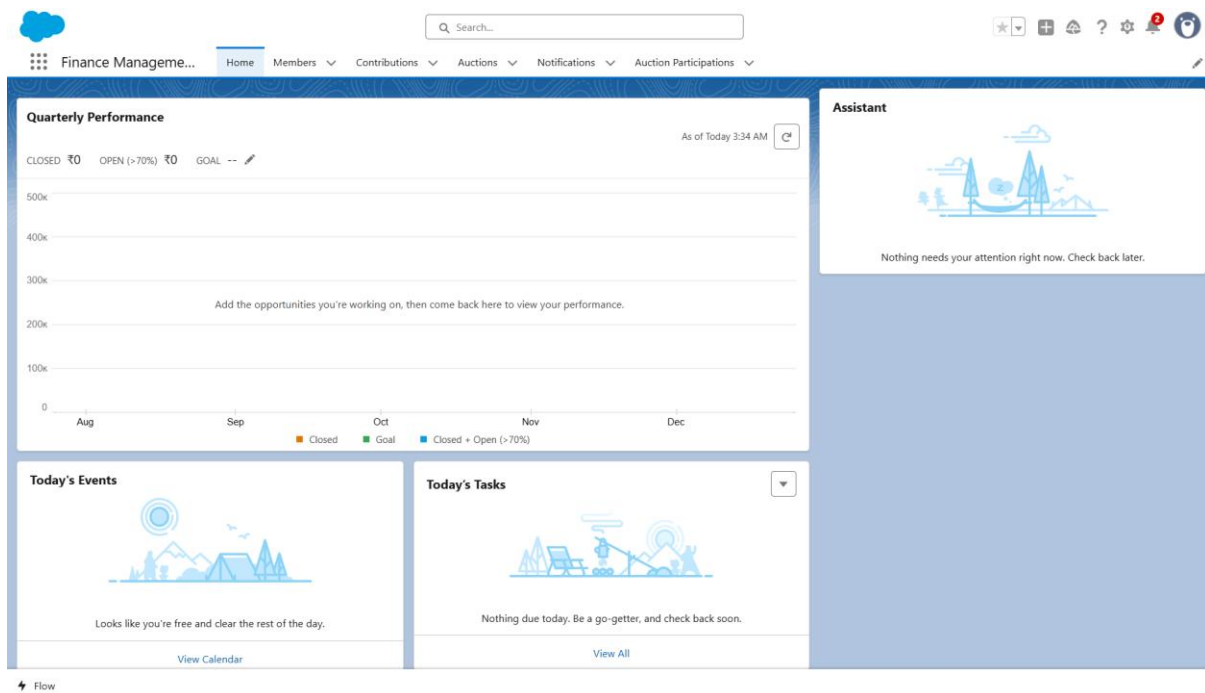


Phase 6: User Interface Development

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.

Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Sharing | Sharing Hierarchy | Edit Labels

Information (Header visible on edit only)

Member Number
GEN-2004-001234

Member ID
GEN-2004-001234

First Name
Sample Text

Last Name
Sample Text

Contact Number
1-415-555-1212

Email
sarah.sample@company.com

KYC ID
Sample Text

Status
Sample Text

Join Date
9/26/2025

Address
Sample Text

Owner
Sample Text

System Information (Header visible on edit only)






Created By
Sample Text

Last Modified By
Sample Text

Custom Links (Header visible on edit only)

Tabs

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

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	

- Arrange Tabs:
 - - Members
 - - Contributions
 - - Auctions
 -

4. Notifications

○

5. Reports

○

6. Dashboards

3. Save App.

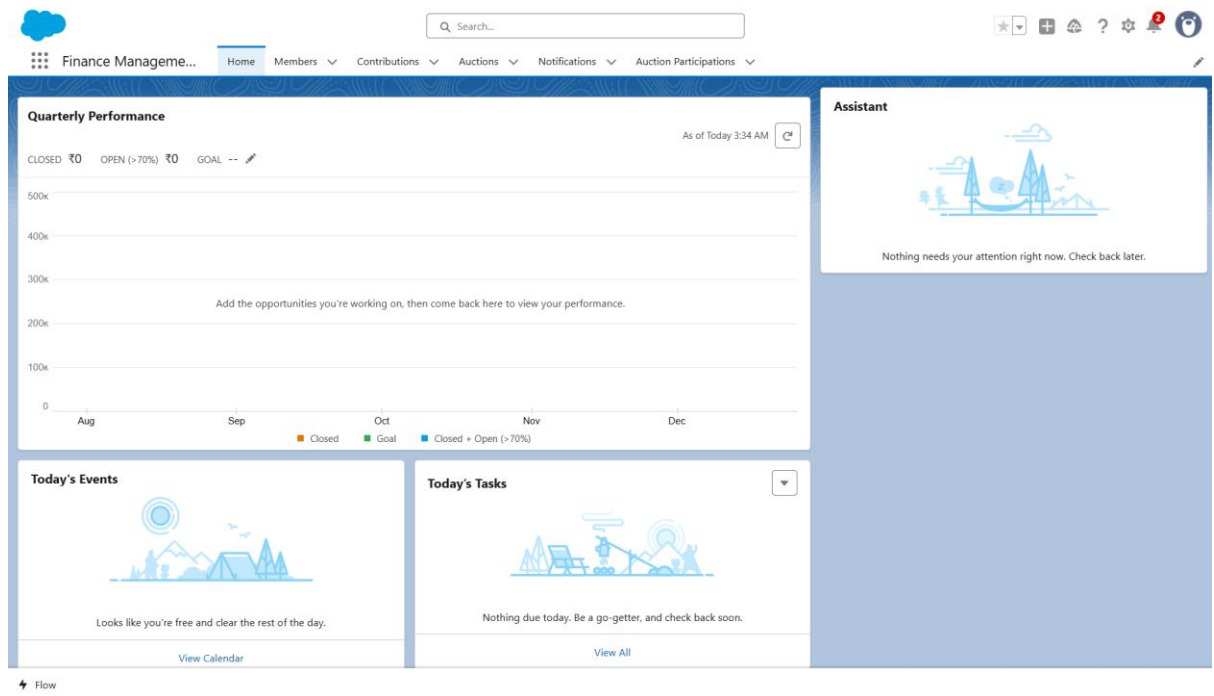
Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

The screenshot displays the 'Navigation Items' configuration interface. It is divided into two main panels: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' panel features a search bar at the top with the placeholder text 'Type to filter list...'. Below the search bar is a scrollable list of 20 items, each with a small icon and a text label. The items are: Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Approval Submission Details, Approval Submissions, Approval Work Items, and Asset Action Sources. To the right of this list are two small square buttons, one with a right-pointing arrow and one with a left-pointing arrow. The 'Selected Items' panel is a vertical list of items that have been chosen for the navigation bar. It currently contains six items: Lightning Usage, Notifications, Members, Auctions, Contributions, and Auction Participations. To the right of this list are two small square buttons, one with an up-pointing arrow and one with a down-pointing arrow. At the top of the 'Selected Items' panel, there is a 'Create' button with a dropdown arrow.




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.

 Flow
 


Auction Scheduling Flow

* AuctionDateInput

* AuctionTypeInput

* DisbursedAmountInput

* StatusInput

Next

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;  
        }  
    }  
}
```