

Phase 6: User Interface Development (EduConsultPro CRM)

Purpose:

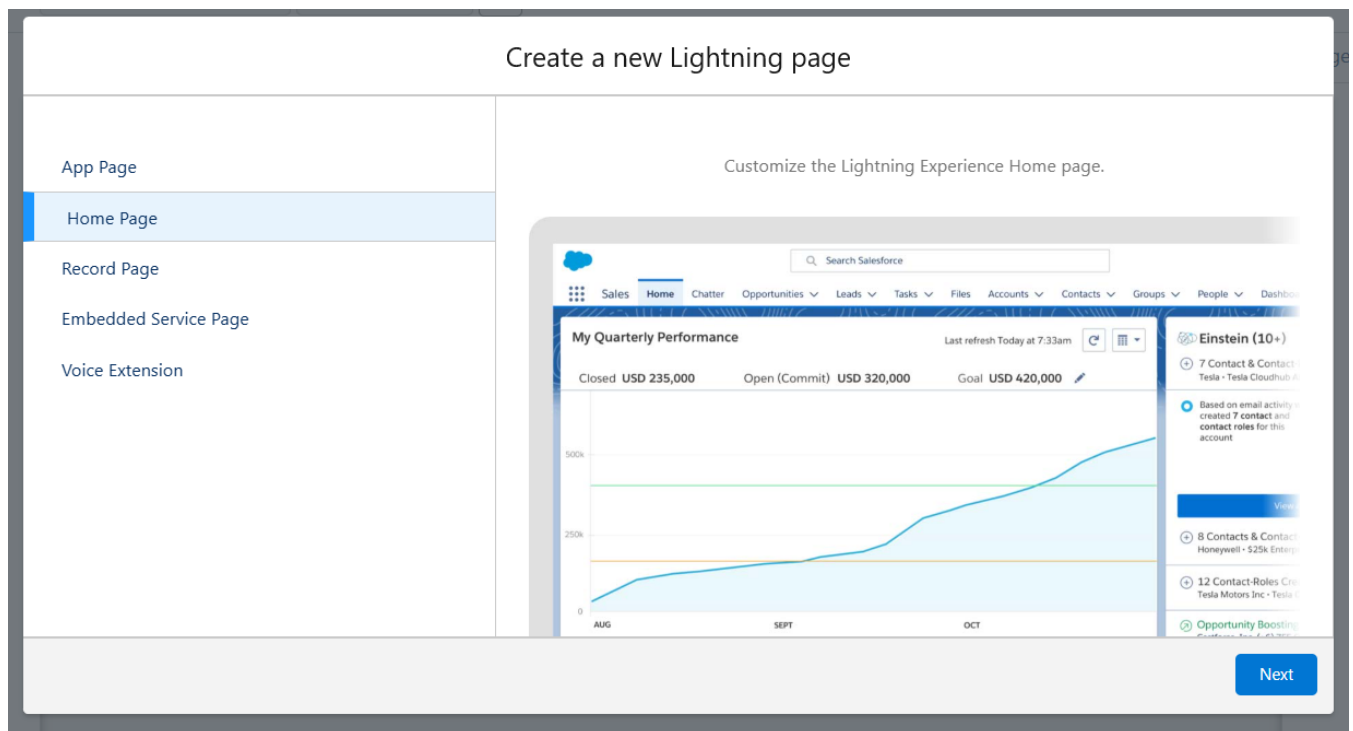
Develop a user-friendly interface for the EduConsultPro CRM, including record pages, home page, tabs, utility bar, and planning for future enhancements using LWCs and Apex.

