

TourFlow: Real Estate Tour and Feedback Automator

Phase 9: Reporting, Dashboards & Security Review

A. Create a Custom Report Type

1. Go to Setup and search for Report Types.
2. Click New Custom Report Type.
3. Primary Object: Select your Tour custom object.
4. Label: Tours with Properties and Clients.
5. Store in Category: Other Reports.
6. Click Next.
7. Define Relationships: Link the Tour object to the Property object, and the Tour object to the Client (Contact) object. This allows all relevant data to be queried in one report.
8. Click Save.

The screenshot displays the Salesforce Setup interface. On the left, the navigation menu shows 'Setup' with a search bar containing 'report'. Under 'Feature Settings', 'Analytics' is expanded, and 'Reports & Dashboards' is selected, with 'Report Types' highlighted. The main content area is titled 'Custom Report Types' and shows the configuration for a report type named 'Tours with Properties and Clients'. The configuration includes buttons for 'Preview Layout', 'Edit Layout', 'Clone', and 'Delete', along with a 'Close' button. Below the buttons, a description states: 'Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type'. The configuration is divided into three sections: 'Details', 'Object Relationships', and 'Fields'. The 'Details' section shows the display name, API name, description, creator, store in category, deployment status, and modification date. The 'Object Relationships' section shows a Venn diagram with two overlapping circles labeled 'A' and 'B', representing the relationship between the primary object and its related objects. The 'Fields' section shows a table with 'Source Object' and 'Included Fields'.

Custom Report Types

Tours with Properties and Clients

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Name: Tours with Properties and Clients

API Name: Tours_with_Properties_and_Clients

Description: Tours with Properties and Clients

Create By: Afiya Firdose Pamidi, 9/26/25, 4:46 PM

Store in Category: other

Deployment Status: Deployed

Modified By: Afiya Firdose Pamidi, 9/26/25, 4:46 PM

Object Relationships

Tours (A)

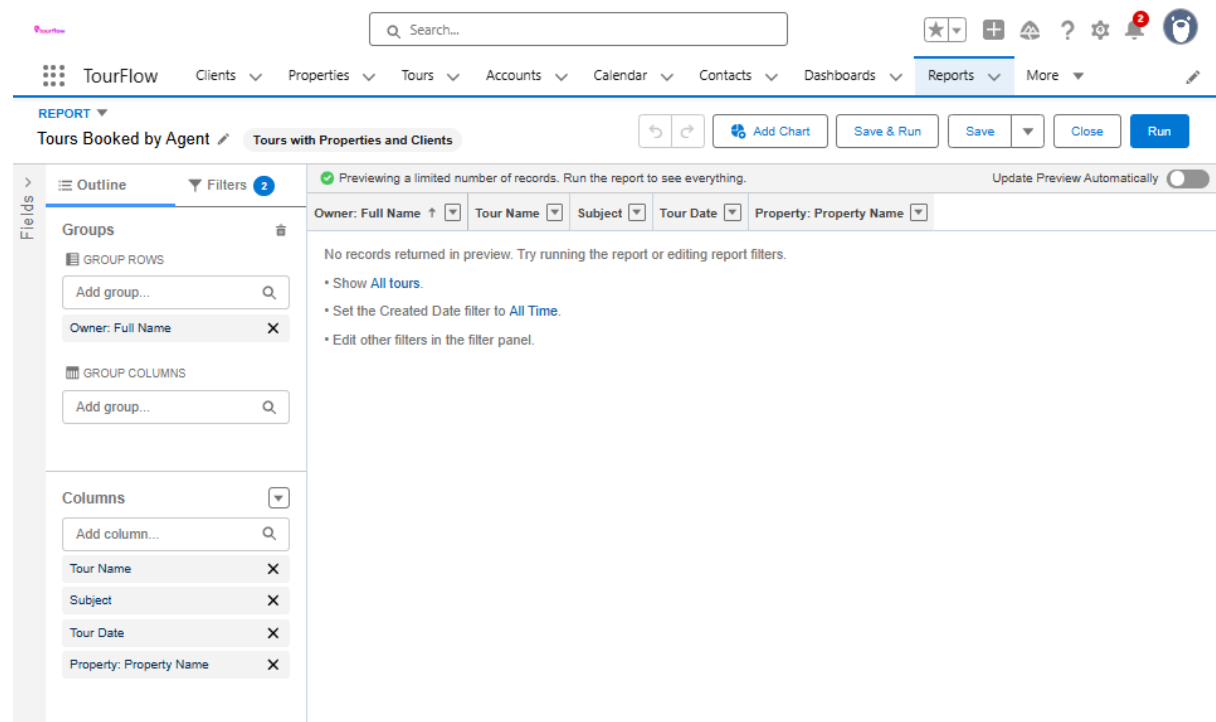
... with at least one related record from A

