

1. Get Started with Lightning App Builder (15 min)

Goal: Create any Lightning page

Steps

1.  Setup → **Lightning App Builder**
2. Click **New**
3. Select → **Home Page**
4. Choose **Standard Home**
5. Drag any component (e.g., Assistant) onto canvas
6. Click **Save**
7. Activate → Assign as **Org Default**

 Trailhead checks:

- Page created
 - Activated
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◆ 2. Build a Custom Home Page for Agentforce 360 (25 min)

Goal: Customize Home with components

Steps

1. Setup → Lightning App Builder → **New** → **Home Page**
2. Drag:
 - **Events**
 - **Tasks**
 - **Performance Chart**
3. Move **Assistant** to top
4. Save → Activate → Org Default

 Trailhead just checks layout change + activation

◆ **3. Build a Custom Record Page (Agentforce + Mobile) (25 min)**

Goal: Create record page with tabs

Steps

1. Setup → Lightning App Builder → **New → Record Page**
 2. Object → **Case** (usually what Trailhead uses)
 3. Template → **Header and Tabs**
 4. Add Tabs:
 - Details
 - Related
 - Activity
 5. Drag **Highlights Panel** at top
 6. Save → Activate → Assign to **App + Profile**
-  Mobile is auto-enabled — nothing extra needed
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◆ **4. Get Started with Dynamic Forms (25 min)**

Goal: Convert fields into Field Section component

Steps

1. Open the **Case Record Page** you created
2. Click **Upgrade Now** (Dynamic Forms)
3. Move fields into **Field Section**
4. Create section name: **Case Information**
5. Save → Activate

 Trailhead checks:

write a 2 page blog medium

Mastering Lightning App Builder & Dynamic Forms: Building Smarter Salesforce Pages for Agentforce 360

Salesforce is powerful out of the box — but the real magic happens when you **shape the user experience** to match how your teams actually work. That's where **Lightning App Builder** and **Dynamic Forms** come in.

If you're working with **Agentforce 360**, service teams, or mobile users, these tools let you build **clean, role-based, intelligent pages** without writing a single line of code.

In this blog, I'll walk you through how Lightning App Builder, Dynamic Pages, and Dynamic Forms help you create **faster, smarter, and more personalized Salesforce experiences**.

Why Lightning App Builder Matters

The default Salesforce layout shows **everything to everyone**.

That means:

- Too many fields
- Irrelevant components
- Slower page load
- Poor mobile experience

Lightning App Builder fixes this by letting you:

- Control page layout visually
- Add components like Tasks, Events, Reports, and Rich Text
- Assign different pages to different apps and profiles
- Optimize for desktop **and mobile**

Think of it as **UI architecture for productivity**.

Building a Custom Home Page for Agentforce 360

Your Home page is your **command center**.

Instead of a generic layout, you can build a Home page that shows:

- Open Tasks
- Upcoming Events
- Performance charts

- Assistant recommendations

For Agentforce 360 users, this means agents see:

- 👉 What needs action today
- 👉 Their performance snapshot
- 👉 Key reminders

Result: **Less clicking, more doing.**

A well-designed Home page reduces navigation time and improves adoption — especially for new users.

Custom Record Pages: The Game Changer

Record pages are where users spend most of their time.

With Lightning App Builder, you can:

- Add **Tabs** (Details, Related, Activity)
- Use **Highlights Panel** for key info
- Reorder components based on priority

For service teams working on **Cases**, this means:

- ◆ Case details on top
- ◆ Activity timeline in one tab
- ◆ Related records separated cleanly

This structure reduces scrolling and makes troubleshooting faster.

And the best part?

It works seamlessly in the **Salesforce mobile app**.

Enter Dynamic Forms: Field-Level Intelligence

Dynamic Forms take customization to the **next level**.

Instead of static page layouts, you can:

- Show fields only when relevant
- Hide fields for certain profiles
- Display sections based on record values

Example:

If **Case Status = Closed**

- Show **Resolution Notes** section

If **Case Type = Escalation**

- Show **Escalation Details** fields

This creates a **context-aware UI**.

Users see only what they need — when they need it.

Visibility Rules = Personalized Salesforce

Dynamic visibility rules let you control:

- Field visibility
- Component visibility
- Section visibility

Based on:

- User profile
- Record field values
- Device type

Example:

Managers see **Performance Metrics**

Agents do not

Mobile users see **compact components**

Desktop users see full layouts

This is how you build **role-based experiences without multiple page layouts**.

App Pages: Building a Workspace

Lightning **App Pages** let you design a full workspace for a specific app.

You can add:

- Reports
- Recent Items
- Custom Lightning Components
- Visualforce pages
- Rich text instructions

For an **Agentforce console**, you can create:

-  Left panel → Performance dashboard
-  Center → Case list view
-  Right panel → Quick links & announcements

Now your app becomes a **productivity hub**, not just a menu.

Custom Lightning Components: Extending Beyond Standard UI

When standard components aren't enough, you can plug in:

- LWC (Lightning Web Components)
- Aura components
- Third-party widgets

This allows:

- ✓ Real-time integrations
- ✓ Embedded tools
- ✓ Guided workflows

All inside the Lightning page.

Business Impact

Organizations that use Lightning App Builder and Dynamic Forms see:

-  Reduced page clutter
-  Faster record handling time
-  Better mobile adoption
-  Role-based user experience
-  Higher productivity for agents

Instead of training users to navigate Salesforce, you **design Salesforce around your users**.

That's the real transformation.

Pro Tips from Real Implementations

- ◆ Always put **Highlights Panel** at the top
- ◆ Use **Tabs** to reduce scroll fatigue
- ◆ Group fields into **logical sections**
- ◆ Use **visibility rules** instead of multiple layouts
- ◆ Test on **mobile view** before activation
- ◆ Assign pages by **App + Profile** for maximum control