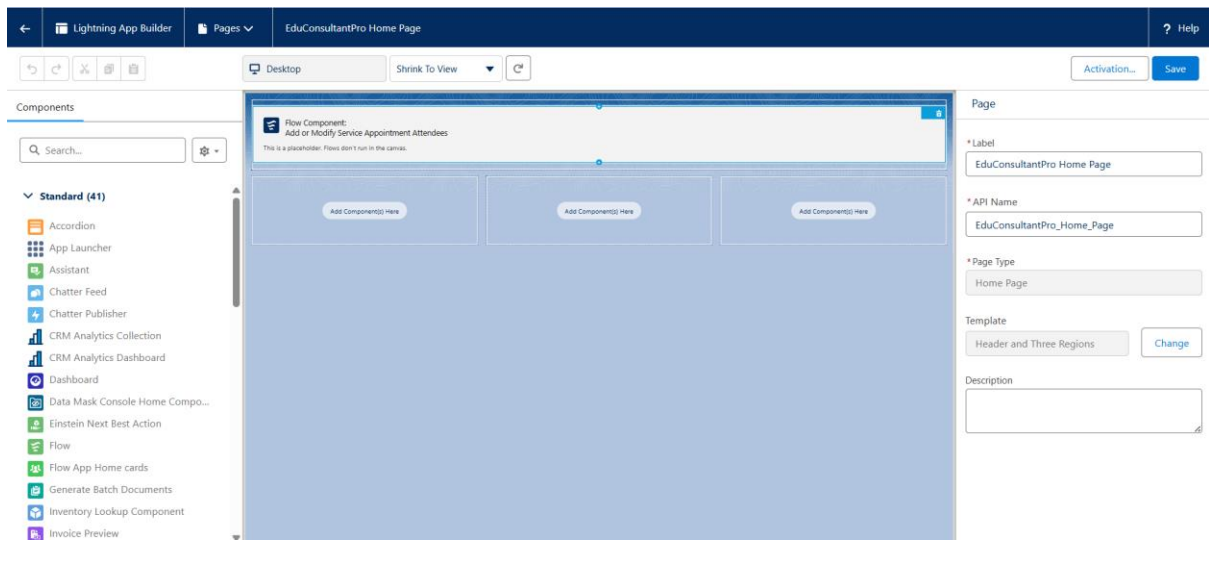
1. Lightning App Builder

Goal: Design and customize pages (Home Page, Record Pages) to enhance user experience.

Steps Done:

1. Opened **Lightning App Builder**.
2. Created **Home Page** using a 3-region layout.
3. Created **EduConsultPro CRM App** with tabs.
4. Added components to regions (Rich Text, List Views, Tabs).
5. Saved and activated pages.





2. Record Pages

Goal: Control what users see when they open a single **Student or Application** record.

Steps Done:

1. Opened **EduConsultPro CRM** in Lightning App Builder.
2. Added a **Tabs component** with two tabs:

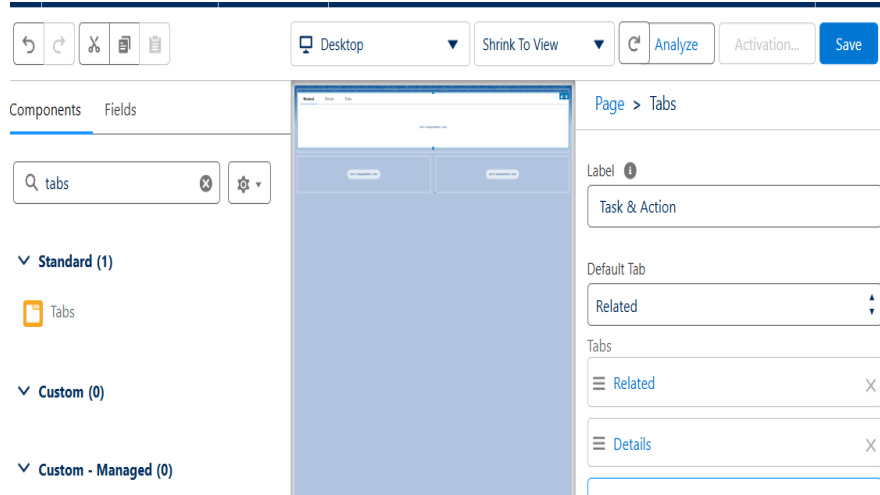
Tab 1: Student/Application Info

- Label: *Student/Application Info*
- Component: List View of Applications/Students
- Filter: Owner/User = Current User (or Active = True) to show only the current user's active records.

Tab 2: Task & Action

- Label: *Task & Action*
- Component: List View of Tasks
- Filter: User = Current User, Number of Records = 3 (shows latest tasks)
- Action Component: Recently Completed Tasks to allow users to review finished actions.

