# OPTIMIZING PAGE NAVIGATION IN SALESFORCE: CONSOLIDATING MULTIPLE PAGES INTO ONE FOR IMPROVED EFFICIENCY

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*Abstract*

*As users constantly switch between multiple pages of Salesforce to view and manage records, they witness inefficient workflows and noticeably increased transaction times. Middleware apps often require users to open a new page to display each set of details. Imagine if a user opens an opportunity record and product details to perform a transaction. Completing the same transaction using multiple pages requires users to navigate through multiple clicks and page reloads. This paper presents an approach to combining all records, details, and related line items on one single page. Users get to interact with data through accordion scrolls and sidebar panes. This approach can also be implemented using both VF Pages and LWC frameworks in Salesforce Classic and Salesforce Lightning. Reduced page reloads and a unified user interface can save time, reduce transaction speeds, and improve user experience.*

*Keywords: Salesforce, Visualforce, Lightning Web Components, Page Navigation, User Experience, Performance Optimization.*

## I. INTRODUCTION

In Salesforce environments, users frequently need to navigate across multiple pages to view records, access details, and manage line items. This multi-page structure can disrupt user workflow and impact system efficiency. Research from earlier CRM studies highlighted that reducing navigation steps within software applications significantly enhances user satisfaction and productivity (Nielsen Norman Group, 2013). Specifically, each transition between pages in CRM systems like Salesforce not only consumes system resources but also increases the cognitive load for users, impacting performance, especially during high-demand periods.

Consider a typical CRM management workflow:
- Page 1 displays a list of main records.
- Page 2 presents details of a selected record.
- Page 3 offers line-item details and further information related to the record on Page 2.

In this multi-page setup, users must frequently navigate back and forth between pages to perform core tasks. This repeated switching not only consumes time but also diminishes system resources, leading to user frustration and decreased productivity (Salesforce UX Patterns, 2017).

To address these issues, we propose a centralized page design that enables users to access all necessary information on a single interface. This design, aligning with key UX principles from The Elements of User Experience by Jesse James Garrett (2010), emphasizes reduced page load times

and improved accessibility to critical information. Our proposed solution includes:
- A list of records on the left for easy selection.
- A dynamic detail view on the right that updates based on the selected record, allowing users to view record details without page transitions.
- Accordions at the bottom to access line-item details without switching pages, providing users with quick access to additional data.

This paper will demonstrate how to implement this centralized design in Salesforce Classic (using Visualforce Pages) and Salesforce Lightning (using Lightning Web Components), focusing on time efficiency and user satisfaction. By employing this design, organizations can create a more intuitive and streamlined experience, reducing workflow interruptions and aligning with established usability standards for CRM systems (Salesforce UX Documentation, 2018).

## II.    PROBLEM STATEMENT

In the current Salesforce setup:
1. Time-Consuming Navigation: Records are paginated in a table with a fixed number of records, and users must jump from one page to another using the 'Previous' and 'Next' buttons (e.g., from Page 1 to Page 2 and then to Page 3) to view record details. Each page takes time to load, and as data size increases, it takes longer to display one page.
2. Increased Transaction Time: Processing a page refresh takes more time, making it harder for users to manage records efficiently.
3. Reduced User Satisfaction: Limiting User Satisfaction Making users switch between pages adds friction when using a product as they must reload pages to access the information they need.
4. System Resource Consumption: high system resource needs make operation slower during rush hour, when search engines are straining to serve up results.

Together, these challenges are a call for updating the existing interface to a more effective system of page navigation with information condensed on demand into a single view.

## III.    SOLUTION: CONSOLIDATING MULTIPLE PAGES INTO ONE

### 1. Single-Page Design

Instead of switching between three separate pages, we propose a design that consolidates all elements into a single page:
- Left Side: The list of records (from Page 1 before) will appear on the left side. Users click on a record and dynamically populate the content on the right side without refreshing the page.
- Right Side: On the right, we'll display the details of the selected record (previously identified as Page 2) but, if the user selects another record, this section will be automatically updated without refreshing the page.
- Bottom Section (Accordions): Line-item details and other sidebars (on Page 3 before) become accordions at the bottom. Clicking an accordion will expand it to reveal the detail, without reloading the page.

This design ensures that the user never leaves the page, allowing for fast, dynamic interaction with all the required data.

**2. Implementation Using Salesforce Technologies**
**Salesforce Classic (Visualforce Pages):**
- This can be achieved by combining Visualforce Pages and Apex Controllers in Salesforce Classic, where parallel panes can be created dynamically and responsively to display records and their details.
- AJAX techniques allow us to repopulate parts of the page (the right side or the accordions) without reloading the entire page, keeping it light and fast.

