Phase 6: User Interface Development
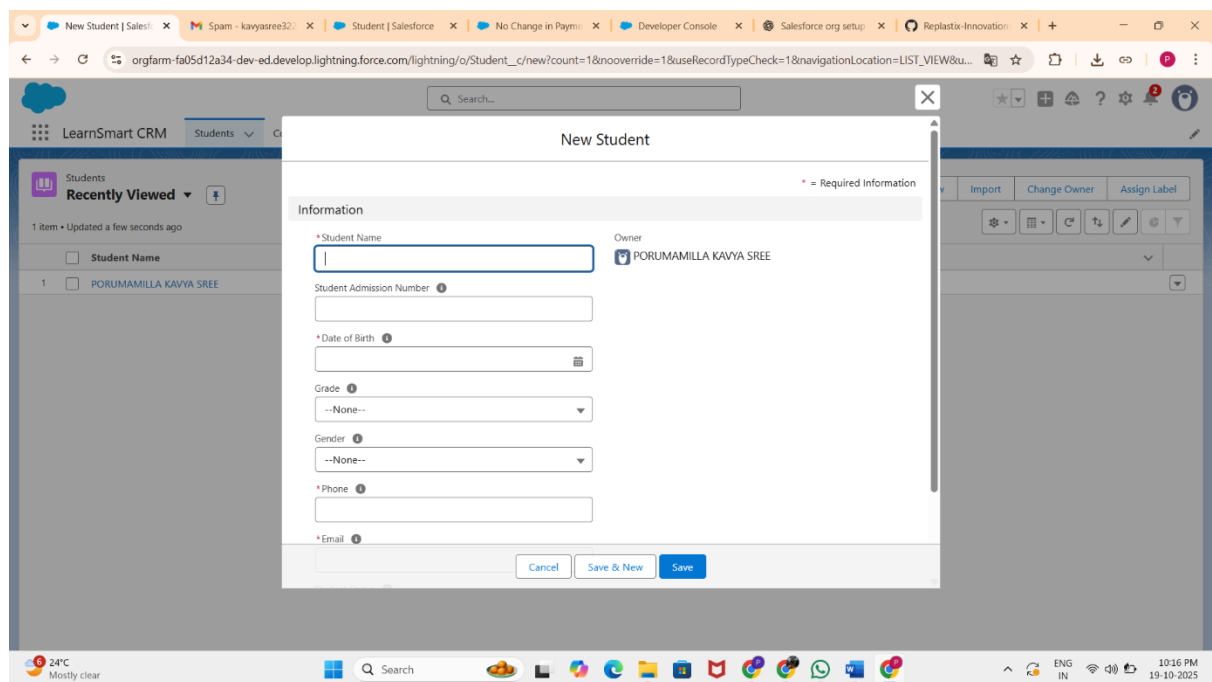
The goal of this phase is to create an intuitive and functional UI for LearnSmart CRM using Salesforce Lightning features.

1. Lightning App Builder

Objective: Create custom Lightning apps and pages tailored for LearnSmart CRM.

Steps:

1. Go to **Setup → App Builder → Lightning App Builder**.

2. Click **New →** select **App Page**, **Record Page**, or **Home Page** depending on the requirement.

3. Name the app/page as per your module (e.g., "Student Management Dashboard").

4. Drag and drop components (standard or custom) onto the page layout.

5. Save and activate the page for the required **user profiles**.

2. Record Pages

Objective: Customize the layout for individual records (Accounts, Leads, Contacts, or custom objects).

