Phase 6 – User Interface Development (Event Management Portal)

Objective

The goal of Phase 6 is to build a user-friendly interface for the Event Management Portal in Salesforce. This phase ensures that users can efficiently navigate and interact with Events, Tickets, and Vendors. Although Lightning Web Components (LWCs) can enhance the interface, they are optional. For this assessment, we are skipping LWCs and focusing on standard Salesforce UI features, while documenting detailed layouts, navigation, and usability.

Create Lightning App

Purpose:
A Lightning App provides a dedicated environment where users can access all relevant objects, tabs, and pages related to event management. This creates a streamlined experience.

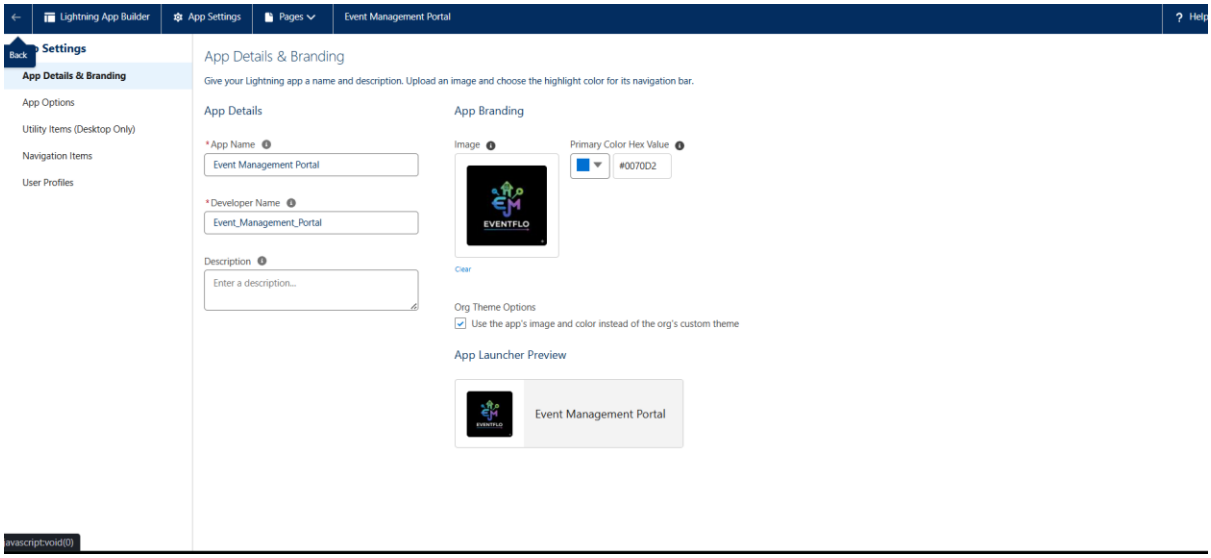
Implementation:

1. Go to **Setup → App Manager → New Lightning App**.
2. Enter **App Name:** Event Management Portal.
3. **Description:** "CRM for managing corporate events, tickets, and vendors efficiently."
4. Choose **Navigation Style:** Standard navigation.
5. Supported Form Factors: Desktop and Phone.
6. App Options: Leave defaults (no Utility Bar needed for assessment).
7. Assign Profiles: System Administrator, Standard User.
8. Save and Finish.

Notes:

- Assigning correct profiles ensures that users can access the app based on their roles.
- The app serves as the foundation for all subsequent UI customizations.

Screenshot :



Step 2: Add Tabs to the App

Purpose:
Tabs allow users to quickly access and navigate between core objects like Events, Tickets, and Vendors. Reports tab is optional for analytics.

