Digital Banking CRM - Phase 6: User Interface (UI) Development

Overview

Phase 6 focuses on building the interactive User Interface of the Digital Banking CRM. This phase connects backend logic (Apex classes) with Lightning Web Components (LWCs) so that Customers, Bank Employees, and Home Page users can interact with the CRM efficiently.

Key highlights of this phase:
- Display recent transactions for Customers.
- Allow Customers to raise Service Requests from their profile page.
- Provide a global account overview on the Home Page.

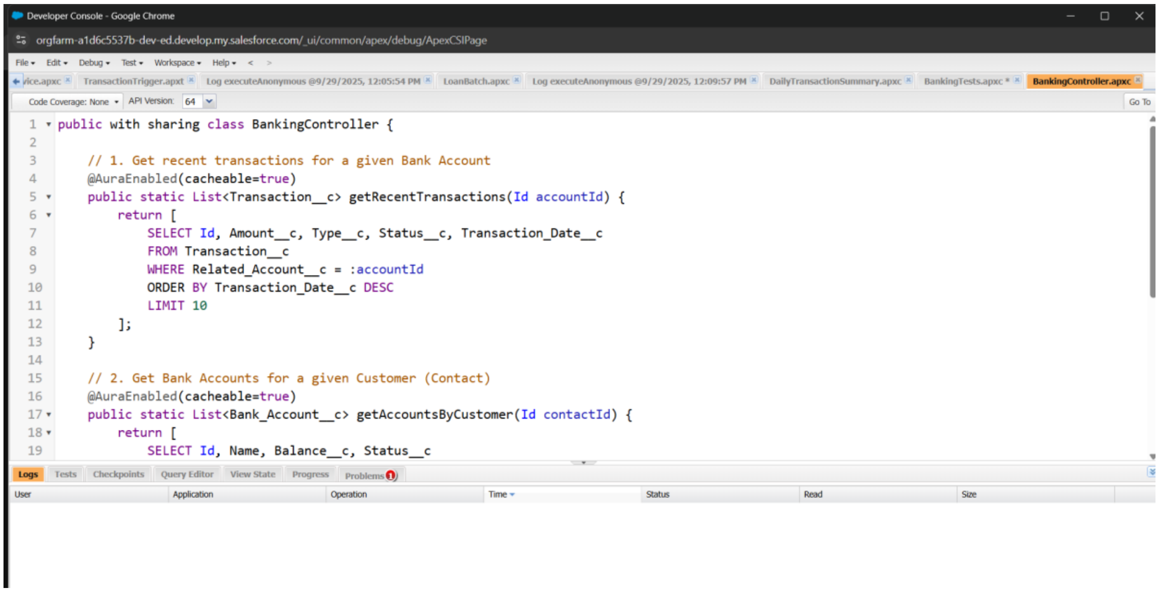
Step 1: Apex Controller – BankingController.cls

Purpose & Use: The Apex controller acts as the backend logic for fetching banking data. It provides methods that LWCs call to retrieve account balances, transactions, or loans.

Key Functionalities:
1. getRecentTransactions(accountId) – Returns the 10 most recent transactions for an account.
2. getAccountsByCustomer(contactId) – Returns all bank accounts belonging to a customer.
3. getLoansByCustomer(contactId) – Returns active loans for a customer.

How it’s used:
- The accountOverview component uses these methods to display account details.
- The transactionList component fetches recent transactions for display.

Deployment:
- Deployed from VS Code using SFDX: Deploy Source to Org.

