Salesforce PropertyHub

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Phase 9 – Reporting, Dashboards & Security Review

Reports

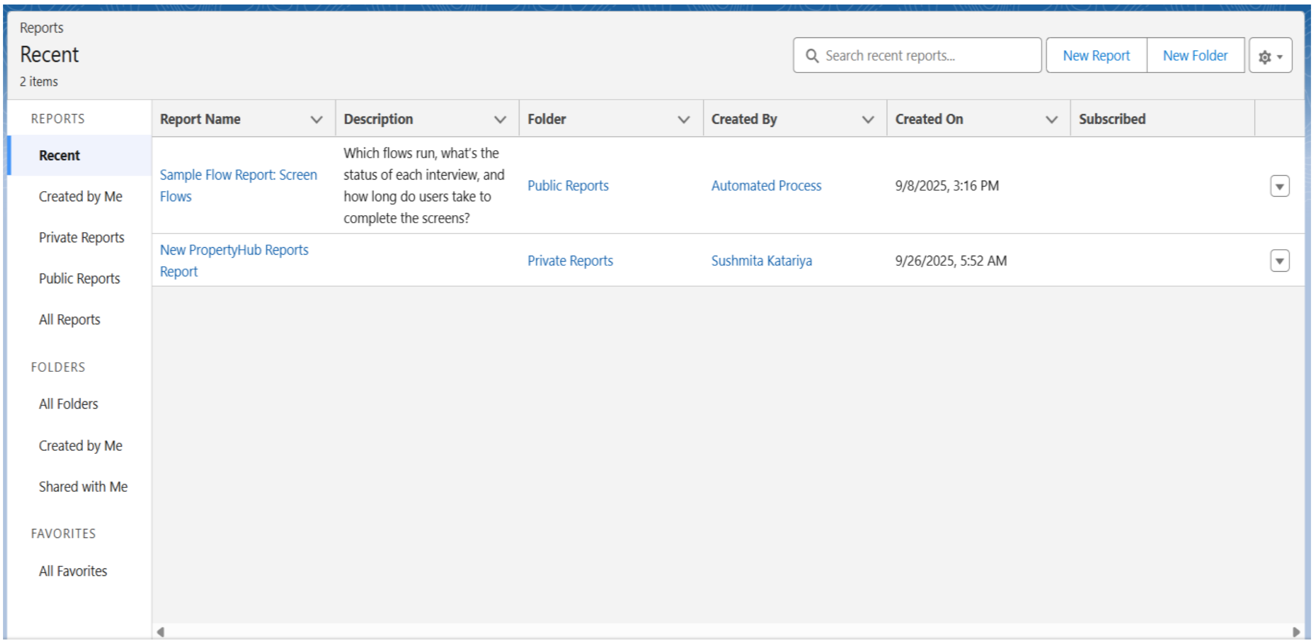
Purpose: Generate insights from Salesforce data for better decision-making.

Key Features:

- Standard & custom report types.
- Filters, groupings, and formulas for analysis.
- Export to Excel or CSV for offline use.

Business Impact:

- Enables data-driven decisions for property sales & lead management.
- Improves performance tracking for agents & teams.



