

Phase 6 – User Interface

1 - Lightning App Builder

- App Name: *Investment Tracker*.
Navigation Style: **Standard Navigation**.

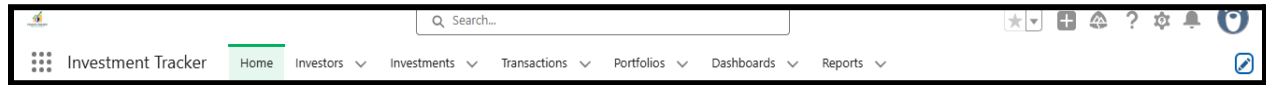
The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two sections: 'App Details' and 'App Branding'. In 'App Details', there are input fields for 'App Name' (filled with 'Investment Tracker'), 'Developer Name' (filled with 'Investment_Tracker'), and 'Description' (placeholder 'Enter a description...'). In 'App Branding', there is an 'Image' upload area showing a logo, a 'Primary Color Hex Value' dropdown set to '#41AE55', and a 'Clear' button. Below these is the 'Org Theme Options' section with a checkbox 'Use the app's image and color instead of the org's custom theme' which is unchecked. At the bottom is the 'App Launcher Preview' showing the app icon and name 'Investment Tracker'.

2 - Tabs

Tabs: Investors, Investments, Transactions, Portfolios, Reports, Dashboards.

The screenshot shows the 'Available Items' and 'Selected Items' panels in the Lightning App Builder. The 'Available Items' panel on the left has a search bar 'Type to filter list...' and a list of items: 'Accounts', 'All Sites', 'Alternative Payment Methods', 'Analytics', 'App Launcher' (highlighted), 'Appointment Bundle Configs', and 'Appointment Bundle Policies'. The 'Selected Items' panel on the right shows a list of selected items: 'Portfolios', 'Dashboards', 'Reports', 'Investments', 'Investors', and 'Transactions'. Navigation arrows are visible between the panels.

3 - Home Page Layouts



- **Investor:** Name, Email, Phone → Related List: Investments, Portfolio.
- **Investment:** Investor lookup at top → Amount, Type, Status → Related List: Transactions.
- **Transaction:** Investment lookup → Date, Type, Amount.
- **Portfolio:** Investor lookup → Totals and Balance.