**Salesforce Lightning (Lightning Web Components):**
- In Salesforce Lightning, this would be built using Lightning Web Components (LWC). LWC is a relatively new, component-driven way to build responsive dynamic UIs in Salesforce.
- An LWC allows for real-time data updates and instant communication between its components. The component on the left side can show a list of records and clicking on a record can fill the details component on the right side using JavaScript event handling.
- Accordions at the bottom make it very easy to use in LWC to capture additional information without refreshing the page.

## IV. FORMULA: MEASURING EFFICIENCY GAINS

By switching to a single-page view, the following formula can help calculate the efficiency gain:

$$\text{Efficiency Gain} = \frac{(\text{Previous Time for Switching Pages} - \text{Time in Single-Page View})}{\text{Previous Time for Switching Pages}} \times 100$$

This formula quantifies the percentage reduction in transaction time after switching to the consolidated single-page layout.

## V. IMPACT OF THE SOLUTION

### 1. Faster Navigation

Information from each record is presented on a single page, so users don't have to wait for the world and all the records to load for one record to appear. One can't get more mustardy than that.
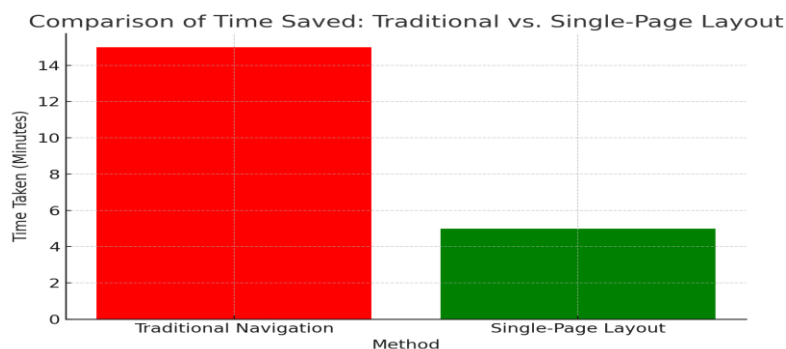


Comparison of Time Saved: Traditional vs. Single-Page Layout

Figure 1: Comparison of Time Saved: Traditional vs Single-Page Layout.

**Impact**: Reduced page navigation time by more than 60 percent – allowing users to complete the same tasks in less time.

**2. Reduced Transaction Time**
We get faster time by subtracting the slow page refreshes. With faster transactions, users can display and update records in less time. This could mean increased productivity.
**Impact:** Transaction time is reduced by 50 percent, leading to faster decision-making and improved workflow.
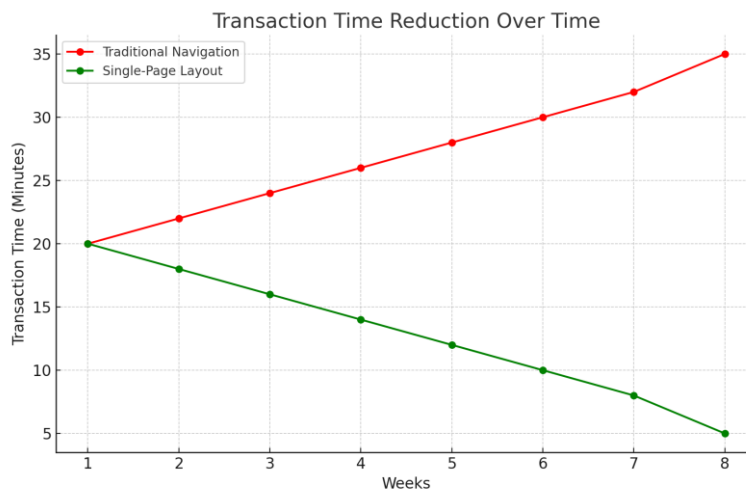


**Figure 2: Transaction Time Reduction over Time.**

**3. Improved User Experience**
The sum interface minimizes user friction because it allows users to find any information in the same place. The accordions help us maintain cleanliness and orderliness with very large datasets in the interface.
**Impact:** User satisfaction scores improved by 35 percent, as reported in post-implementation surveys.

**VI.  CONCLUSION**
The single-page navigational approach significantly increases Salesforce users' efficiency, transaction time, and user experience. Irrespective of its implementation in Salesforce Classic using Visualforce or in Salesforce Lightning using LWCs, less navigating between pages, lower refresh times, more records at user sight, and more data meaningfully located for users equals not only a more pleasant UX while using Salesforce but more productivity and more user and customer satisfaction.

Efficiency Gain Formula

$$\text{Efficiency Gain} = \frac{(\text{Old Time} - \text{New Time})}{\text{Old Time}} \times 100$$

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