3. Activated the page as **Org Default / App Default** so it is visible to all users in the org.

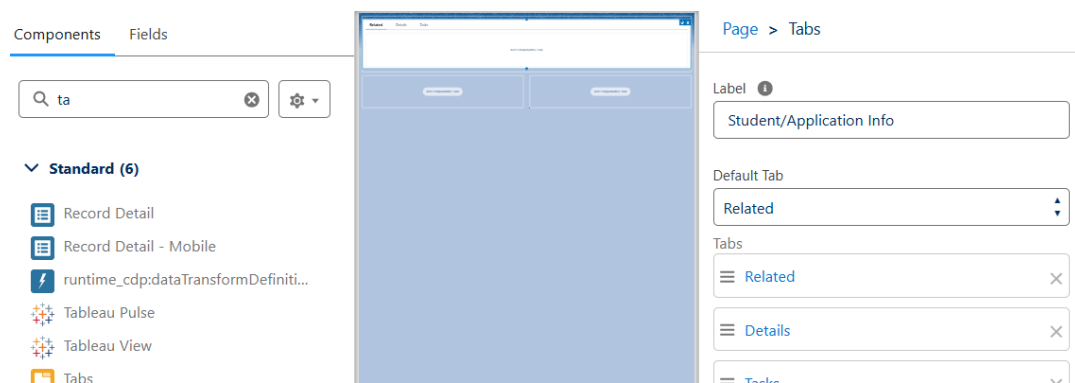


3. Tabs

Goal: Separate sections inside the record page for easy navigation.

Steps Done:

- **Tab 1:** Student/Application Info → displays all active applications for the logged-in user.
- **Tab 2:** Task & Action → shows pending and recently completed tasks.



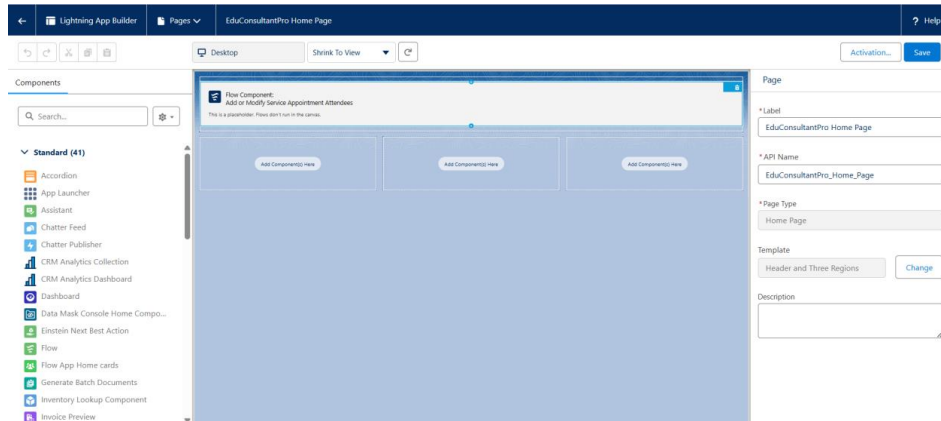
4. Home Page Layouts

Goal: Create a main dashboard view for the app.

Steps Done:

1. Opened Home Page in Lightning App Builder.
2. Selected **3-region layout** for better component organization.
3. Added components:
 - **Rich Text:** Welcome message for guidance.

- **List View:** Recent Applications/Students filtered for current user.
 - **List View:** Tasks / Actions filtered for current user.
- Used **Tabs component** to combine multiple List Views in one region.
 - Saved and activated the page.

