

# TourFlow: Real Estate Tour and Feedback Automator

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## Phase 6: User Interface Development

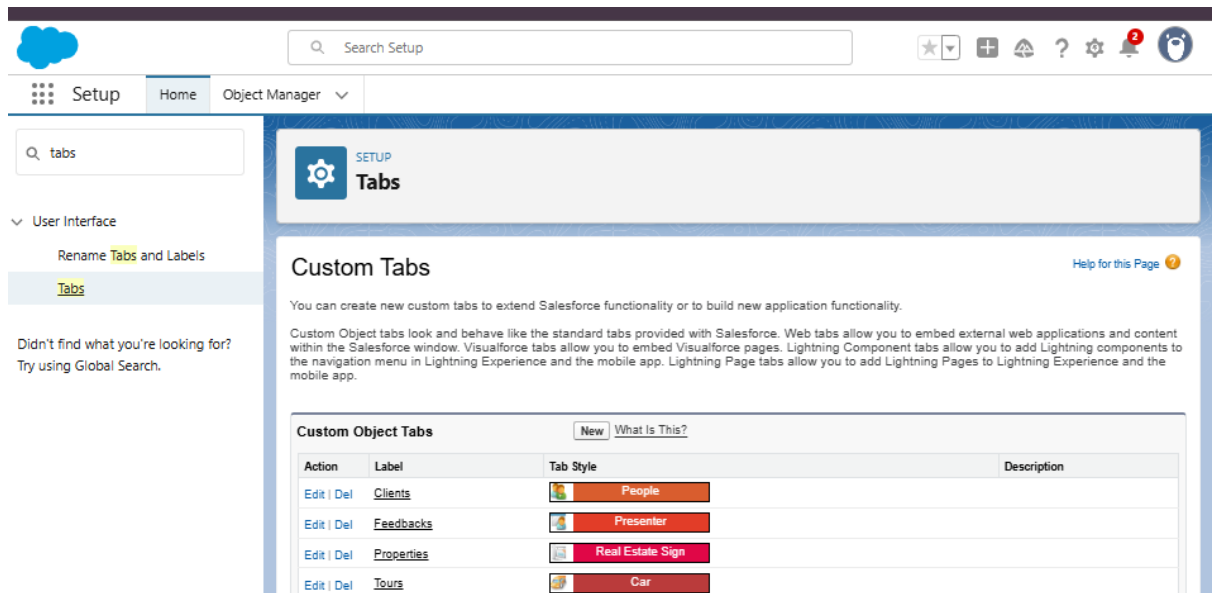
### A. Create the Lightning App

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 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 titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section contains fields for 'App Name' (filled with 'TourFlow'), 'Developer Name' (filled with 'Afifa\_Firdose\_Pamidi'), and 'Description' (filled with 'This is a custom Salesforce CRM designed for real estate agents. It automates the...'). The 'App Branding' section includes an 'Image' field with a placeholder showing a 'tourflow' logo, a 'Primary Color Hex Value' field with a dropdown menu and the value '#0070D2', and a 'Clear' link. Below this is the 'Org Theme Options' section with a checkbox 'Use the app's image and color instead of the org's custom theme'. At the bottom is the 'App Launcher Preview' section, which shows a preview of the app icon and name, and a description: 'TourFlow 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**



