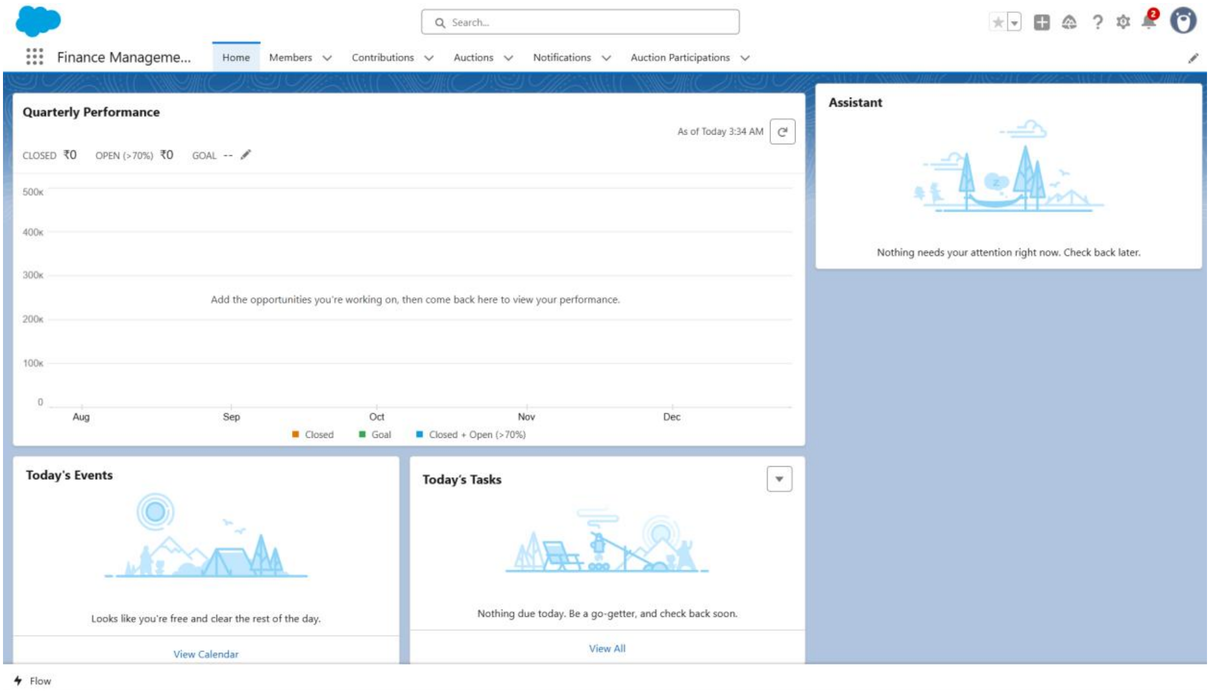
Phase 6: User Interface Development

Project Title – "Finance Management System – Salesforce CRM"

Lightning App Builder

- Setup → App Manager → **New Lightning App**.
- App Name: **Finance Management**, developer name auto-fills.
- Branding: upload logo (optional) and blue theme color.
- Choose **Standard Navigation** for tab-based navigation.
- Add Tabs: **Members, Contributions, Auctions, Notifications, Reports, Dashboards**.
- Finish wizard and Save.

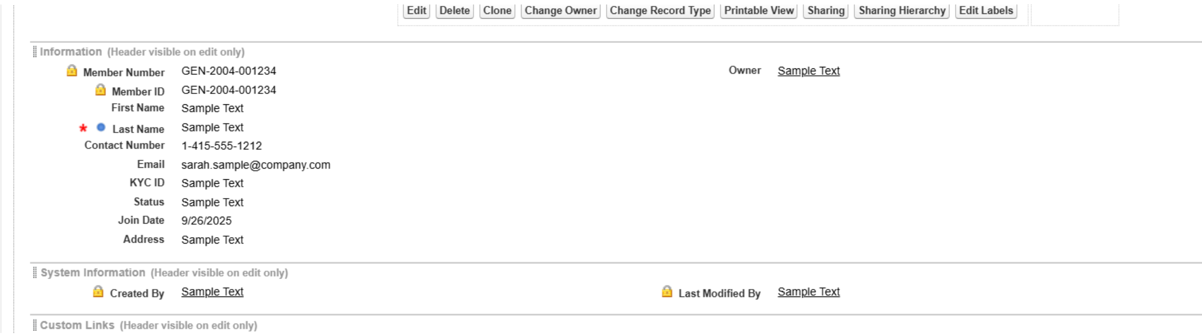


Record Pages

- Setup → Lightning App Builder → **New** → **Record Page**.
- Page Name: **Member Record – Custom**.
- Template: Header + Two Columns.
- Choose Object: **Member__c**.
- Add Components:
  - Top: Path (Active/Inactive status), Highlights Panel.