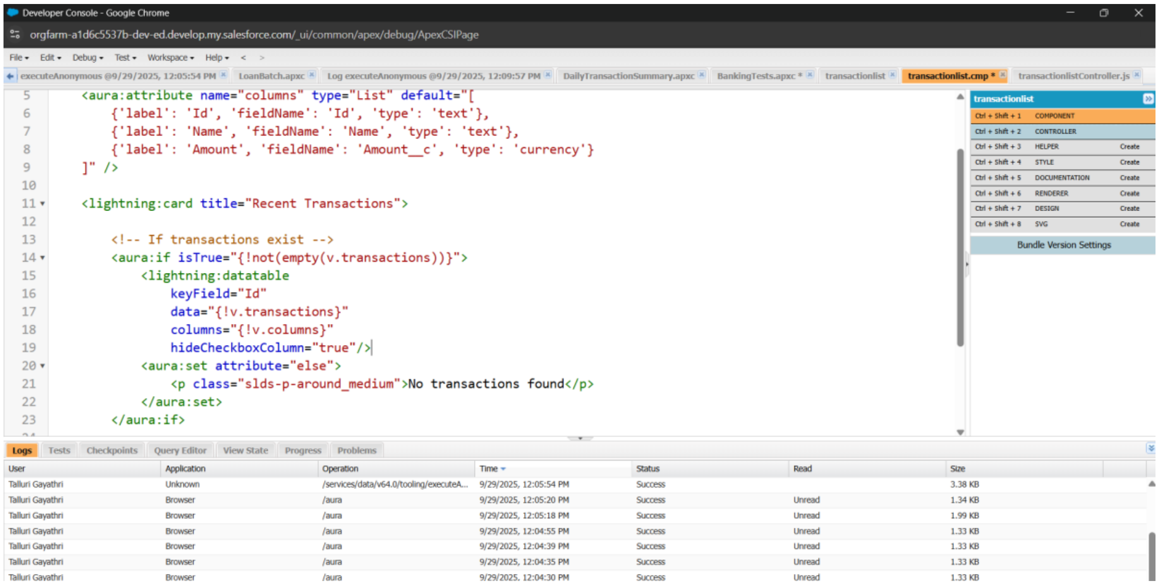


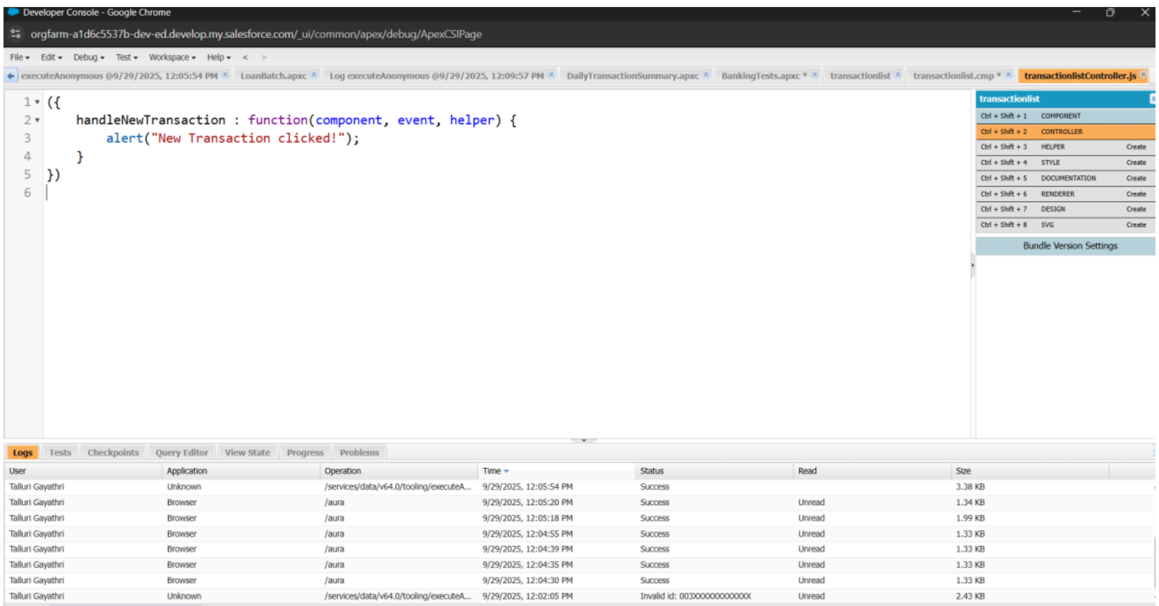
Step 2: LWC – transactionList

Purpose & Use: This component shows a list of transactions in a table format and allows users to create new transactions (e.g., transfers, deposits).