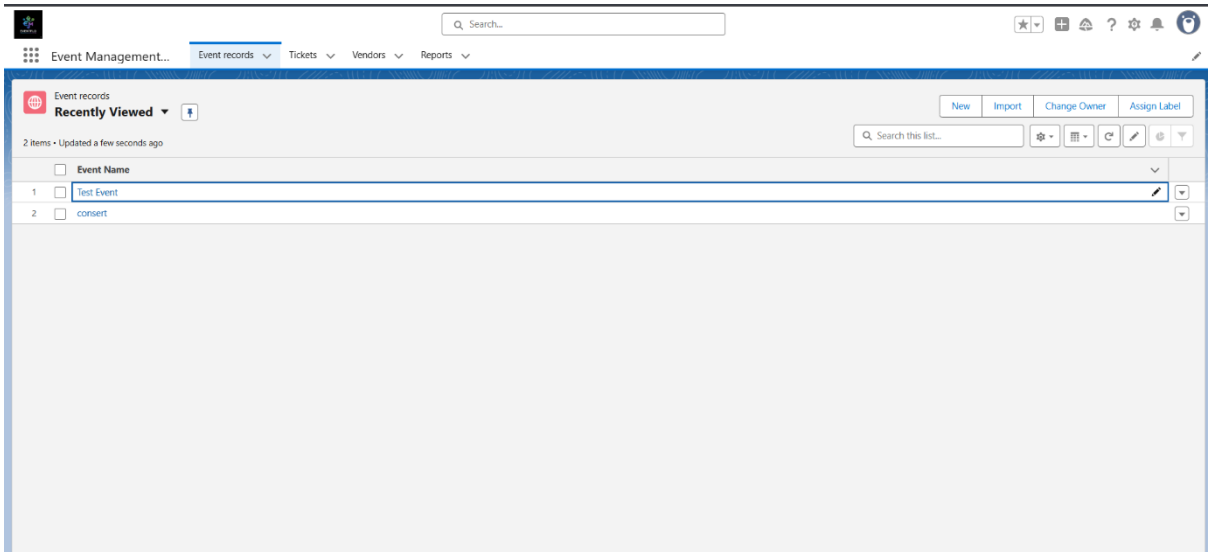
Implementation:

1. Open the app in **App Manager → Edit**.
2. Go to **Navigation Items**.
3. Move the following items from Available → Selected:
    - Events → Event_record__c list view
    - Tickets → Ticket__c list view
    - Vendors → Vendor__c list view
    - Reports
4. Arrange the tabs in logical order: Events → Tickets → Vendors → Reports.
5. Click **Save**.

Notes:

- These tabs ensure all relevant data is accessible with minimal clicks.
- Reports tab allows future analytical expansion without additional development.

ScreenShot :



Step 3: Create and Customize Record Pages

Purpose:
Record Pages define how information for each object (Event, Ticket, Vendor) is displayed. Using Salesforce Lightning Record Pages improves clarity and reduces manual data searches.

3.1 Event Record Page

1. **Setup → Object Manager → Event_record__c → Lightning Record Pages → New**
2. Label: Event Record Page
   Object: Event_record__c
3. Template: **Header and Right Sidebar**
4. Drag components:

Left / Main Region

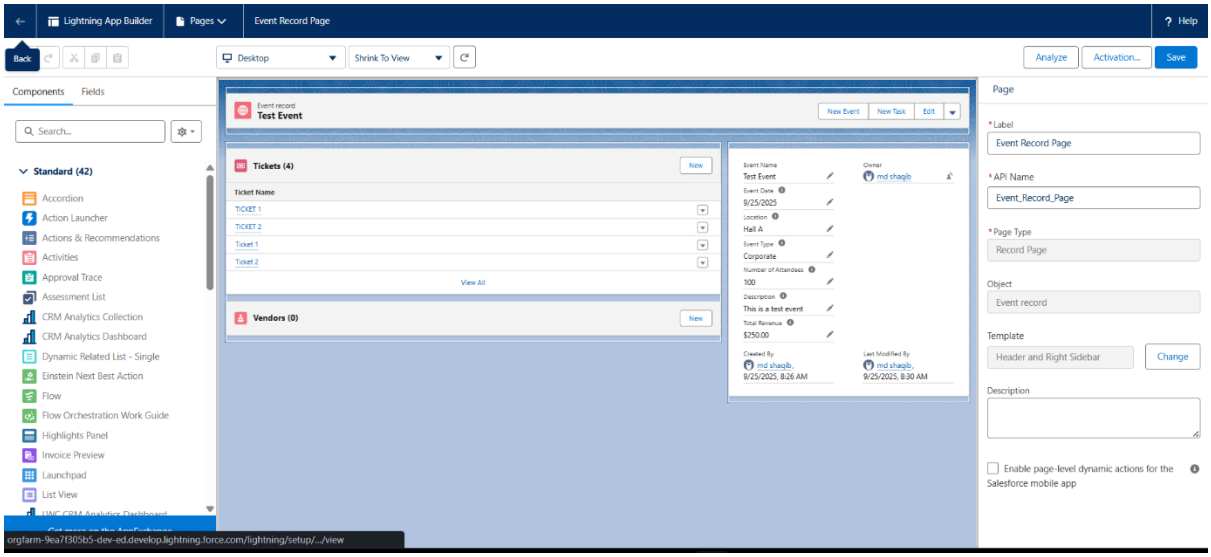
- **Highlights Panel:** Event Name, Event Date, Event Type, Location
- **Details Component (optional):** Description, Notes, Location specifics

