

## Phase 6 — User Interface Development (Lightning App & LWC)

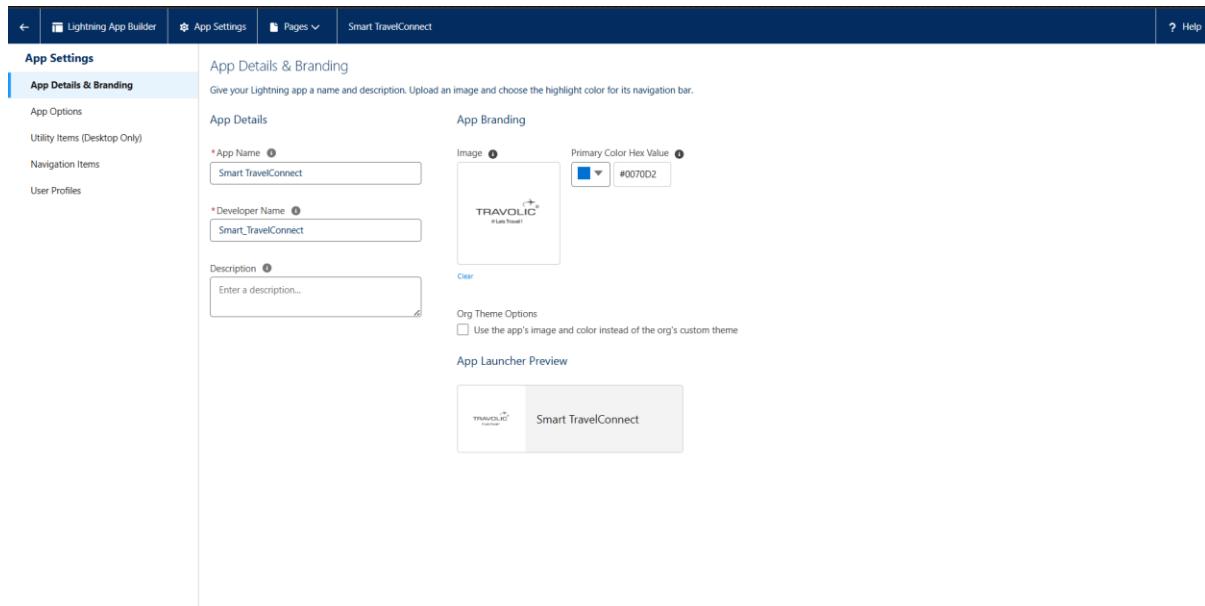
**Objective:** Build a user-friendly interface in Salesforce Lightning Experience for agents and customers to interact with the Smart TravelConnect CRM. This includes Lightning App, Record Pages, Tabs, and custom Lightning Web Components (LWC).

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### A. Lightning App Creation

**Steps (Click by Click):**

1. Go to **Setup** → **App Manager**.
2. Click **New Lightning App** → **Next**.
3. Enter **App Name**: Smart TravelConnect → Click **Next**.
4. Upload **App Logo** (optional) → Click **Next**.
5. Select **Navigation Style**: Standard → Click **Next**.
6. Add **User Profiles**: Admin, Sales Agent, Marketing Manager → Click **Next**.
7. Choose **Utility Items** (optional: Notes, Recent Items, etc.) → Click **Next**.
8. Click **Save & Finish**.