Features:
- Displays columns like Date, Type, Amount, and Status.
- Shows error messages if data cannot be fetched.
- New Transaction button opens a modal with default values.

How it works:
- Calls the Apex controller to fetch recent transactions.
- Formats returned data for the datatable.
- Uses NavigationMixin to navigate to new transaction page.





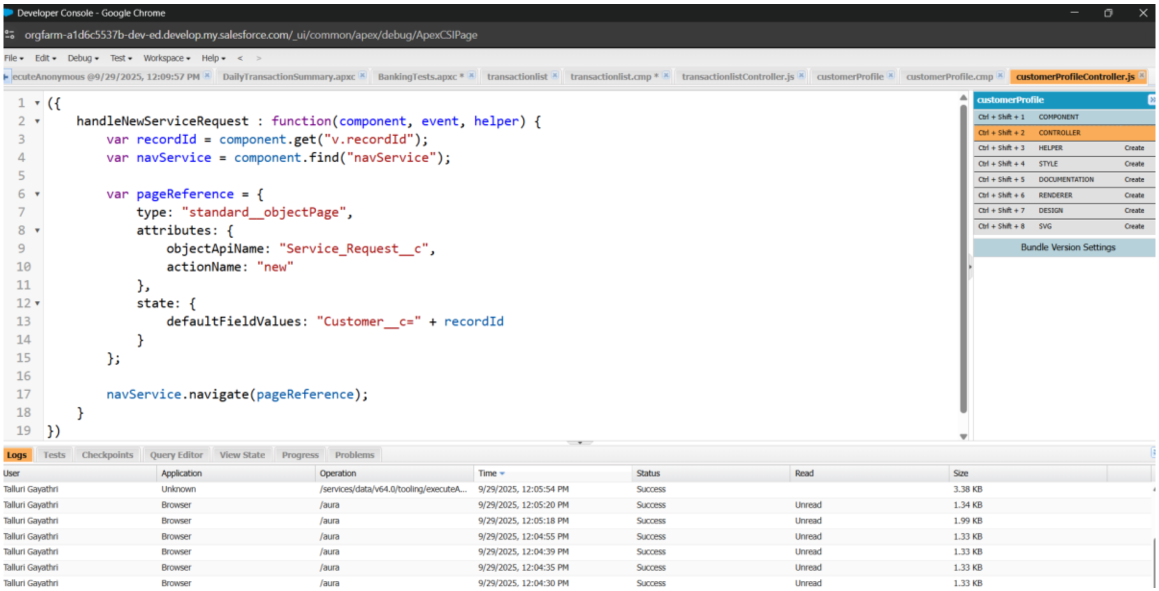
Step 3: LWC – customerProfile

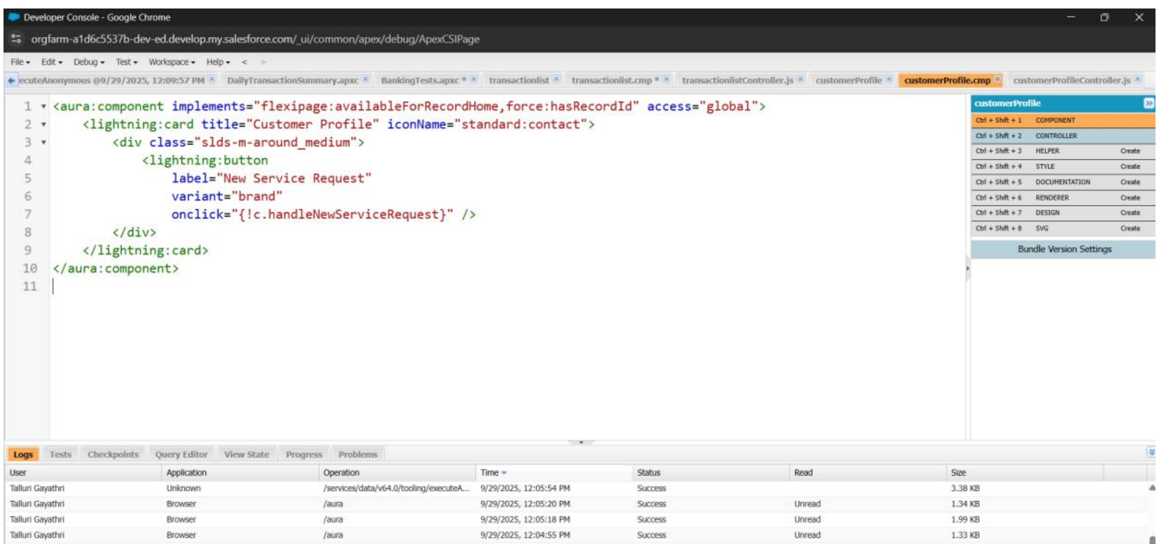
Purpose & Use: The customerProfile component is a quick action panel on the Contact page. It allows Customers to raise new Service Requests directly.

Features:
- Displays a 'New Service Request' button.
- Uses NavigationMixin and encodeDefaultFieldValues to prefill the Customer field in the new request modal.

How it works:

- Appears in sidebar on customer record page.
- Clicking the button opens the Service Request creation page with Customer field prefilled.