Dashboards

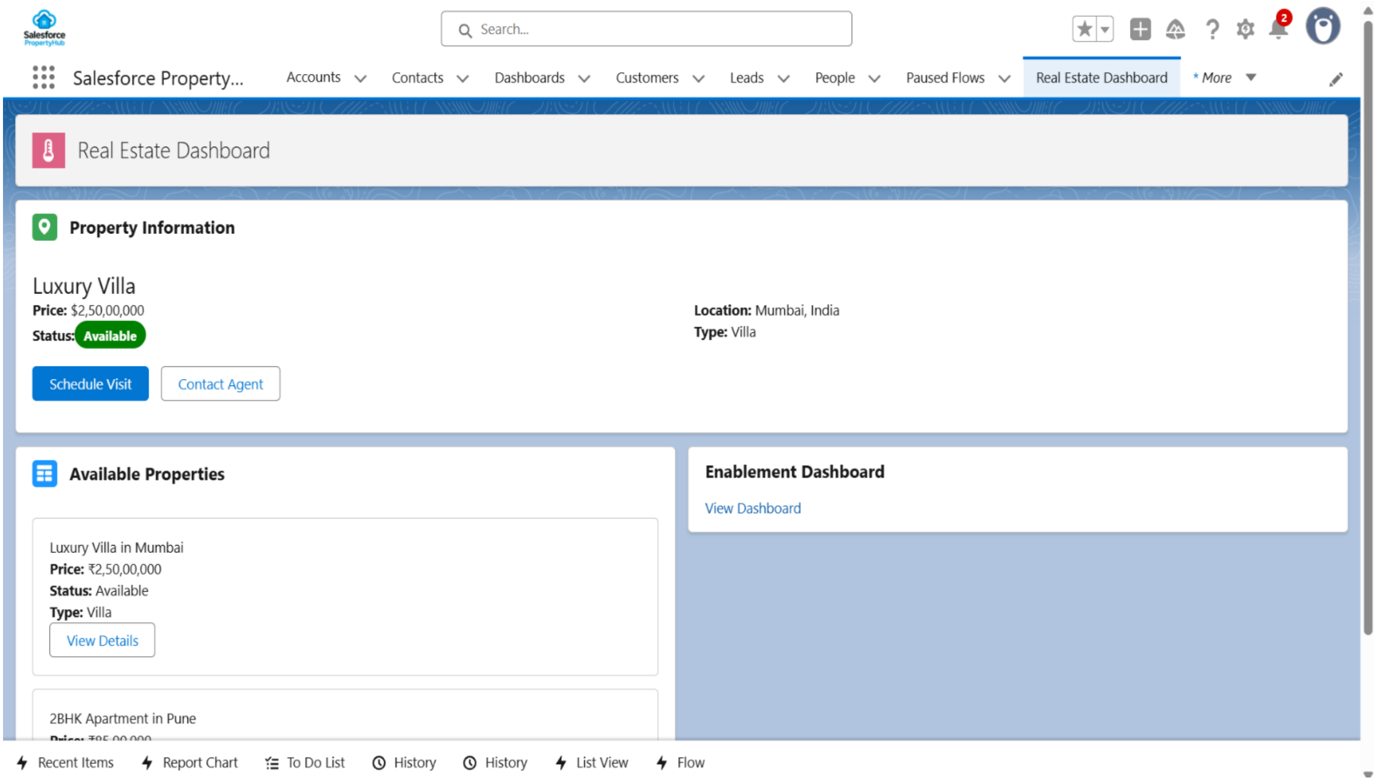
Purpose: Visualize key metrics in real-time for stakeholders.

Key Features:

- Drag-and-drop components: charts, tables, gauges.
- Filter by date, agent, property type, etc.
- Dynamic dashboards for multiple users.

Business Impact:

- Provides at-a-glance performance insights.
- Helps monitor property sales, visits, and lead conversion.



Report & Dashboard Folder Security

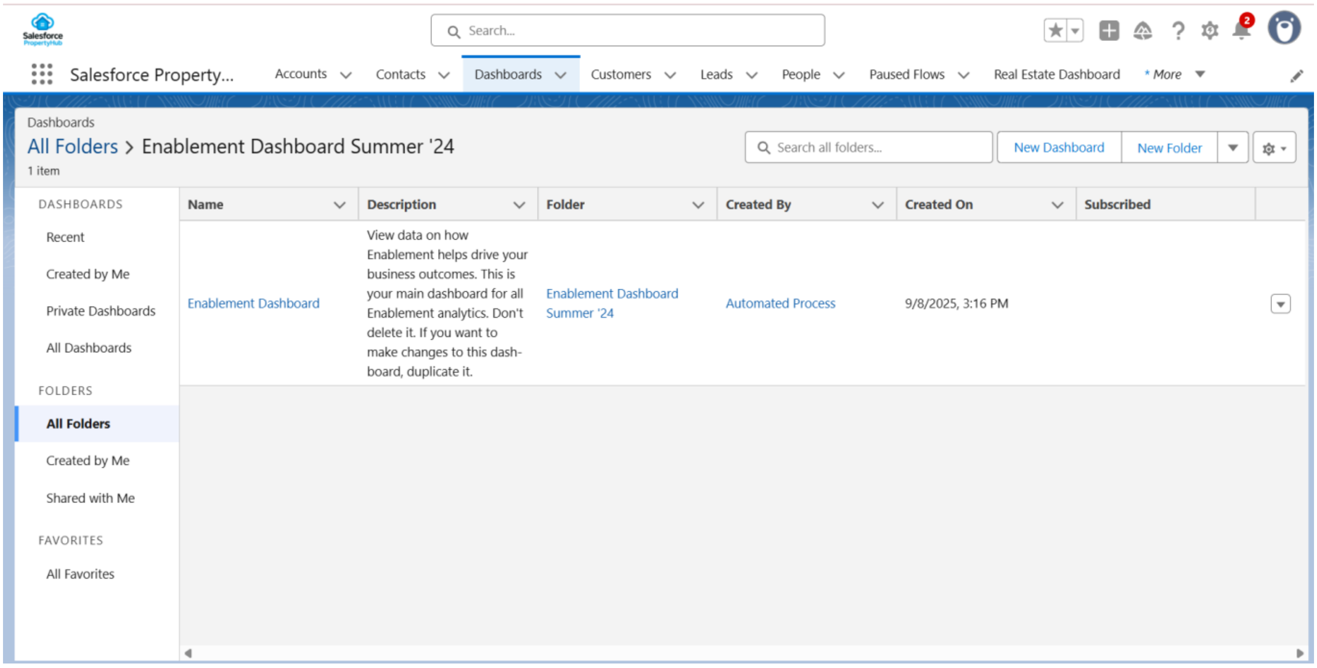
Purpose: Control access to reports and dashboards.