Steps:

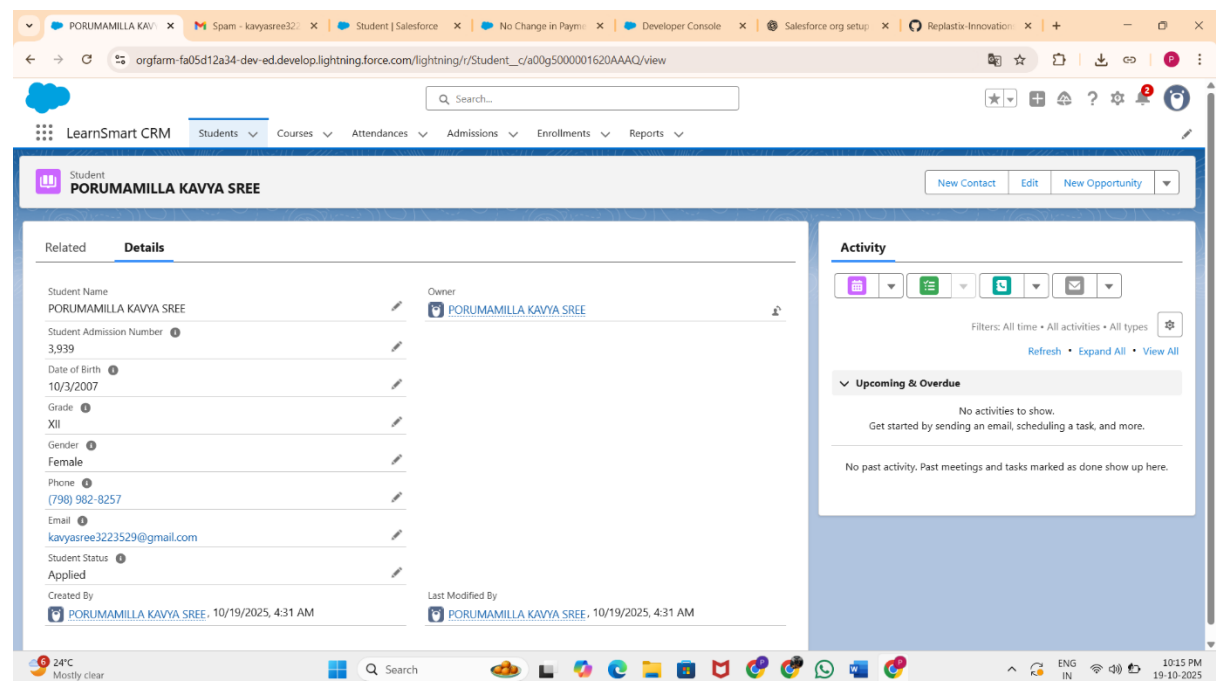1. Go to **Setup → Object Manager → [Object Name] → Lightning Record Pages**.

2. Click **New → Record Page**.

3. Add relevant sections: details, related lists, custom LWC components.

4. Assign this page to **specific apps, profiles, or as org default**.

3. Tabs

Objective: Create tabs to organize objects, Visualforce pages, or Lightning Components in your app.

Steps:

1. Setup → Tabs → Click **New**.

2. Choose type: **Custom Object Tab, Lightning Page Tab, Web Tab**.

3. Assign a **tab label and icon**.

4. Add tab to your app via **App Manager → Edit Lightning App → Navigation Items**.

4. Home Page Layouts

Objective: Customize home pages for users to provide dashboards, reports, or key components.

Steps:

1. Go to **Setup → Lightning App Builder → Home Page**.

2. Create a **New Home Page** and name it (e.g., "Sales Team Dashboard").

3. Drag components such as **Reports, Lists, or Custom LWC components**.

4. Activate the home page for specific **profiles or the org default**.

5. Utility Bar

Objective: Provide easy access to frequently used tools.

Steps:

1. Go to **Setup → App Manager → Edit App → Utility Bar**.

2. Click **Add Utility Item** (e.g., **Notes, Recent Records, Omni-Channel**).

3. Set **visibility and labels** for each item.

4. Save and activate the app.

6. Lightning Web Components (LWC)

Objective: Create reusable, dynamic UI components for LearnSmart CRM.

