

# Phase 6: Lightning UI – Customer Complaint CRM

This phase focuses on building a user-friendly interface for the Complaint CRM using Salesforce Lightning components. The steps below guide you to configure Tabs, App, Record Pages, and Home Page.

## 1. Create Custom Object Tabs

**Purpose:** Make objects accessible via navigation in Lightning App.

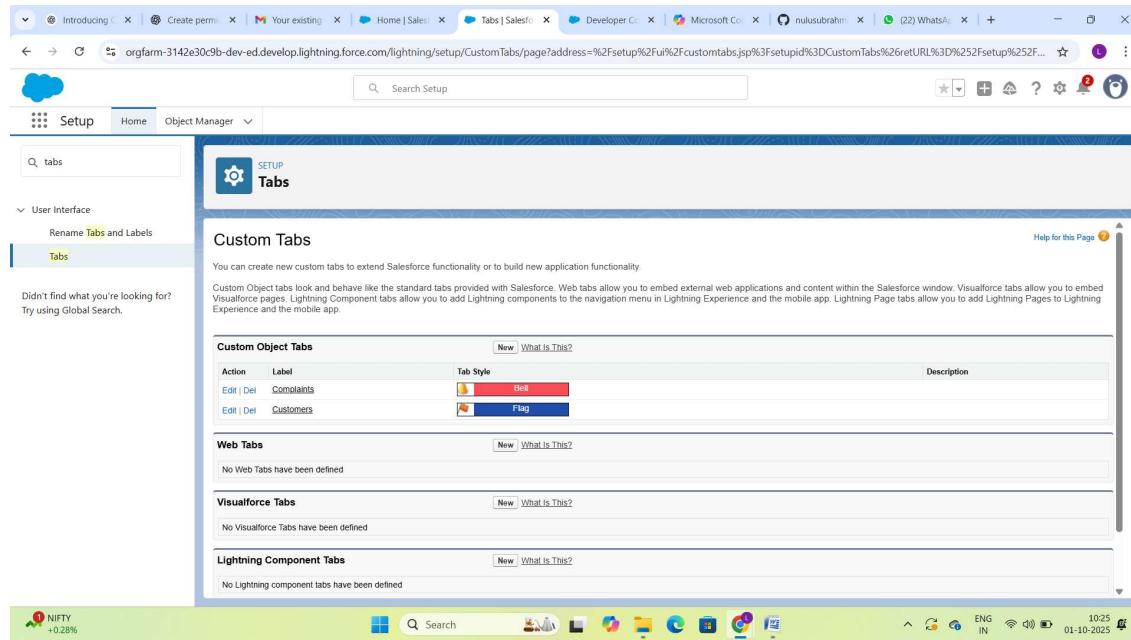
### Steps:

1. Setup → Quick Find → **Tabs** → Select **Custom Object Tabs** → New.
2. Select **Object:** Complaint
3. Choose **Tab Style** and **Tab Label:** Complaints
4. Click **Next** → **Save**

