

Phase 6: User Interface Development

Purpose: Develop a user-friendly interface for the Customer Feedback CRM, including record pages, home page, tabs, utility bar, and plan for future enhancements with LWCs and Apex.

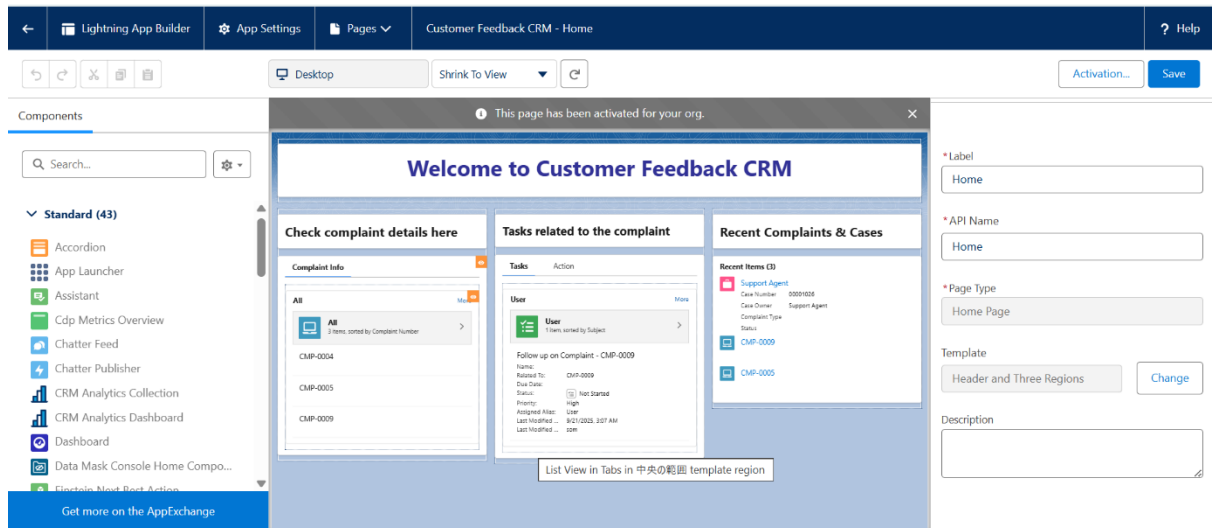
Lightning App Builder

Goal: Design and customize pages (Home Page, Record Pages) for better user experience.

Steps Done:

1. Opened Lightning App Builder.
2. Created Home Page using 3-region layout.
3. Created Customer Feedback CRM with Tabs.
4. Added components to regions (Rich Text, List Views, Tabs).
5. Saved and activated pages.

The screenshot shows the Lightning App Builder interface for the 'Customer Feedback CRM' app. The top navigation bar includes a back arrow, 'Lightning App Builder', 'App Settings', 'Pages', and the app name 'Customer Feedback CRM'. A 'Help' icon is in the top right. The left sidebar is titled 'App Settings' and contains a list of options: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes a subtitle: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section has three input fields: '* App Name' (filled with 'Customer Feedback CRM'), '* Developer Name' (filled with 'Customer_Feedback_CRM'), and 'Description' (filled with 'CRM for tracking customer complaints and resolutions'). The 'App Branding' section includes an 'Image' upload area (showing a placeholder image of two people), a 'Primary Color Hex Value' dropdown (set to '#0070D2'), and a 'Clear' button. Below this is the 'Org Theme Options' section with a checked checkbox 'Use the app's image and color instead of the org's custom theme'. At the bottom is the 'App Launcher Preview' section, which shows a preview of the app's launcher card with the app name and description.



Record Pages

Goal: Control what users see when they open a single Complaint record.

Steps Done:

1. Opened Customer Feedback CRM in Lightning App Builder.
2. Added Tabs component with two tabs:
 - Tab 1: Complaint Info
 - Tab Label: Complaint Info
 - Component: List View of Complaints
 - Filter: Owner/User = Current User (or Active = True) to show only the current user's active complaints.
 - Tab 2: Task & Action
 - Tab Label: Task & Action
 - List View: Object = Task, Filter = User = Current User, Number of Records = 3 to show latest tasks.
 - Action Component: Object = Task, Filter = Recently Completed Tasks to allow users to review recently completed tasks.
3. Activated the page as Org Default / App Default so it is visible to all users in the org.

