

Phase 6

This phase discusses about the User Interface Development and its various components.

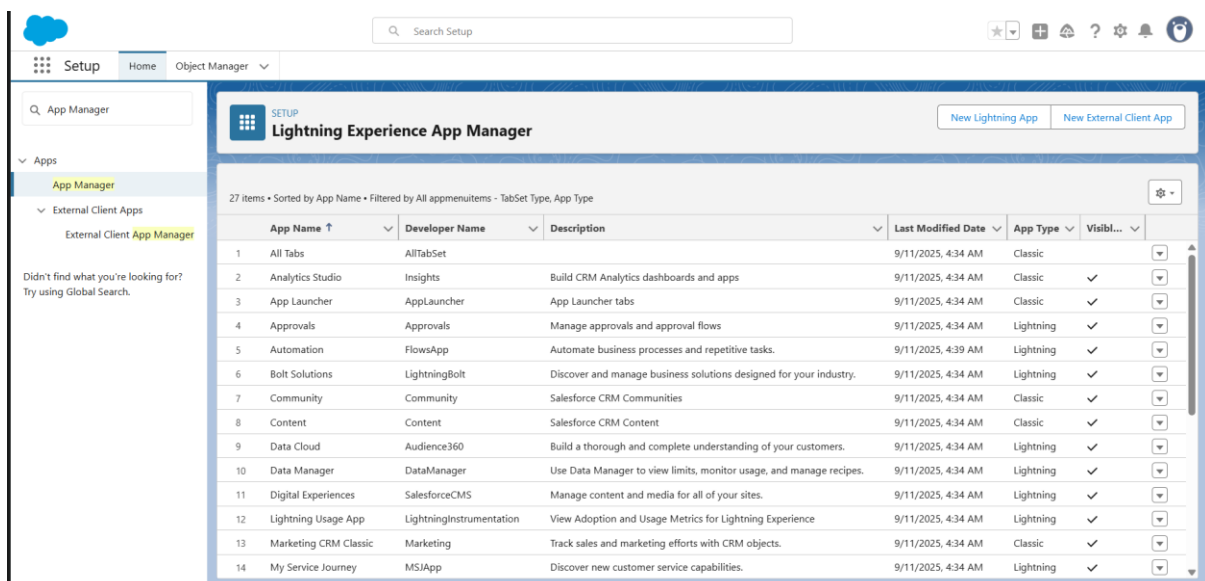
SHELF SYNC LIBRARY

❖ Lightning App Creation :

- Logo used for the app (Company Logo)



- Go to app manager to create a Lightning app



App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
1 All Tabs	AllTabSet		9/11/2025, 4:34 AM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/11/2025, 4:34 AM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	9/11/2025, 4:34 AM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	9/11/2025, 4:34 AM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/11/2025, 4:39 AM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/11/2025, 4:34 AM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	9/11/2025, 4:34 AM	Classic	✓
8 Content	Content	Salesforce CRM Content	9/11/2025, 4:34 AM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/11/2025, 4:34 AM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/11/2025, 4:34 AM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/11/2025, 4:34 AM	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/11/2025, 4:34 AM	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/11/2025, 4:34 AM	Classic	✓
14 My Service Journey	MSJApp	Discover new customer service capabilities.	9/11/2025, 4:34 AM	Lightning	✓

- Created an app named Shelf Sync Library with the custom created logo of the company

The screenshot shows the 'App Settings' page for 'Shelf Sync Library' in the Lightning App Builder. The 'App Details & Branding' tab is selected. The page is divided into two main sections: 'App Details' and 'App Branding'.

App Details:

- App Name:** Shelf Sync Library
- Developer Name:** Shelf_Sync_Library
- Description:** This app manages all the books related tasks for the company.

App Branding:

- Image:** A logo for 'SHELF SYNC TECHNOLOGIES' featuring a stylized bookshelf and a gear.
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme' is unchecked.
- App Launcher Preview:** A preview of the app launcher showing the 'Shelf Sync Library' icon and the text 'This app manages all the books related tasks for the c...'.

App Options :

The screenshot shows the 'App Options' tab in the 'App Settings' page. The page is divided into two main sections: 'Navigation and Form Factor' and 'Setup and Personalization'.

