

# Phase 6 User Interface Development

## Step1: Lightning App

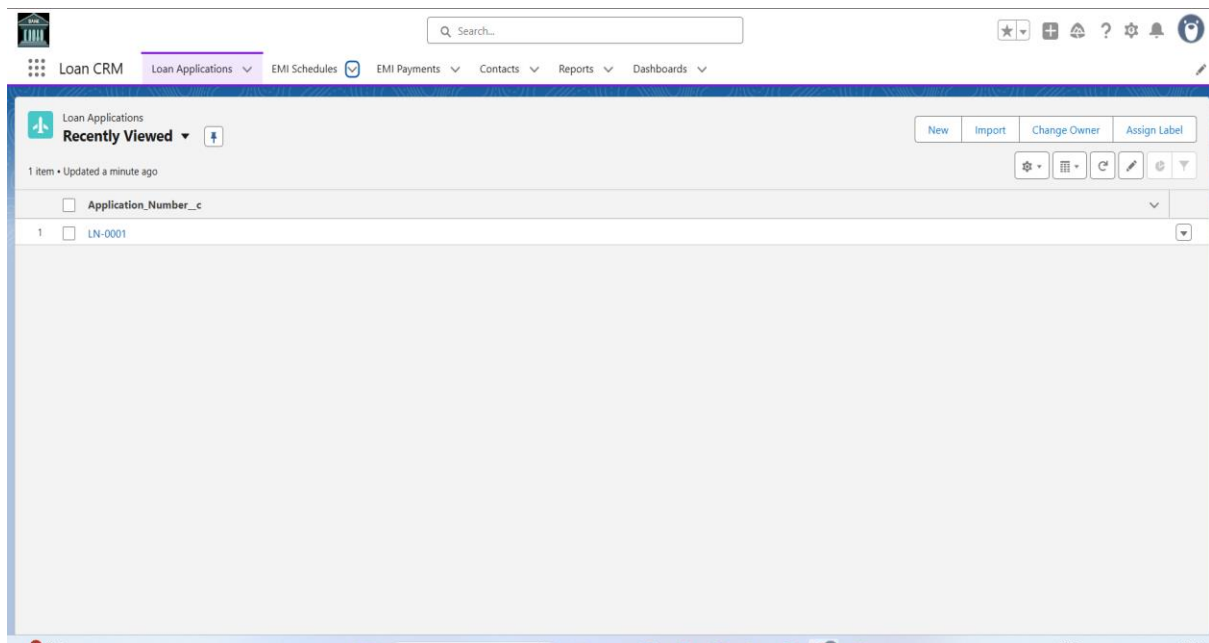
Created a custom Lightning App named FinTrust Loan CRM.

