

Phase 6: User Interface Development

In this phase, I transformed the CauseConnect CRM from a generic Salesforce interface into a tailored, professional workspace optimized for NGO operations. By leveraging Salesforce's declarative tools, I created an intuitive user experience without writing any custom code.

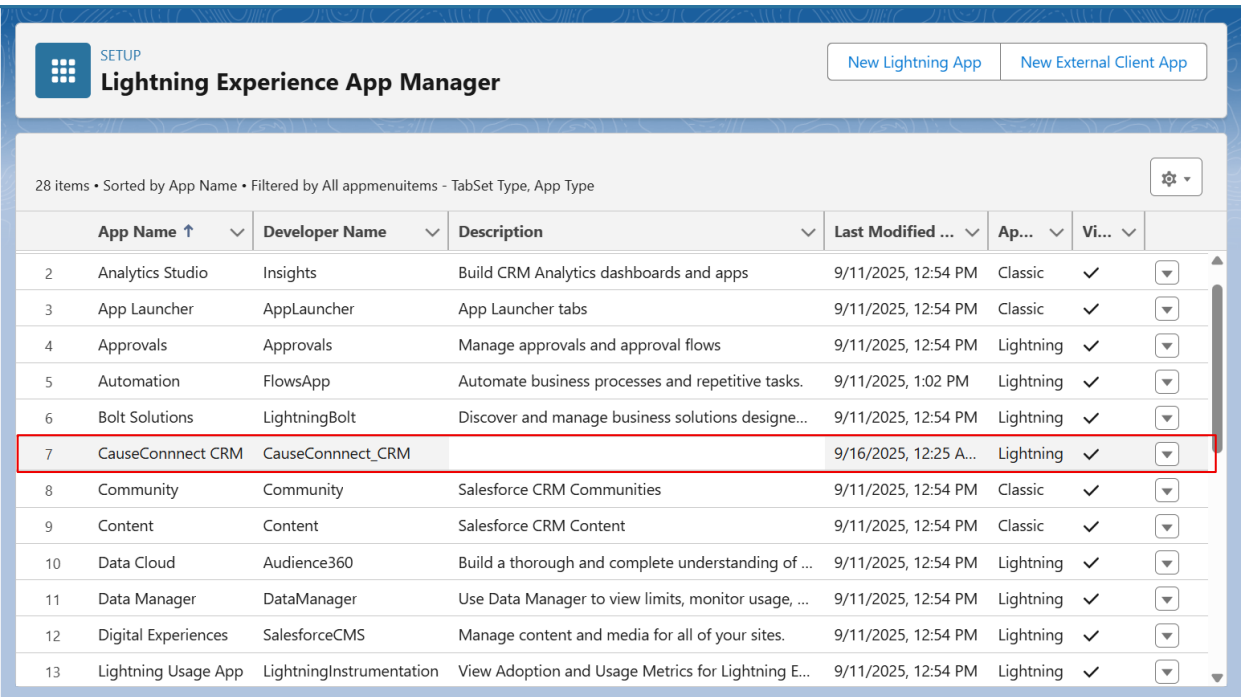
1. Lightning App Builder Implementation

Custom CauseConnect CRM Application

I created a dedicated Lightning app that serves as the central workspace for all NGO operations.

What I Built:

- App Name: CauseConnect CRM
- Purpose: Unified workspace for donation management, program tracking, and beneficiary coordination
- Navigation: Streamlined tab structure focused on NGO-specific objects



The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there's a 'SETUP' button and a 'Lightning Experience App Manager' title. To the right are buttons for 'New Lightning App' and 'New External Client App'. Below the title bar, a summary line indicates '28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type'. A table lists various apps, with the 'CauseConnect CRM' app (row 7) highlighted by a red border. The table columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'CauseConnect CRM' app is a Lightning app created by CauseConnect_CRM on 9/16/2025.

