

Project Title: Real Estate Property Management System

Phase 9: Reporting, Dashboards & Security Review

Objective & Acceptance Criteria:

The goal of this phase was to implement reporting and dashboard capabilities for the Property-Lease Management system and ensure proper access control through field-level security. The acceptance criteria were:

- Create reports to track Properties, Leases, and Tenants.
- Use standard report types to visualize relevant data.
- Build dashboards to summarize key metrics like property status and monthly rent per city.
- Ensure field-level security and sharing settings are correctly applied.

Trailhead-Style Step-by-Step Implementation:

A. Reports

- **Steps:**
 1. Navigate to **Setup → Reports → New Report**.
 2. Select the object: **Property / Lease / Tenant**.
 3. Choose the report format: **Tabular or Summary**.
 4. Apply filters: e.g., Properties where Status = Occupied.
 5. Group records as needed: e.g., Leases grouped by Status.
 6. Add summaries: e.g., Total Monthly Rent per City.
 7. Save the report with an appropriate name.

Real Estate Manage...

Owners

Properties

Tenants

Reports

More

Report: Properties

Active Propertie...

Enable Field Editing

Add Chart

Edit

Total Records

3

Total Rental Amount

₹56,000.00

Total No. of Bedrooms

6

City	Status →	Available	Total
<input type="checkbox"/> Chennai	Sum of Rental Amount	₹36,000.00	₹36,000.00
	Sum of No. of Bedrooms	4	4
	Record Count	2	2
<input type="checkbox"/> Hyderabad	Sum of Rental Amount	₹20,000.00	₹20,000.00
	Sum of No. of Bedrooms	2	2
	Record Count	1	1
Total	Sum of Rental Amount	₹56,000.00	₹56,000.00
	Sum of No. of Bedrooms	6	6
	Record Count	3	3

Details (3 Rows)

Click an intersection in the table above to filter details.

	Property: Property ID	Rental Amount	No. of Bedrooms
1	PROP-0004	₹18,000.00	2
2	PROP-0011	₹18,000.00	2
3	PROP-0015	₹20,000.00	2
4		₹56,000.00	6

Project Title: Real Estate Property Management System

B. Report Types

- **Steps:**
 1. Navigate to **Setup → Report Types**.
 2. Use **Standard Report Types** for Property, Lease, and Tenant.
 3. Verify that relationships are correctly configured.
- No custom report types were required for our current project.

Q report

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access

Report

Didn't find what you're looking for?
Try using Global Search.

Custom Report Types

Lease with Property and Tenant

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

Lease with Property and Tenant

API Name

Lease_with_Property_and_Tenant

Description

Report showing leases with property and tenant details

Created By

Dharma Teja Garipally, 9/26/25, 5:21 PM

Store in Cate...

other

Deployment ...

Deployed

Modified By

Dharma Teja Garipally, 9/26/25, 5:21 PM

Fields

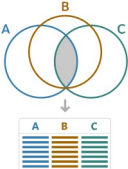
Source Object	Included Fields
Leases	15
Properties	10

Object Relationships

Leases (A)

with at least one related record from Properties (B)

with at least one related record from Tenants (C)