Right Sidebar

- **Related List – Tickets:** Shows all Tickets linked to the Event
- **Related List – Vendors:** Shows all Vendors associated with the Event

5. Save → Activate → Assign as Org Default

ScreenShot:



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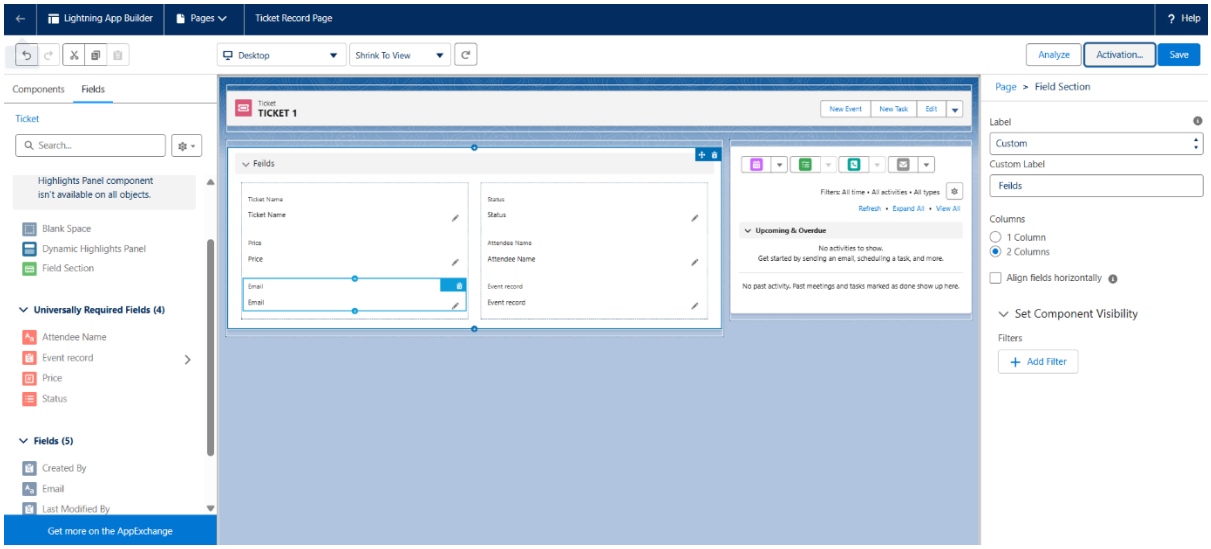
3.2 Ticket Record Page

1. Setup → Object Manager → Ticket__c → Lightning Record Pages → New
2. Label: Ticket Record Page
   Object: Ticket__c
3. Template: **One Region** (minimal layout)
4. Drag components:

- **Highlights Panel:** Ticket Name, Status, Price, Attendee Name
- **Related List – Parent Event:** Link back to Event

5. Save → Activate → Assign Org Default

ScreenShot:



