Phase 6: User Interface Development

Goal

To design a **user-friendly interface** in Salesforce so sales agents and managers can easily handle leads and follow-ups.

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1. Lightning App Builder

- Create a **"Lead Management CRM" app** in Salesforce.
- Combines standard and custom objects, tabs, dashboards, and actions into a single app for easy navigation.

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2. Record Pages

- **Lead Record Page:**
  - Shows lead details, activity history, assigned agent, and related interactions.
- **Opportunity Record Page:**
  - Displays customer details, opportunity stage, and related lead or account.
- **Lead Interaction Page:**
  - Displays communication history and follow-up tasks.

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3. Tabs

- Include tabs for:
  - **Leads** – list and manage all leads.
  - **Opportunities** – track converted leads and deals.
  - **Tasks/Activities** – track follow-ups.
  - **Reports/Dashboards** – monitor performance and conversion metrics.

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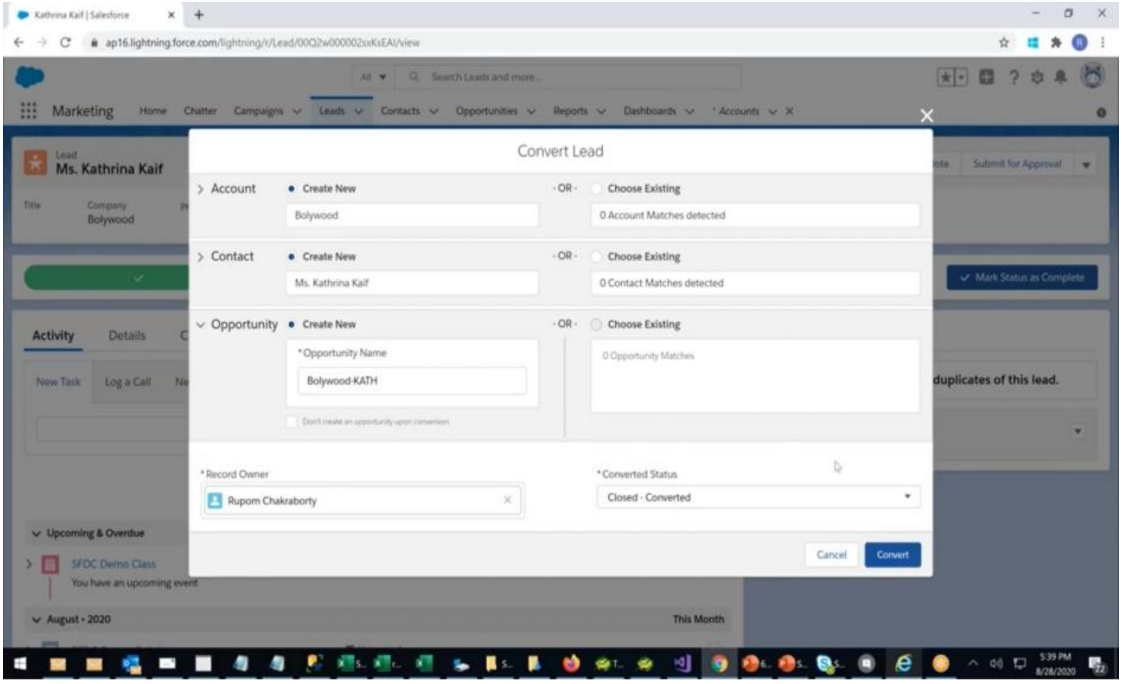
4. Home Page Layouts

- Design a **Dashboard for Sales Agents and Managers**:
  - Total Leads Assigned
  - Leads by Status (New, Contacted, Qualified)
  - Upcoming Follow-ups
  - Conversion rate metrics

- 

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5. Utility Bar

- Quick actions for agents:
    - **New Lead**
    - **Schedule Follow-up**
    - **Log a Call/Email**

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6. Navigation

- Easy navigation between:
    - Lead → Lead Interactions → Opportunity
    - Lead → Assigned Tasks
- Agents can quickly switch between tabs, dashboards, and record pages for seamless workflow.