

# Phase 6 — User Interface Development

**Goal:** Build polished Lightning experiences for HR, Managers, and Employees to interact with records efficiently.

## 1. Create Lightning App(s)

- Setup → App Manager → New Lightning App
  - App Name: **Onboarding - HR** (and **Onboarding - Manager** if needed)
  - Add Navigation Items: Employees, Onboarding Tasks, Documents, Reports
  - Set branding and permissions

The screenshot displays the Salesforce Lightning App Builder interface. The left sidebar shows the navigation menu with 'Lightning App Builder' selected. The main content area shows the configuration for the 'Employee\_Page\_Onboarding' Lightning Page. The 'Lightning Page Detail' section includes fields for Name, Label, and Description. Below this, the 'Assignments By App' section shows a table with one assignment: 'Onboard' (App), 'Master' (Record Type), 'HR\_Profile' (Profile), and 'Desktop and phone' (Form Factor). The 'Assignments By App, Record Type, and Profile' section shows a table with one assignment: 'Onboard' (App), 'Master' (Record Type), 'HR\_Profile' (Profile), and 'Desktop and phone' (Form Factor).

Lightning Page  
**Employee\_Page\_Onboarding**

Lightning Page Detail

Name	Label
Employee_Page_Onboarding	Employee Page - Onboarding

Assignments By App

No Assignments to display

Assignments By App, Record Type, and Profile

App	Record Type	Profile	Form Factor
Onboard	Master	HR_Profile	Desktop and phone

## 2. Customize Record Pages with Lightning App Builder

- Setup → Object Manager → Employee\_\_c → Lightning Record Pages → New
  - Start with a standard template (Header + Two Regions)
  - Add components: Record Detail, Related Lists (Tasks, Documents), Path (Status\_\_c on OnboardingTask\_\_c), Report Chart (Tasks by Status)
  - Add Quick Actions: **New Task**, **Upload Document**, **Submit for Approval**
  - Activate page for specific profiles (HR / Manager)

The screenshot shows the Lightning App Builder interface for customizing the "Employee Page - Onboarding" record page. The interface is divided into three main sections: Components, Fields, and Page.

**Components:** A sidebar on the left lists various components available for use, including Report Chart, Rich Text, runtime\_cdp:dataModelTab, runtime\_cdp:dataTransformDefin..., Salesforce Anywhere Messages, Slack, Tableau Pulse, Tableau View, Tabs, Topics, Trending Topics, and Visualforce. Below this list, there are sections for "Custom (0)" and "Custom - Managed (0)", both indicating that no components are available in these categories.

**Fields:** A central pane displays the fields for the "Employee" object. Fields include Employee Name, Manager, Email, Department, Joining Date, and Created By. Below the fields, there are sections for "Onboarding Tasks (0)", "Documents (0)", "Onboarding Tasks (Assigned Employee) (1)", and "Documents (0)".

**Page:** A right-hand pane shows the configuration for the "Employee Page - Onboarding". It includes fields for Label, API Name, Page Type, Object, Template, and Description. The Page Type is set to "Record Page", the Object is "Employee", and the Template is "Header and Right Sidebar".

### 3. Add Quick Actions & Publisher Actions

- Setup → Object Manager → OnboardingTask\_\_c → Buttons, Links, and Actions → New Action
  - Action Type: Create a Record / Lightning Component
  - Example quick action: **Complete Task** (updates Status\_\_c to Completed)
- Put quick actions in the record page layout / compact layout.

SETUP > OBJECT MANAGER

Onboarding Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

**Buttons, Links, and Actions**

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

**Buttons, Links, and Actions**

10 Items, Sorted by Label

[New Action](#)

[New Button or Link](#)

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	▼
Clone	Clone			Standard page	▼
<a href="#">Complete Task</a>	Complete_Task		Update a Record	Action Layout Editor	▼
<a href="#">Complete Task Global</a>	Complete_Task_Global		Update a Record	Action Layout Editor	▼
Delete	Delete			Standard page	▼
Edit	Edit			Standard page	▼
List	List			Standard page	▼
New	New			Standard page	▼
Onboarding Tasks Tab	Tab			Standard page	▼
View	View			Standard page	▼