

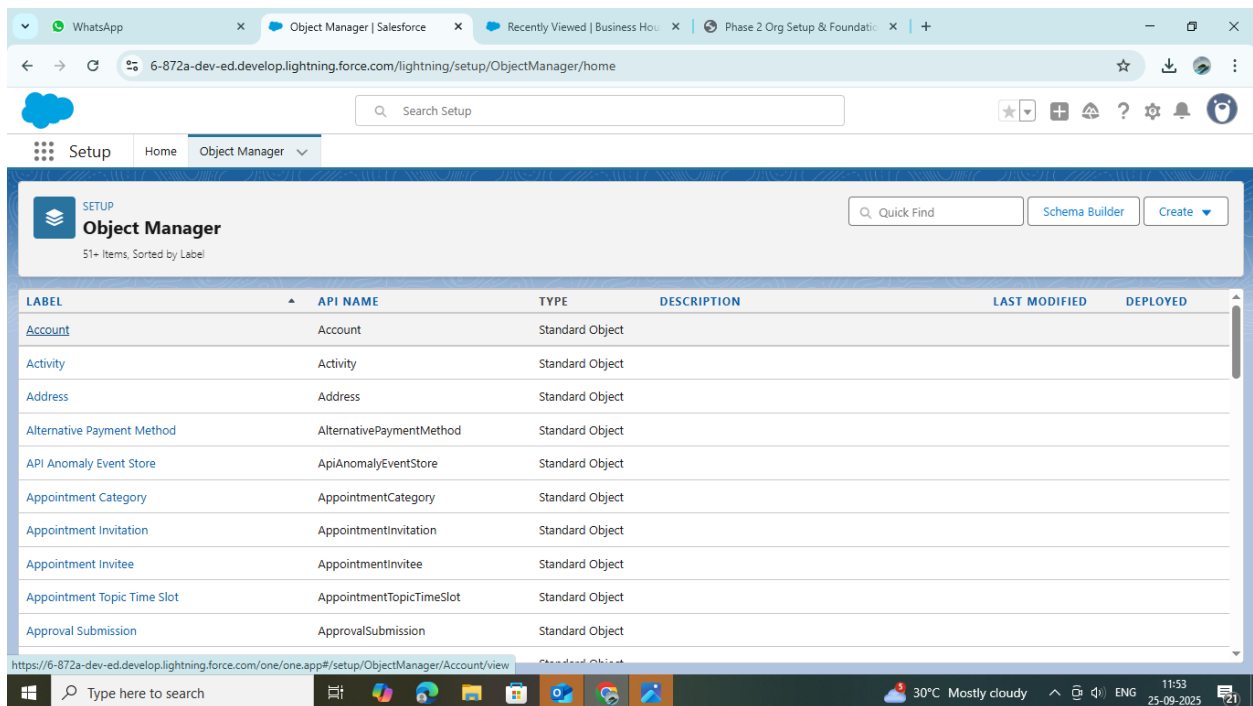
Phase 3: Data Model & UI Design (Salesforce Step-by-Step)

This phase focuses on creating the data structure and designing the user interface in Salesforce for the Smart Property Portal project.

Step 1: Identify Objects

Determine main objects: Account, Contact, Opportunity.

Decide relationships: e.g., Property linked to Account and Visit.