Navigation and Form Factor:

- Navigation Style:**
 - ☒ Standard navigation
 - ☐ Console navigation
- Supported Form Factors:**
 - ☒ Desktop and phone
 - ☐ Desktop

If you don't see all the form factors in this list, it's because this app contains items that prevent selection of one or more options. For example, if an app contains pages assigned to the phone form factor, you can't switch the app to be for desktop only.

Setup and Personalization:

- Setup Experience:**
 - ☒ Setup (full set of Setup options)
 - ☐ Service Setup
 - ☐ Data Cloud Setup
- App Personalization Settings:**
 - ☐ Disable end user personalization of nav items in this app
 - ☐ Disable temporary tabs for items outside of this app
 - ☐ Use Omni-Channel sidebar

Utility Items :

The screenshot shows the 'Utility Items (Desktop Only)' tab in the 'App Settings' page. The page is divided into two main sections: 'Recent Items' and 'Properties'.

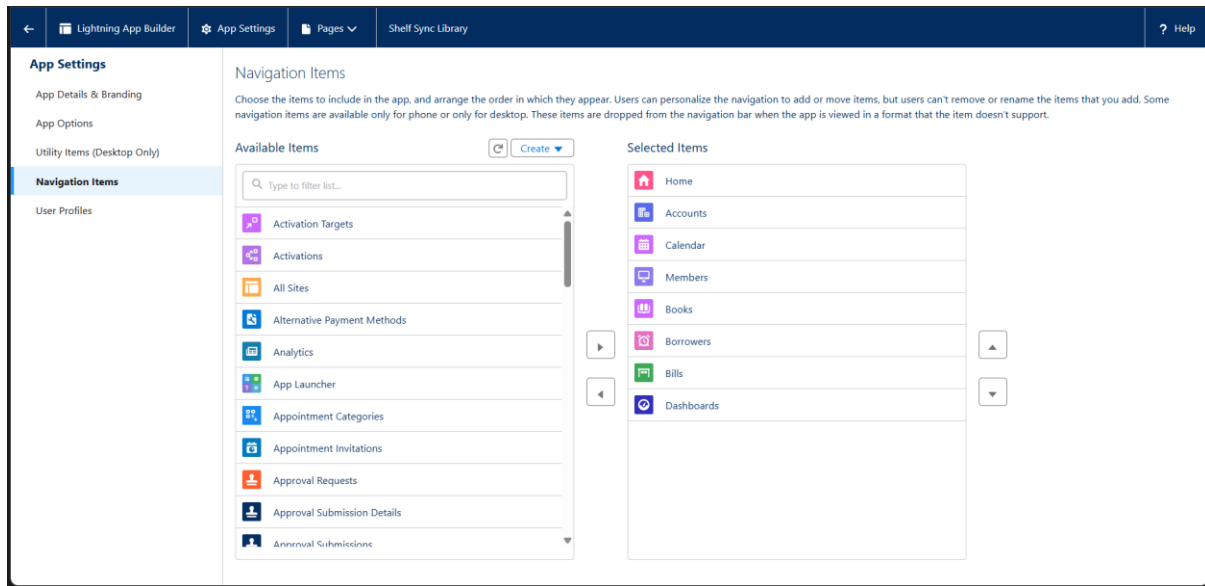
Recent Items:

- History:** A list of recent utility items, currently empty.
- Notes:** A list of notes, currently empty.

Properties:

- Utility Item Properties:**
 - Label:** Recent Items
 - Icon:** A fallback icon (X)
 - Panel Width:** 340
 - Panel Height:** 480
 - ☐ Start automatically
- Component Properties:**
 - Label:** Custom
 - Custom Label:** Custom Label

Navigation Items :

