



Salesforce PropertyHub

By:- Sushmita Katariya

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.

The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with navigation links: Reports, Recent (selected), 2 items, REPORTS, Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, and FAVORITES, All Favorites. The main area displays a table of recent reports. The columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are two rows visible:

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/8/2025, 3:16 PM	<input type="checkbox"/>
New PropertyHub Reports Report		Private Reports	Sushmita Katariya	9/26/2025, 5:52 AM	<input type="checkbox"/>

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.

The screenshot shows the Salesforce PropertyHub interface with the following details:

- Header:** Salesforce PropertyHub logo, Search bar, and various navigation links (Accounts, Contacts, Dashboards, Customers, Leads, People, Paused Flows) and icons (star, plus, question mark, gear, bell).
- Dashboard Title:** Real Estate Dashboard.
- Property Information Section:** Shows a "Luxury Villa" listing with a price of \$2,50,00,000, status "Available", location Mumbai, India, and type Villa. It includes "Schedule Visit" and "Contact Agent" buttons.
- Available Properties Section:** Shows a "Luxury Villa in Mumbai" listing with a price of ₹2,50,00,000, status Available, type Villa, and a "View Details" button.
- Enablement Dashboard Section:** Shows a "View Dashboard" button.
- Footer:** Navigation links for Recent Items, Report Chart, To Do List, History, List View, and Flow.

Report & Dashboard Folder Security

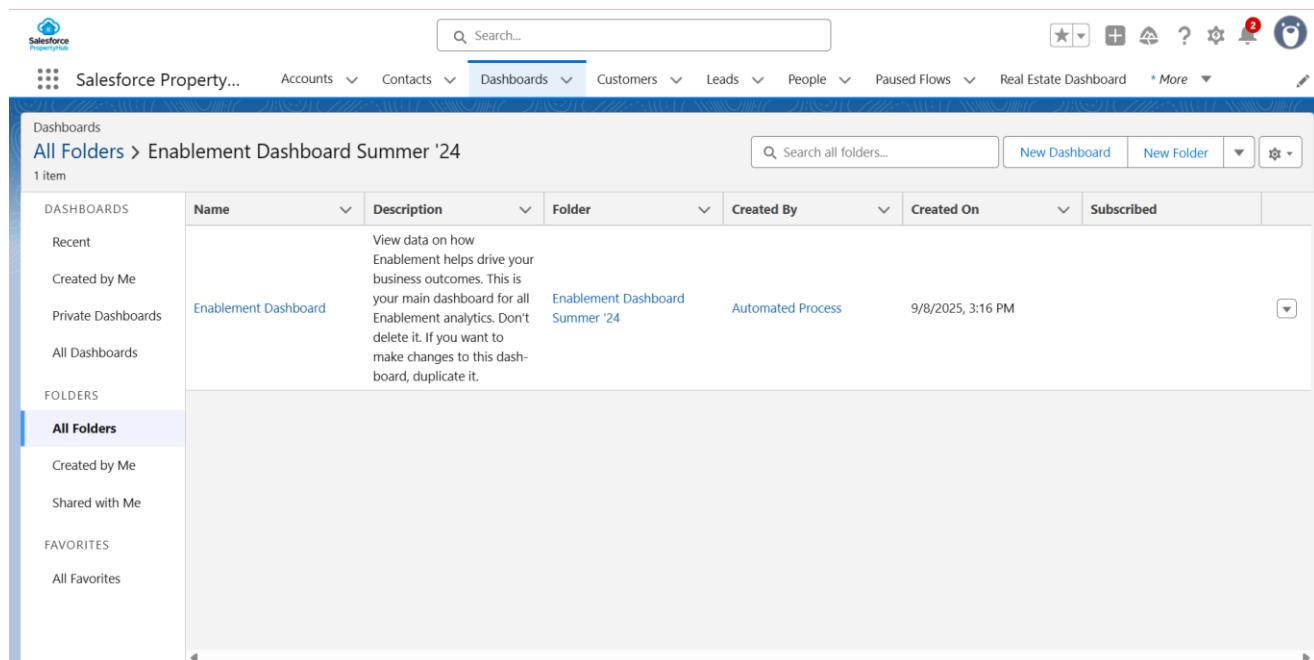
Purpose: Control access to reports and dashboards.

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.



The screenshot shows the Salesforce interface for managing dashboard folders. The top navigation bar includes links for Accounts, Contacts, Dashboards (which is the active tab), Customers, Leads, People, Paused Flows, Real Estate Dashboard, and More. A search bar at the top right is labeled 'Search...'. On the left, a sidebar menu lists 'Dashboards' (Recent, Created by Me, Private Dashboards, All Dashboards), 'Folders' (All Folders, which is selected and highlighted in blue), 'Created by Me', 'Shared with Me', and 'Favorites' (All Favorites). The main content area displays a table titled 'All Folders > Enablement Dashboard Summer '24'. The table has columns for Name, Description, Folder, Created By, Created On, and Subscribed. One row is visible, showing the 'Enablement Dashboard Summer '24' folder, which was created by an 'Automated Process' on 9/8/2025, 3:16 PM. There is also a small checkbox icon next to the row.

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.

The screenshot shows the Salesforce Setup interface with the 'SETUP' button in the top-left corner. Below it, a page titled 'Set Field-Level Security' for an 'Account' field is displayed. The page includes a 'Save' and 'Cancel' button at the top right. The 'Field Label' is set to 'Account' and the 'Data Type' is 'Lookup(Account)'. The main section is titled 'Field-Level Security for Profile' and lists various user profiles with checkboxes for 'Visible' and 'Read-Only' permissions. Most profiles have both checkboxes checked.

Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. At the top, there's a blue header bar with the 'SETUP' icon and the title 'Sharing Settings'. Below the header, the main content area has a light gray background. At the top left of the content area, the title 'Sharing Settings' is displayed. On the right side, there's a small link 'Help for this Page' with a question mark icon. A yellow warning banner at the top of the content area contains a warning icon and the text: 'One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.' Below the banner, there's a dropdown menu labeled 'Manage sharing settings for: Opportunities'. Underneath this, there's a button labeled 'Disable External Sharing Model'. The main configuration area is titled 'Default Sharing Settings' and contains two sections: 'Organization-Wide Defaults' and 'Other Settings'. The 'Organization-Wide Defaults' section has a table with three columns: 'Object', 'Default Internal Access', and 'Default External Access'. A single row is shown for 'Opportunity', where 'Public Read/Write' is selected for internal access and 'Private' is selected for external access. There's also a checkbox for 'Grant Access Using Hierarchies' which is checked. The 'Other Settings' section contains three items: 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). Each item has an info icon (i) next to it.

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.

Login History												
Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	
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		
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 6:10:10 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, 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	
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 2:01:16 AM PDT	106.77.157.192	India	Application	Restricted Domain	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	
sushmita.katariya.cs22257@agentforce.com	9/26/2025, 2:00:48 AM	106.77.157.192	India	Application	Restricted Domain	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	

🏆 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.