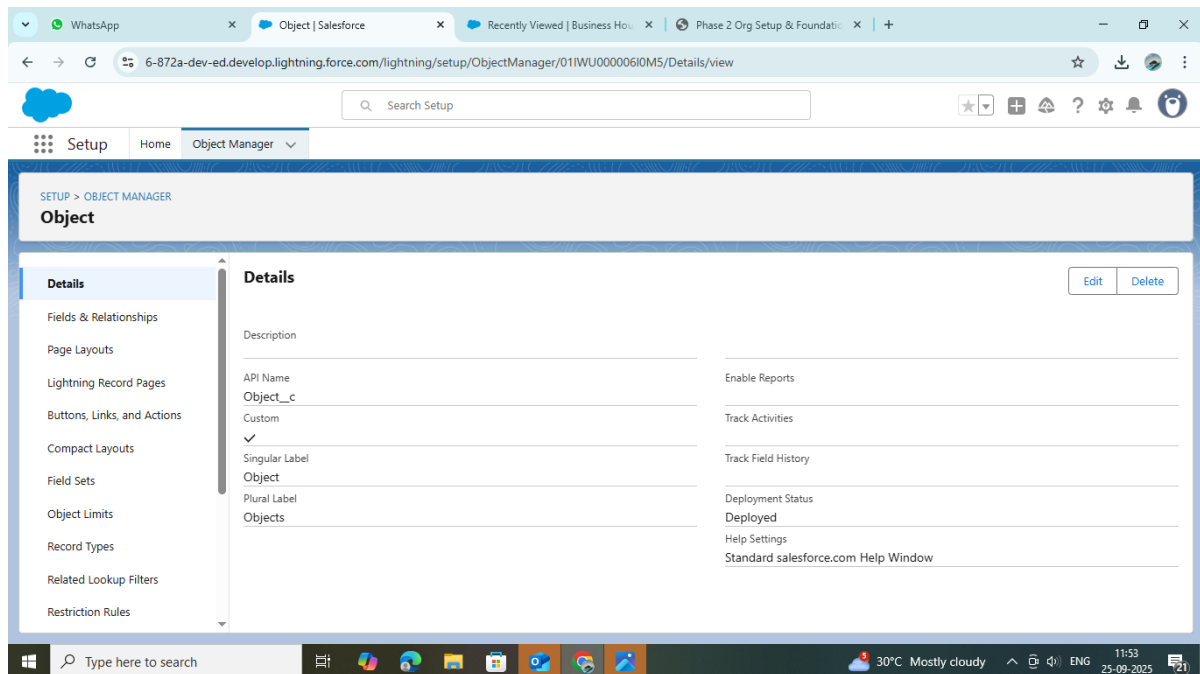
The screenshot shows the Salesforce Object Manager interface in a web browser. The browser tabs include 'WhatsApp', 'Object Manager | Salesforce', 'Recently Viewed | Business Hou...', and 'Phase 2 Org Setup & Foundatio...'. The address bar shows the URL '6-872a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. The page header includes a search bar labeled 'Search Setup' and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Object Manager' section with a 'Quick Find' search bar, a 'Schema Builder' link, and a 'Create' button. Below this is a table listing standard objects, sorted by label. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The objects listed are: Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, and Approval Submission. All objects are of type 'Standard Object'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			

Step 2: Create Custom Fields

Go to Setup → Object Manager → Select Object → Fields & Relationships → New.

