Subscription / Personal Services Tracker CRM

Phase 6: User Interface Development

OBJECTIVE:

To enhance the user experience by customizing the Salesforce UI using:

- Lightning Record Pages

- Dynamic Forms

- Custom Tabs and Navigation

- (Optional) Custom Components / Buttons

WHAT TO DO:
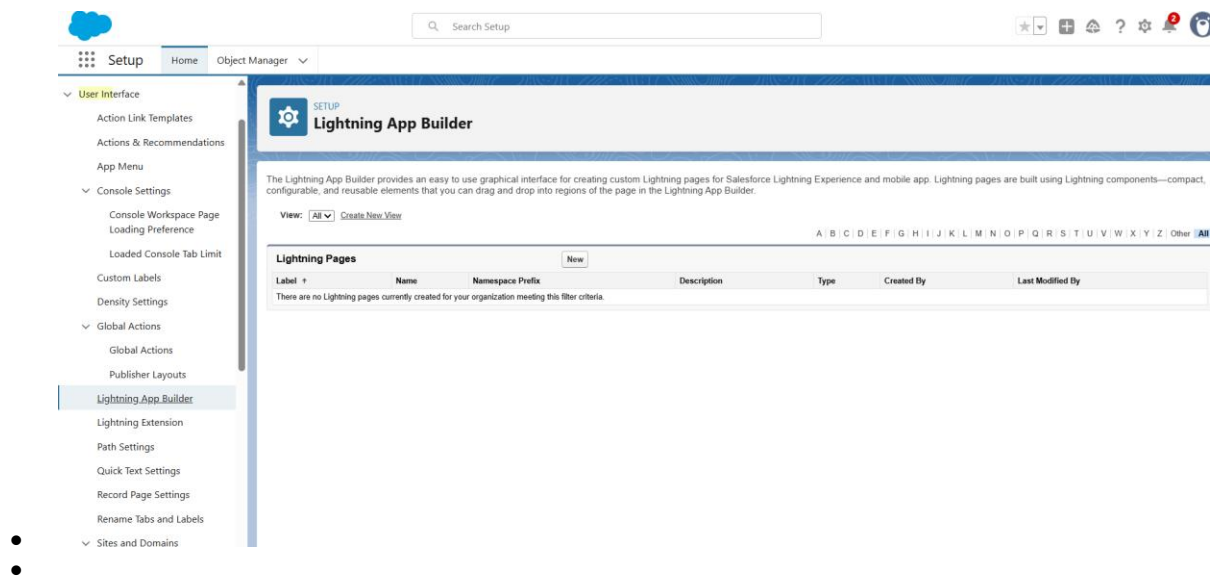
Feature	Purpose
Customize Lightning Record Pages	Show subscription info clearly per user
Add Related Lists	Show related Payments inside Subscription
Add Tabs to Navigation	Ensure all custom objects are accessible
Use Dynamic Forms	Show/hide fields based on values (optional)
Add Utility Icons & Branding (opt.)	Improve usability

