Phase 9: Reporting, Dashboards & Security Review

Objective:

Phase 9 ensures that Revaa users have actionable insights into **investor portfolios, transactions, and property performance**. This includes **custom reports, dashboards**, and a thorough **security review** of all data exposed in reports and dashboards.

1️⃣ Custom Report Types

Purpose:
To define a reusable report structure that allows combining **Investors, Transactions, and Property** objects for reporting.

Steps to Create Custom Report Type

1. Go to **Setup → Report Types → New Custom Report Type**.
2. Configure the Primary Object:
   - **Primary Object:** Investor__c
   - **Report Type Label:** Investor Portfolio Report
   - **Report Type Name (API):** Investor_Portfolio_Report
   - **Description:** Investor's total portfolio details including transactions and properties
   - **Category:** Investor Reports (Create a new category if it does not exist)
   - **Deployment Status:** Deployed
   - {Screenshot: “Report Type Creation Window”}
3. Add Related Objects (Optional for Expanded Reporting):
   - **Transaction__c** (Related by Investor__c)
   - **Property__c** (Related via Transaction__c.Property__c)
   - Ensure the relationship is set as **"Each "A" record must have at least one related "B" record"** if mandatory.
   - {Screenshot: “Related Object Selection Window”}
4. Save the report type.

Investment Lot Report

Preview Layout | Edit Layout | Clone | Delete | Close

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 Label	Investment Lot Report
API Name	Investment_Lot_Report
Description	Tracks individual lots purchased per transaction
Created By	ANIKET KAKADE, 9/29/25, 8:17 AM
Store in Category	other
Deployment Status	Deployed
Modified By	ANIKET KAKADE, 9/29/25, 8:17 AM

Fields

Source Object	Included Fields
Investment Lots	14
Transactions	19
Activities	36
Assigned To	74

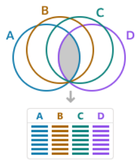
Object Relationships

Investment Lots (A)

└ with at least one related record from Transactions (B)

└ with at least one related record from Activities (C)

└ with at least one related record from Assigned To (D)



Investor Portfolio Report

Preview Layout | Edit Layout | Clone | Delete

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 Label	Investor Portfolio Report
API Name	Investor_Portfolio_Report
Description	Investor's total Portfolio Details
Created By	ANIKET KAKADE, 9/29/25, 7:56 AM
Store in Category	other
Deployment Status	Deployed
Modified By	ANIKET KAKADE, 9/29/25, 7:56 AM

Fields

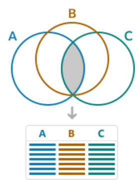
Source Object	Included Fields
Investors	16
Transactions	19
Duplicate Record Items	8

Object Relationships

Investors (A)

└ with at least one related record from Transactions (B)

└ with at least one related record from Duplicate Record Items (C)



2️⃣ Creating Reports

Purpose:
To provide detailed **investor portfolio insights**.

Steps

1. Navigate to **Reports → New Report**.
2. Select the custom report type: Investor Portfolio Report.
3. Configure columns:
    - **Investor Name:** Investor__c.Name
    - **Property Name:** Transaction__c.Property__c
    - **Lots Purchased:** Transaction__c.Lots_Purchased__c
    - **Investment Amount:** Transaction__c.Ownership_Amount__c
    - **Total Portfolio Value:** Investor__c.Total_Investment__c
    - {Screenshot: "Report Builder Columns Configuration"}
4. Apply **filters** as needed:
    - Date of Transaction
    - Property Type
    - Investor Name
    - {Screenshot: "Report Filters Window"}
5. **Save & Run** the report.

Tip: Use **Summary Reports** to group data by Investor or Property, **Matrix Reports** for multi-dimensional analysis, and **Joined Reports** to compare multiple datasets.

Withdrawal Request Report

Preview Layout | Edit Layout | Clone

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

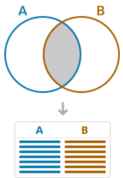
Details

Display Label	Withdrawal Request Report
API Name	Withdrawal_Request_Report
Description	Tracks withdrawal requests and approval status
Created By	ANIKET KAKADE, 9/29/25, 8:09 AM
Store in Category	admin
Deployment Status	Deployed
Modified By	ANIKET KAKADE, 9/29/25, 8:09 AM

Object Relationships

Transactions (A)

└ with at least one related record from Activities (B)



Fields

Source Object	Included Fields
Transactions	20
Activities	36

Prperty Transactions Report

Preview Layout | Edit Layout | Clone | Delete

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 Label	Prperty Transactions Report
API Name	Prperty_Transactions_Report
Description	Total Transactions done on Property
Created By	ANIKET KAKADE, 9/29/25, 8:14 AM
Store in Category	other
Deployment Status	Deployed
Modified By	ANIKET KAKADE, 9/29/25, 8:14 AM

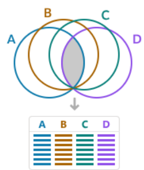
Object Relationships

Properties (A)

└ with at least one related record from Investment Lots (B)

└ with at least one related record from Transactions (C)

└ with at least one related record from Activities (D)



Fields

Source Object	Included Fields
Properties	19
Investment Lots	13
Transactions	19
Activities	36