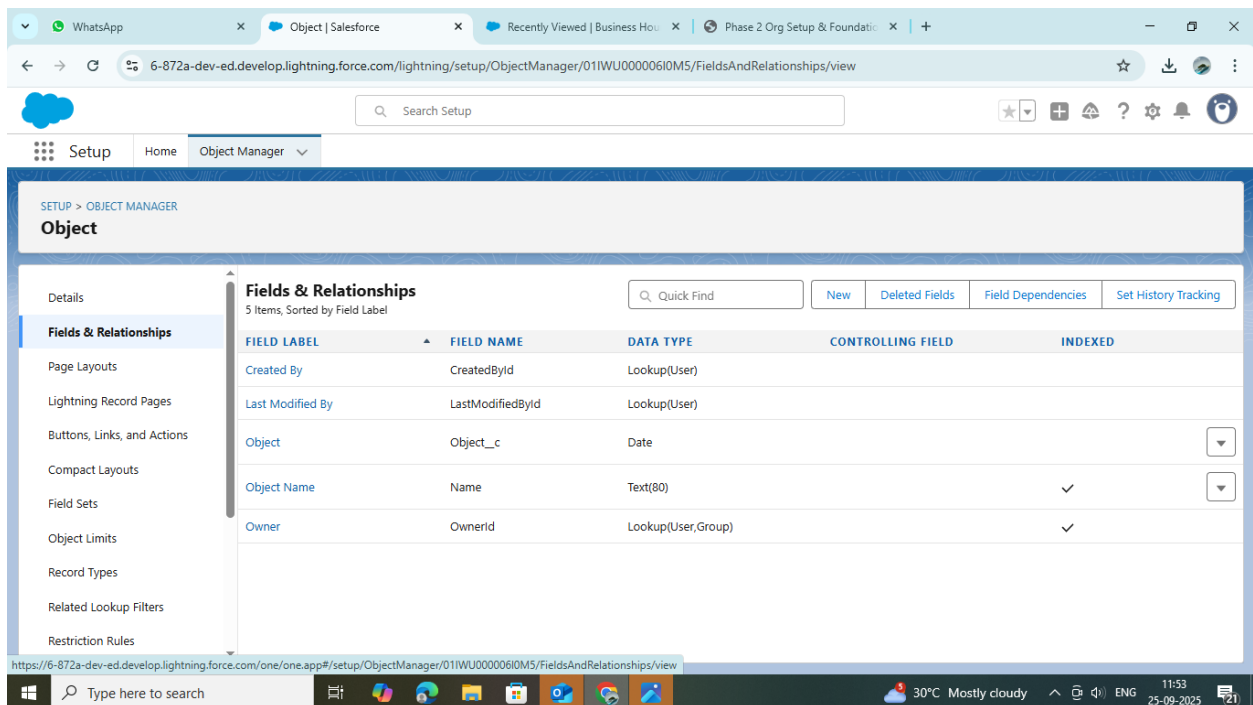
Add fields like Date.

