

1. REPORTS

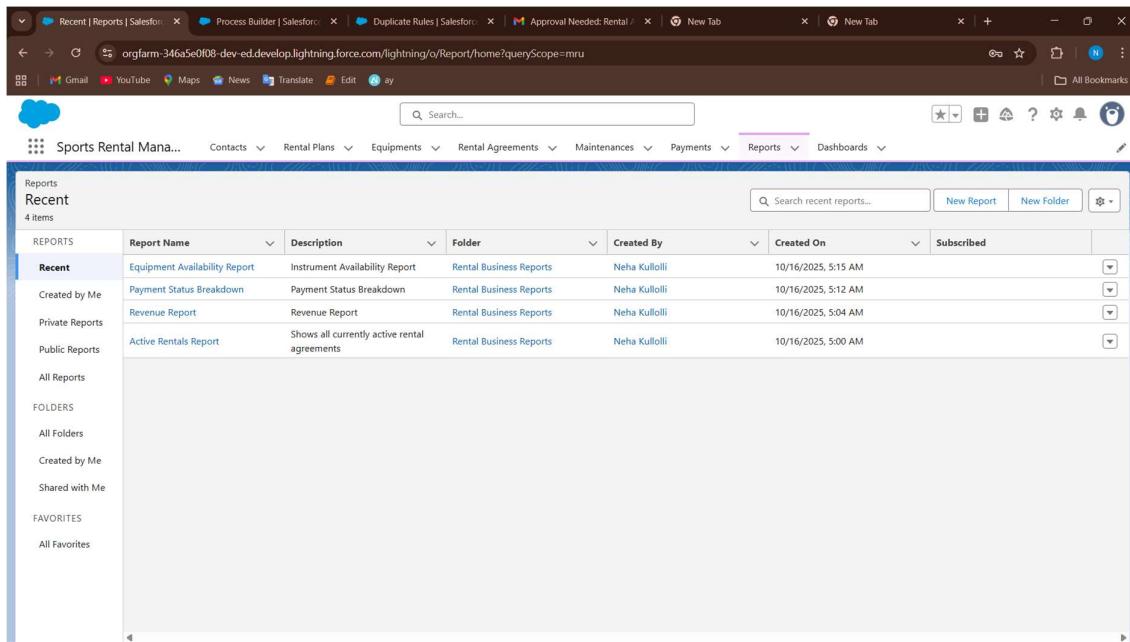
Goal:

Visualize business data such as rentals, payments, and customer activity.

Step-by-Step:

A. Create a New Report

1. Go to **App Launcher (9 dots)** → search **Reports** → click **New Report**.
2. Choose the **Report Type** (e.g., *Rental Agreements*, *Payments*, or your custom type).
3. Click **Continue**.



The screenshot shows the Salesforce Reports page. At the top, there's a navigation bar with links for Recent, Process Builder, Duplicate Rules, Approval Needed, and a New Tab. Below the bar, there's a toolbar with icons for Gmail, YouTube, Maps, News, Translate, Edit, and a search bar. The main content area has a header 'Sports Rental Mana...' and a navigation menu on the left with sections for Reports, Recent, Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. On the right, there's a table titled 'RECENT' with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists four reports: Equipment Availability Report, Payment Status Breakdown, Revenue Report, and Active Rentals Report, all created by Neha Kulloli on 10/16/2025.

Report Name	Description	Folder	Created By	Created On	Subscribed
Equipment Availability Report	Instrument Availability Report	Rental Business Reports	Neha Kulloli	10/16/2025, 5:15 AM	
Payment Status Breakdown	Payment Status Breakdown	Rental Business Reports	Neha Kulloli	10/16/2025, 5:12 AM	
Revenue Report	Revenue Report	Rental Business Reports	Neha Kulloli	10/16/2025, 5:04 AM	
Active Rentals Report	Shows all currently active rental agreements	Rental Business Reports	Neha Kulloli	10/16/2025, 5:00 AM	

B. Choose Report Format

- **Tabular:** simple list → select columns like *Payment Name*, *Amount*, *Status*.
- **Summary:** click “Group Rows” → choose *Customer* or *Instrument*.
- **Matrix:** click “Group Columns” → compare *Instrument* vs *Rental Plan*.
- **Joined:** click **Report** → **Add Report Type** → combine *Rental Agreement* + *Payment*.

C. Add Filters & Columns

- Example filters:
 - *Status = Active*
 - *Start Date = THIS MONTH*
- Drag in needed columns and remove unnecessary ones.