### Repeat for Customer:

- Object: Customer
- Tab Label: Customers

**Result:** Users can navigate easily to Complaints and Customers.



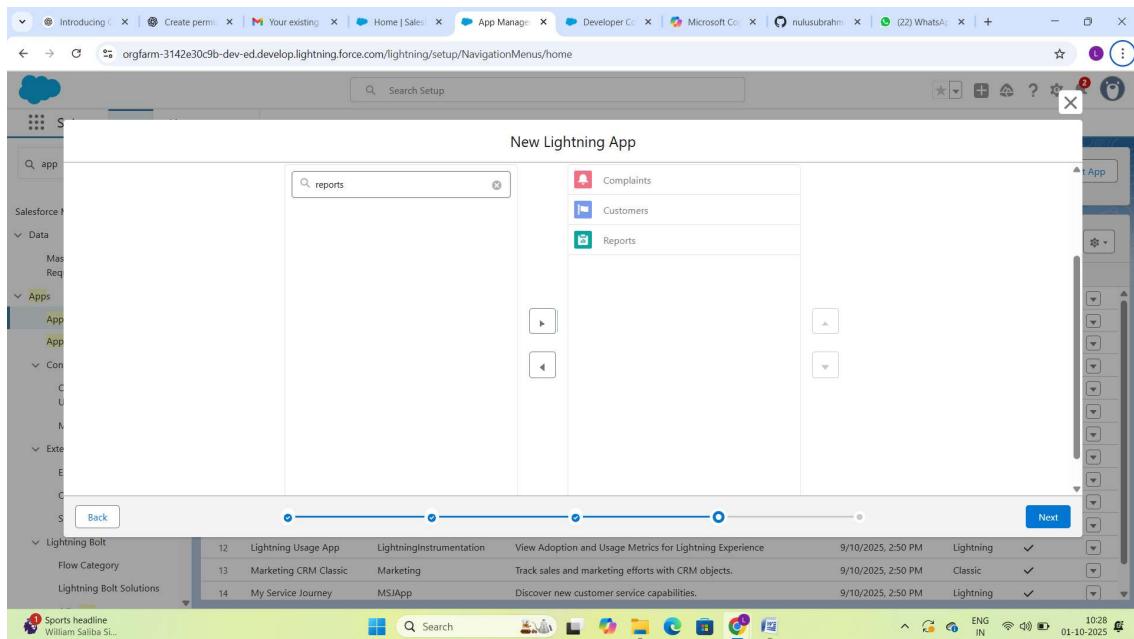
## 2. Create a Lightning App

**Purpose:** Combine tabs and components into one app for users.

**Steps:**

1. Setup → Quick Find → **App Manager** → New Lightning App.
2. Fill basic info:
  - o **App Name:** Complaint Management
  - o Description: Short project description
  - o Upload Icon (optional)
  - o Navigation Style: **Standard Navigation**
3. Click **Next** → **Utility Bar (skip or add later)** → **Next**
4. **Navigation Items:** Add:
  - o Complaints
  - o Customers
  - o Reports (optional)
5. Finish → Save

**Result:** Lightning app ready for project users.



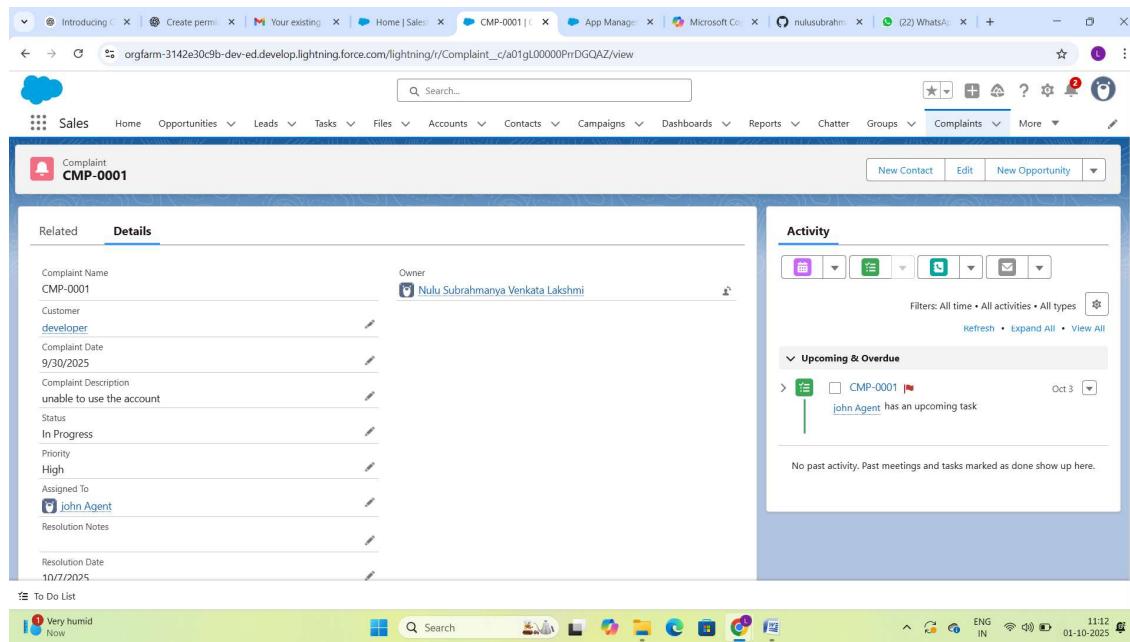
## 5. Build / Customize Complaint Record Page

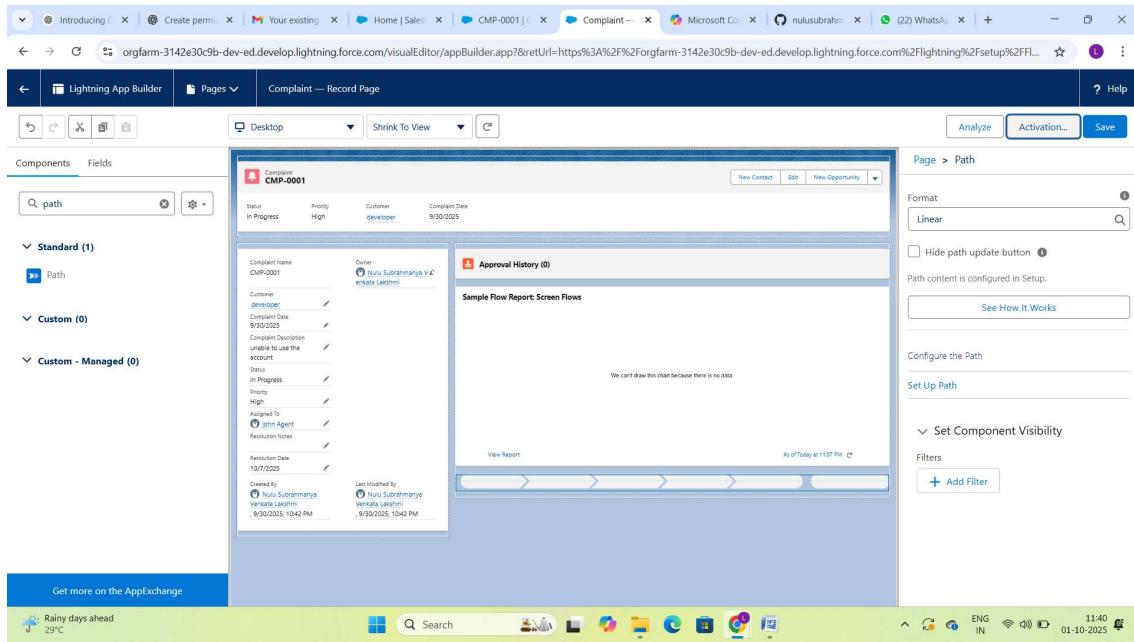
**Purpose:** Customize record view for better user experience.