Fields

Source Object	Included Fields
Tours	15

B. Create a Summary Report

1. Go to the Reports tab and click New Report.
2. Select the new report type: Tours with Properties and Clients.
3. Format: Select Summary format.
4. Group By: Drag and drop the Owner field (the Tour Agent) into the grouping area.
5. Columns: Add relevant fields like Tour Date, Tour Name, and Property Name.
6. Filter: Filter Tour Date → All Time or Current and Next F.Y..
7. Click Save and name it Tours Booked by Agent.



C. Sharing Settings (Org-Wide Defaults)

1. Go to **Setup** and search for Sharing Settings.
2. Scroll down to **Org-Wide Defaults (OWD)**.
3. **Set Defaults for your custom objects:**
 - **Tour** → Set to **Private**. (This ensures agents only see their own tours unless a Sharing Rule or Role Hierarchy grants wider access.)
 - **Property** → Set to **Public Read Only**. (This ensures all agents can see all properties but cannot modify them.)
4. Click **Save**.

Sharing Settings

Object	Sharing Model	Controlled Sharing	Visible
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Client	Private	Private	✓
Feedback	Public Read/Write	Private	✓
Property	Public Read Only	Public Read Only	✓
Tour	Private	Private	✓

D. Field Level Security (FLS)

1. Go to **Setup** → **Object Manager** and select the **Tour** object.
2. Click **Fields & Relationships** and select the **Feedback Notes** custom field.
3. Click **Set Field-Level Security**.
4. Review the profiles and **hide** this field from standard user profiles (like the "Standard User" profile) that shouldn't see sensitive feedback.
5. Ensure the "System Administrator" profile has the field **Visible** and **Editable**.
6. Click **Save**.

Set Field-Level Security for Feedback Notes

Field Label: Feedback Notes
Data Type: Long Text Area (32768)

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	✓	<input type="checkbox"/>
Analytics Cloud Security User	✓	<input type="checkbox"/>
Anypoint Integration	✓	<input type="checkbox"/>
Contract Manager	✓	<input type="checkbox"/>
Cross Org Data Proxy User	✓	<input type="checkbox"/>
Custom: Marketing Profile	✓	<input type="checkbox"/>
Custom: Sales Profile	✓	<input type="checkbox"/>
Custom: Support Profile	✓	<input type="checkbox"/>
Einstein Agent User	✓	<input type="checkbox"/>
Force.com - App Subscription User	✓	<input type="checkbox"/>
Force.com - Free User	✓	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	✓	<input type="checkbox"/>
Marketing User	✓	<input type="checkbox"/>
Minimum Access - API Only Integrations	✓	<input type="checkbox"/>
Minimum Access - Salesforce	✓	<input type="checkbox"/>
Partner App Subscription User	✓	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	✓	<input type="checkbox"/>
Real Estate Agent	✓	<input type="checkbox"/>
Real Estate Manager	✓	<input type="checkbox"/>
Salesforce API Only System Integrations	✓	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	✓	<input type="checkbox"/>
Standard Platform User	✓	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	✓	✓
Work.com Only User	✓	<input type="checkbox"/>

E. Login IP Ranges (Profile-Specific Security)

Login IP Ranges restrict which networks a user can log in from, adding a strong layer of physical security, typically used for office access.

1. **Go to Setup** and search for Profiles.
2. Select the profile for your tour agents (e.g., the "Real Estate Agent" profile).
3. Scroll down to the **Login IP Ranges** section and click **New**.
4. **Specify Range:** Enter the starting and ending IP addresses for your office network (e.g., Start IP: 203.0.113.1 to End IP: 203.0.113.255).
5. **Save:** Once implemented, users with this profile can only log in from within that specified network range.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered and a list of 'Users' and 'Profiles'. The main content area is titled 'SETUP Profiles'. It features a table with columns for 'Clients', 'Records', 'All Records', and 'Fields'. Below the table are sections for 'Session Settings', 'Password Policies', 'Login Hours', and 'Login IP Ranges'. The 'Login IP Ranges' section includes a 'New' button and a table with columns for 'Action', 'IP Start Address', 'IP End Address', and 'Description'.

Clients	Records	All Records	Fields
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Login Hours

No login hours specified

Login IP Ranges

New

Action	IP Start Address	IP End Address	Description
Edit Del	106.215.170.1	106.215.170.255	