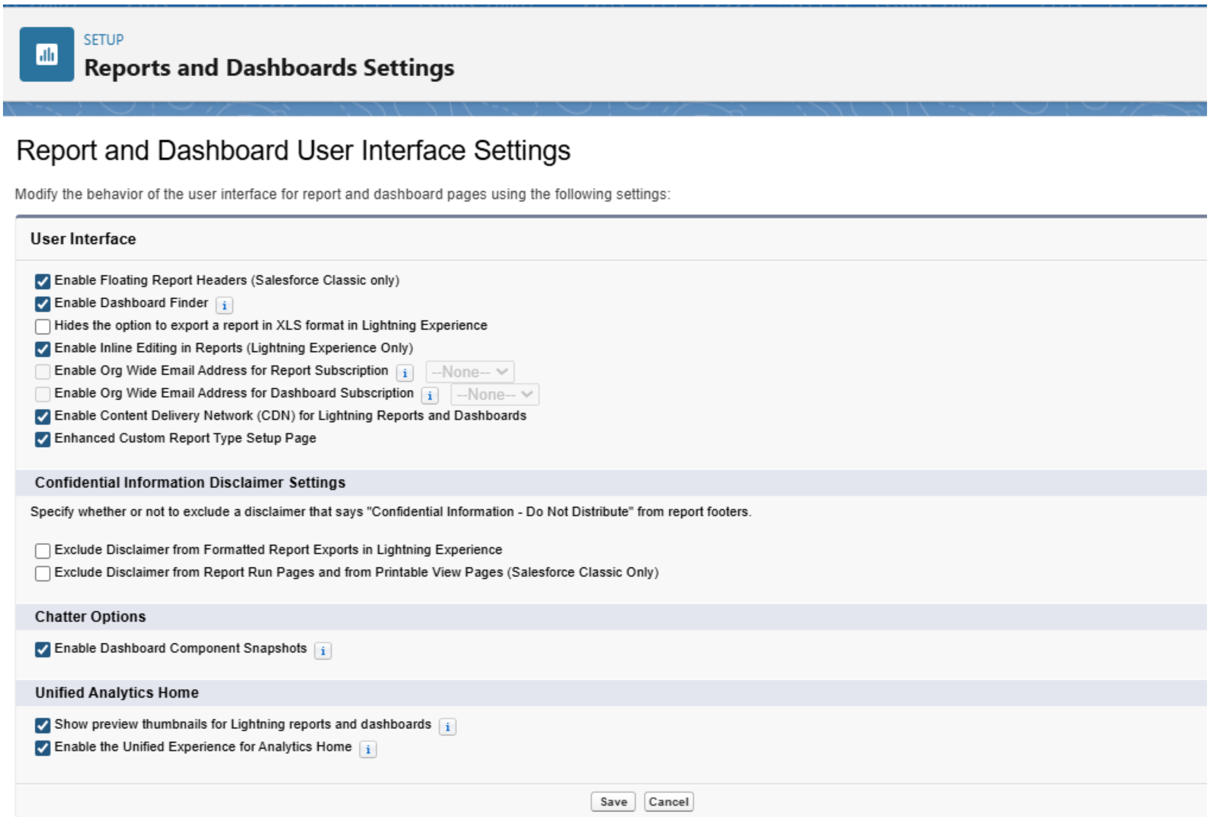
3️⃣ Dashboards

Purpose:
To visualize investor and property metrics for easy consumption by stakeholders.

Steps

1. Go to **Dashboards → New Dashboard**.
2. Configure:
    - **Name:** Investor Portfolio Dashboard
    - **Folder:** Investor Reports
3. Add components:
    - **Pie Chart:** Total Investment per Investor
    - **Bar Chart:** Lots Purchased per Property
    - **Gauge:** Portfolio Value vs Expected Value
    - {Screenshot: "Dashboard Builder Window"}
4. Select the corresponding **custom report** for each component.
5. Save and run the dashboard.

Tip: Use **dynamic dashboards** to reflect data based on the logged-in user (optional for admin vs investor view).



Security Review

A. Field-Level Security

1. Navigate to **Setup** → **Profiles** → **[Relevant Profile]** → **Field-Level Security**.
2. Ensure sensitive fields are secured:
    - Investor__c.Total_Investment__c
    - Transaction__c.Ownership_Amount__c
    - Property__c.Price__c
    - {Screenshot: "Field-Level Security Settings"}

B. Sharing Settings

1. Go to **Setup** → **Sharing Settings**.
2. Configure **Organization-Wide Defaults (OWD):**

   - **Investor__c:** Private
   - **Transaction__c:** Controlled by Parent (Investor)
   - **Property__c:** Public Read-Only
3. Use **Sharing Rules** to grant access to managers or admins as needed.
4. {Screenshot: "Sharing Settings Window"}

C. Login & Session Security

1. Navigate to **Setup → Session Settings**.
2. Configure:
   - Session timeout duration
   - Login IP ranges
   - Login access policies for users
3. {Screenshot: "Session Settings Window"}

D. Audit Trail

1. Go to **Setup → View Setup Audit Trail**.
2. Track all changes to objects, fields, users, and security settings.
3. {Screenshot: "Audit Trail Page"}

5️⃣ Outcome of Phase 9

- Custom reports provide **detailed insights** into investor portfolios, property investments, and transaction history.
- Dashboards **visualize key metrics** for decision-making.
- Security configurations ensure **data privacy and compliance**.
- Audit trail provides a **historical record** of changes to critical Salesforce objects and settings.