

Phase 6: User Interface Development

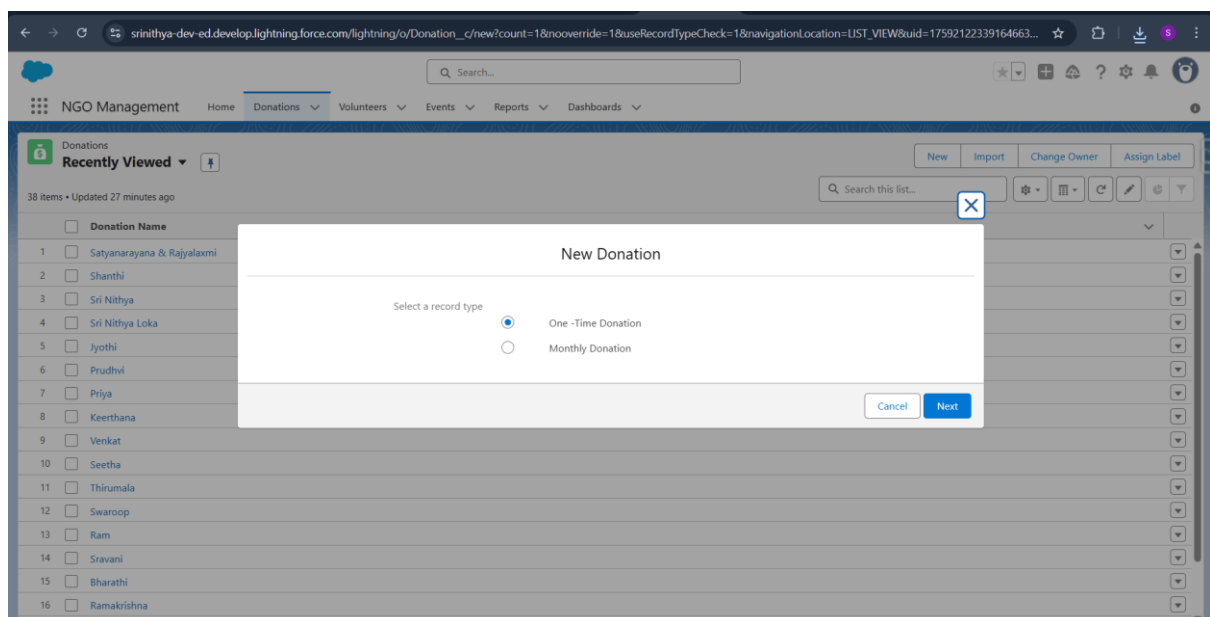
Objective

To design a **user-friendly, role-specific interface** in Salesforce using **Page Layouts, Record Types, and Dashboards**, ensuring donors, volunteers, and admins interact with the system seamlessly.

UI Components Implemented

1. Page Layouts & Record Types

- **Donation Object (Donation__c)**
 - **One-Time Donation Layout** → Fields: Donor Info, Amount, Date, Occasion, Related Event.
 - **Monthly Donation Layout** → Fields: Donor Info, Monthly Start Date, Frequency, Reminder Settings.
- **Volunteer Object (Volunteer__c)**
 - **Registration Layout** → Fields: Name, Skills, Availability, Event Participation.
 - **Feedback Layout** → Fields: Event Attended, Feedback Comments, Participation Hours.
- **Event Object (Event__c)**
 - **Event Management Layout** → Fields: Event Name, Date, Location, Description, Related Volunteers/Donations.



2. Custom Lightning Pages

- **Donation Record Page**
 - Displays donation details with quick actions for “Send Thank You Email.”
 - Highlights donation type (Money, Food, Clothes, etc.).
- **Volunteer Registration Page**
 - Easy form for registering new volunteers.
 - Quick links to assign volunteers to events.
- **Event Detail Page**
 - Provides a consolidated view of event details, related donations, and volunteers.
 - Related lists for better navigation.

The screenshot displays the 'New Donation: One-Time Donation' form in a Salesforce Lightning interface. The form is titled 'New Donation: One-Time Donation' and includes a search bar at the top. It features several input fields for 'Information' including 'Donation Name', 'Donor Name', 'Email', 'Phone', 'Donation Date', 'Occasion', 'Occasion Date', and 'Related Event'. There is a 'Donation Type' section with 'Available' and 'Chosen' lists. The 'Owner' is set to 'Sri Nithya Loka'. The form has 'Cancel', 'Save & New', and 'Save' buttons at the bottom. The background shows a sidebar with 'Donations' and 'Recently Viewed' lists.

3. Dashboards & Reports UI

- **Donations by Occasion (Bar Chart)** → e.g., Birthday, Anniversary, Festival.
- **Volunteers by Event (Donut Chart)** → Shows volunteer distribution across events.
- **Top Donors (Lightning Table)** → Highlights recurring and high-value donors.

4. UI Enhancements for Usability

- **Record Types** ensure only relevant fields appear (e.g., Monthly vs One-Time Donations).

- **Compact Layouts** highlight key donor/volunteer info at the top.
- **Dynamic Forms (Lightning)** allow conditional visibility of fields.
- **Tab Visibility** is role-based (Admins see all, Donor Managers see Donations, Volunteer Coordinators see Volunteers).

Tabular Summary

UI Component	Type	Purpose
Donation Page Layouts	Record-Type Based	Separate layouts for One-Time & Monthly donations.
Volunteer Page Layouts	Record-Type Based	Different layouts for Registration & Feedback.
Event Page Layout	Standard Page Layout	Shows Event details with related donations & volunteers.
Donation Lightning Page	Custom Lightning Page	Quick access to donation info & “Thank You Email” action.
Volunteer Registration Page	Custom Lightning Page	Simple volunteer form with assignment options.
Event Detail Page	Custom Lightning Page	Unified view of events, linked donors & volunteers.
Dashboards	Charts & Tables	Real-time view of donations, events, top donors, and volunteer stats.

Benefits of UI Development

- Improves **user adoption** with intuitive layouts.
- Reduces **data entry errors** by showing only relevant fields.
- Provides **real-time insights** via dashboards.
- Ensures **role-based clarity** (each profile sees only what’s needed).