

FinSmart CRM Project – Phase 6:

Lightning App & Tabs (No-Code Step by Step Procedure)

1: Create Lightning App

What I did: I created a new Lightning App using App Manager in Salesforce to organize all loan-related features in one application.

Reason: A Lightning App provides a dedicated workspace for users. By grouping related objects and features (Customers, Loan Applications, Repayments, Documents, Reports), it improves navigation and user experience.

Steps:

1. Go to Setup → App Manager → New Lightning App.
2. Enter details:
 - App Name: FinSmart Banking App
 - Navigation Type: Standard (Lightning)
 - Optionally upload a logo → Next
3. Add Tabs:
 - Customers
 - Loan Applications
 - Repayments
 - Documents
 - Reports
4. Save & Finish.

New Lightning App

App Details

* App Name ⓘ
FinSmart Banking App

* Developer Name ⓘ
FinSmart_Banking_App

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#D7330E

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

New Lightning App

Available Items

Create

Type to filter list...

Accounts

Activation Targets

Activations

All Sites

Alternative Pay...

Analytics

App Launcher

Selected Items

Bank...

Loan...

Repa...

Docu...

Offers

Back

Next

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Standar

Customer Portal M...

Standard Platform ...

Selected Profiles

Loan_Officer_Profile

Risk_Analyst_Profile

Manager_Profile

System Administra...

Standard User

Back

Save & Finish

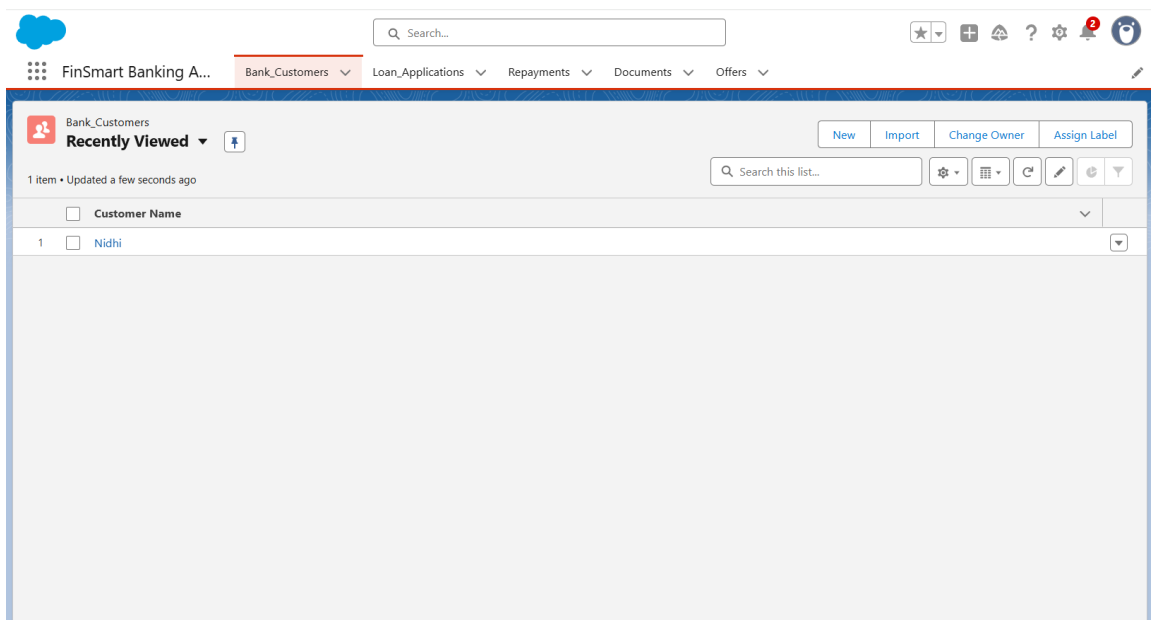
Step 2: Confirm Tabs in App Launcher

What I did: I verified the app setup by launching it from the App Launcher and ensuring all required tabs are visible.

Reason: Verification ensures the app is properly configured and that users will be able to access all necessary components in their daily work.

Steps:

1. Go to Setup → App Launcher.
2. Open the newly created FinSmart Banking App.
3. Confirm that all required tabs (Customers, Loan Applications, Repayments, Documents, Reports) are visible.



Summary

- What I did: Created a dedicated Lightning App named FinSmart Banking App and added navigation tabs for core objects.
- Reason: To provide a centralized, easy-to-use application that helps users manage customers, loans, repayments, documents, and reports efficiently.

Next step: Add screenshots of app creation and tab confirmation for documentation.