Key Features:

- Public, private, or shared folder access.
- Role-based and permission set visibility.
- Folder-level management for easier governance.

Business Impact:

- Ensures sensitive data is only accessible to authorized users.
- Improves compliance and internal audit readiness.



Field-Level Security

Purpose: Restrict access to sensitive fields on objects.

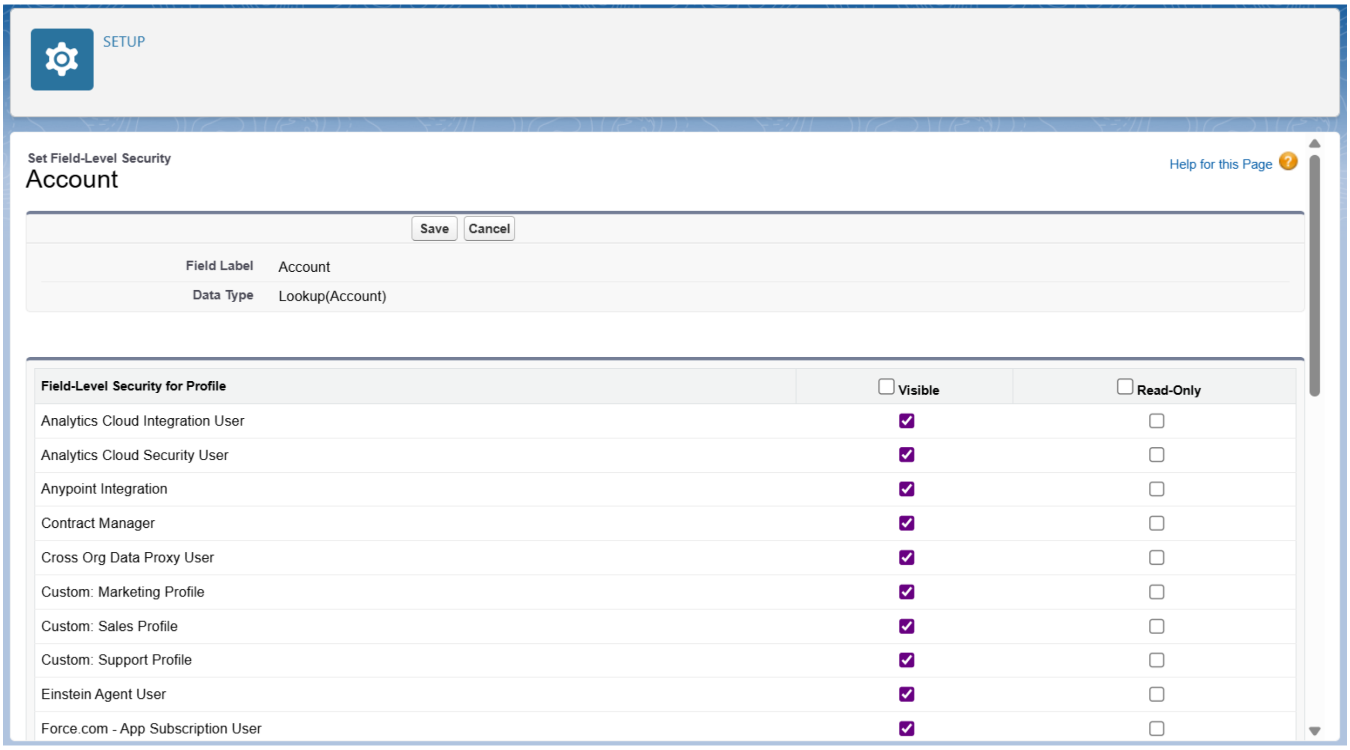
Key Features:

- Control visibility/edit access per profile or permission set.
- Supports standard & custom fields.

- Works with page layouts and API access.

