

# Phase 6 - User Interface Development

This document provides a detailed, step-by-step summary of all user interface (UI) tasks completed for Phase 6 of the Salon Management System project. The objective of this phase was to build a clean, branded, and efficient application experience for all salon users.

## 1. Lightning App Builder, Tabs, & Utility Bar

- **Purpose:** To create a dedicated, branded "home" for the salon's operations, moving users out of the standard "Sales" app and into a custom-built environment. This provides a focused workspace with only the necessary tools and information.
- **Steps Followed (Creating the "Salon Console" App):**
  - Navigated to **Setup > App Manager** and launched the **New Lightning App** wizard.
  - **App Details:** Named the application `Salon Console` and provided a description.
  - **Navigation Style:** Selected **Console** navigation to allow users (especially the busy receptionist) to open multiple records in separate workspace tabs.
  - **Utility Bar:** Used the **Add Utility Item** feature to add the **Recent Items** component to the app's footer, giving all users a quick way to access their record history.
  - **Tabs:** From the "Navigation Items" screen, the **Appointments**, **Services**, and **Contacts** tabs were selected and ordered to be the primary navigation for the application.
  - **Profile Assignment:** The new `Salon Console` app was assigned to the **Receptionist Profile**, **Stylist Profile**, and **System Administrator** profiles, making it visible and accessible to all project users in the App Launcher.

The screenshot displays the Lightning App Builder interface for configuring the 'Salon Console' app. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Salon Console'. A left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', 'Navigation Rules', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains the following sections:

- App Details:** Includes input fields for 'App Name' (filled with 'Salon Console'), 'Developer Name' (filled with 'Salon\_Console'), and a 'Description' text area (filled with 'The primary application for managing salon appointments and clients').
- App Branding:** Includes an 'Image' upload area (showing a 'VANITY' logo), a 'Primary Color Hex Value' dropdown (set to '#000000'), and 'Org Theme Options' with a checkbox 'Use the app's image and color instead of the org's custom theme'.
- App Launcher Preview:** A preview of the app icon and name, showing 'Salon Console' and the description 'The primary application for managing salon appointment...'.

Lightning App Builder | App Settings | Pages | Salon Console | ? Help

### App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- Navigation Rules
- User Profiles

#### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

☐ Create

Type to filter list...

- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details
- Approval Submissions
- Approval Work Items

Selected Items

- Home
- Appointments
- Services
- Contacts
- Reports
- Dashboards

### User Profiles

Choose the user profiles that can access this app.

#### Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User

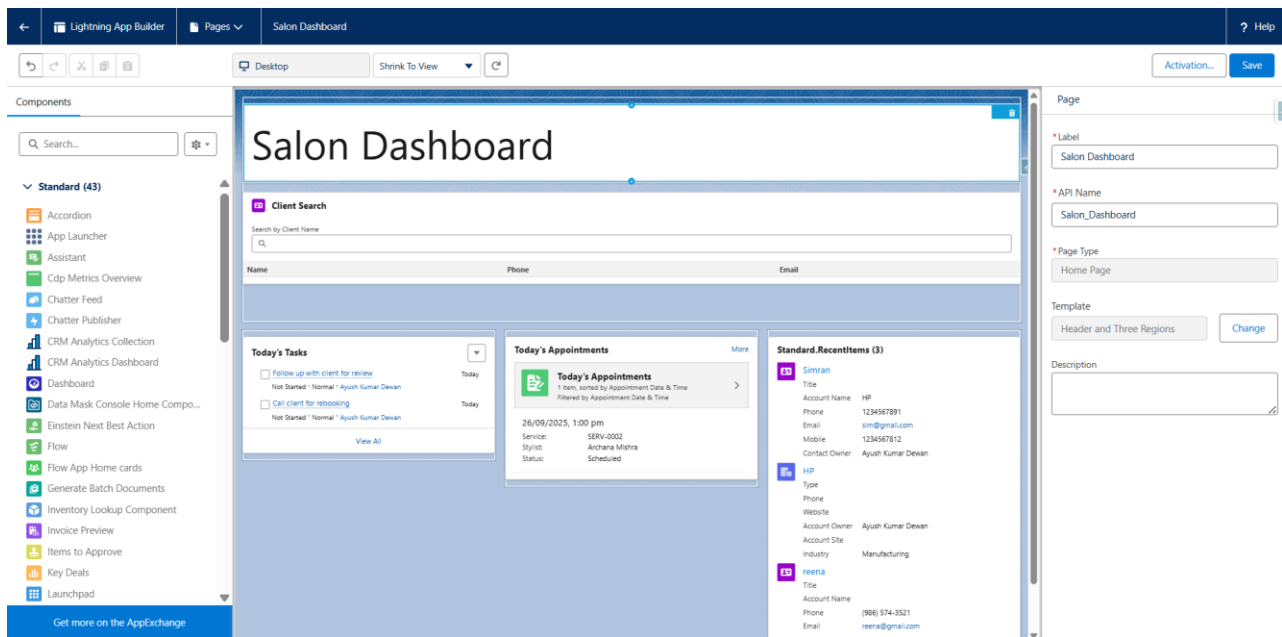
#### Selected Profiles

- System Administrator
- Receptionist Profile
- Stylist Profile
- Salon Owner

## 2. Record Pages

- **Purpose:** To customize the layout of a record's detail page to be more logical and efficient. The goal was to place the most important information in high-visibility areas for the user.
- **Steps Followed (Customizing the Appointment Page):**
  1. Navigated to an existing Appointment record within the new Salon Console app.
  2. Launched the **Lightning App Builder** by clicking the gear icon ⚙ > **Edit Page**.
  3. **Template Changed:** The page's template was changed from the default to "**Header and Right Sidebar**" to create a more organized two-column layout.
  4. **Components Organized:**

- The standard **Record Detail** component was placed in the main (left) column to display all the fields from the page layout.
  - A **Related List - Single** component was added to the sidebar on the right. This component was configured to specifically display the **Approval History** related list, making it easy for users to see the status of discount requests.
5. **Activation:** The new, customized page was saved and **Activated**, then set as the **Org Default** for all users.



### 3. Home Page Layouts

- **Purpose:** To create a tailored "dashboard" experience for the primary user, the receptionist. Instead of a generic home page, this custom layout provides immediate access to the most relevant information for their daily tasks.
- **Steps Followed (Creating the Receptionist Home Page):**
  1. **Prerequisite Created:** A new Appointment **List View** named Today's Bookings was created. It was filtered to show only records where the Status is "Scheduled" and the Appointment Date & Time is for TODAY.
  2. Navigated to the **Home** tab and launched the **Lightning App Builder** (Edit Page).
  3. The existing Home Page was **cloned** to create a new, editable version named Receptionist Home Page.
  4. **Components Added:** The new page was designed by dragging and dropping key components onto the canvas:
    - A **List View** component was configured to show the Today's Bookings list.
    - The standard **Tasks** component was added so the receptionist can see their follow-up and rebooking tasks.
    - The **Recent Items** component was added for quick navigation.
  5. **Activation & Assignment:** The new page was saved and **Activated**. Using the "App and Profile" assignment option, it was specifically assigned to the **Salon**

**Console** app for users with the **Receptionist Profile**. This ensures other users (like the Stylist) will still see the standard home page.

#### **4. LWC (Lightning Web Components), Apex with LWC, Events, etc.**

- **Purpose:** To understand the role of Lightning Web Components (LWC) as the professional, code-based framework for building custom user interface components that are not available with the standard drag-and-drop tools.
- **Steps Followed:** For this project, mastering the declarative UI tools (Lightning App Builder, Page Layouts, Home Pages) was the primary goal. **No LWC code was written.** The key learning was identifying the use case where LWC *would* be the correct tool—for example, building