D. Save & Run

- Name: Active Rentals Report
 - Folder: Public Reports / My Personal Custom Reports
 - Click **Save & Run** 
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2. REPORT TYPES

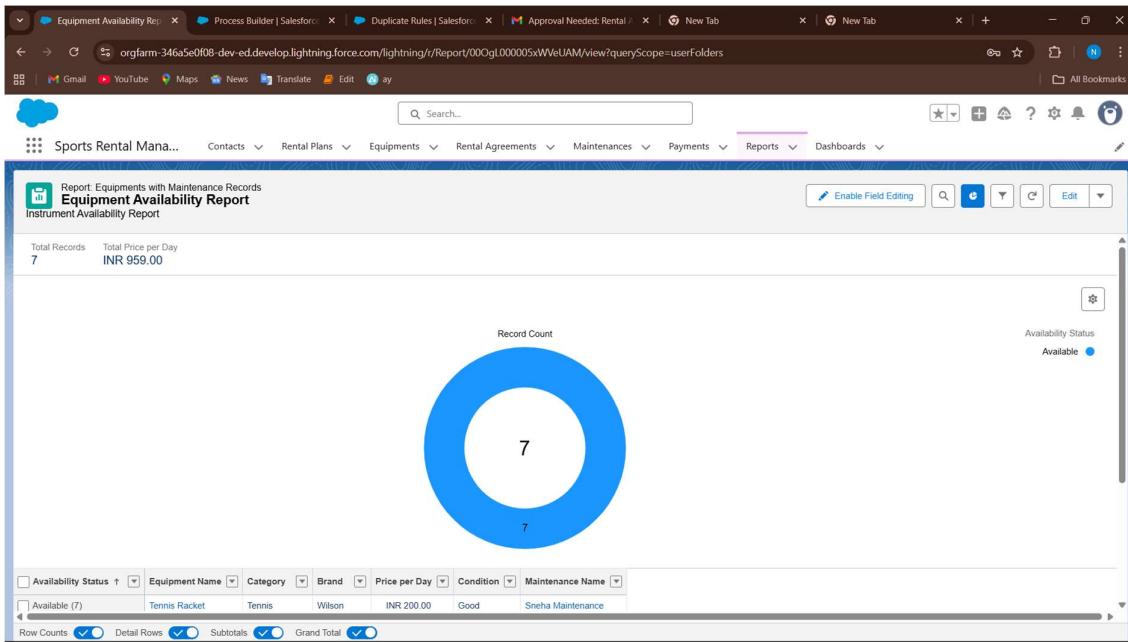
Goal:

Enable cross-object reporting.

Procedure:

1. Setup  → Quick Find → **Report Types**.
2. Click **New Custom Report Type**.
3. **Primary Object:** Rental_Agreement__c.
4. **Report Type Label:** Rental Agreements with Payments and Customers.
5. **Store in Category:** Custom Reports.
6. Click **Next**.
7. **Define Relationships:**
 - Add related object Contact (lookup = Customer).
 - Add Instrument__c.
 - Add Payment__c.
8. Save.

You can now build reports combining these objects. 



3. DASHBOARDS

Goal:

Visual summary of KPIs such as revenue, rentals, and status.

Procedure:

1. Open **App Launcher** → **Dashboards** → **New Dashboard**.
2. **Name:** Store Performance Dashboard.
3. **Folder:** Public Dashboards.
4. Click **Create**.

Add Components:

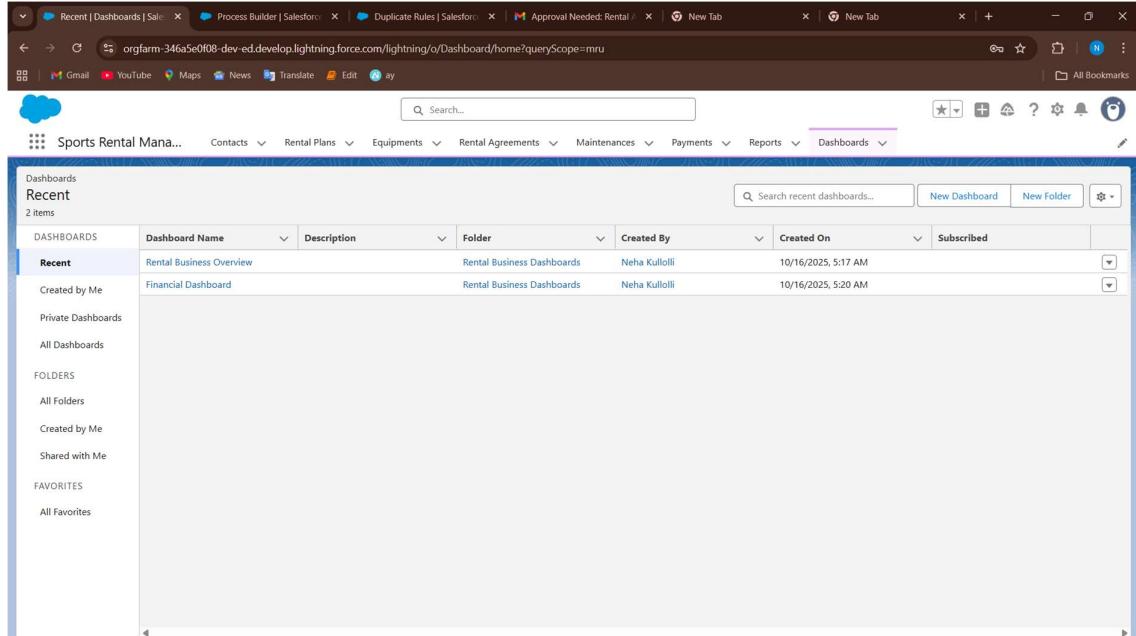
Type	Source Report	Purpose
Pie Chart	Rentals by Status	Show Active vs Completed
Bar Chart	Rentals by Instrument	Identify top rented items
Metric	Payments Summary	Display Total Revenue
Gauge	Active vs Overdue Rentals	Show Customer Satisfaction Ratio