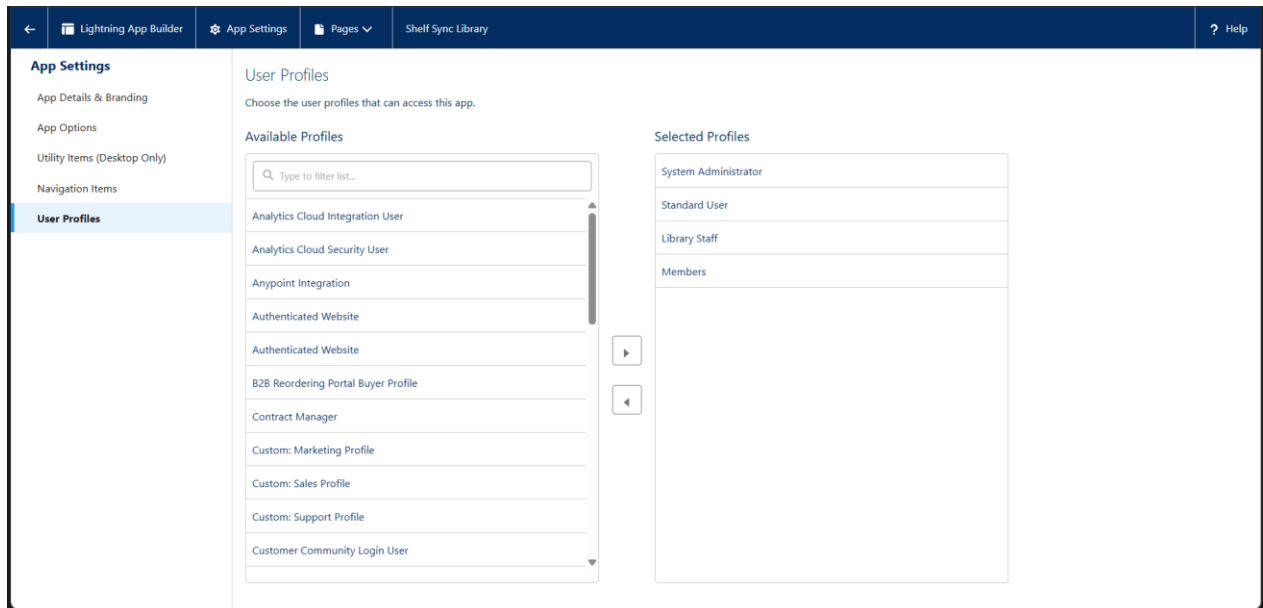


Selecting navigation items like Home, Calendar, Members, Books, Borrowers, Bills, Dashboards

These navigation items are selected in terms of displaying them to the different profiles i.e. Staff or the Members of the library, The Access has been set accordingly.

For Example the dashboards will be shown to the System Admin (Librarian) and the Library Staff Only.

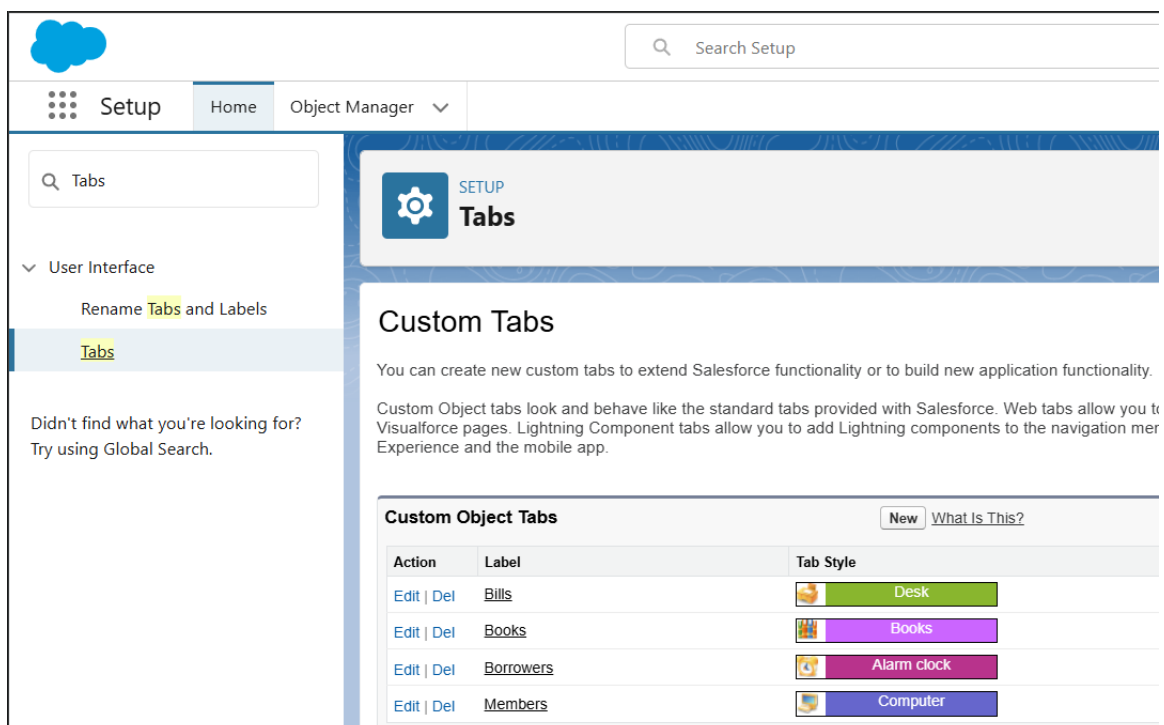
User Profiles :



