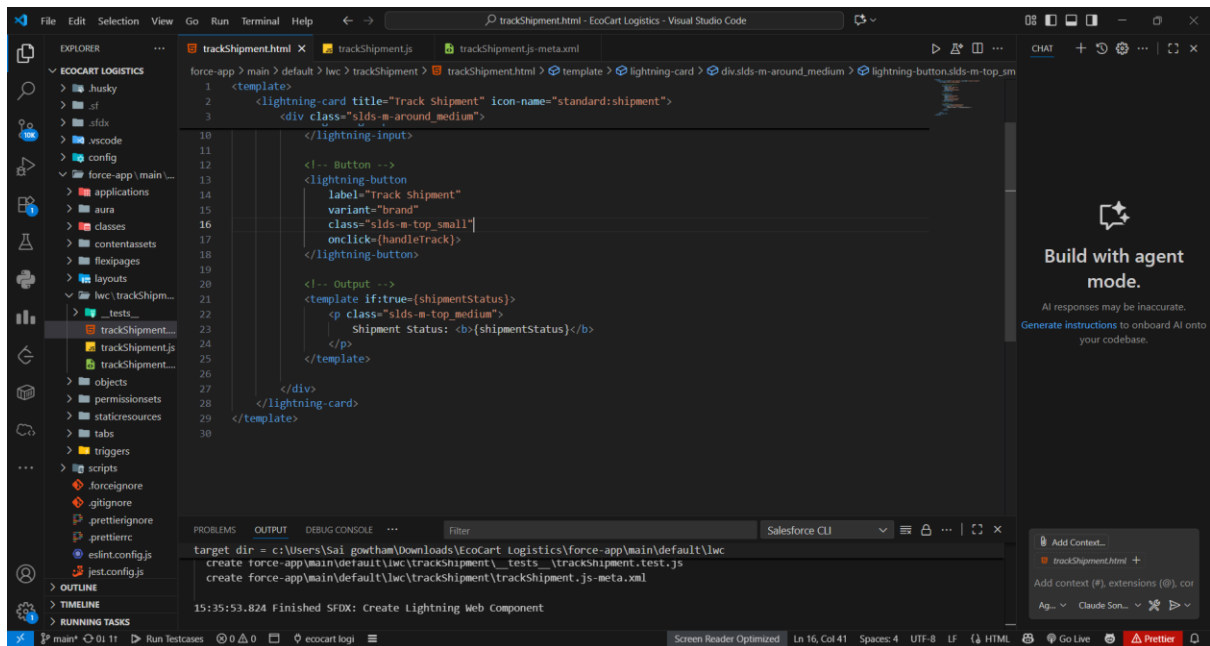
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Summer '24	Automated Process	9/17/2025, 6:11 PM	
Created by Me	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Spring '24	Automated Process	9/17/2025, 6:11 PM	
Private Reports	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Spring '24	Automated Process	9/17/2025, 6:11 PM	
Public Reports	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Summer '24	Automated Process	9/17/2025, 6:11 PM	
FOLDERS	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Spring '24	Automated Process	9/17/2025, 6:11 PM	
All Folders	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	9/17/2025, 6:11 PM	
Created by Me	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Summer '24	Automated Process	9/17/2025, 6:11 PM	
Shared with Me	Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Enablement Dashboard Reports Summer '24	Automated Process	9/17/2025, 6:11 PM	

