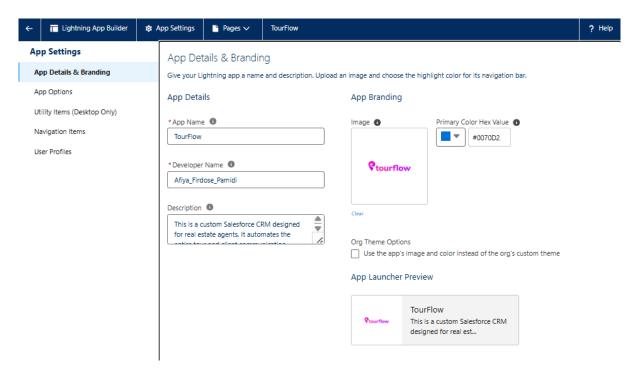
TourFlow: Real Estate Tour and Feedback Automator

Phase 6:User Interface Development

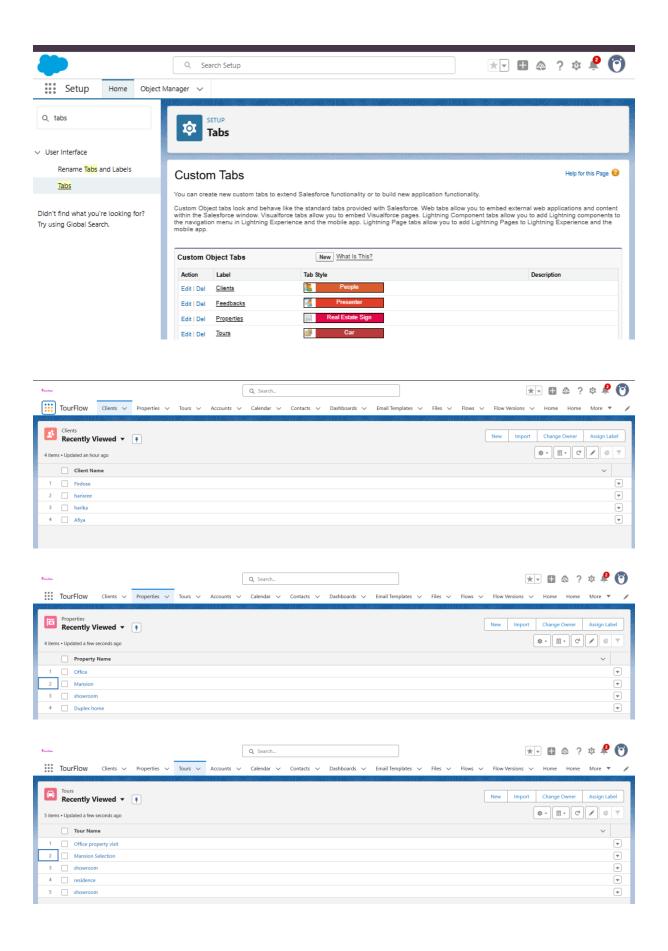
A. Create the Lightning App

- 1. Go to Setup \rightarrow App Manager \rightarrow 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.



B. Create Tabs for Objects

- 1. Go to Setup \rightarrow Tabs \rightarrow New \rightarrow Custom Object Tab.
- 2. Create tabs for:
 - o Tour
 - o Client
 - Property



C. Page Layouts

Go to Setup \rightarrow Object Manager \rightarrow Property \rightarrow Page Layouts.

Property Object Page Layouts

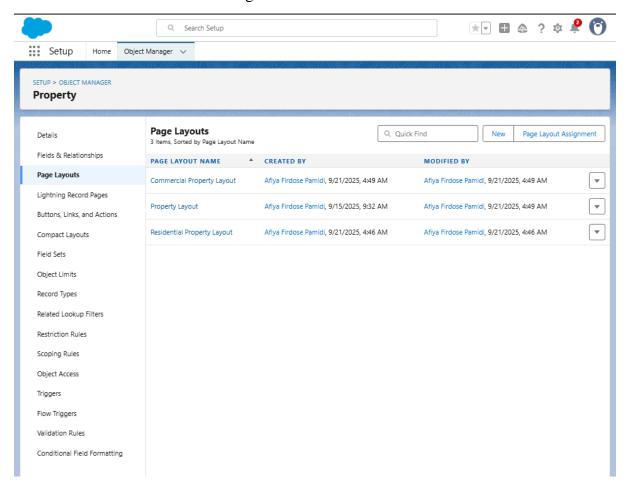
To ensure that agents only see relevant information when viewing different types of properties, two dedicated Page Layouts were created for the **Property** object:

1. Residential Page Layout:

- Purpose: Optimized to display fields crucial for residential properties (e.g., Number of Bedrooms, Number of Bathrooms).
- o **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).
- o **Benefit:** Provides a focused and efficient layout for agents working with commercial listings.



D. Record Pages (Lightning App Builder)

- 1. Navigate: Go to Object Manager \rightarrow Tour Object \rightarrow 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