Now selecting the profiles the app should be visible to in the above screenshot

❖ Tabs :

Creating the tabs for the objects i.e. Bill, Book, Member, Borrower



These Tabs allow us to show them as Navigation Items in the respective apps.










Navigation Items for the Shelf Sync Library App :

Edit Shelf Sync Library App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#) ⓘ

NAVIGATION ITEMS (9)

Add More Items

≡		Home	
≡		Contacts	×
≡		Dashboards	
≡		Accounts	
≡		Calendar	
≡		Books	
≡		Borrowers	
≡		Members	
≡		Bills	

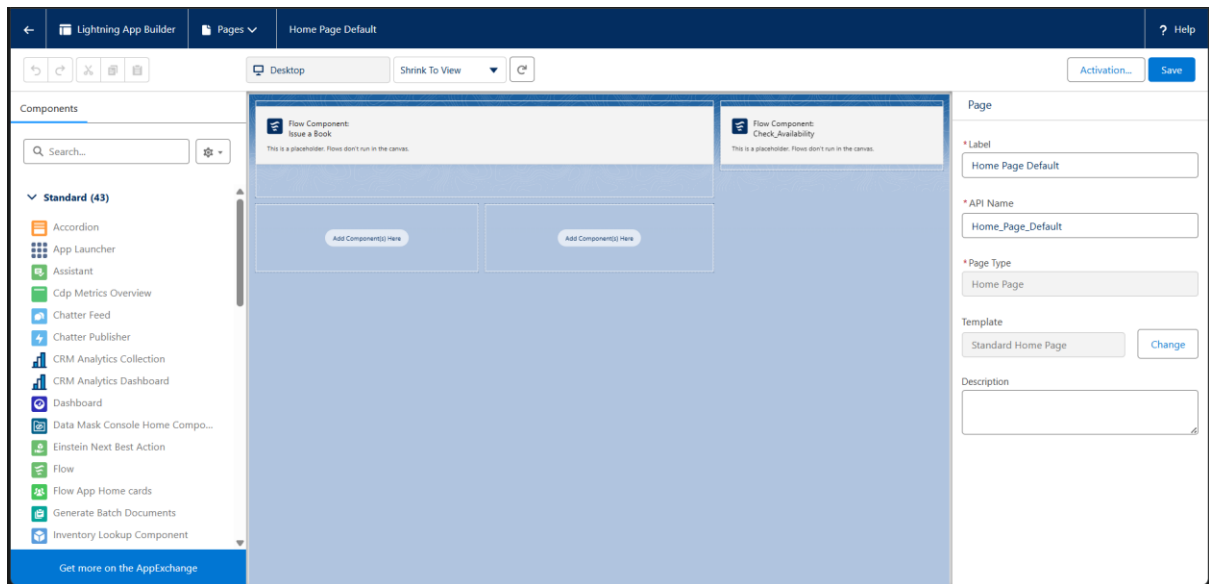
[Reset Navigation to Default](#) ⓘ

Cancel

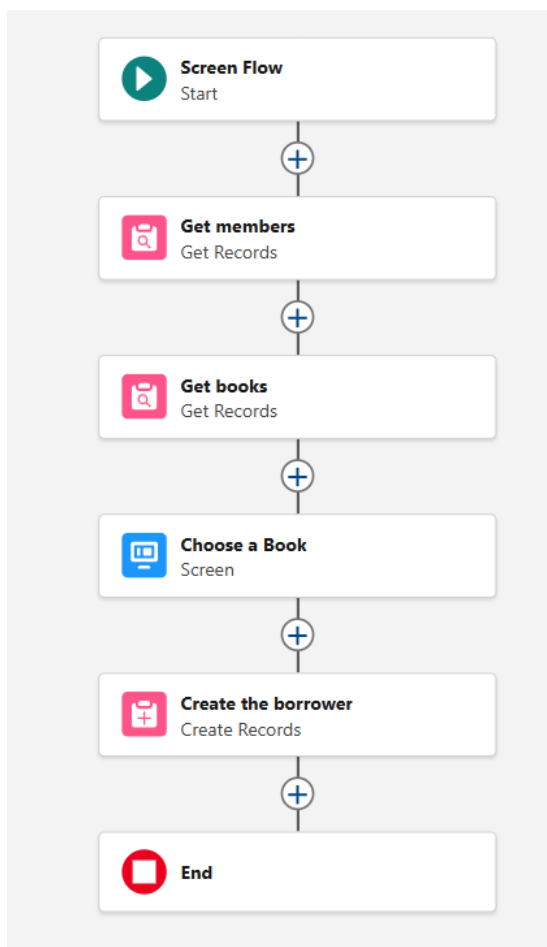
Save

❖ Home Page Layouts :

- While being on the Home page click the setting icon on the top right
- Click on the Edit Page Button
- Now in the app builder the Layout of the home page can be customized



- For a custom experience in the book issue process, I have created 2 screen flows for the Library Staff to Allocate the books to the Members Via an Interactive Flow **(The First One :)**



- This flow created using flow builder facilitates creation of the borrower record through a user interface based process and then the flow was added to the home page.

Get Records

* Label

Get members

* API Name ⓘ

Get_members

Description

Get Records of This Object

* Object

Member

Filter Member Records

⚠ With no conditions, the flow retrieves **all** Member records.

Condition Requirements

None—Get All Member Records

Sort Member Records

Sort Order

Ascending

* Sort By

Name

How Many Records to Store

☐ Only the first record

☐ All records, up to a specified limit

