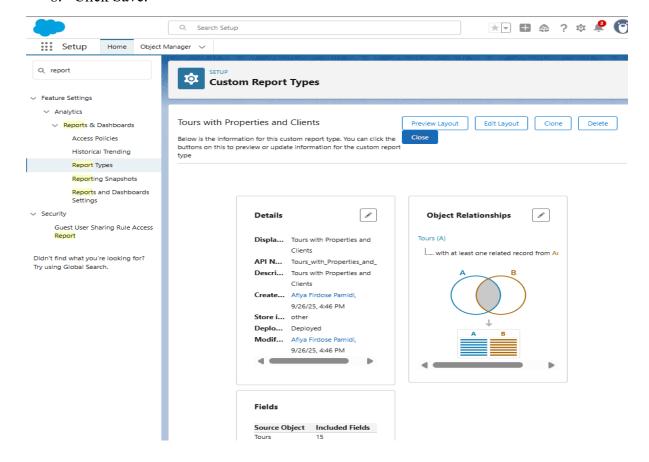# TourFlow: Real Estate Tour and Feedback Automator

---

Phase 9: Reporting, Dashboards & Security Review

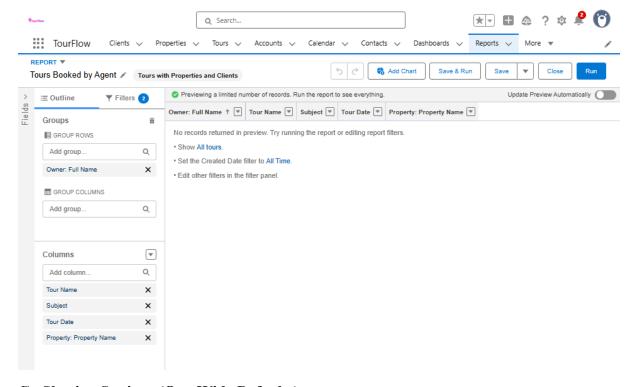### A. Create a Custom Report Type

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.
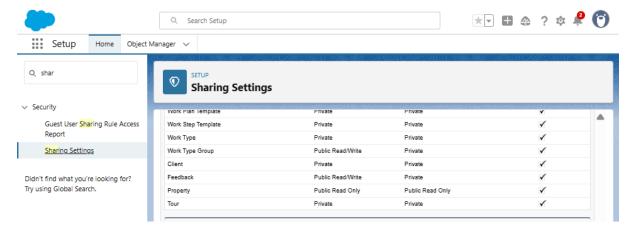
8. Click Save.

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..

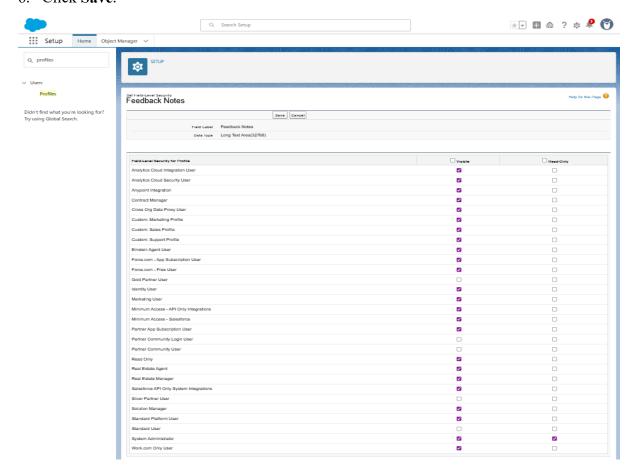7. Click Save and name it Tours Booked by Agent.

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**.

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**.

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.