

Phase 7 – External Access / UI Enhancement

This phase focused on creating a **custom Salesforce Lightning App** for the Retail CRM project. The app centralizes navigation for Sales, Service, and Approvals, ensuring that all project users can access the key objects and processes in one place.

Deliverables

1. App Setup

- Created a new Lightning App named **Retail CRM App**.
 - Navigation Style: **Standard Navigation** (suited for Sales/Service teams).
 - Supported Form Factors: **Desktop and Phone** for cross-device access.
 - Setup Experience: **Setup (full set of Setup options)**.
 - App Personalization: End-user personalization kept enabled for flexibility.
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2. Branding

- App Name: **Retail CRM App**
 - Description: *Centralized application for managing Customers, Orders, Products, and Approvals.*
 - Added a **custom app logo** to differentiate the app in the App Launcher.
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3. Navigation Items

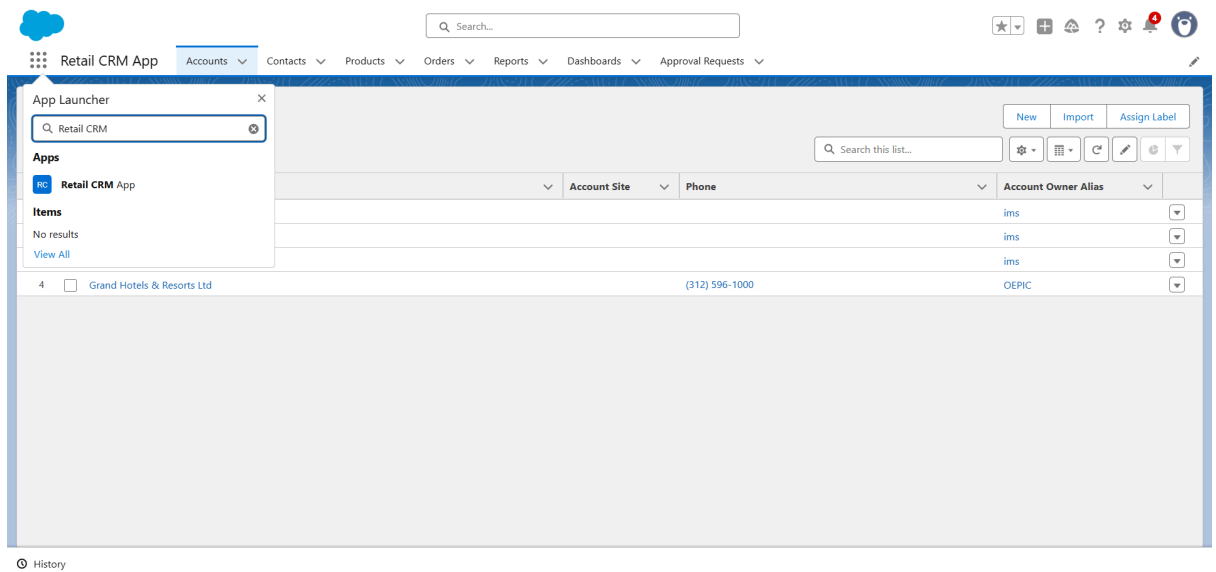
Added the following key objects and items to the navigation bar:

- **Accounts** → Manage customers.

- **Contacts** → Manage customer details.
- **Orders** → Track customer orders.
- **Order Line Items** → Manage product details inside orders.
- **Products** → View/manage product catalog.
- **Approvals (Approval Requests)** → View and act on approval submissions.
- **Dashboards** → View sales and service metrics.
- **Reports** → Access custom reports on sales, service, and products.

4. Utility Bar

- Enabled **Notes** and **History** in the utility bar for quick access.





Retail CRM App

Accounts ▾

Contacts ▾

Products ▾

Orders ▾

Reports ▾

Dashboards ▾

Approval Requests ▾

Search...



Accounts

Recently Viewed ▾



New

Import

Assign Label

4 items • Updated a few seconds ago

Search this list...



	<input type="checkbox"/> Account Name ▾	<input type="checkbox"/> Account Site ▾	<input type="checkbox"/> Phone ▾	<input type="checkbox"/> Account Owner Alias ▾	
1	<input type="checkbox"/> Test Account			ims	▾
2	<input type="checkbox"/> Test Retail Customer			ims	▾
3	<input type="checkbox"/> Test Account			ims	▾
4	<input type="checkbox"/> Grand Hotels & Resorts Ltd		(312) 596-1000	OEPIC	▾

History