Business Impact:

- Protects sensitive client/property information.
- Prevents unauthorized changes to critical fields.



Record-Level Security

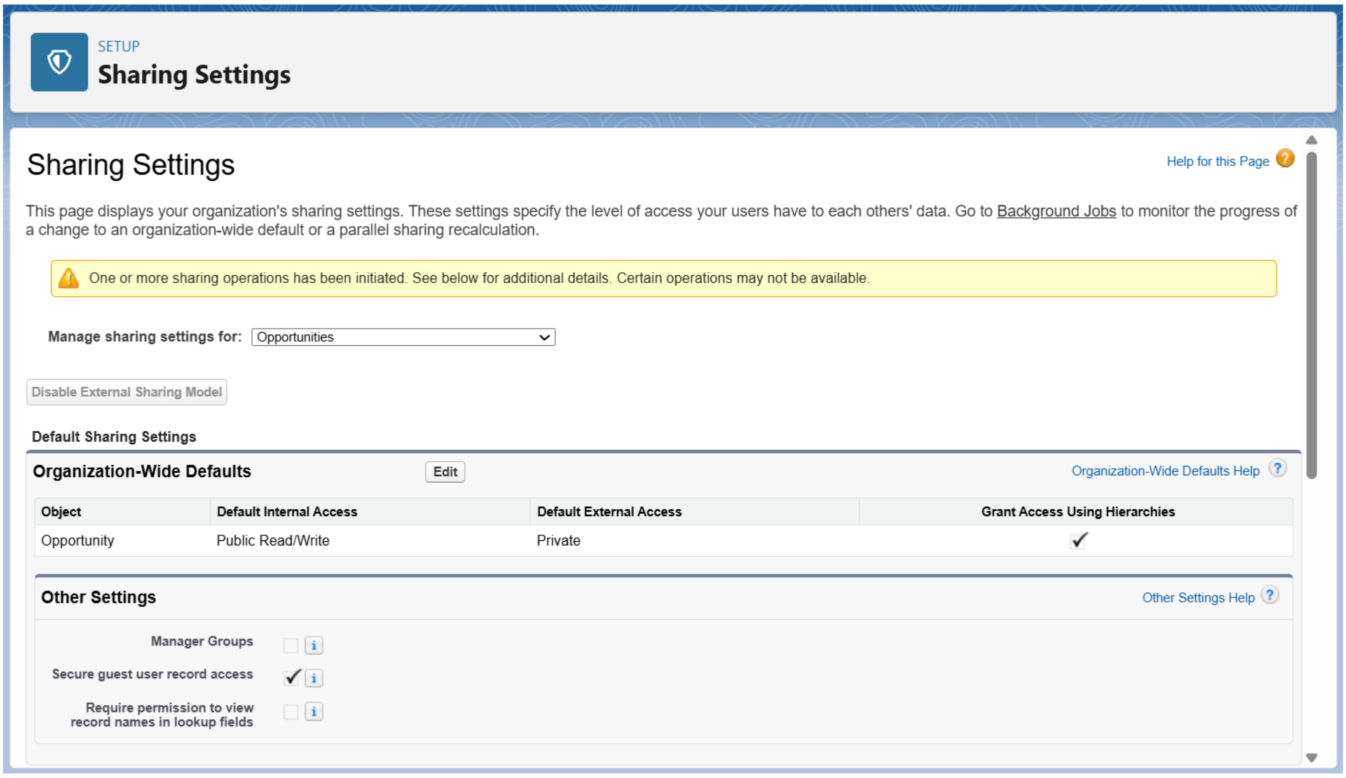
Purpose: Control access to individual records.

Key Features:

- Sharing rules, roles, and manual sharing.
- Org-wide defaults: Public, Private, or Controlled by Parent.
- Supports owner-based access and criteria-based sharing.

Business Impact:

- Ensures users see only the records relevant to their role.
- Enhances data privacy and compliance.