Customize Lightning Record Page – Subscription

Step 1: Navigate to Subscription Object

- Go to:
  Setup → Object Manager → Subscription__c

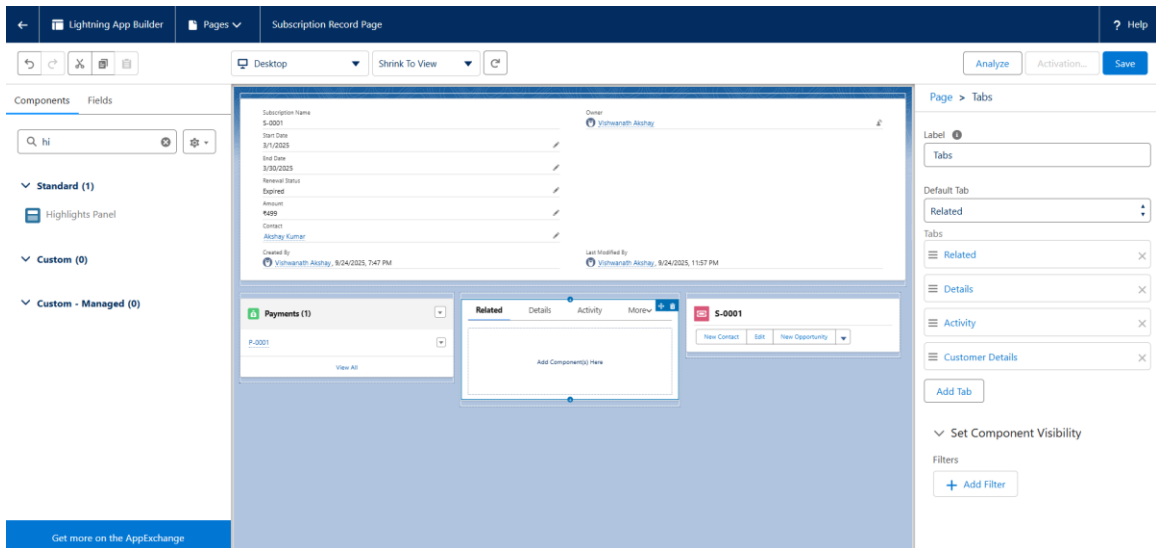- Click: Lightning Record Pages → New

Create a New Record Page

Field	Value
Label	Subscription Record Page
Template	Header and Three Regions
Object	Subscription__c

Add Components to Page

You'll now see the Lightning App Builder:

1. Drag and drop:
   - Record Detail → Main section
   - Related Lists – Single → Bottom or right
     - Configure to show Payments
   - (Optional) Highlights Panel
   - Tabs → To split between Details, Payments, etc.
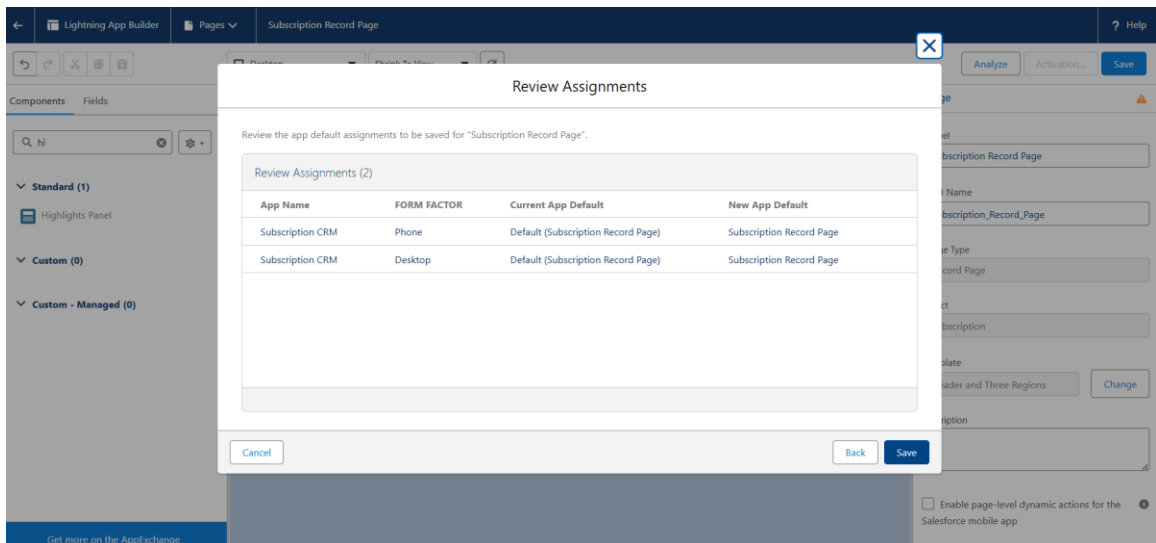
Click Save → Activate

Customize Contact Record Page

Step 1: Go to Contact Object

- Setup → Object Manager → Contact

- Lightning Record Pages → New

Step 2: Add Tabs

PART 4: Add Utility Icons & App Branding (Optional)

Steps:

- In App Settings → Set a Utility Bar

    - Add tools like Notes, Recent Items, etc.

- Upload an App Logo (recommended size: 128x128px)

- Change app color (theme)

PART 5: (Optional) Dynamic Form – Show Fields Based on Status

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Example: Show Renewal Notes field only if status = "Expired"

Step 1: Add Custom Field

Field   Type Values

Renewal Notes Text (User notes)

Step 2: Go to Subscription Record Page (Lightning App Builder)

- Click on "Renewal Notes" field → Set Visibility Filter

    - Show If: Renewal Status = Expired

Save & Activate