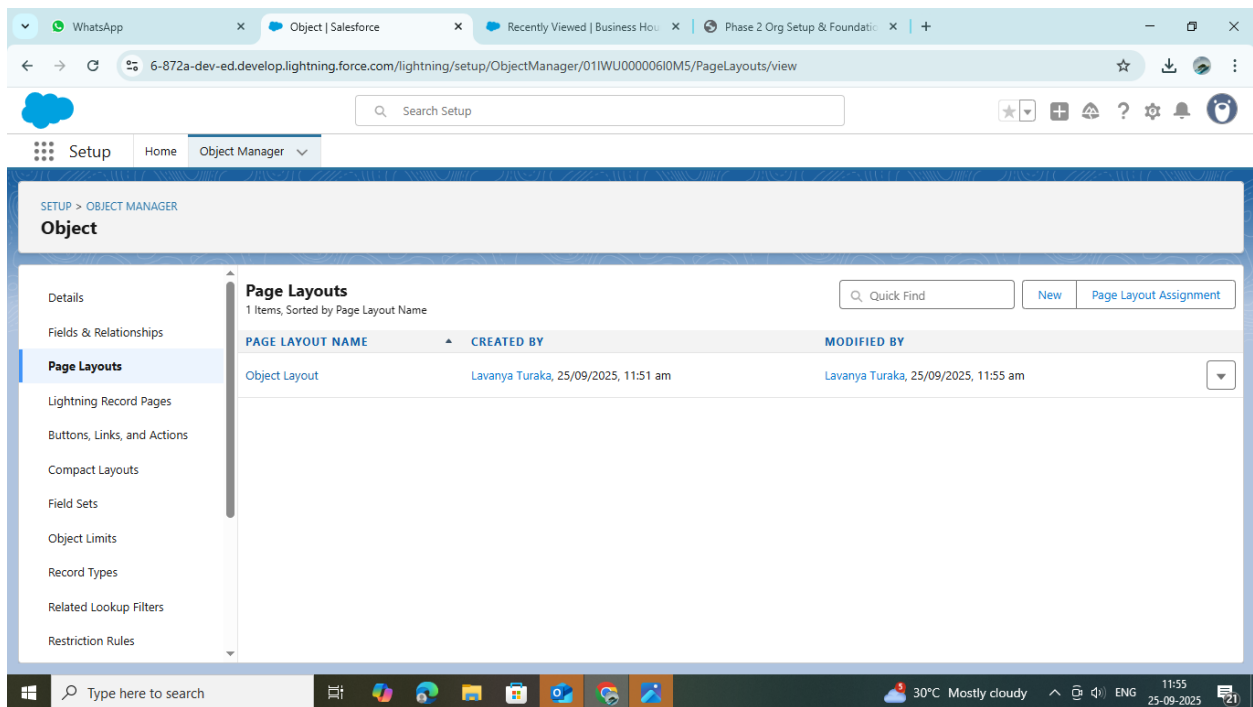


Step 3: Configure Page Layouts

Go to Object Manager → Page Layouts.

Add important fields and related lists (Properties, Visits) for easy access.