**Steps:**

1. Open any Complaint record → gear  → **Edit Page**  
OR Setup → Object Manager → Complaint → **Lightning Record Pages** → New
2. Template: Header + Right Sidebar (or One Region with Tabs)
3. Name: Complaint – Record Page
4. Drag Components:
  - **Highlights Panel (standard):** show Complaint Number, Status, Priority, Customer, Complaint Date
  - **Record Detail (standard):** display all fields
  - **Related Lists (standard):** Activities, Tasks, Notes, Files
5. Save → **Activate**
6. Choose Activation: App Default → select **Complaint Management** app (or Org Default)
7. Publish

**Tip:** If Highlights Panel does not show fields → edit **Compact Layout:** Object Manager → Complaint → Compact Layouts → include desired fields.



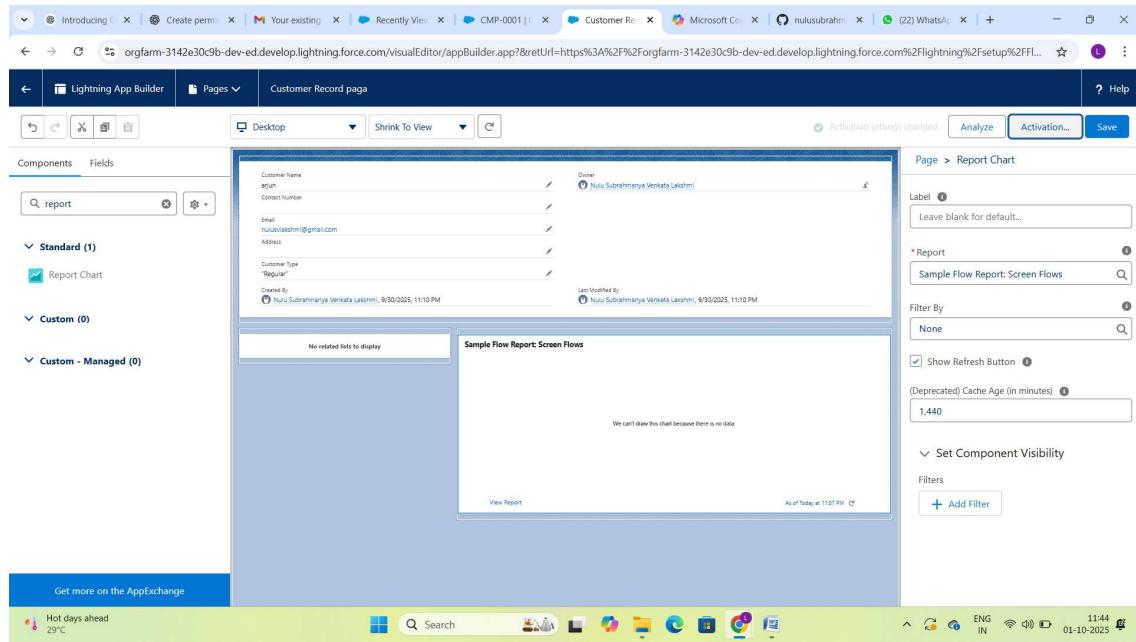


## 6. Customize Customer Record Page

### Steps:

1. App Launcher → Customers → open a Customer → gear → **Edit Page**
2. Template: two-column with related list on right
3. Drag Components:
  - o **Record Detail**
  - o **Related Lists** (include Complaints related list)
  - o Optional Report Chart
4. Save → Activate → choose App Default or Org Default

**Result:** Customer record page shows all relevant details and related complaints.



## 7. Create Home Page for the App

**Purpose:** Provide a landing page with summary and quick access to complaints.

### Steps:

1. Setup → Quick Find → **Lightning App Builder** → New → **Home Page**
2. Template: Header + 3 columns (or any preferred layout)
3. Name: Complaint Home
4. Drag Components:
  - **Rich Content / Text:** project title or summary
  - **Report Chart:** Complaints by Status or Priority (create report first)
  - **List View:** Recent Complaints
  - **Recent Records:** show recent Complaints
  - Optional: Today's Tasks / Announcements
5. Save → Activate → choose App Default → Complaint Management app

**Tip:** To display charts → create a simple report: Reports → New → Complaints → Group by Status → Save → use in Report Chart component.