Instructions:

1. Set up VS Code with Salesforce Extension Pack.

2. Create a new Lightning Web Component (LWC) for each module, e.g., Students, Courses, Enrollments.

3. Design the component layout using HTML and CSS for UI elements.

4. Implement component logic in JavaScript.

5. Deploy the LWC to Salesforce.

6. Add the deployed LWC to Lightning pages via Lightning App Builder.

AIML | Course | Sales × | M Spam - kavyasree322 × | Student | Salesforce × | No Change in Payme × | Developer Console × | Salesforce org setup × | Replastix-Innovation × | +

orgfarm-fa05d12a34-dev-ed.develop.lightning.force.com/lightning/r/Course__c/a01g5000001TRCLAA4/view

LearnSmart CRM   Students ⌄   Courses ⌄   Attendances ⌄   Admissions ⌄   Enrollments ⌄   Reports ⌄

Course
AIML

New Contact   Edit   New Opportunity

Related   **Details**

Course Name
AIML

Course Title
Mathematics

Credits
2

Department
CSE

Description
In this specialization mathematics can have 2 credits

Created By
PORUMAMILLA KAVYA SREE, 10/19/2025, 1:41 AM

Owner
PORUMAMILLA KAVYA SREE

Last Modified By
PORUMAMILLA KAVYA SREE, 10/19/2025, 1:41 AM

Activity

Filters: All time • All activities • All types
Refresh • Expand All • View All

⌄ Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Regular | Attendance × | M Spam - kavyasree322 × | Student | Salesforce × | No Change in Payme × | Developer Console × | Salesforce org setup × | Replastix-Innovation × | +

orgfarm-fa05d12a34-dev-ed.develop.lightning.force.com/lightning/r/Attendance__c/a02g5000002lqzhAAA/view

LearnSmart CRM   Students ⌄   Courses ⌄   Attendances ⌄   Admissions ⌄   Enrollments ⌄   Reports ⌄

Attendance
Regular

New Contact   Edit   New Opportunity

Related   **Details**

Attendance Name
Regular

Student
PORUMAMILLA KAVYA SREE

Date
9/27/2025

Status
Present

Remarks
GOOD

User
Prudhvi Porumamilla

Created By
PORUMAMILLA KAVYA SREE, 10/19/2025, 7:24 AM

Owner
PORUMAMILLA KAVYA SREE

Last Modified By
PORUMAMILLA KAVYA SREE, 10/19/2025, 7:24 AM

7. Apex with LWC

Objective: Connect UI components with backend Salesforce logic.

Instructions:

1. Create Apex classes to handle backend operations like fetching, updating, or deleting records.

2. Connect the Apex classes to your LWC to display and manipulate data dynamically.

3. Ensure that data is displayed correctly in the LWC interface.

8. Events in LWC

Objective: Enable communication between parent and child components.

Instructions:

1. Define events in child components to notify parent components when an action occurs.

2. Configure parent components to listen and respond to these events.

3. Use events to update UI or trigger further actions within the CRM.

9. Wire Adapters

Objective: Fetch Salesforce data reactively.

Instructions:

1. Connect LWCs to Salesforce data sources using reactive data fetching.

2. Ensure the component automatically updates when the underlying data changes.

3. Display the retrieved data in a structured and user-friendly manner.

10. Imperative Apex Calls

Objective: Call Apex methods on demand (e.g., when a button is clicked).

Instructions:

1. Configure LWCs to call Apex methods only when required by user action.

2. Handle the data returned from Apex and update the UI dynamically.

3. Manage errors or exceptions gracefully to ensure a smooth user experience.

11. Navigation Service

Objective: Navigate between pages, records, or URLs.

Instructions:

1. Set up navigation in LWCs to allow users to move between different CRM pages.

2. Configure navigation for records, objects, or external URLs.

3. Ensure navigation actions are intuitive and consistent with the CRM workflow.