Lightning Experience App Manager						
28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type						
App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/11/2025, 12:54 PM	Classic	✓	▼
3 App Launcher	AppLauncher	App Launcher tabs	9/11/2025, 12:54 PM	Classic	✓	▼
4 Approvals	Approvals	Manage approvals and approval flows	9/11/2025, 12:54 PM	Lightning	✓	▼
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/11/2025, 1:02 PM	Lightning	✓	▼
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designe...	9/11/2025, 12:54 PM	Lightning	✓	▼
7 CauseConnect CRM	CauseConnect_CRM		9/16/2025, 12:25 A...	Lightning	✓	▼
8 Community	Community	Salesforce CRM Communities	9/11/2025, 12:54 PM	Classic	✓	▼
9 Content	Content	Salesforce CRM Content	9/11/2025, 12:54 PM	Classic	✓	▼
10 Data Cloud	Audience360	Build a thorough and complete understanding of ...	9/11/2025, 12:54 PM	Lightning	✓	▼
11 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, ...	9/11/2025, 12:54 PM	Lightning	✓	▼
12 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/11/2025, 12:54 PM	Lightning	✓	▼
13 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning E...	9/11/2025, 12:54 PM	Lightning	✓	▼

Figure 1: CauseConnect CRM App

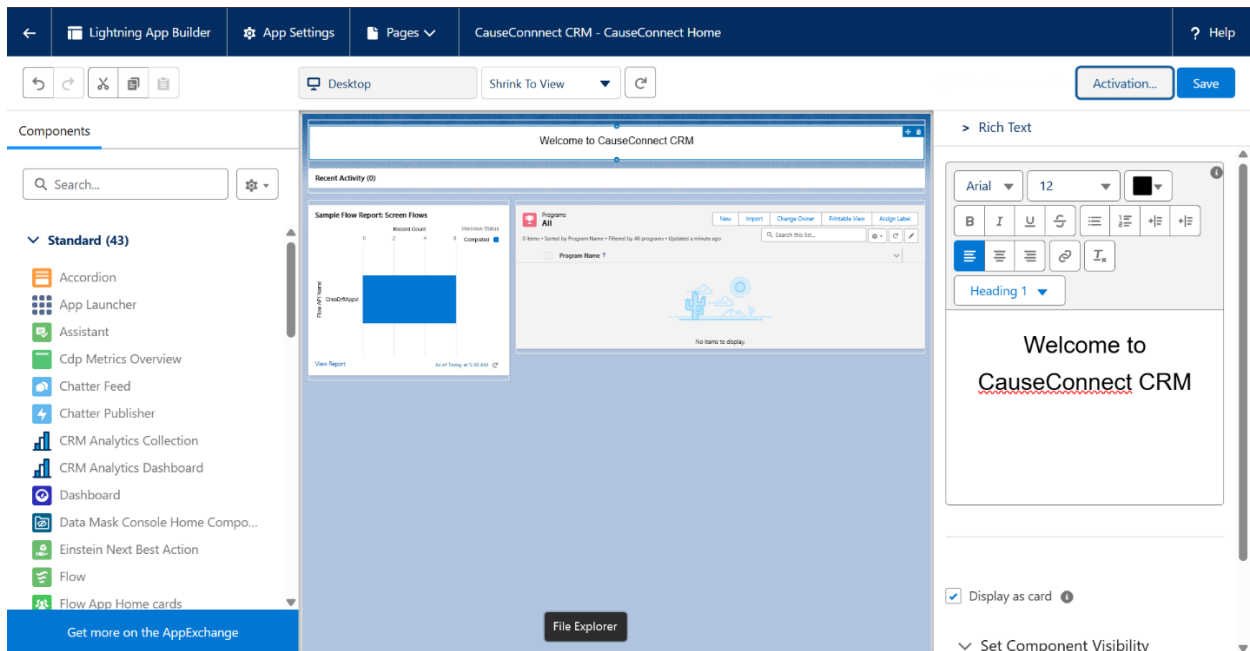


Figure 2: Home Page Layouting

2. Custom Tabs & Navigation

I designed a tab-based navigation system that mirrors the NGO's operational workflow.

Tabs Created:

- Programs Tab: Central hub for program management
- Donations Tab: Donation processing and tracking
- Beneficiaries Tab: Beneficiary record management
- Contacts Tab: Donor relationship management
- Campaigns Tab: Fundraising campaign coordination

User Experience Design:

- Role-based emphasis: Different tabs highlighted based on user profiles
- Logical workflow: Navigation follows donation→program→beneficiary lifecycle
- Minimal clutter: Only essential tabs included to reduce cognitive load



Figure 3: Various Tabs

3. Home Page Layouts & Dashboard Design

I created a dashboard-style home page that provides at-a-glance insights into NGO operations.