- ✓ A new Lightning App is now ready in Salesforce.
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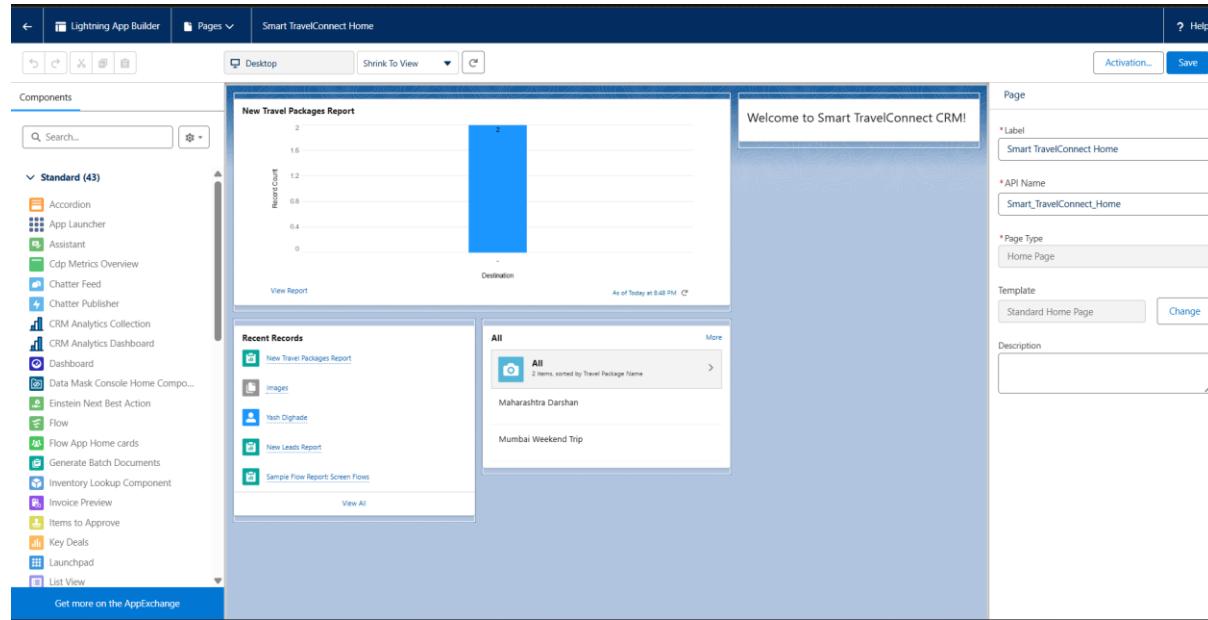
## B. Home Page Setup

**Objective:** Display key metrics like pending leads, active bookings, and top packages.

### Steps (Click by Click):

1. Go to **Setup** → **Lightning App Builder**.
2. Click **New** → **Home Page**.
3. Select **Standard Home Page Template** → Click **Next**.
4. Enter **Page Name**: Smart Travel Home → Click **Next**.
5. Drag **Components** from the left panel onto the canvas:
  - o **Report Chart** (Travel Packages Report)
  - o **Recent Records**
  - o **List View** (Travel Package)
6. Click **Activation** → Set as **Org Default Home Page** for relevant profiles → Save & Activate.

✓ Now users see an overview of key metrics when they log in.

