Phase 9: Reporting, Dashboards & Security Review

1. Reports

Lead Reports

- **Leads by Source:** Breakdown of leads from Website, Social Media, Offline.

- **Leads by Territory:** Helps managers see which region generates the most demand.

- **Lead Conversion Rate:** % of qualified leads converted into deals.

Property Reports

- **Available vs. Sold Properties:** Track inventory health.

- **Top Property Types:** Apartments vs. Villas vs. Commercial spaces.

- **Property Visits Scheduled vs. Completed:** Helps monitor buyer engagement.

Deal Reports

- **Deals by Stage:** Enquiry → Negotiation → Offer → Closed Won/Lost.

- **Monthly Revenue Report:** Total booking amounts per month.

- **High-Value Deals:** Highlight deals above a set threshold (e.g., > ₹1 Crore).

Agent Performance Reports

- **Leads Handled per Agent.**

- **Deals Closed per Agent.**

- **Average Response Time to Inquiries.**

2. Dashboards

Sales Funnel Dashboard

- Tracks the journey from Leads → Qualified → Deals → Bookings.

- Shows drop-off rates at each stage.

Property Demand Dashboard

- Graph of most in-demand locations, property types, and price ranges.

- Helps property managers prioritize listings.

Agent Leaderboard Dashboard

- Ranks agents by:

    o Deals Closed

    o Visits Scheduled

    o Lead Conversion %

Revenue Dashboard

- Monthly/Quarterly revenue from bookings.

- Comparison of performance vs. targets.

Territory Dashboard

- Regional sales performance.

- Helps managers allocate agents more effectively.

3. Sharing Settings

- **Lead Object:** Private → only owner + manager can view.

- **Property Object:** Public Read-Only → visible to all agents, editable by managers.

- **Deal & Booking Objects:** Private → only assigned agent + manager can view.

4. Field-Level Security (FLS)

- **Booking Amount & Payment Details:** Visible only to Sales Managers.

- **Customer Personal Data (Phone, Email):** Visible to assigned agent + manager.

- **Property Status:** Editable only by Property Managers.

5. Session Settings

- Enable **Session Timeout** after inactivity (e.g., 20 mins).

- Restrict login from multiple devices simultaneously.

- Require re-authentication for sensitive operations (like booking confirmation).

6. Login IP Ranges

- Restrict Salesforce access to **company office IPs** + known remote IPs.

- Example: Only allow login from corporate office or verified agent locations.

7. Audit Trail

- Enable **Setup Audit Trail** to track changes to org configuration.

- Example: Logs who modified sharing rules, flows, or dashboards.

- Useful for compliance and troubleshooting.