Login & Audit Monitoring

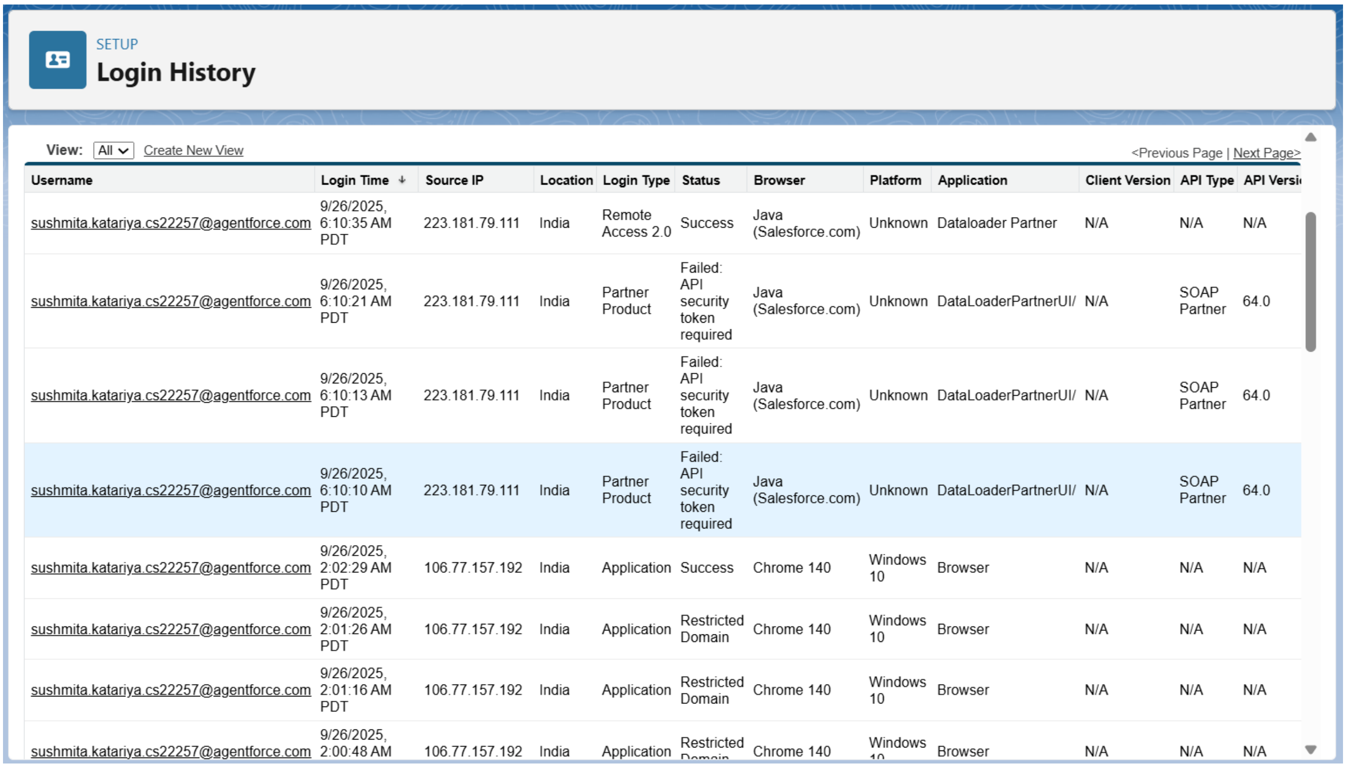
Purpose: Track user activity and system changes for compliance.

Key Features:

- Login history for all users.
- Setup Audit Trail for metadata changes.
- Reports on failed logins, IP ranges, and session times.

Business Impact:

- Improves security monitoring.
- Helps with internal audits and compliance requirements.



SETUP

Login History

View: All Create New View <Previous Page | Next Page>

Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Versi
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 6:10:35 AM PDT	223.181.79.111	India	Remote Access 2.0	Success	Java (Salesforce.com)	Unknown	Dataloader Partner	N/A	N/A	N/A
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 6:10:21 AM PDT	223.181.79.111	India	Partner Product	Failed: API security token required	Java (Salesforce.com)	Unknown	DataLoaderPartnerUI/	N/A	SOAP Partner	64.0
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 6:10:13 AM PDT	223.181.79.111	India	Partner Product	Failed: API security token required	Java (Salesforce.com)	Unknown	DataLoaderPartnerUI/	N/A	SOAP Partner	64.0
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sushmita.katariya.cs22257@agentforce.com	9/26/2025, 2:02:29 AM PDT	106.77.157.192	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 2:01:26 AM PDT	106.77.157.192	India	Application	Restricted Domain	Chrome 140	Windows 10	Browser	N/A	N/A	N/A
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🏆 Outcomes of Phase 9

- ☑ Reports created for Leads, Properties, and Agent performance.
- ☑ Dashboards visualizing sales, visits, and conversions.
- ☑ Folder-level security applied to all reports/dashboards.
- ☑ Field-level & record-level security enforced across org.
- ☑ Login and audit monitoring implemented for compliance.

🔜 Next Steps: Phase 10 – User Training & Adoption

- Train agents on reports, dashboards, and data entry best practices.
- Share documentation & quick reference guides.
- Gather feedback and optimize reporting & security settings.