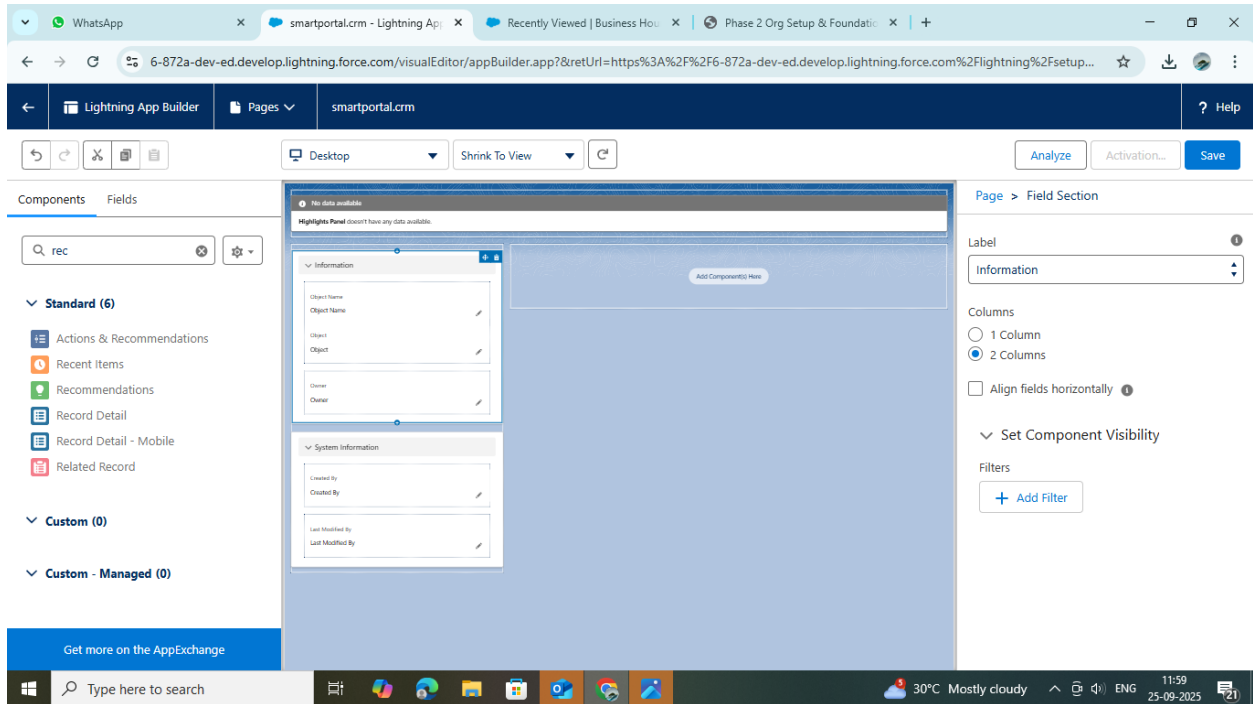


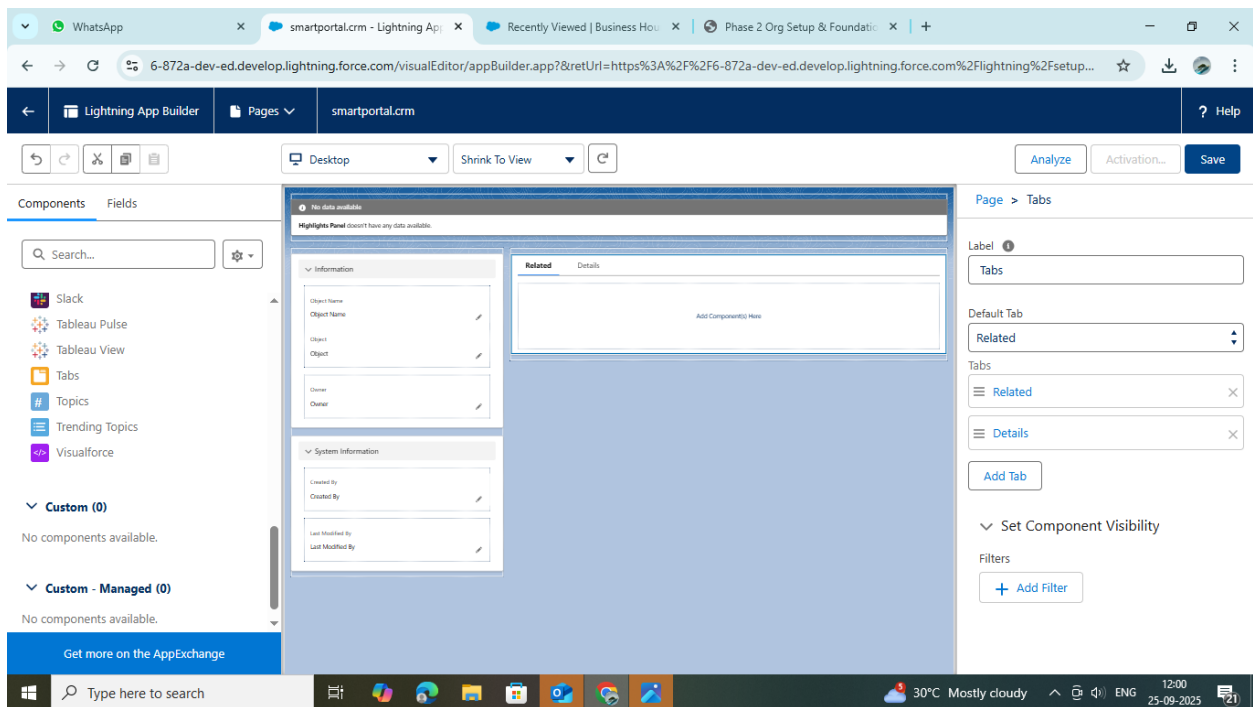


Step 4: Create Lightning Record Pages

Setup → Lightning App Builder → New Record Page.