Record Type Help for this Page

Customer Feedback

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

[Edit](#)

Record Type Label	Customer Feedback	Active	✓
Support Process	Customer Feedback Process		
Record Type Name	Customer_Feedback		
Namespace Prefix			
Description	Record type for tracking customer complaints and feedback		
Created By	Somya Nema, 9/17/2025, 1:58 AM	Modified By	Somya Nema, 9/17/2025, 1:58 AM

Record Type: Customer Feedback ~ Salesforce - Developer Edition

Picklists Available for Editing		Picklists Available for Editing Help ?
Action	Field	Modified Date
Edit	Case Origin	9/17/2025, 1:58 AM
Edit	Case Reason	9/17/2025, 1:58 AM
Edit	Complaint Type	9/17/2025, 1:58 AM
Edit	Potential Liability	9/17/2025, 1:58 AM
Edit	Priority	9/17/2025, 1:58 AM
Edit	Product	9/17/2025, 1:58 AM
Edit	SLA Violation	9/17/2025, 1:58 AM
Edit	Status	9/17/2025, 1:58 AM
Edit	Type	9/17/2025, 1:58 AM

Tabs

Goal: Separate sections inside the Record Page for easy navigation.

Steps Done:

- Tab 1: Complaint Info → displays all complaints for the logged-in user.
- Tab 2: Task & Action → shows pending and recently completed tasks for the user.

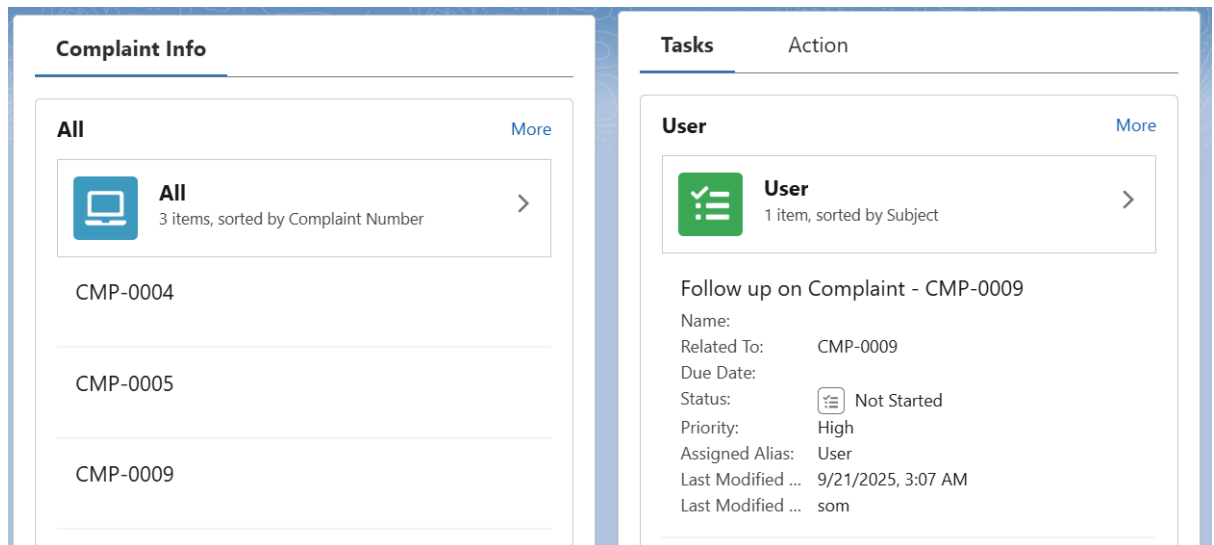
Home Page Layouts

Goal: Create main dashboard view for the app.

Steps Done:

1. Opened Home Page in Lightning App Builder.
2. Selected 3-region layout for better component organization.
3. Added components:
 - Rich Text: Welcome for guidance.
 - List View: Recent Complaints filtered for current user to see latest complaints.
 - List View: Tasks / Actions filtered for current user to track actions.
4. Used Tabs component to combine multiple List Views in one region.