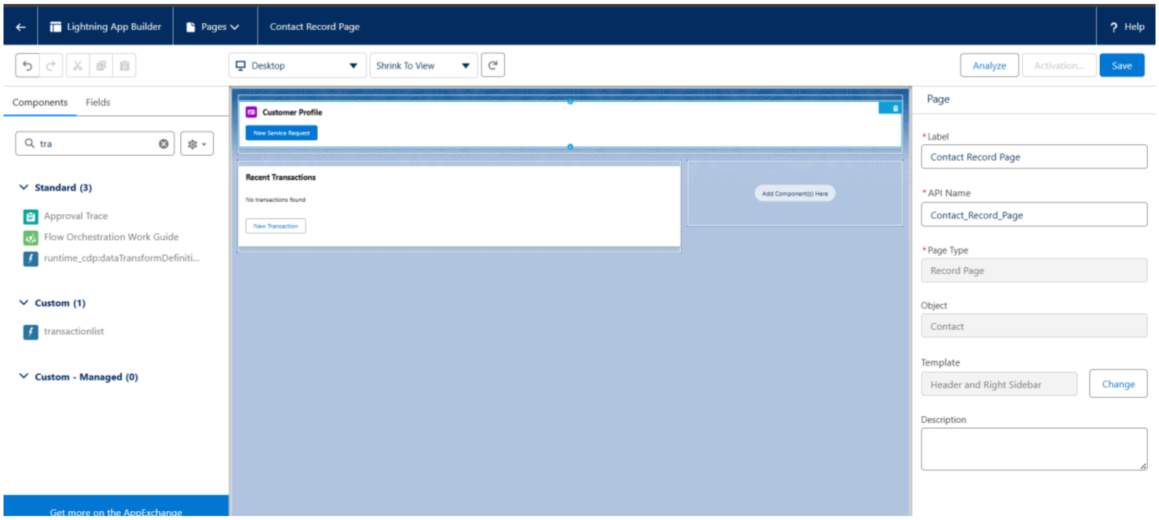


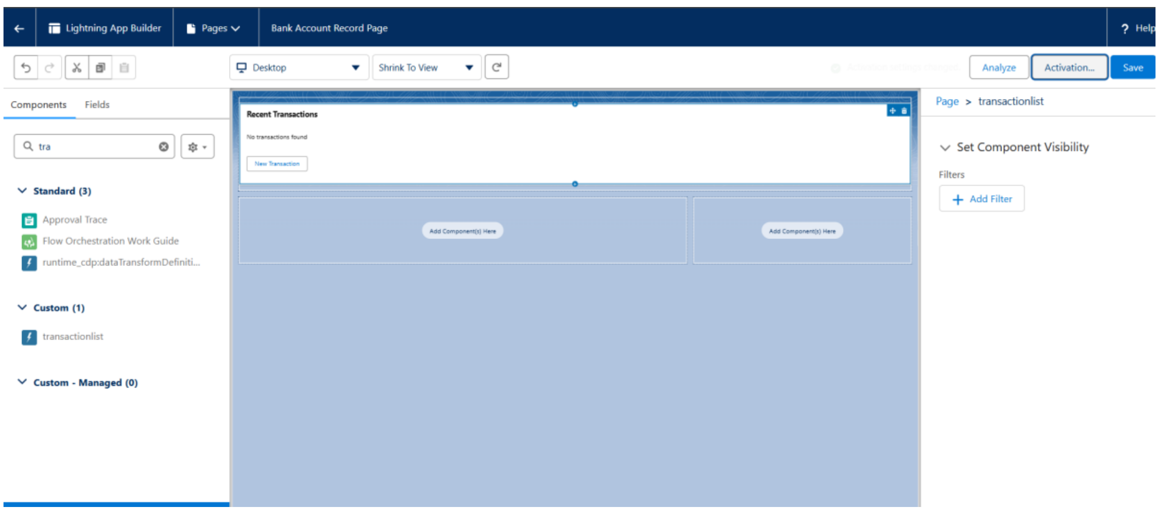


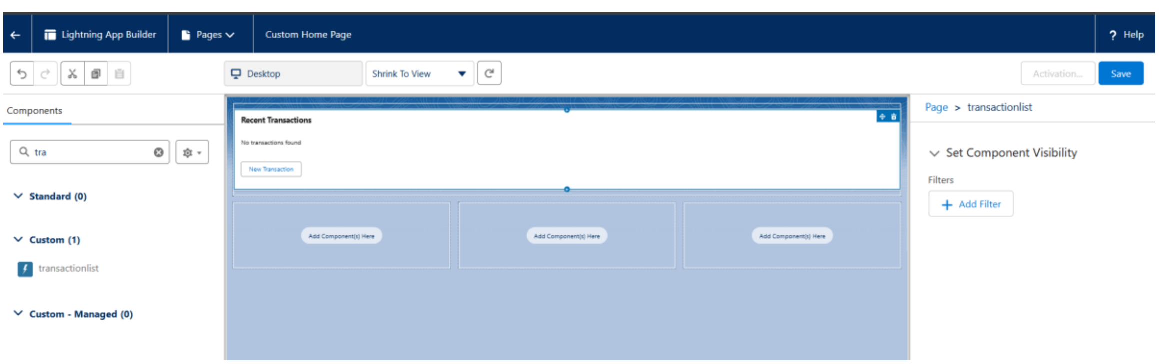
Step 4: Adding Components to Pages

Purpose & Use: The LWCs are added to Salesforce pages using the Lightning App Builder, so users can see and interact with them directly on the record pages or Home Page.

Steps & Usage:
1. Contact Page – Sidebar: customerProfile, Main section: transactionList.
2. Bank Account Page – Main section: transactionList.
3. Home Page – Displays accountOverview and global transaction list.







Step 5: Testing the UI

Purpose & Use: Ensures all components are working as intended and users can interact with the CRM efficiently.

Testing Steps:

1. Open a Customer record → 'New Service Request' button appears → opens prefilled new request page.
2. Open a Bank Account record → sees recent transactions → can create new transaction using button.
3. Open Home Page → global account overview and transaction list are visible.
4. Check modal opens with correct prefilled fields.