# Phase 6: User Interface Development

Objective

To design a **user-friendly, role-specific interface** in Salesforce using **Page Layouts, Record Types, Lightning Pages, and Dashboards**, ensuring support agents, managers, and admins interact with the system seamlessly.

UI Components Implemented

1. Page Layouts

- **Case Object (Case)**
  - Case layout

- **Account Object (Account)**
  - Single layout displaying account details: Name, Industry, Contact Info

- **Contact Object (Contact)**
  - Single layout for customer contact details and communication history

Note: Existing Salesforce layouts were customized;
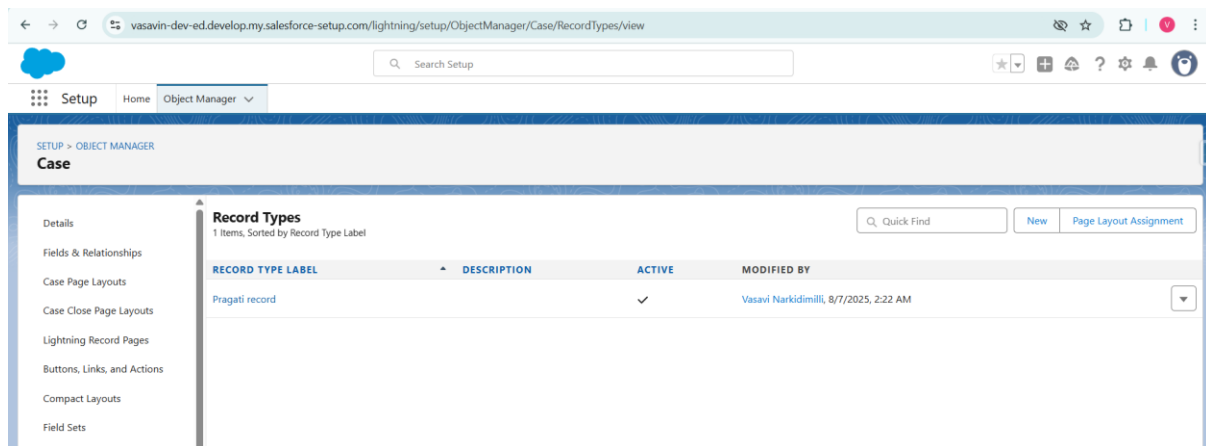
2. Custom Lightning Pages

- **Case Record Page**
  - Displays case details with quick actions for **"Send Status Update Email"**
  - Highlights priority and case type

- **Account & Contact Pages**
  - Provide easy access to related cases and communication history

     o Related lists allow seamless navigation between Accounts, Contacts, and Cases

3. Dashboards & Reports UI

- **Cases by Status (Bar Chart)** → Shows number of cases in New, Working, Escalated, and Closed status

- **Cases by Priority (Donut Chart)** → Highlights High, Medium, and Low priority cases

- **Top Customers (Lightning Table)** → Lists customers with most cases or recurring issues

- **Agent Performance Dashboard** → Tracks number of cases handled per agent and SLA adherence

4. UI Enhancements for Usability

- **Compact Layouts** highlight key case information at the top of pages

- **Dynamic Forms (Lightning)** allow conditional visibility of fields based on case type

- **Tab Visibility** is role-based:

    o   Admins see all tabs and records

    o   Support Managers see Cases, Accounts, Contacts, and Reports

    o   Support Agents see Cases only

Tabular Summary

UI Component Type	Purpose
Case Page Layouts	Customized layouts for Technical Issues & Customer Inquiries
Account & Contact Layouts	Displays account/contact info and related cases
Case Lightning Page	Quick access to case details and status update actions
Dashboards & Reports	Real-time view of case statuses, priorities, top customers, and agent performance

Benefits of UI Development

- Enhances **user adoption** with intuitive, role-specific layouts

- Reduces **data entry errors** by showing only relevant fields

- Provides **real-time insights** via dashboards and charts

- Ensures **role-based clarity**, so each user sees only what is relevant