

Phase 6: User Interface Development — EdTech Enrollment Automation

Objective

Design intuitive, role-based user interfaces using Lightning App Builder for enrollment workflows, surface key data, and enhance user experience across profiles.

Lightning App Builder Configuration

Record Pages

- Customized for Student, Program, and Enrollment objects
- Embedded Flow components and dashboards
- Conditional visibility based on status

The screenshot displays the Lightning App Builder interface for configuring a record page. At the top, there are three buttons: "Analyze", "Activation...", and "Save". Below these, the breadcrumb "Page > Field Section" is visible. The main workspace on the left shows a preview of the record page layout, including a "Last Modified By" field and a "Review Notes" section with a table of data. The right sidebar contains configuration options for the selected component. Under "Label", the "Custom" option is selected, and the "Custom Label" is set to "Review Notes". Under "Columns", the "1 Column" option is selected. There is an unchecked checkbox for "Align fields horizontally". Under "Set Component Visibility", a filter is applied: "Record > Enrollment Status Equal Rejected". At the bottom of the filter list is a "+ Add Filter" button.

Analyze Activation... Save

Page > Field Section

Label i

Custom

Custom Label

Review Notes

Columns

☒ 1 Column

☐ 2 Columns

☐ Align fields horizontally i

Set Component Visibility

Filters

1 Record > Enrollment Status Equal Rejected ×

+ Add Filter

Analyze

Activation...

Save

Page > Rich Text



Normal

Your application has been received. Please upload your documents and await counselor review.

☒ Display as card ⓘ

Set Component Visibility

Filters

1

Record > Enrollment Status Equal Applied

+ Add Filter

Last Modified By

Last Modified By

Review Notes

Counselor Comments

Counselor Comments

Review Date

Review Date

Reviewed By

Reviewed By

Follow up Required

Follow up Required

Your application has been received. Please upload your documents and await counselor review.

Congratulations! Your enrollment has been approved. Please check your email for onboarding instructions and next steps.

[Analyze](#)[Activation...](#)[Save](#)

Page > Rich Text

Normal

Congratulations! Your enrollment has been approved. Please check your email for onboarding instructions and next steps.

☒ Display as card ⓘ

▼ Set Component Visibility

Filters

1 Record > Enrollment Status Equal Approved

+ Add Filter

Last Modified By

Last Modified By

▼ Review Notes ⓘ

Counselor Comments

Counselor Comments

Review Date

Review Date

Reviewed By

Reviewed By

Follow up Required

Follow up Required

Your application has been received. Please upload your documents and await counselor review. ⓘ

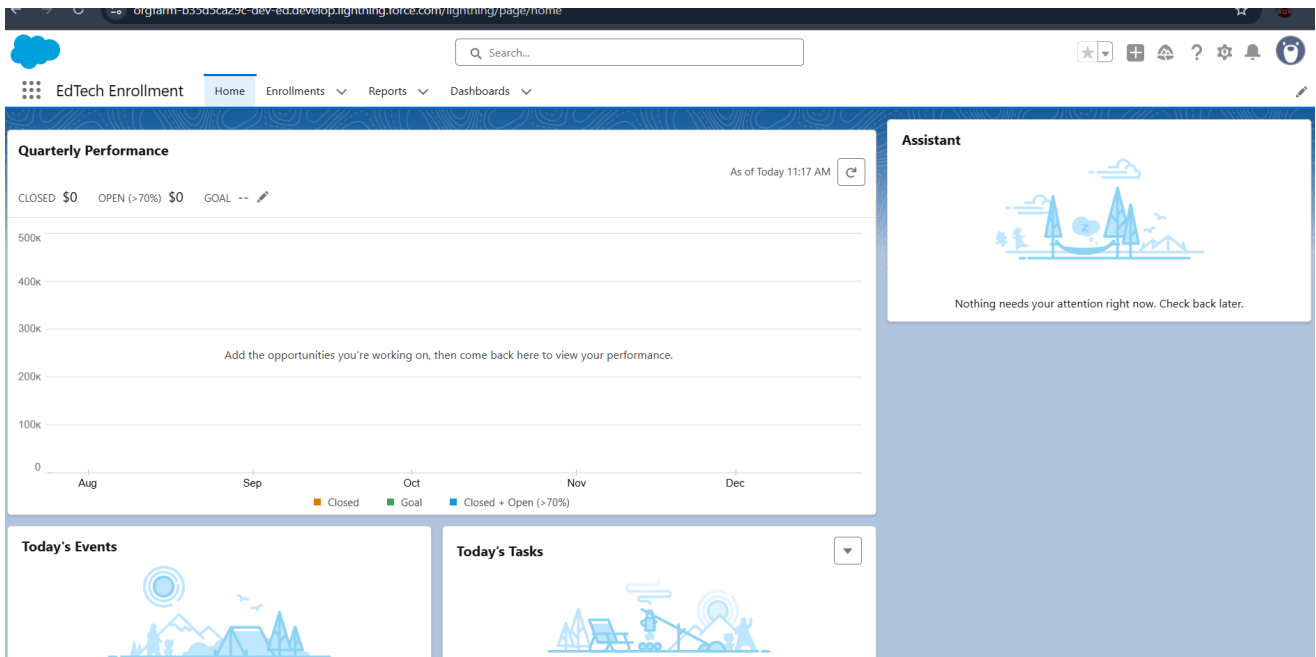
Congratulations! Your enrollment has been approved. Please check your email for onboarding instructions and next steps. ⓘ + 🗑️

Tabs

- Organized navigation: Home, Students, Programs, Reports, Automation Logs
- Dynamic tab visibility using App Builder filters

Home Page Layouts

- Role-specific layouts for Admins, Counselors, and Analysts
- Highlights: Enrollment summary, error alerts, quick links to Flows



The screenshot shows the 'New Enrollment: Internal' form. The form has a title bar with a search bar and a close button. The main content area is divided into sections:

- Information:** A section with a red border and a red background. It contains the following fields:
 - * Enrollment Name:** A text input field with a red border and a red 'X' icon. Below it, the text 'Complete this field.' is displayed.
 - Owner:** A dropdown menu showing 'Parth Khare'.
 - User:** A search input field with the placeholder 'Search People...' and a magnifying glass icon.
 - * Student email:** A text input field.
 - * Enrollment Status:** A dropdown menu showing '--None--'.
 - Created Date:** A section with two input fields:
 - * Date:** A date input field with a calendar icon.
 - * Time:** A time input field with a clock icon.
- Program Name:** A text input field at the bottom of the form.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

• Utility Bar

- Global access to:
- Enrollment Quick Create
- Report Launcher

- Configured via App Manager and App Builder

App Launcher



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Apps



Salesforce Scheduler Setup



EdTech Enrollment

Items

Calculated Insights

Consumption Schedules

Credit Memos

Enhanced Letterheads

Paused Flows

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