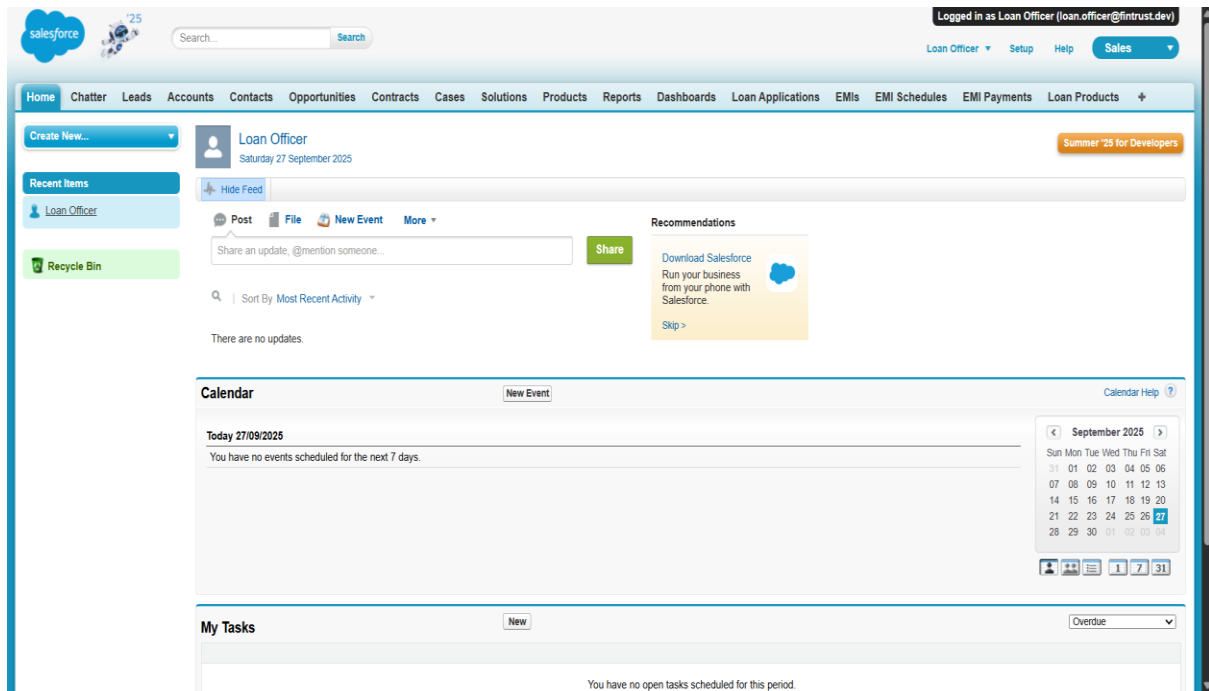
Configured navigation tabs:

- Loan Applications (custom object Loan\_Application\_\_c)
- EMIs (EMI\_Schedule\_\_c)
- Payments (Payment\_\_c)
- Contacts (standard)
- Reports & Dashboards (standard analytics tabs)


Uploaded the FinTrust logo for branding.

Assigned app access to Loan Officer and Manager profiles.





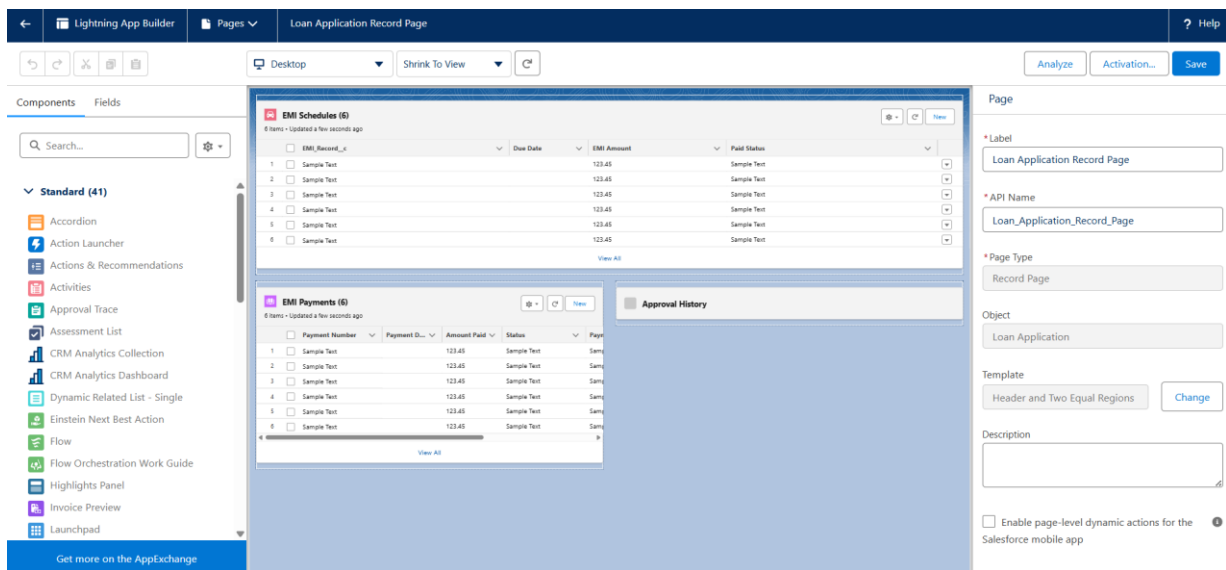
## Step 2: Steps to Customize Loan Application Record Page

