Phase 6: User Interface Development

This phase focused on designing and building the user interface for the Retail CRM application. The goal was to create an intuitive, interactive environment for Sales and Service agents to view, manage, and act on records efficiently. All UI work was completed using Salesforce Setup and Lightning App Builder, without requiring Salesforce CLI or Lightning Web Components (LWC) coding.

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1. Lightning App Builder – App Page Creation

The Retail CRM Sales App was created using the Lightning App Builder. A **One Column layout** was selected to provide a clean and simple interface for users. Key components, including record details, related lists, report charts, and recent records, were added to the page. The page was named **"Retail CRM Sales App"** and activated for the Sales Agent and Service Agent profiles.

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2. Components and Layout

To enhance usability, the app page included the following components:

- **Record Details / Related Lists** – labeled `Order & Account Details`, allowing users to view full order and account information in one place.

- **Report Charts** – labeled `Orders Dashboard`, displaying key metrics such as total orders and pending approvals.

- **Recent Records** – labeled `Recent Orders`, giving quick access to recently viewed records.

- **Rich Text / Links** – labeled `Quick Links / Instructions`, providing guidance and shortcuts for common actions.

These components were arranged thoughtfully within the layout to provide a seamless user experience.
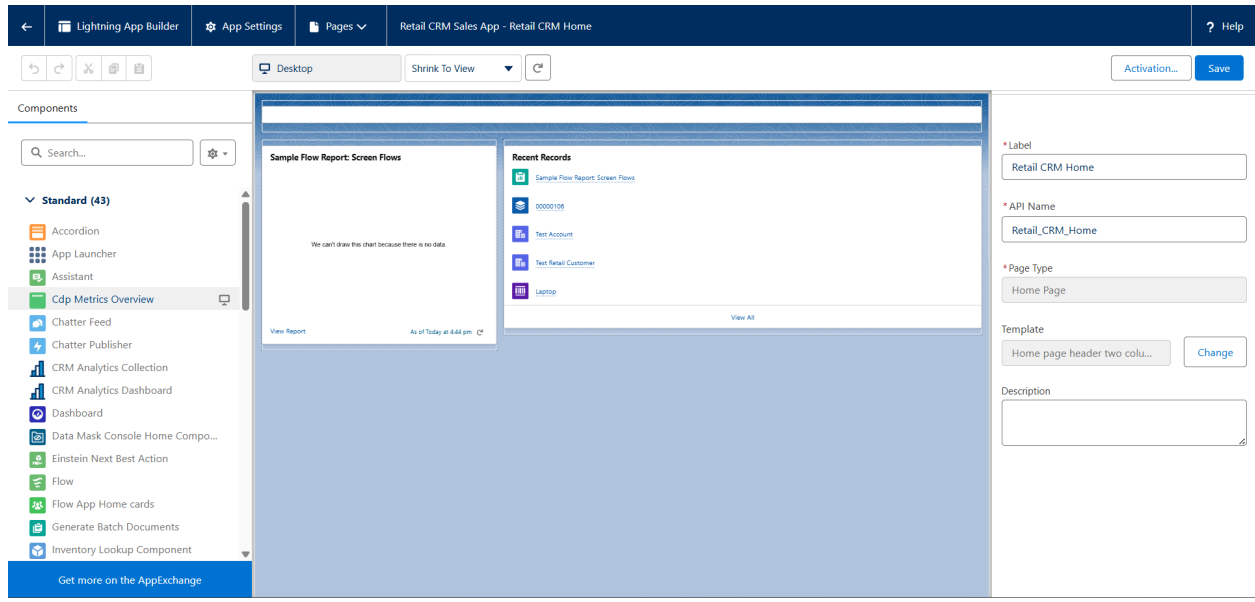
3. Utility Bar Configuration

A **Utility Bar** was configured for the Retail CRM Sales App to provide quick access to important tools and metrics. Components added included:

- **Notes** – labeled `Notes` for quick note-taking.

- **Recent Items** – labeled `Recent Items` for easy navigation.

