

Phase 6: User Interface Development

Objective

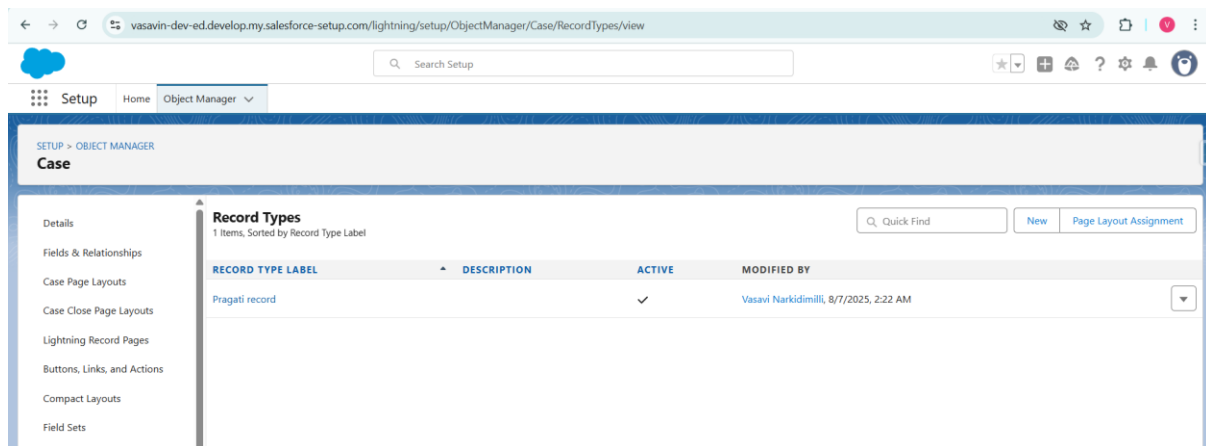
To design a **user-friendly, role-specific interface** in Salesforce using **Page Layouts, Record Types, Lightning Pages, and Dashboards**, ensuring support agents, managers, and admins interact with the system seamlessly.

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

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

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is divided into 'App Details' and 'App Branding' sections.

App Details:

- * App Name:** Case Management System
- * Developer Name:** Case_Management_System
- Description:** Manage customer cases efficiently

App Branding:

- Image:** A placeholder box with an 'Upload' button.
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme' is currently unchecked.

App Launcher Preview: A preview of the app launcher showing a blue square icon with 'CM' and the text 'Case Management System' and 'Manage customer cases efficiently'.

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

The screenshot shows the Salesforce Dashboards interface. At the top, there's a search bar and navigation tabs for 'Case Management ...', 'Cases', 'Dashboards' (selected), 'Accounts', 'Contacts', and 'Reports'. Below the navigation, there's a 'Dashboards' section with a 'Recent' filter and a table of recent dashboards.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	case management dashboard		Private Dashboards	Vasavi Narkidimilli	7/19/2025, 11:22 AM	

On the left side of the dashboard, there's a sidebar with categories: 'Dashboards' (Recent, 1 item), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

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:
 - Admins see all tabs and records
 - Support Managers see Cases, Accounts, Contacts, and Reports
 - 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