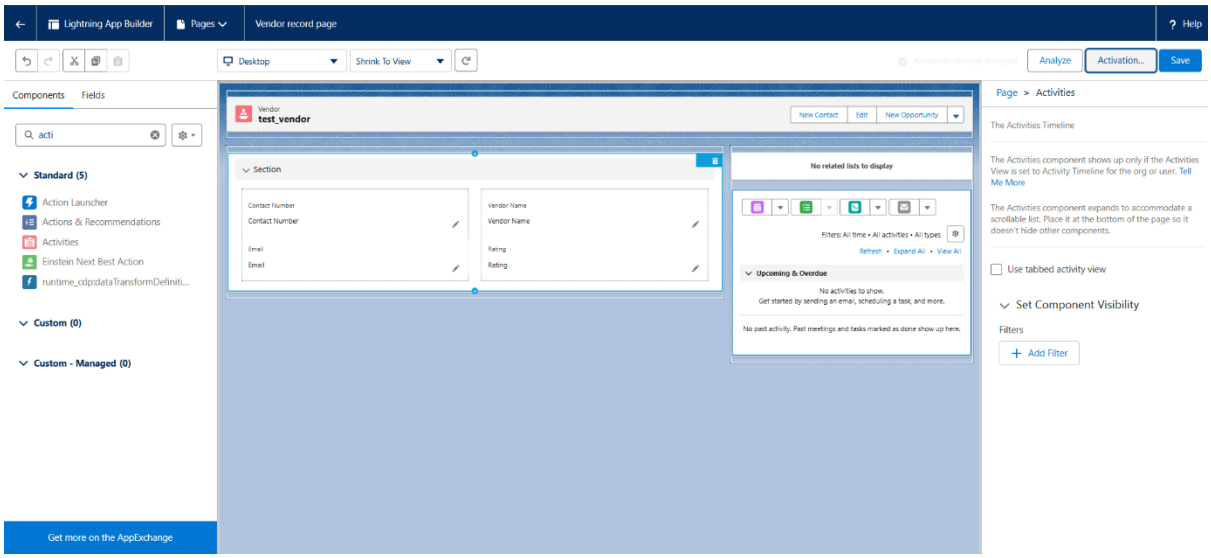
3.3 Vendor Record Page

1. Setup → Object Manager → Vendor → Lightning Record Pages → New
2. Label: Vendor Record Page
   Object: Vendor
3. Template: **One Region** (minimal layout)
4. Drag components:

- **Highlights Panel:** Vendor Name, Contact, Email, Phone
- **Related Lists:** Events linked to Vendor, Tickets linked to Vendor (if applicable)

5. Save → Activate → Assign Org Default

ScreenShot :



Step 4: Home Page Layout

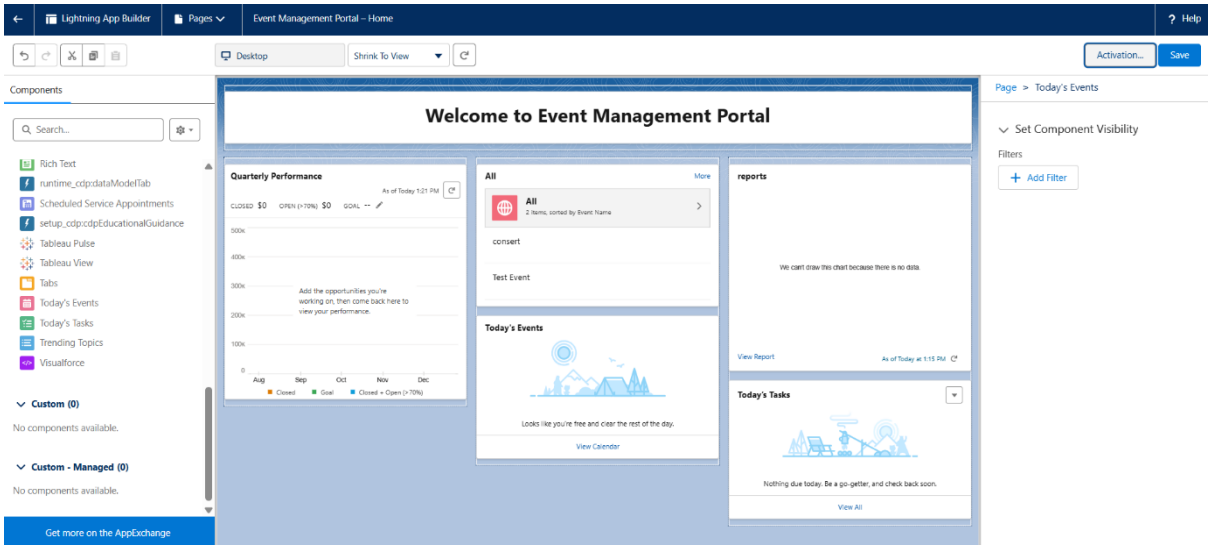
Purpose:
The Home Page provides a summary view with key metrics and quick access to records, improving productivity.

Implementation:

1. **Setup → Lightning App Builder → Home Page → New**
2. Template: **Standard Template**

Save → Activate → Assign App Default

ScreenShot :



Step 5: Lightning Web Components (Skipped)

Purpose:
LWCs provide dynamic, interactive features. In a full implementation, LWCs could show Tickets per Event in a responsive component.

Reasoning for Skipping:

- The assessment allows for minimal functional delivery.
- Standard Lightning Pages with Highlights Panels and Related Lists provide full functional access to users.
- LWC can be added later for enhanced UI, without affecting current assessment submission.

Step 6: Testing and Verification

Steps:

1. Open **Event Management Portal** app from App Launcher.
2. Check tabs:

- Events → displays Event list view
- Tickets → displays Ticket list view
- Vendors → displays Vendor list view
- Reports → optional metrics

3. Open sample records for each object:

- Event record → verify Highlights Panel and related Tickets/Vendors
- Ticket record → verify details and related Event
- Vendor record → verify contact info and related records

4. Confirm users assigned to the profiles can access the tabs and record pages.

Notes:

- All flows and automations from Phase 4 remain functional within this UI.
- Without LWC, the interface is fully usable using standard components.