## C. Page Layouts

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

### Property Object Page Layouts

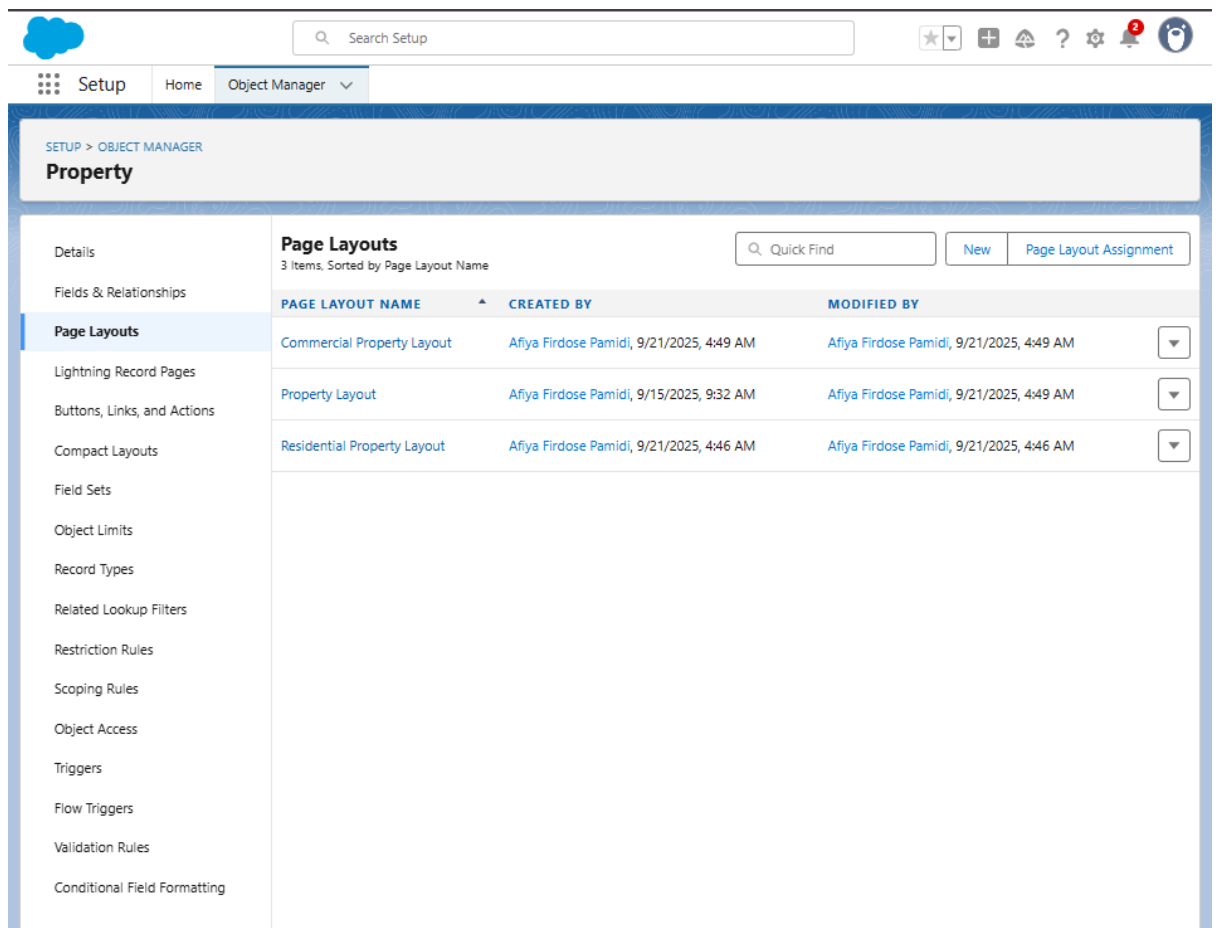
To ensure that agents only see relevant information when viewing different types of properties, two dedicated Page Layouts were created for the **Property** object:

#### 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. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and the page title is 'Property'. A left sidebar contains a list of setup categories: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Page Layouts' and shows '3 Items, Sorted by Page Layout Name'. It includes a 'Quick Find' search bar, a 'New' button, and a 'Page Layout Assignment' button. Below these is a table with three columns: 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The table lists three layouts: 'Commercial Property Layout', 'Property Layout', and 'Residential Property Layout', all created and modified by 'Afiya Firdose Pamidi' on 9/21/2025. Each row has a dropdown arrow on the right.

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**