☒ All records

How to Store Record Data

☐ Automatically store all fields

☒ Choose fields and let Salesforce do the rest

☐ Choose fields and assign variables (advanced)

Select Member Fields to Store in Variable

Field

Id

Field


Name

+ Add Field

Get Records

*Label

Get books

*API Name 

Get_books

Description


Get the book records.

Get Records of This Object

*Object

Book

Filter Book Records

 With no conditions, the flow retrieves **all** Book records.

Condition Requirements

None—Get All Book Records

Sort Book Records

Sort Order

Ascending

*Sort By

Name

How Many Records to Store

- ☐ Only the first record
- ☐ All records, up to a specified limit
- ☒ All records

How to Store Record Data

- ☐ Automatically store all fields
- ☒ Choose fields and let Salesforce do the rest
- ☐ Choose fields and assign variables (advanced)

Select Book Fields to Store in Variable

Field

Id

Field

Name



Field

Book_Type__c



Field

Author__c



+ Add Field

Edit Screen

Components Fields

Search components...

- Input (53)
- Action Button
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup
- Currency
- Data Table
- Date
- Date & Time
- Dependent Picklists
- Display Image
- Email
- Enhanced Message

Get more on the AppExchange

Issue a Book

Select Book (One at a time)

0 of 0 items • 0 items selected

Book Title	Book Type	Author
No items to display.		

Choose Member

0 of 0 items • 0 items selected

Member Name
No items to display.

* Select Date

Pause Previous Finish

Screen Properties

Properties

*Label

Choose a Book

*API Name

Choose_a_Book

Description

A page to issue a book

Stage

Select a stage resource...