1. Open Loan Application record page
  - Go to any Loan Application record.
  - Click  Gear icon → Edit Page.
2. Add EMIs related list
  - From left panel, drag Related List – Single.
  - In properties → choose EMIs.
3. Add Payments related list
  - Drag another Related List – Single.
  - Choose Payments.
4. Add Approval History
  - Drag Related List – Single again.
  - Choose Approval History.
5. Add Chatter Feed
  - Add a Tab if not there.
  - Drag Chatter component inside that tab.
6. Add Quick Actions
  - Go to Object Manager → Loan Application → Page Layouts.

- In Mobile & Lightning Actions, add:
  - Submit for Approval
  - (Optionally custom Approve/Reject if created).

## 7. Save & Activate

- Click Save → Activate.
- Assign this page to Loan CRM App.



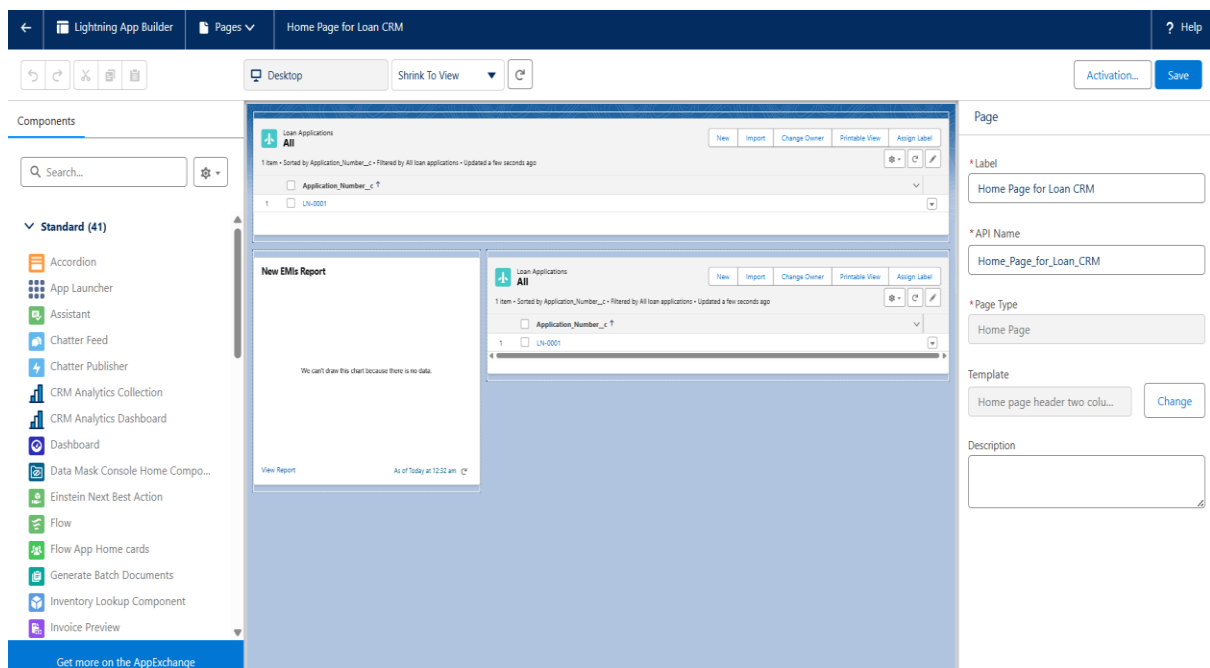
## Step 3: Steps to Build Home Page for Loan CRM