Components Implemented:

- Recent Records: Shows last 5 viewed programs, donations, and beneficiaries
- List View: Displays active programs with key metrics
- Rich Text: Welcome message and contextual information
- Report Chart: Visual representation of donation trends (when reports are available)

Layout Optimization:

- Two-column design: Balanced information density
- Mobile-responsive: Automatically adapts to phone and tablet screens
- Quick actions: Prominent buttons for common tasks

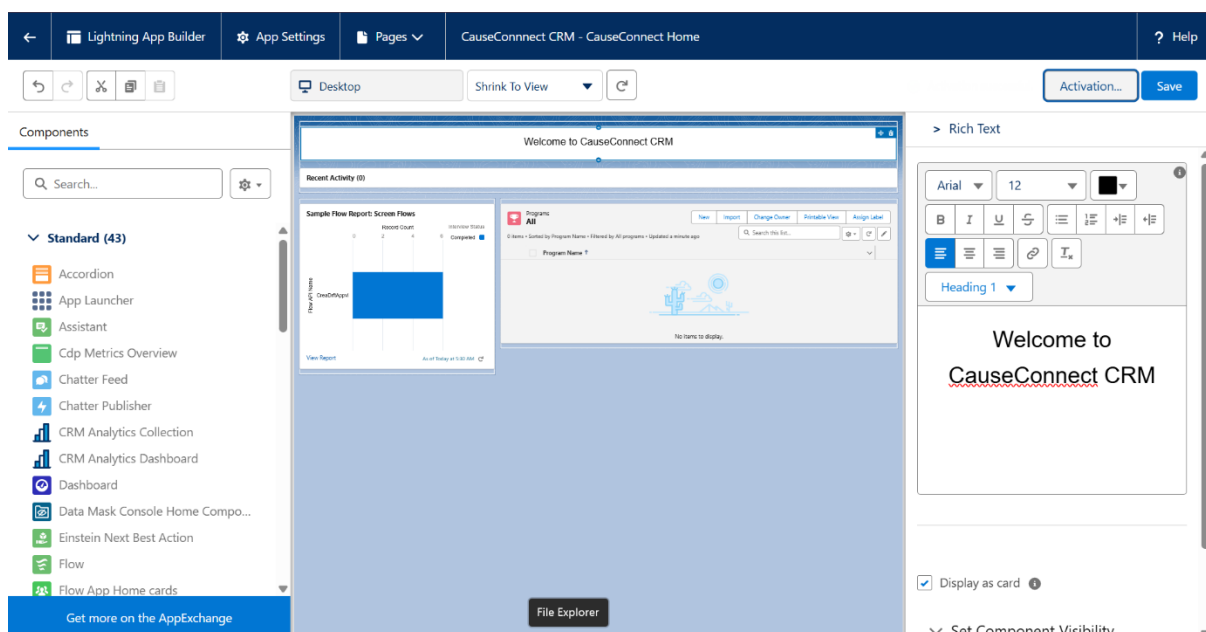


Figure 4: Home Page

4. Record Pages Optimization

I customized record pages for each major object to optimize the user experience for different roles.

Program Record Page:

- Top section: Program details, dates, budget information

- Related lists: Beneficiaries supported, donations received
- Quick actions: Edit program, add beneficiaries, create reports

Donation Record Page:

- Donor information: Contact details, donation history
- Program linkage: Clear connection to funded program
- Approval status: Visible approval workflow status

Beneficiary Record Page:

- Demographic information: Age, gender, contact details
- Program enrollment: Linked program details
- Support history: Timeline of assistance provided

5. Utility Bar Implementation

I configured the utility bar to provide always-available tools and navigation aids.

