
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.

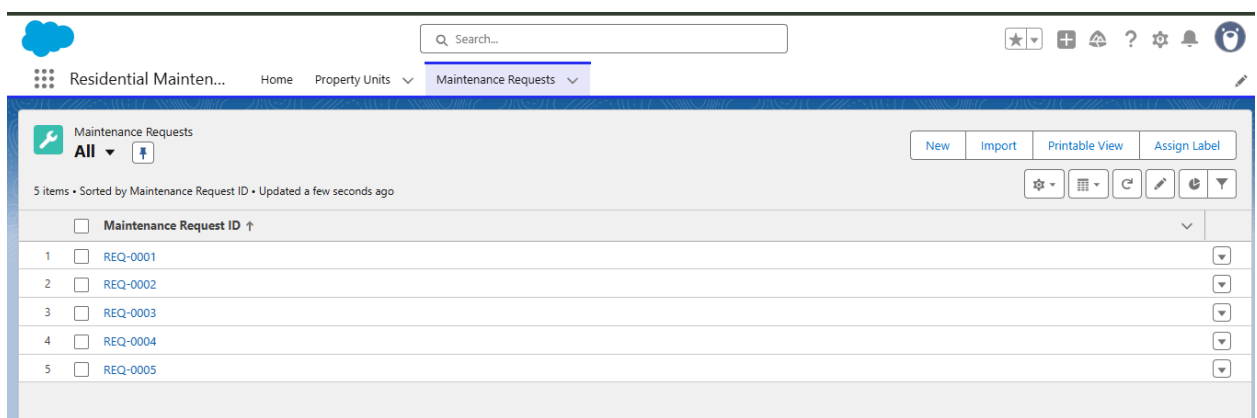
1. Custom Lightning App: Residential Maintenance

- **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.

The screenshot displays the Salesforce Lightning App Builder interface for configuring the 'Residential Maintenance' app. The top navigation bar includes a back arrow, 'Lightning App Builder', 'App Settings', 'Pages', and the app name 'Residential Maintenance'. A left sidebar under 'App Settings' lists '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 columns: 'App Details' and 'App Branding'. The 'App Details' column contains fields for 'App Name' (filled with 'Residential Maintenance'), 'Developer Name' (filled with 'Residential_Maintenance'), and 'Description' (filled with 'For managing property maintenance requests.'). The 'App Branding' column features an 'Image' upload area with an 'Upload' button, a 'Primary Color Hex Value' field (filled with '#252FF4'), and an 'Org Theme Options' checkbox (unchecked) with the label 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows a blue square icon with 'RM' and a text box containing 'Residential Maintenance' and 'For managing property maintenance requests.'

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.



Search...



Property Units
Recently Viewed

New Import Change Owner Assign Label

4 items • Updated a few seconds ago



	<input type="checkbox"/> Property Unit Name	
1	<input type="checkbox"/> D-401	
2	<input type="checkbox"/> A-101	
3	<input type="checkbox"/> C-301	
4	<input type="checkbox"/> B-201	