1. Create Home Page
  - Setup → Lightning App Builder → New → Home Page.
  - Pick a template (2 or 3 columns).
2. Add Pending Approvals
  - Drag List View component.
  - Object: Loan Applications.
  - Choose list view = Pending Approvals.
3. Add Overdue EMIs chart
  - First create a report on EMIs (filter: Due Date <= TODAY, Status ≠ Paid).
  - Save it with a chart.
  - In Home Page, drag Report Chart → select this report.
4. Add New Applications

- Drag another List View component.
- Object: Loan Applications.
- Choose list view = New Applications (Created Last 7 Days).

## 5. Save & Activate

- Click Save → Activate.
- Assign to Loan CRM App.



## Step 4: List Views for Loan Officers & Managers

### 1. My Pending Loans /pending loan approvals (For Loan Officers)

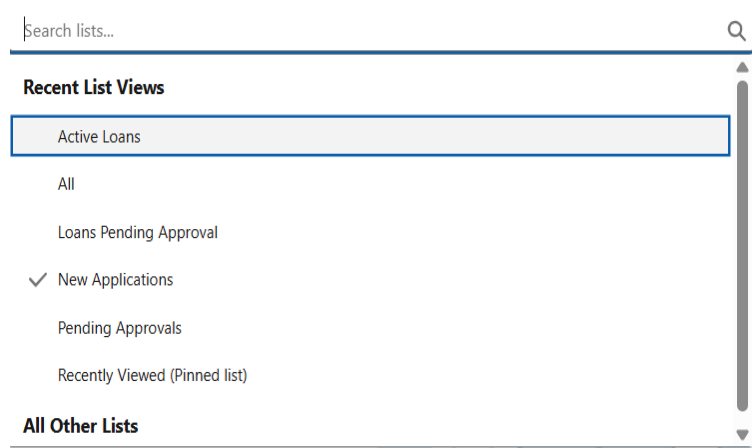
- Object: Loan Applications
- List View Name: My Pending Loans
- Filters:
  - Owner = Current User → shows only loans assigned to the logged-in officer
  - Status = Pending → shows only loans that are pending
- Purpose: Helps officers quickly see their own pending loan applications.

## 2. Loans Pending Approval (For Managers)

- Object: Loan Applications
- List View Name: Loans Pending Approval
- Filters:
  - Status = Waiting for Approval → shows loans that need manager review
- Purpose: Lets managers see all loans awaiting approval.

## 3. Active Loans

- **Object:** Loan Applications
- **List View Name:** Active Loans
- **Purpose:** Provides a consolidated view of currently active loans.



## Custom LWC Components

### 1. loanApplicationForm

```
<> loanApplicationForm.html X JS loanApplicationForm.js loanApplicationForm.js-meta.xml <> emiCalcula
force-app > main > default > lwc > force-app > main > default > lwc > loanApplicationForm > <> loanApplicationForm.html
1 <template>
2   <lightning-card title="Loan Application Form" icon-name="standard:contact">
3     <div class="slds-p-around_medium">
38       </lightning-record-edit-form>
39     </div>
40   </lightning-card>
41 </template>
42
```

```
loanApplicationForm.html JS loanApplicationForm.js X loanApplicationForm.js-meta.xml emiCalculator.html JS emiCalculator.js
force-app > main > default > lwc > force-app > main > default > lwc > loanApplicationForm > JS loanApplicationForm.js > ...
4 export default class LoanApplicationForm extends LightningElement {
7   handleSubmit(event) {
11   }
12
13   handleSuccess(event) {
14     this.recordId = event.detail.id; // get newly created record ID
15     this.showToast('Success', 'Loan Application created successfully!', 'success');
16   }
17
18   handleUploadFinished(event) {
19     const uploadedFiles = event.detail.files;
20     this.showToast('Success', uploadedFiles.length + ' file(s) uploaded successfully!', 'success');
21   }
22
23   showToast(title, message, variant) {
24     const evt = new ShowToastEvent({
25       title: title,
26       message: message,
27       variant: variant,
28     });
29     this.dispatchEvent(evt);
30   }
31 }
32
```

```
loanApplicationForm.html JS loanApplicationForm.js loanApplicationForm.js-meta.xml X emiCalculator.html JS emiCalculator.js
force-app > main > default > lwc > force-app > main > default > lwc > loanApplicationForm > loanApplicationForm.js-meta.xml
1 <?xml version="1.0" encoding="UTF-8"?>
2 <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
3   <apiVersion>58.0</apiVersion>
4   <isExposed>true</isExposed>
5   <targets>
6     <target>lightning__RecordPage</target>
7     <target>lightning__AppPage</target>
8     <target>lightning__HomePage</target>
9   </targets>
10 </LightningComponentBundle>
11
```