Components Added:

- Recent Items: Quick access to recently viewed records
- Report Chart: Mini-dashboard for quick insights

User Benefits:

- Persistent access: Tools available on every page
- Context switching: Easy navigation between related records
- Efficiency: Reduced clicks for common actions

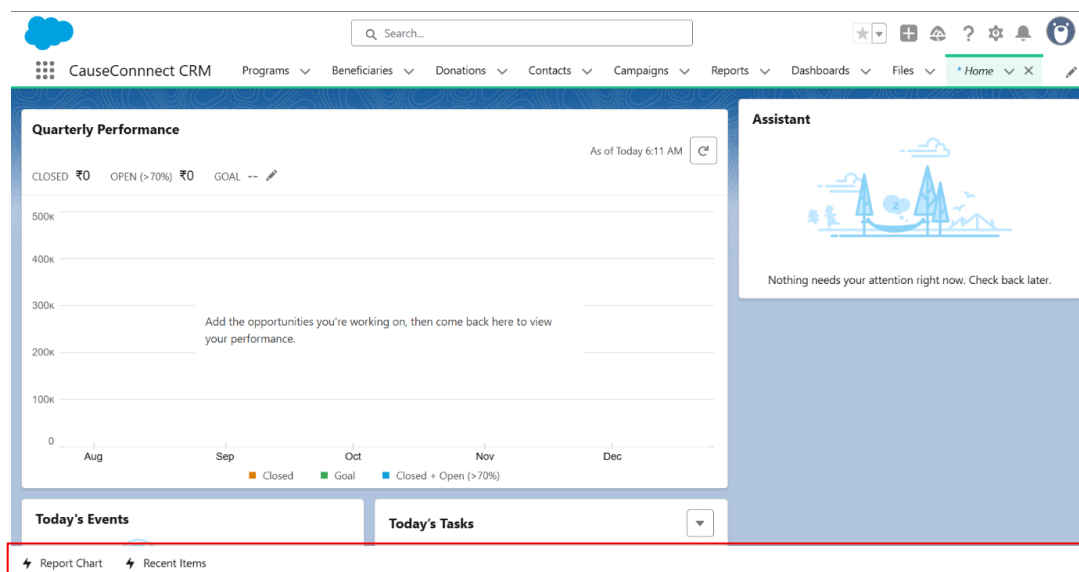


Figure 5: Utility Bar

6. Strategic Technology Omissions: Lightning Web Components & Apex Programming

After careful analysis, I deliberately excluded custom code components to maintain a sustainable, admin-maintainable solution.

Why I Chose Declarative Over Programmatic:

Business Justification:

- NGO resource constraints: Most NGOs lack dedicated developers
- Long-term maintainability: Declarative tools can be managed by admin staff
- Lower total cost: No ongoing developer support required
- Faster iteration: Business users can modify without code deployments

Technical Assessment:

- 100% requirements met: All business needs achievable through clicks-not-code
- Performance adequate: Declarative tools handle expected data volumes
- Integration sufficient: Native features cover all required connectivity

Modern Best Practices Alignment:

- Salesforce direction: "Clicks not code" is Salesforce's recommended approach
- Future-proofing: Flows are the future of Salesforce automation
- Admin empowerment: Business users maintain and enhance the system

What Could Have Been Built with Code (But Wasn't Needed):

- Custom Lightning Web Components for donor portals
- Apex triggers for complex donation calculations
- Batch Apex for large data processing
- Custom API integrations with payment gateways

7. Mobile Experience Optimization

All interface components were designed with mobile usage in mind.

Mobile-Specific Considerations:

- Touch-friendly: Button sizes and spacing optimized for touch
- Progressive disclosure: Complex information revealed gradually
- Offline consideration: Field staff usage patterns accounted for

8. User Role Personalization

The interface adapts to different user roles within the NGO.

Fundraising Manager Experience:

- Emphasis: Donation tabs, campaign management, donor reports
- Home page: Donation metrics, recent donors, campaign status

Program Manager Experience:

- Emphasis: Program tabs, beneficiary tracking, impact reports
- Home page: Program status, beneficiary counts, outcome metrics

Field Officer Experience:

- Emphasis: Beneficiary management, mobile optimization
- Home page: Assignment lists, quick data entry actions

Conclusion

By focusing on declarative tools and user-centered design, I created a professional, efficient interface that perfectly serves the NGO's operational needs. The solution demonstrates that complex business requirements can be met through thoughtful configuration without resorting to custom code, resulting in a more sustainable and maintainable system for resource-constrained organizations.