Configure Header

Configure Footer

Configure Screen Actions

Cancel Done

Create Records

* Label

Create the borrower

* API Name

Create_the_borrower

Description

* How to set record field values

Manually

Create a Record of This Object

* Object

Borrower

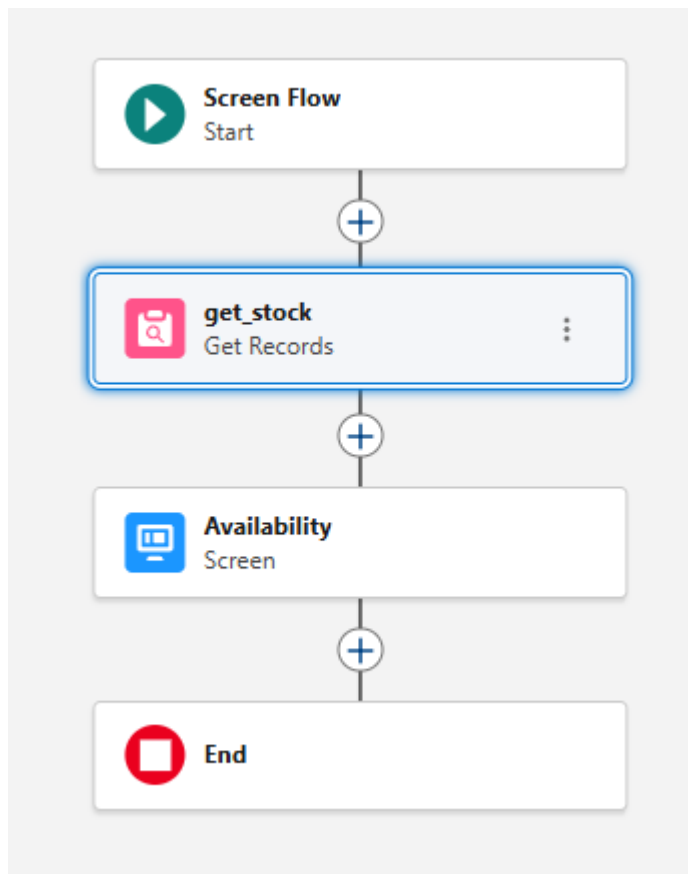
Set Field Values for the Borrower

Field	Value
A Book	A ...(One at a time) > First Selected Row > Record ID
Issue Date	Choose a Book > Select Date
A Member	A ...oose Member > First Selected Row > Record ID


+ Add Field

- These above screenshots give the overview of the workflow to create the records and provide an interactive flow on the home page.


- Follows the sequence → Get Member Records → Selecting the Member → Getting Book Records → Selecting the book to issue → Through the Screen → Finally using the data collected from the screen to input the fields of borrower and creating record successfully.
- The next flow added on the home page is to show the availability of the books in the library.



- First gets the records from the books

 Get Records

Filter Book Records

 With no conditions, the flow retrieves **all** Book records.

Condition Requirements

None—Get All Book Records ▼

Sort Book Records

Sort Order *Sort By

Ascending ▼ Name

How Many Records to Store

☐ Only the first record

☐ All records, up to a specified limit

☒ All records

How to Store Record Data

☐ Automatically store all fields

☒ Choose fields and let Salesforce do the rest


☐ Choose fields and assign variables (advanced)

Select Book Fields to Store in Variable


Field

Id


Field

Name 

Field

Author__c 

Field

Stock__c 

+ Add Field

The availability screen :

Check_Availability


Stock Available
0 of 0 items • 0 items selected

Book Name	Available Stock	Author
No items to display.		

[Pause](#)[Previous](#)[Finish](#)

This will show the remaining book stock for any book and also has the search bar to check for certain books in the huge stack.

• The below is the Home Page Created :

**Shelf Sync Library**

[★](#) [+](#) [🗑️](#) [?](#) [⚙️](#) [🔔](#) [👤](#)

[Home](#) [Contacts](#) [Dashboards](#) [Accounts](#) [Calendar](#) [Books](#) [Borrowers](#) [Members](#) [Bills](#)

Issue a Book

Select Book (One at a time)
2 of 2 items • 0 items selected

Book Title	Book Type	Author
<input type="radio"/> Kshirsagar	Art & Photography	asas
<input type="radio"/> Vedant	Adventure	asas

Choose Member
3 of 3 items • 0 items selected

Member Name

☐ Disco

☐ Vedant

☐ Vedanti

* Select Date

[Next](#)

Check_Availability

Stock Available
2 of 2 items

Book Name	Available Stock	Author
Kshirsagar	4	asas
Vedant	3	asas

[Finish](#)

[Recent Items](#) [History](#)

Note : LWC Components are not included in this project.