Phase 6 Summary: User Interface (UI) Development

Project: Residential Maintenance Request Portal

This phase focused on creating a branded, intuitive, and efficient user experience by customizing the standard Salesforce interface.

1. Custom Lightning App: Residential Maintenance

- **Purpose**: To provide a dedicated and focused workspace for the maintenance team, free from irrelevant tabs.
- **Key Actions**: A new app was created containing only three essential tabs: **Home**, **Property Units**, and **Maintenance Requests**. This app was assigned to the **Property Manager** and **Maintenance Technician** profiles.

2. Customized Record Page: Maintenance Request

- **Purpose**: To make the record page more efficient by highlighting the most critical information at a glance.
- **Key Actions**: The **Highlights Panel** at the top of the Maintenance Request page was edited. The **Property Unit** field was added to this panel, ensuring a user can immediately see which property the request is for.
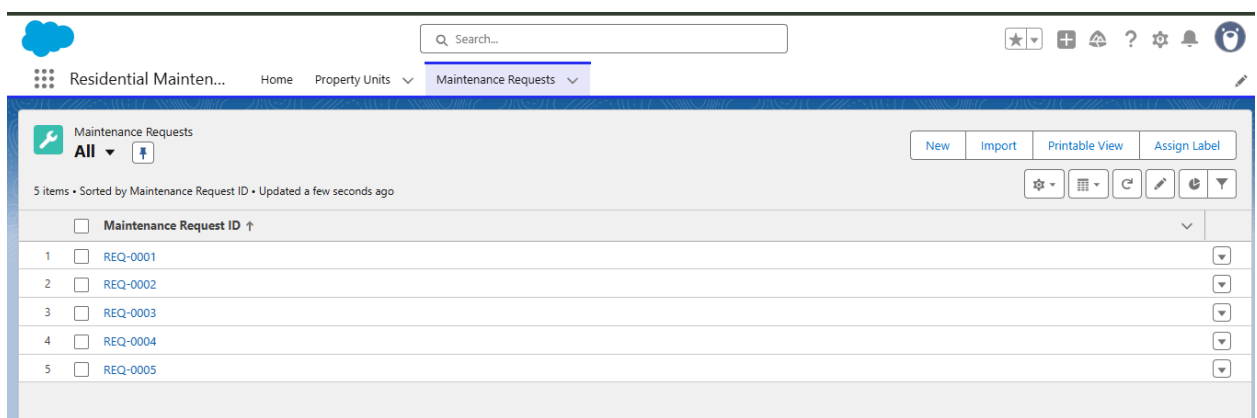
3. Customized Home Page: Maintenance Technician Home Page

- **Purpose**: To transform the generic Home Page into an actionable "to-do list" dashboard for technicians.
- **Key Actions**:
    - A custom **List View** named "My Open Requests" was created to show only the records assigned to the current user that are not yet "Completed".
    - A new **Home Page** was designed using the Lightning App Builder to prominently display this list view.
    - This new page was assigned as the default Home Page for the **Property Manager** and **Maintenance Technician** profiles within the "Residential Maintenance" app.

Property Units
Recently Viewed ∨ 📌

New   Import   Change Owner   Assign Label

4 items • Updated a few seconds ago

		Property Unit Name	
1	☐	D-401	▼
2	☐	A-101	▼
3	☐	C-301	▼
4	☐	B-201	▼