## 2. emiCalculator

```
loanApplicationForm.html JS loanApplicationForm.js loanApplicationForm.js-meta.xml emiCalculator.html X
force-app > main > default > lwc > force-app > main > default > lwc > emiCalculator > emiCalculator.html > ...
1 <template>
2   <lightning-card title="EMI Calculator" icon-name="standard:money">
3     <div class="slds-p-around_medium">
24       <lightning-input
25         value={interestRate}
26         onchange={handleInputChange}
27         data-id="interestRate">
28       </lightning-input>
29
30       <!-- Calculated EMI -->
31       <div class="slds-m-top_medium">
32         <p><strong>Monthly EMI:</strong> {emi}</p>
33       </div>
34     </div>
35   </lightning-card>
36 </template>
37
```

```
loanApplicationForm.html JS loanApplicationForm.js loanApplicationForm.js-meta.xml emiCalculator.html JS emiCalculator.js
force-app > main > default > lwc > force-app > main > default > lwc > emiCalculator > JS emiCalculator.js > EmiCalculator > calculateEMI
3   export default class EmiCalculator extends LightningElement {
9       handleInputChange(event) {
18   }
19
20   calculateEMI() {
21       if (this.principal > 0 && this.tenure > 0 && this.interestRate > 0) {
22           let P = this.principal;
23           let r = (this.interestRate / 12) / 100; // monthly rate
24           let n = this.tenure;
25
26           let emiValue = (P * r * Math.pow(1 + r, n)) / (Math.pow(1 + r, n) - 1);
27           this.emi = emiValue.toFixed(2); // round to 2 decimals
28       } else {
29           this.emi = 0;
30       }
31   }
32 }
33
```

```
loanApplicationForm.html JS loanApplicationForm.js loanApplicationForm.js-meta.xml emiCalculator.html JS emiCalculator.js emiCalculator.js-meta.xml X
force-app > main > default > lwc > force-app > main > default > lwc > emiCalculator > emiCalculator.js-meta.xml
1  <?xml version="1.0" encoding="UTF-8"?>
2  <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
3      <apiVersion>58.0</apiVersion>
4      <isExposed>true</isExposed>
5      <targets>
6          <target>lightning__AppPage</target>
7          <target>lightning__RecordPage</target>
8          <target>lightning__HomePage</target>
9      </targets>
10 </LightningComponentBundle>
11
```