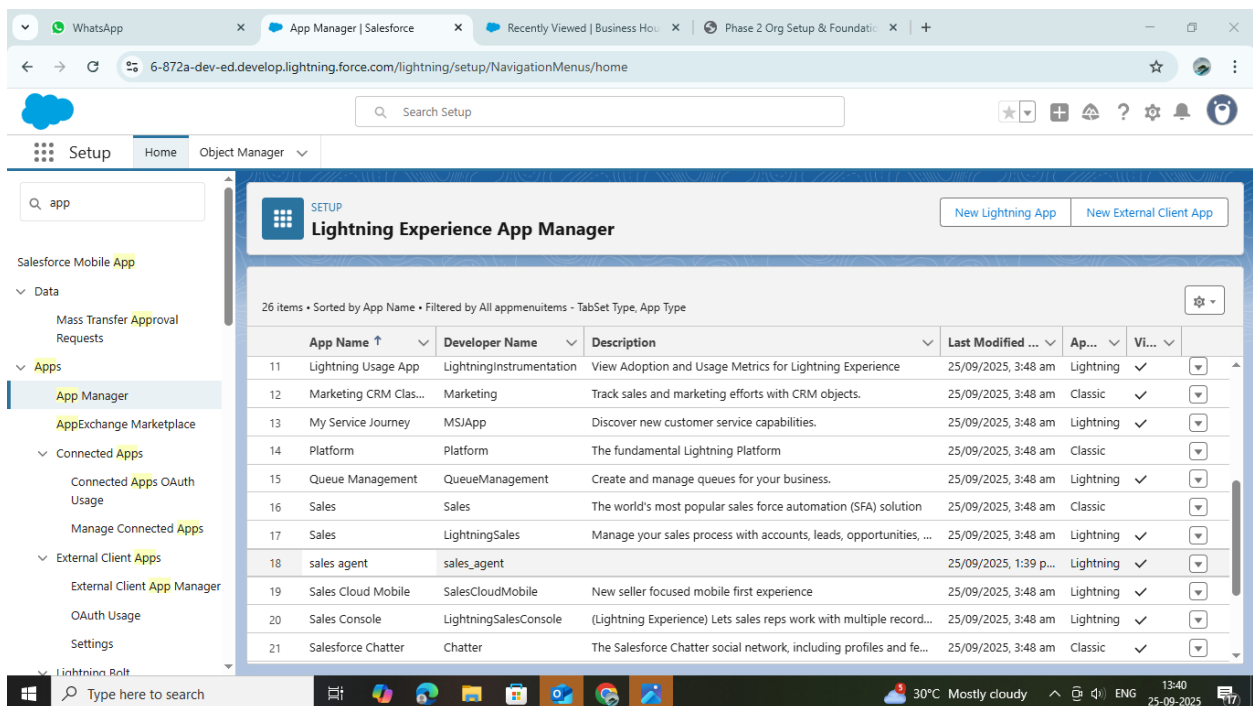
Add tabs: Details, Related, Activity, Highlights Panel.





Step 5: Arrange Navigation & Tabs

Setup → App Manager → Edit App → Add objects as tabs (Accounts, Properties, Visits).



Step 6: Test User Experience

Login as Sales Agent or Manager.

Ensure forms are simple, fields visible, related lists work.

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


App Details


* App Name [?] sales agent

* Developer Name [?] sales_agent

Description [?] Enter a description...

App Branding


Image [?]  Upload

Primary Color Hex Value [?]  #0070D2

Org Theme Options



☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

 sales agent

sales agent Accounts Cases














Accounts

All Accounts  

New Import Printable View Assign Label

13 items • Sorted by Account Name • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Account Name [?]	Acco... [?]	Billing State/Pro... [?]	Phone [?]	Type [?]	Account O... [?]
1 <input type="checkbox"/>	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	LTura 
2 <input type="checkbox"/>	Dickenson plc 		KS	(785) 241-6200	Customer - Channel	LTura 
3 <input type="checkbox"/>	Edge Communications		TX	(512) 757-6000	Customer - Direct	LTura 
4 <input type="checkbox"/>	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	LTura 
5 <input type="checkbox"/>	GenePoint		CA	(650) 867-3450	Customer - Channel	LTura 
6 <input type="checkbox"/>	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	LTura 
7 <input type="checkbox"/>	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	LTura 
8 <input type="checkbox"/>	Sample Account for Entitlements					autoproc 
9 <input type="checkbox"/>	sForce		CA	(415) 901-7000		LTura 
10 <input type="checkbox"/>	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	LTura 
11 <input type="checkbox"/>	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	LTura 
12 <input type="checkbox"/>	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	LTura 
13 <input type="checkbox"/>	University of Arizona		AZ	(520) 773-9050	Customer - Direct	LTura 