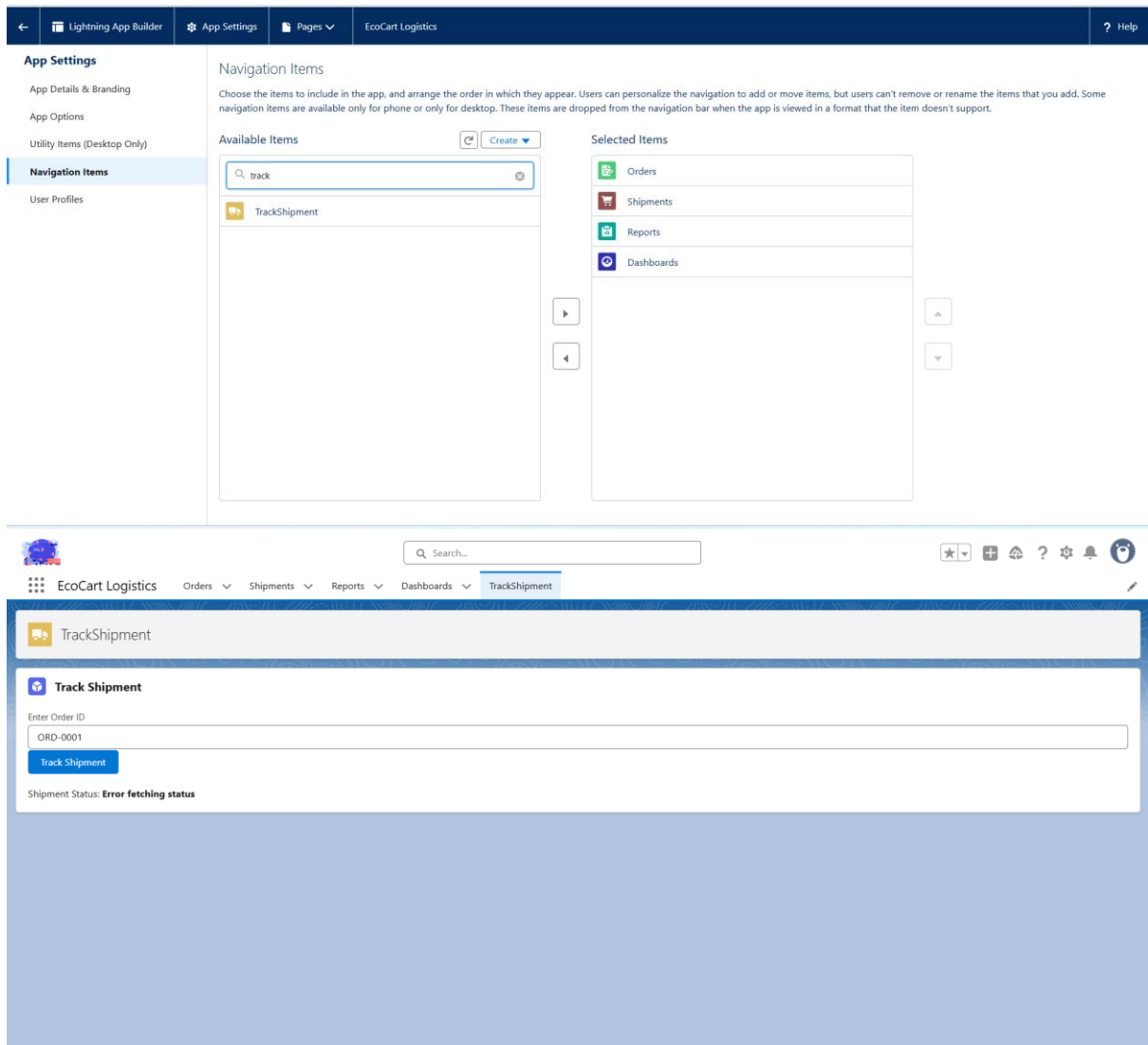
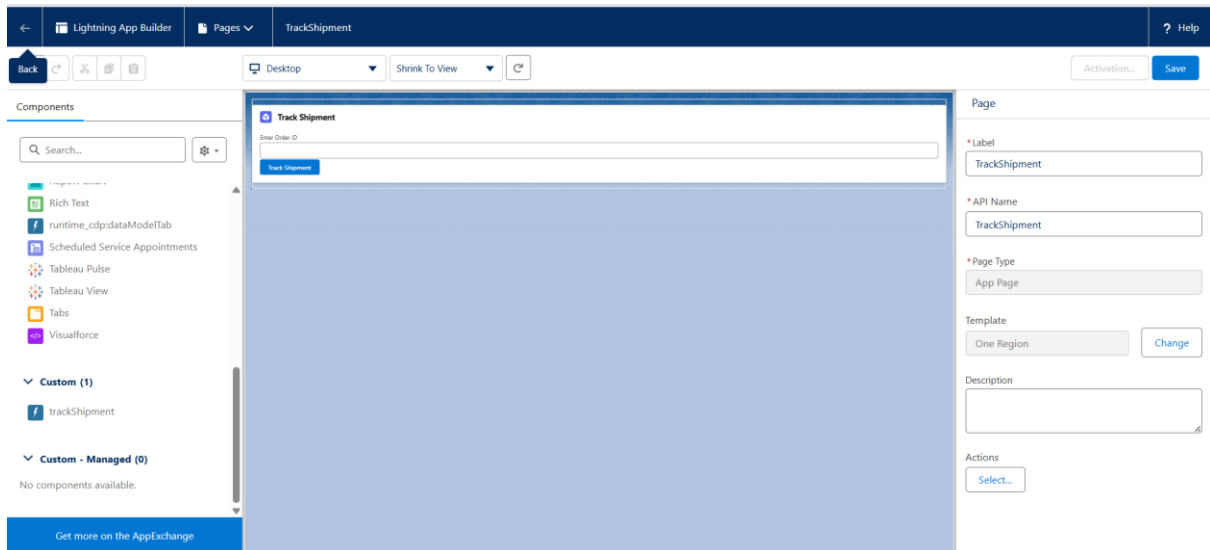
4. Lightning Web Components (LWC)

Track Shipment Component

- Input: Order ID.
- Output: Shipment status (Pending, In Transit, Delivered).







Results Achieved

- **EcoCart Logistics App** created with custom tabs for Orders & Shipments.
- **Record Pages** configured with related lists for quick navigation.
- **Home Page Dashboard** shows real-time delivery performance.
- **Utility Bar** gives quick access to new bookings and tracking.
- **LWC Components** allow agents to track shipments and update deliveries seamlessly.
- **Apex + LWC** integration ensures real-time data flow.

Next Steps

- Move to **Phase 7: Integration & External Access**.
- Connect Salesforce with external courier APIs (for real-time delivery updates).
- Configure **Named Credentials** and **Remote Site Settings** for secure integration.
- Set up **Platform Events** for real-time exception handling.