Preview Layout

Edit Layout

Clone

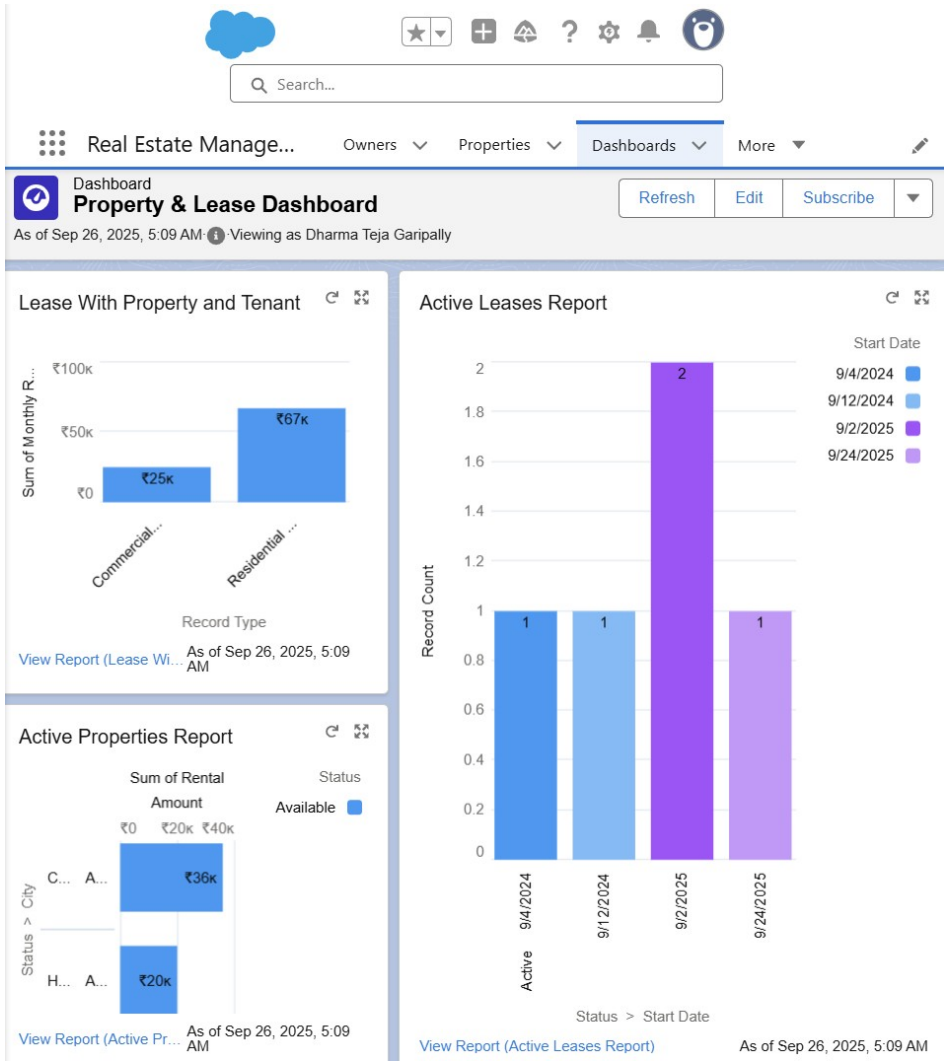
Delete

Close

C. Dashboards

- **Steps:**
 1. Navigate to **Setup → Dashboards → New Dashboard**.
 2. Enter the Dashboard Name and select a Folder.
 3. Click **+ Component**, select the report, and choose chart type.
 4. Configure the component (e.g., bar chart showing Properties by Status).
 5. Add additional components (e.g., Total Monthly Rent per City).
 6. Save and run the dashboard.

Project Title: Real Estate Property Management System



D. Sharing Settings & Field-Level Security

- Steps:
 - Navigate to **Setup → Profiles → Object Settings → Property / Lease / Tenant → Edit**.
 - Set **Read / Write** access as required for each user role.
 - Navigate to **Setup → Permission Sets → Assign objects/fields** for additional access.
 - Verify that users can access only the fields they are authorized to view or edit.

Project Title: Real Estate Property Management System

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Lease

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

This page allows you to view Lease field accessibility for a particular field.

Field accessibility for Field:

Monthly Rent

Click on a cell in the table below to change the field's accessibility.

Profiles	Field Access
Analytics Cloud Integration User	Hidden
Analytics Cloud Security User	Hidden
Anypoint Integration	Hidden
Contract Manager	Hidden
Cross Org Data Proxy User	Hidden
Custom: Marketing Profile	Hidden
Custom: Sales Profile	Hidden
Custom: Support Profile	Hidden
Einstein Agent User	Hidden
Force.com - App Subscription User	Hidden
Force.com - Free User	Hidden
Gold Partner User	Hidden
Identity User	Hidden
Marketing User	Hidden
Minimum Access - API Only Integrations	Hidden
Minimum Access - Salesforce	Hidden
Partner App Subscription User	Hidden
Partner Community Login User	Hidden
Partner Community User	Hidden
Read Only	Hidden
Salesforce API Only System Integrations	Hidden
Silver Partner User	Hidden
Solution Manager	Hidden
Standard Platform User	Hidden
Standard User	Read-Only
System Administrator	Read-Only
Work.com Only User	Hidden
Profiles	Field Access

Deliverables:

- Saved Reports: Property Report, Lease Report, Tenant Report.
- Saved Dashboard with visualizations of key metrics.
- Screenshots of reports, dashboards, and field-level security setup.