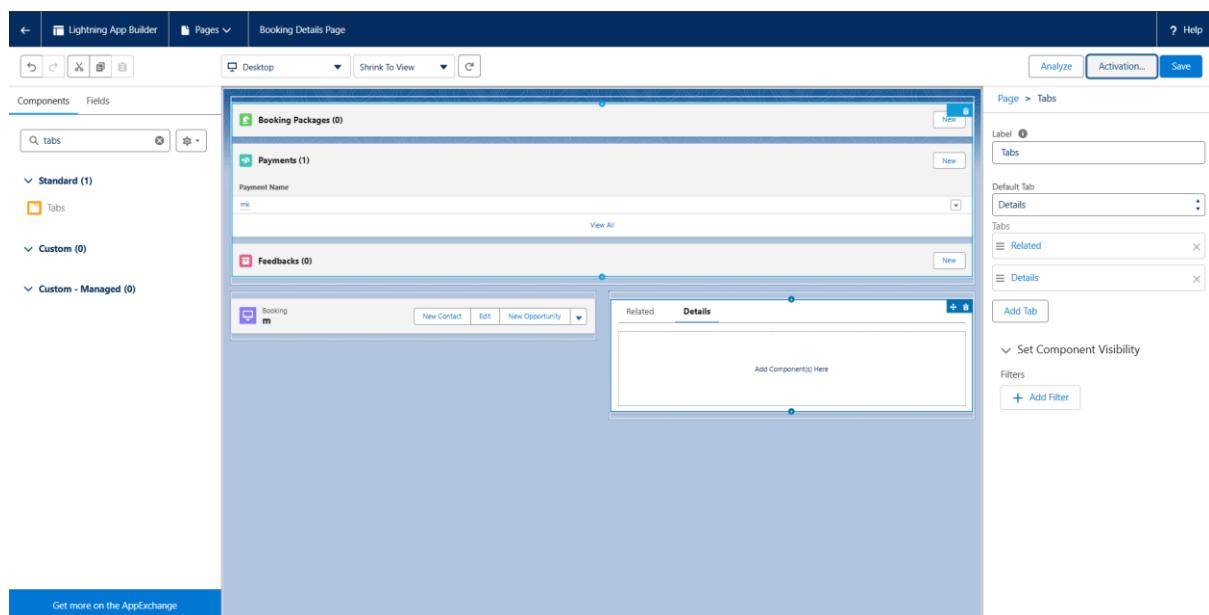


## C. Record Pages Customization

**Objective:** Enhance booking and customer record pages for clarity and usability.

## Steps (Click by Click):

1. **Setup → Object Manager → Booking → Lightning Record Pages → Click New.**
2. Select **Record Page Template** → Enter Name: Booking Details Page.
3. Drag sections:
  - o **Highlights Panel** (Booking Status, Assigned Agent, Total Amount)
  - o **Related Lists** (Payments, Feedback, Booking Packages)
  - o **Tabs** (Details, Activity, Chatter, Related)
4. Click **Save** → **Activate** → Assign to **All Profiles** or selected ones.



- ✓ Booking and Customer pages now show all relevant information in one place.

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## D. Tabs Configuration

**Objective:** Add easy access to objects like Leads, Customers, Packages, Bookings, Payments, and Feedback.

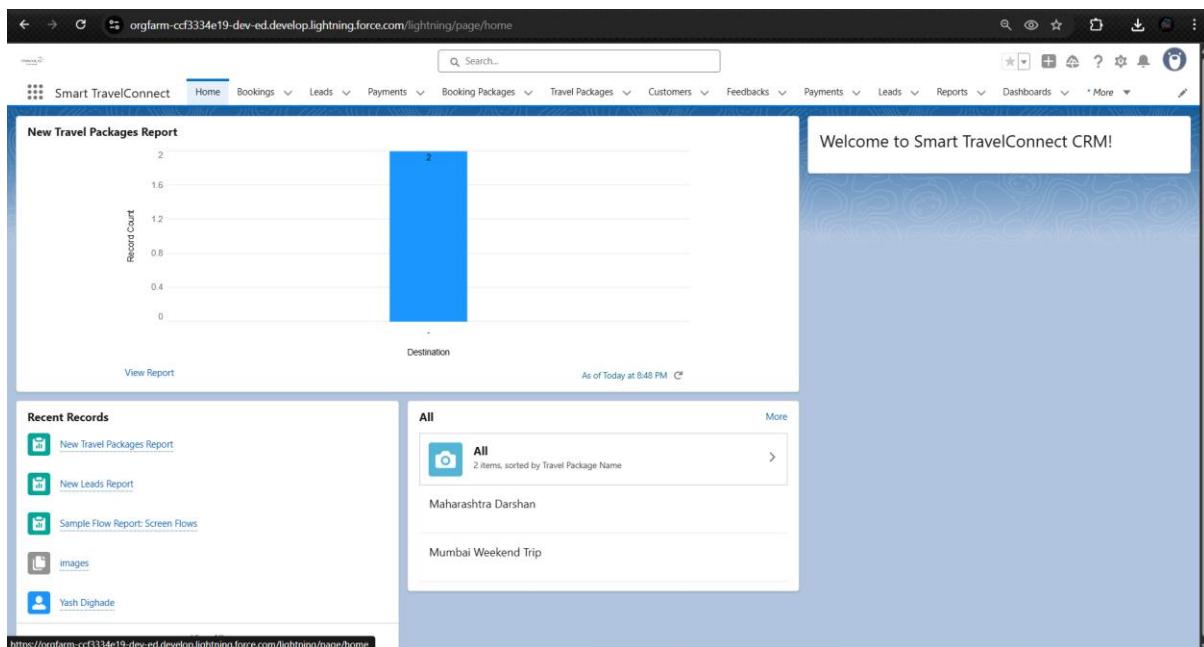
## Steps (Click by Click):

1. **Setup → App Manager → Smart TravelConnect → Edit.**
2. Click **Navigation Items** → Add objects:
  - o Leads

- Customers
- Travel Packages
- Bookings
- Payments
- Feedback

### 3. Click Save.

 All key objects now appear as tabs in the Lightning App.



## E. Summary of Phase 6

- **Lightning App:** Centralized interface for all users.
- **Home Page:** Key metrics at a glance.
- **Record Pages:** Improved layout for Booking & Customer records.
- **Tabs:** Quick navigation to all objects.
- **LWC Components:** Interactive dashboards and widgets.