5. Saved and activated the page.

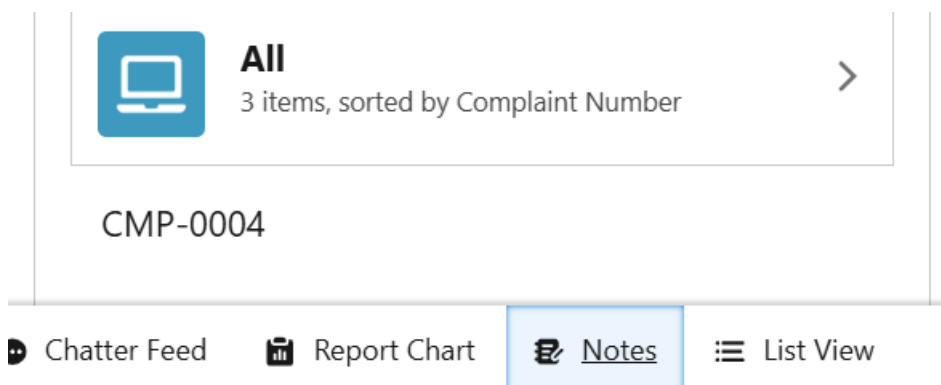


Utility Bar

Goal: Provide quick access to tools (Notes, Flow, Reports, Chatter) at the bottom of the app.

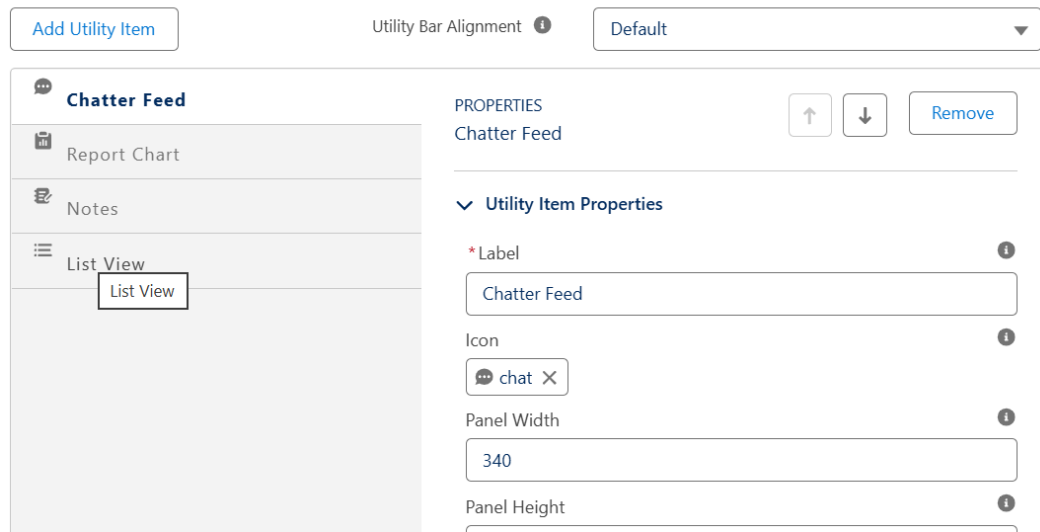
Steps Done:

1. Go to Setup → App Manager → Customer Feedback App → Edit.
2. Click Utility Bar in left menu.
3. Click Add → select utility type (Notes, Chatter ,Report Chart ,List View).
4. Set Label, Icon, Height, and arrange order.
5. Save the app.



Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.



LWC (Lightning Web Components)

Goal: Create custom, interactive components for dynamic data display.

Will implement in future: For dynamic charts, complaint summaries, or quick action buttons.

Apex with LWC

Goal: Use Apex methods to provide data or actions for LWCs.

Will implement in future: To fetch complaint counts, tasks, or perform automated actions.

Events in LWC

Goal: Enable communication between LWCs for interactive features.

Will implement in future: To make tabs, charts, and components interact dynamically.

Wire Adapters

Goal: Fetch Salesforce data reactively in LWCs.

Will implement in future: To show live updates of complaints and tasks.

Imperative Apex Calls

Goal: Call Apex methods on-demand from LWCs.

Will implement in future: For actions like assigning tasks, updating records, or triggering automation.

Navigation Service

Goal: Programmatically navigate users to records or pages from LWCs.

Will implement in future: To enhance user experience with quick navigation between records and dashboards.
