

TourFlow: Real Estate Tour and Feedback Automator

Phase 6: User Interface Development

A. Create the Lightning App

1. Go to Setup → App Manager → New Lightning App.
2. Name: TourFlow.
3. Navigation Items: add custom object tabs (Tours, Clients, Properties) + Reports + Dashboards.
4. Assign the app to Admin, Real Estate Agent, Real Estate Manager & User profiles.

The screenshot shows the 'App Details & Branding' configuration page in the Salesforce Lightning App Builder. The left sidebar lists navigation options: App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The main content area is divided into two sections: 'App Details' and 'App Branding'.

App Details:


- App Name:** TourFlow
- Developer Name:** Afiya_Firdose_Pamidi
- Description:** This is a custom Salesforce CRM designed for real estate agents. It automates the entire real estate process.

App Branding:

- Image:** A logo featuring a pink location pin and the text 'tourflow'.
- 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 icon and name, showing 'TourFlow' and the description 'This is a custom Salesforce CRM designed for real est...'.

B. Create Tabs for Objects

1. Go to Setup → Tabs → New → Custom Object Tab.
2. Create tabs for:
 - **Tour**
 - **Client**
 - **Property**



Setup

Home

Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP

Tabs

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Clients	People	
Edit Del	Feedbacks	Presenter	
Edit Del	Properties	Real Estate Sign	
Edit Del	Tours	Car	

TourFlow

Clients

Properties

Tours

Accounts

Calendar

Contacts

Dashboards

Email Templates

Files

Flows

Flow Versions

Home

Home

More

Clients

Recently Viewed

New

Import

Change Owner

Assign Label

4 items • Updated an hour ago

	<input type="checkbox"/> Client Name	
1	<input type="checkbox"/> Firdose	
2	<input type="checkbox"/> harisree	
3	<input type="checkbox"/> harika	
4	<input type="checkbox"/> Afya	

TourFlow

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Assign Label

4 items • Updated a few seconds ago

	<input type="checkbox"/> Property Name	
1	<input type="checkbox"/> Office	
2	<input type="checkbox"/> Mansion	
3	<input type="checkbox"/> showroom	
4	<input type="checkbox"/> Duplex home	

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Change Owner

Assign Label

5 items • Updated a few seconds ago

	<input type="checkbox"/> Tour Name	
1	<input type="checkbox"/> Office property visit	
2	<input type="checkbox"/> Mansion Selection	
3	<input type="checkbox"/> showroom	
4	<input type="checkbox"/> residence	
5	<input type="checkbox"/> showroom	

C. Page Layouts

Go to **Setup** → **Object Manager** → **Property** → **Page Layouts**.

Property Object Page Layouts

To ensure that agents only see relevant information when viewing different types of properties, two dedicated Page Layouts were created for the **Property** object:

1. Residential Page Layout:

- **Purpose:** Optimized to display fields crucial for residential properties (e.g., Number of Bedrooms, Number of Bathrooms).
- **Benefit:** Hides commercial-specific fields, streamlining data entry and viewing for residential transactions.

2. Commercial Page Layout:

- **Purpose:** Configured to highlight fields critical for commercial properties (e.g., Square Footage, Zoning Classification).
- **Benefit:** Provides a focused and efficient layout for agents working with commercial listings.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' dropdown is selected, and the 'Property' object is chosen. The main content area displays the 'Page Layouts' for the 'Property' object. A left sidebar lists various setup options, with 'Page Layouts' highlighted. The main area shows a table of three page layouts: 'Commercial Property Layout', 'Property Layout', and 'Residential Property Layout'. Each row includes the layout name, the creator (Afiya Firdose Pamidi), the creation date and time, and a dropdown menu for assignment.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Commercial Property Layout	Afiya Firdose Pamidi, 9/21/2025, 4:49 AM	Afiya Firdose Pamidi, 9/21/2025, 4:49 AM	▼
Property Layout	Afiya Firdose Pamidi, 9/15/2025, 9:32 AM	Afiya Firdose Pamidi, 9/21/2025, 4:49 AM	▼
Residential Property Layout	Afiya Firdose Pamidi, 9/21/2025, 4:46 AM	Afiya Firdose Pamidi, 9/21/2025, 4:46 AM	▼

D. Record Pages (Lightning App Builder)

1. **Navigate:** Go to **Object Manager** → **Tour Object** → **Lightning Record Pages**.
2. **Create:** Click **New** and select a template (e.g., Header/Two Columns).
3. **Design:** In the App Builder, drag **Record Detail** and **Related List** components onto the canvas.
4. **Save & Activate:** Click **Save**, then **Activation**.
5. **Assign Default:** Set the new page as the **Org Default**