- Left column: Record Detail (fields like KYC ID, Contact, Join Date).
- Right column: Custom LWCs (Contribution Summary).
- Bottom: Related Lists (Contributions, Auctions).

- Save → Activate → Assign as App Default for Finance Management.



Tabs

1. From Available Items, select:
   - **Members** → Member__c
   - **Contributions** → Contribution__c
   - **Auctions** → Auction__c
   - **Notifications** → Notification__c
   - **Reports** → Reports dashboard
   - **Dashboards** → Fund Manager view

Custom Object Tabs New What Is This?

Action	Label	Tab Style	Description
Edit | Del	Auction Participations	Sack	
Edit | Del	Auctions	Hammer	
Edit | Del	Contributions	Stack of Cash	
Edit | Del	Members	People	
Edit | Del	Notifications	Mail	

2. Arrange Tabs:
   - 1. Members
   - 2. Contributions
   - 3. Auctions
   -

4. Notifications

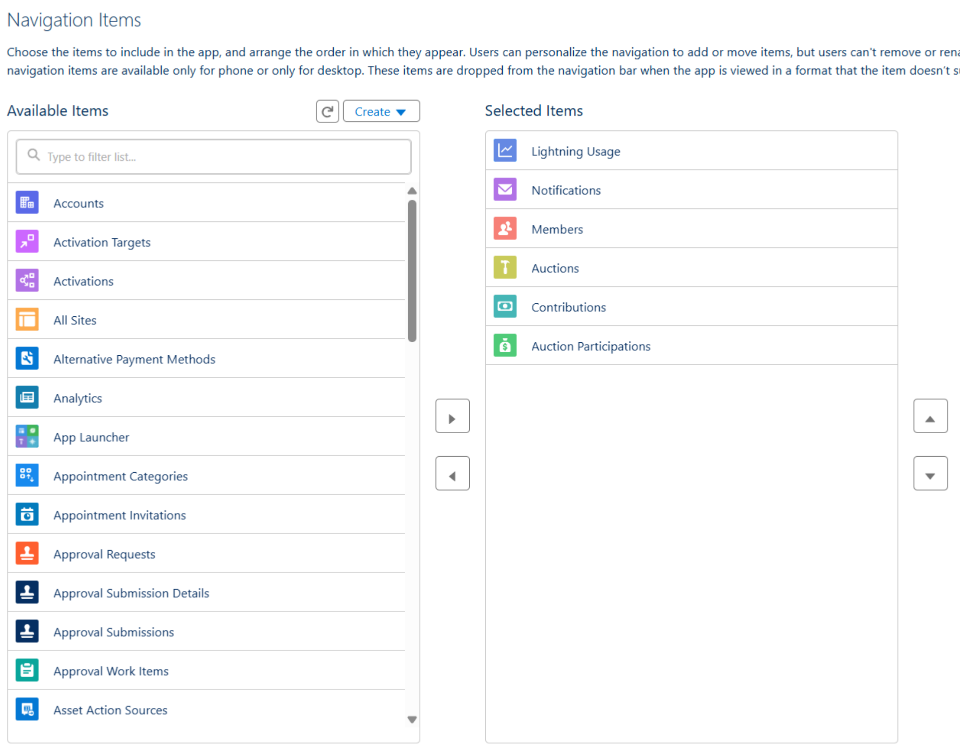
   o

5. Reports

   o

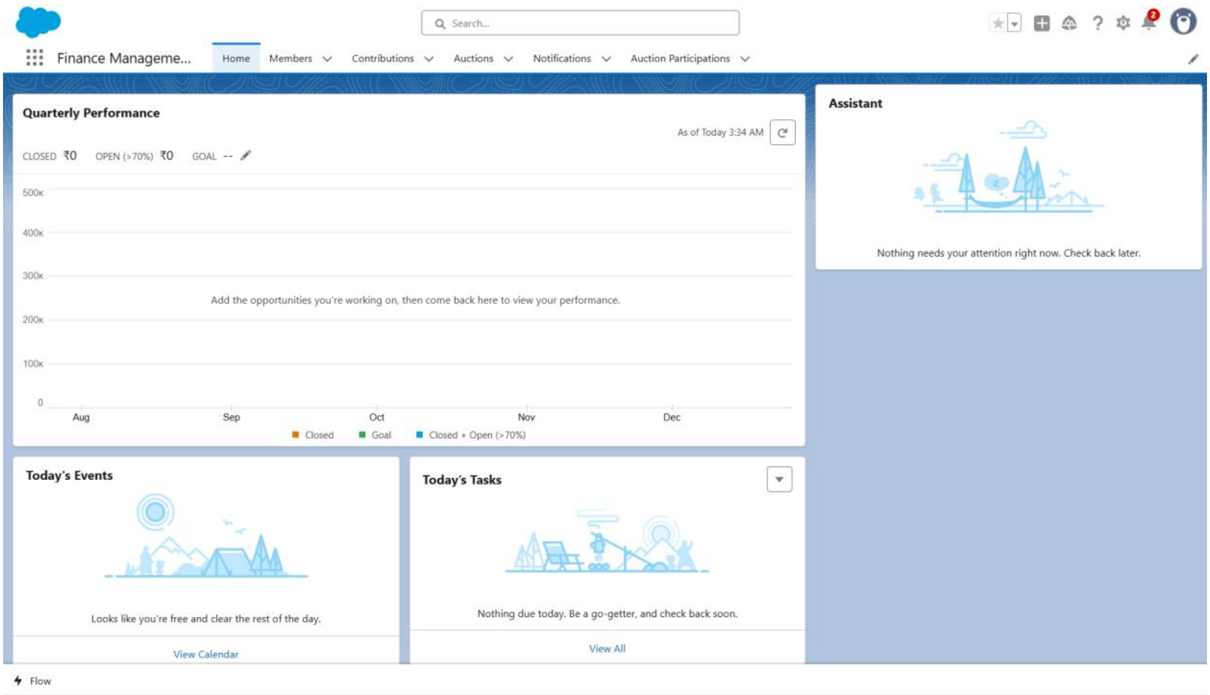
6. Dashboards

3. Save App.



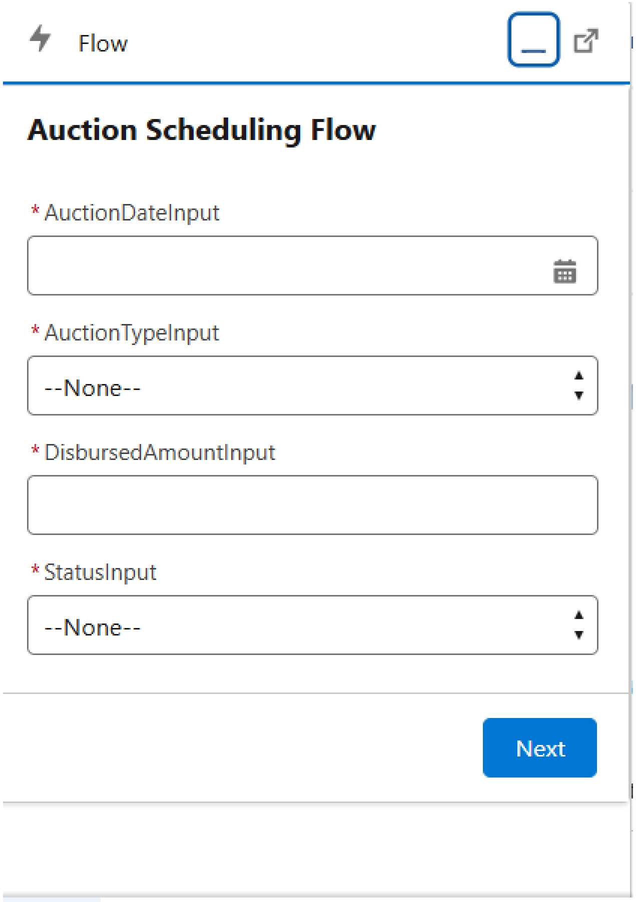
Home Page Layouts

- Setup → Lightning App Builder → **New** → **Home Page**.
- Layout: Two-Column.
- Page Name: **Finance Home / Fund Manager Dashboard**.
- Add Components:
  - **Report Chart** → Total Contributions vs Overdue.
  - **List View** → Overdue Contributions.