- **Report Chart** – labeled `Orders Dashboard` to provide a snapshot of key sales metrics.

The Utility Bar was aligned at the bottom of the desktop interface to ensure that users had instant access to these tools while working in the app.
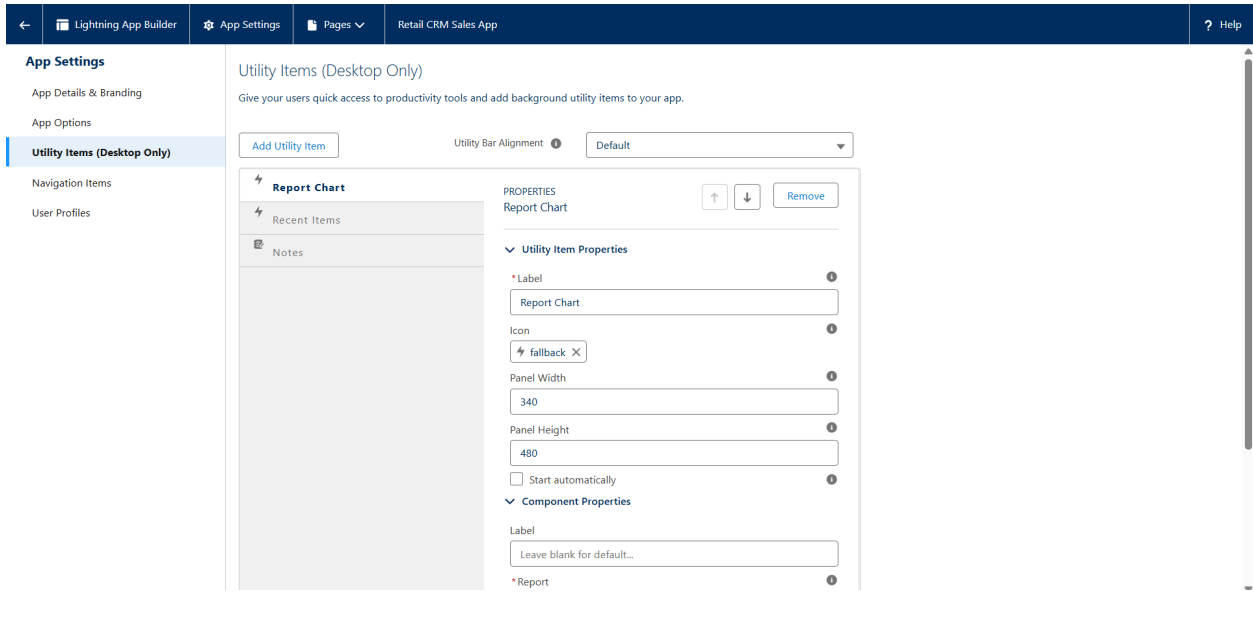
4. Home Page and Record Page Layouts

A **Home Page** was created for the Retail CRM environment and labeled **"Retail CRM Home"**. This page combined key components to provide a centralized dashboard for users:

- **Report Chart** – labeled `Orders Summary`, showing aggregate sales data.

- **Recent Records** – labeled `Recent Orders` to quickly access the most relevant orders.

- **Rich Text / Links** – labeled `Quick Links / Instructions`, giving guidance and shortcuts.

Similarly, record pages were configured to include related lists and details so users could manage orders efficiently. These pages were activated and assigned to the Sales Agent and Service Agent profiles to ensure appropriate access.

Activation... | Save

Components

Search...

Standard (43)

Accordion
App Launcher
Assistant
Cdp Metrics Overview
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component

Get more on the AppExchange

Desktop | Shrink To View ⌄

Sample Flow Report: Screen Flows

We can't draw this chart because there is no data.

View Report   As of Today at 4:44 pm

Recent Records

Sample Flow Report: Screen Flows
00000106
Test Account
Test Retail Customer
Laptop

View All

Page

* Label
Retail CRM Home

* API Name
Retail_CRM_Home

* Page Type
Home Page

Template
Home page header two colu...   Change

Description