

Phase 6: User Interface Development

Objective: To create a clean, intuitive, and efficient user experience for the Loan Officers and Managers who will use the application daily. The goal was to move beyond the default Salesforce layout to a polished interface that guides users and presents information logically.

Key Activities & Outcomes:

- 1. Lightning App Creation:** A dedicated and branded "Loan Processing" Lightning App was created. This provides a focused workspace for users, containing only the necessary tabs (Loan Applications, Customers, Reports, Dashboards), which minimizes clutter and improves navigation.
- 2. Custom Page Layout with Dynamic Forms:** The standard Loan Application record page was significantly enhanced. We upgraded to Dynamic Forms in the Lightning App Builder, which allowed us to:
 - Organize fields into logical sections (e.g., "Customer Information" and "Loan Details").
 - Improve the overall readability and data entry flow for the user.
- 3. Visual Path Implementation:** A Path component was configured and added to the top of the Loan Application record page.
 - This Path is based on the Status field.
 - It provides a clear, visual roadmap of the loan's lifecycle, showing users exactly which stage a loan is in and what the next steps are.

Supporting Evidence: The Final Loan Application Record Page

The screenshot below shows the final, polished user interface for a Loan Application record. It demonstrates the organized sections for data and the visual Path component at the top, which guides the user through the process.