  - **Recent Items** → Quick access to latest records.
  - **Flow Component** → Auction Scheduling Flow for quick setup.
- Save & Activate → Assign to **Finance Management App**.



Utility Bar

- Setup → App Manager → Edit **Finance Management App**.
- Add **Utility Items (Desktop Only)**.
- Items Added:
    - **Schedule Auction Flow** → quick auction scheduling.
    - **Overdue Contributions List** → view overdue records instantly.
    - **Mini Report Chart** → collections summary.
- Configure: Label, Icon, and Save.



LWC (Lightning Web Components)

LWC 1: Contribution Summary

- Displays count of Contributions grouped by status (Paid, Pending, Overdue).

HTML

```
<template>
   <lightning-card title="Contribution Summary">
      <p>Paid: {paid}</p>
      <p>Pending: {pending}</p>
      <p>Overdue: {overdue}</p>
   </lightning-card>
</template>
```

JS

```
import { LightningElement, wire } from 'lwc';
import getContributionSummary from '@salesforce/apex/ContributionService.getSummary';
```

```
export default class ContributionSummary extends LightningElement {
    paid;
    pending;
    overdue;

    @wire(getContributionSummary)
    wiredData({ data }) {
        if(data){
            this.paid = data.Paid;
            this.pending = data.Pending;
            this.overdue = data.Overdue;
        }
    }
}
```