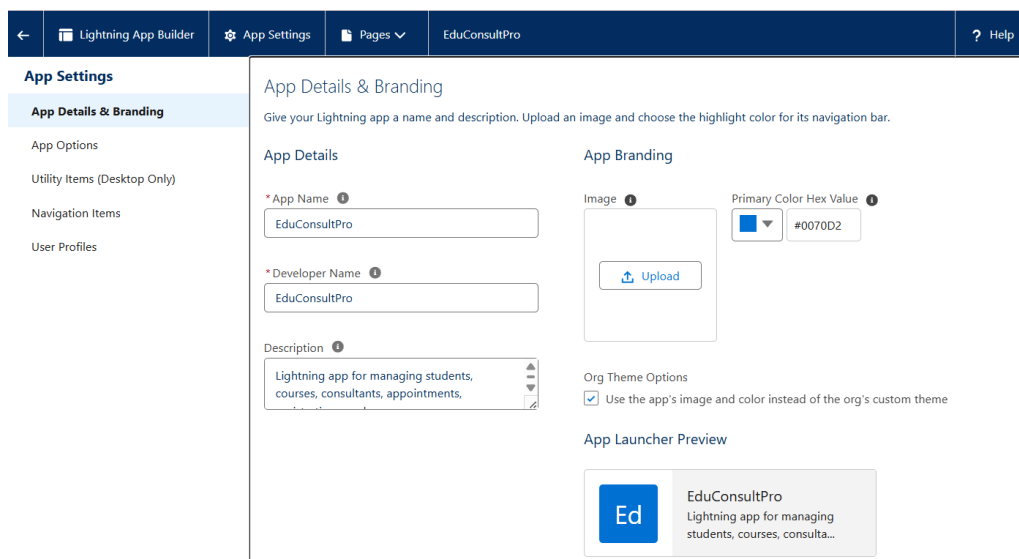


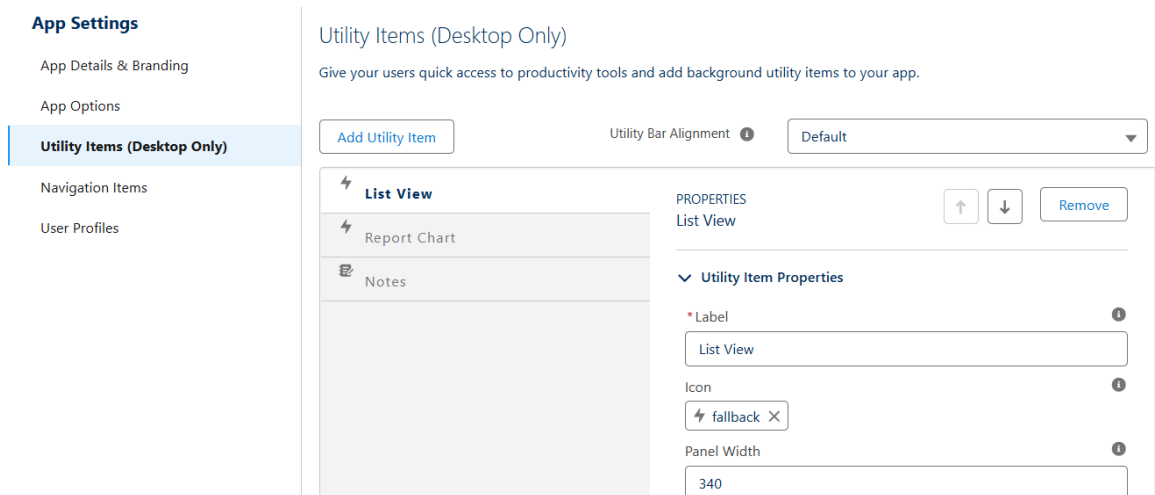
5. Utility Bar

Goal: Provide quick access to tools (Notes, Flow, Reports, Chatter) at the bottom of the app.

Steps Done:

- Go to **Setup → App Manager → EduConsultPro App → Edit**.
- Click **Utility Bar** in the left menu.
- Click **Add** → select utility type (Notes, Chatter, Report Chart, List View).
- Set **Label, Icon, Height**, and arrange the order.
- Save the app.





6. Lightning Web Components (LWC)

Goal: Create custom, interactive components for dynamic data display.

Future Implementation Plans:

- Dynamic charts for application progress or student stats.
- Complaint summaries or quick action buttons.

7. Apex with LWC

Goal: Use Apex methods to provide data or actions for LWCs.

Future Implementation Plans:

- Fetch counts of applications, tasks, or perform automated actions.

8. Events in LWC

Goal: Enable communication between LWCs for interactive features.

Future Implementation Plans:

- Make tabs, charts, and components interact dynamically.

9. Wire Adapters

Goal: Fetch Salesforce data reactively in LWCs.

Future Implementation Plans:

- Show live updates of applications, complaints, or tasks.

10. Imperative Apex Calls

Goal: Call Apex methods on-demand from LWCs.

Future Implementation Plans:

- Actions like assigning tasks, updating records, or triggering automation.

11. Navigation Service

Goal: Programmatically navigate users to records or pages from LWCs.

Future Implementation Plans:

- Enhance user experience with quick navigation between records and dashboards.

12. Create a Lightning App Page for EduConsultPro

Steps:

1. From **Setup**, enter **App Builder** → **Lightning App Builder**.
2. Click **New** → **Home Page** → **Next**.
3. Name the page "**EduConsultPro Home Page**", select **Standard Home Page template**, and click **Done**.
4. Drag the **Flow component** to the top-right region.
5. Search for "**EduConsultPro Flow**" and click **Save**.
6. Click **Activate** → **App and Profile** → **Assign to Apps and Profiles**.
7. Select the **Sales App**, then click **Next**.
8. Scroll to select **System Administrator profile**, then click **Next**.
9. Review the assignment and click **Save**.