### 3. loanSummaryCard

```
loanApplicationForm.js loanApplicationForm.js-meta.xml emiCalculator.html JS emiCalculator.js emiCalculator.js-meta.xml
force-app > main > default > lwc > force-app > main > default > lwc > loanSummaryCard > loanSummaryCard.html > ...
1   <template>
2       <lightning-card title="Loan Summary" icon-name="standard:opportunity">
3           <div class="slds-p-around_medium">
8               </template>
9
10          <!-- Loan details -->
11          <template if:true={recordId}>
12              <template if:true={loan}>
13                  <p><strong>Loan Amount:</strong> {loan.Loan_Amount__c}</p>
14                  <p><strong>Tenure (Months):</strong> {loan.Tenure_Months__c}</p>
15                  <p><strong>EMI:</strong> {loan.EMI__c}</p>
16                  <p><strong>Status:</strong> {loan.Status__c}</p>
17              </template>
18          </template>
19
20          <!-- Error message -->
21          <template if:true={error}>
22              <p class="slds-text-color_error">Error fetching loan details: {error}</p>
23          </template>
24      </div>
25  </lightning-card>
26 </template>
27
28
```

```
loanApplicationForm.js-meta.xml  emiCalculator.html  JS emiCalculator.js  emiCalculator.js-meta.xml  loanSummaryCard.js > ...
force-app > main > default > lwc > force-app > main > default > lwc > loanSummaryCard > JS loanSummaryCard.js > ...
12 export default class LoanSummaryCard extends LightningElement {
18   wiredLoan({ error, data }) {
19     // ...
20
21     if (data) {
22       this.loan = {
23         Loan_Amount__c: data.fields.Loan_Amount__c.value,
24         Tenure_Months__c: data.fields.Tenure_Months__c.value,
25         Status__c: data.fields.Status__c.value,
26         EMI__c: data.fields.EMI__c ? data.fields.EMI__c.value : 'Not Calculated'
27       };
28       this.error = undefined;
29     } else if (error) {
30       this.error = error.body ? error.body.message : error;
31       this.loan = undefined;
32     }
33   }
34 }
35
```

```
xml  emiCalculator.html  JS emiCalculator.js  emiCalculator.js-meta.xml  loanSummaryCard.html  JS loanSummaryCard.js
force-app > main > default > lwc > force-app > main > default > lwc > loanSummaryCard > loanSummaryCard.js-meta.xml
1  <?xml version="1.0" encoding="UTF-8"?>
2  <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
3    <apiVersion>58.0</apiVersion>
4    <isExposed>true</isExposed>
5    <targets>
6      <target>lightning_RecordPage</target>
7      <target>lightning_AppPage</target>
8      <target>lightning_HomePage</target>
9    </targets>
10 </LightningComponentBundle>
11
```

## Step 7 — Verify Deployment

Log in to your Developer Org.

Go to App Builder → Loan Application Record Page.

Drag and drop your LWCs (loanApplicationForm, emiCalculator, loanSummaryCard) into the page layout.

Save & Activate.



← Lightning App Builder

Pages ▾

Loan Application Record Page

?

Help

↶ ↷ ✂ 📄 🗑

Desktop ▾

Shrink To View ▾

🖨

Analyze

Activation...

Save

Components

Fields

🔍 Search...

⚙

▼ Standard (41)

📄 Accordion

🔗 Action Launcher

📋 Actions & Recommendations

📅 Activities

📊 Approval Trace

📋 Assessment List

📊 CRM Analytics Collection

📊 CRM Analytics Dashboard

📋 Dynamic Related List - Single

📊 Einstein Next Best Action

📊 Flow

📋 Flow Orchestration Work Guide

📋 Highlights Panel

📄 Invoice Preview

📋 Launchpad

Get more on the AppExchange

Loan Application Form

🔍

Contact

Search Contacts...

🔍

Loan Type

⌵None⌵

Loan Amount

Interest Rate

Upload Supporting Documents

📎 Upload Files

Or drop files

Submit

EMI Calculator

Loan Amount (Principal)

0

Tenure (Months)

0

Interest Rate (% per annum)

0

Monthly EMI 0

Loan Summary

Loan Amount: 100000

Tenure (Months): 12

EMI:

Status: Submitted

Page

\* Label

Loan Application Record Page

\* API Name

Loan\_Application\_Record\_Page

\* Page Type

Record Page

Object

Loan Application

Template

Header and Two Equal Regions

Change

Description

☐ Enable page-level dynamic actions for the Salesforce mobile app

?