5. Click **Add Component**, choose visualization, select source report, and click **Add**.
6. Click **Save** → **Done**.

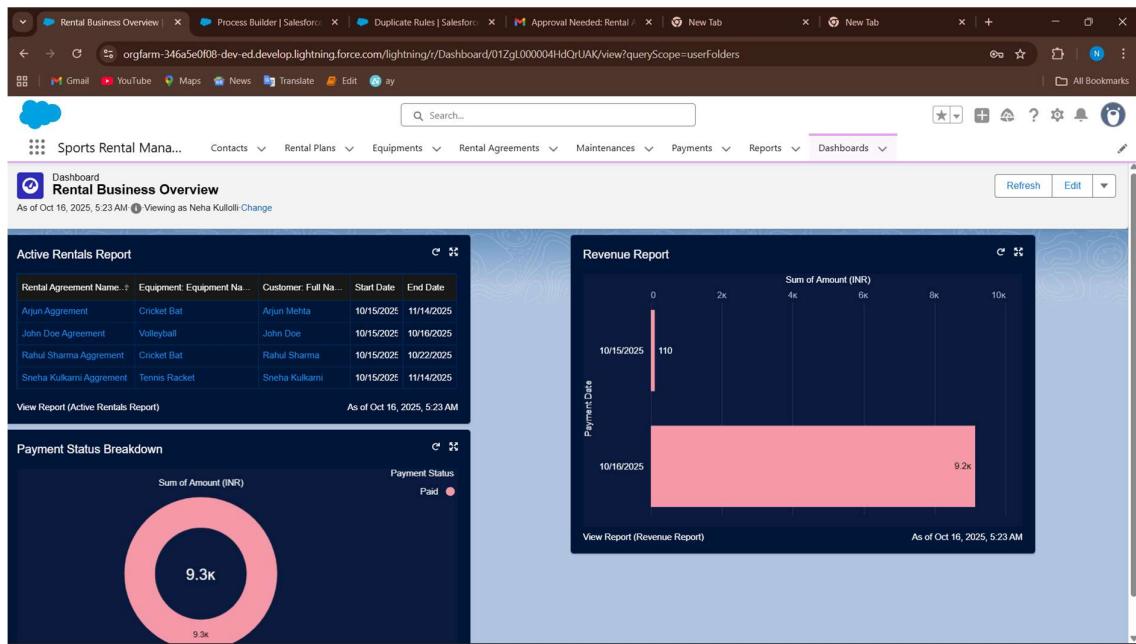
Dynamic Dashboard (Per User View):

1. In Dashboard Properties  (top-right) → check **View Dashboard As** → **The viewer**.

2. Save → this makes it **dynamic** (each user sees their own data). 



This screenshot shows the 'Dashboards' section of the Salesforce interface. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The main area displays a table of dashboards with columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. Two dashboards are listed: 'Rental Business Overview' and 'Financial Dashboard', both created by Neha Kulloli on 10/16/2025.



This screenshot shows the 'Rental Business Overview' dashboard. At the top, it says 'As of Oct 16, 2025, 5:23 AM' and 'Viewing as Neha Kulloli Change'. The dashboard features three main components: 1) 'Active Rentals Report' which lists rental agreements with columns for Rental Agreement Name, Equipment, Customer Full Name, Start Date, and End Date. 2) 'Payment Status Breakdown' which is a donut chart showing 9.3k in pink. 3) 'Revenue Report' which is a bar chart showing revenue for two dates: 10/15/2025 (110 INR) and 10/16/2025 (9.2k INR).

4. SHARING SETTINGS

Goal:

Define default record-level visibility.

Procedure:

1. Setup → Quick Find → **Sharing Settings**.
2. Scroll to **Organization-Wide Defaults** → Click **Edit**.
3. Set internal access:

Object	Default Access
Instrument	Public Read/Write
Rental Agreement	Private
Payment	Private
Maintenance Record	Public Read Only
Rental Plan	Public Read Only

4. Click **Save**.

Role Hierarchy

1. Setup → **Roles** → Set Up Roles.
 2. Create hierarchy:
Store Owner > Manager > Technician > Support.
 3. Assign users to roles accordingly. 
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5. FIELD-LEVEL SECURITY

Goal:

Restrict sensitive fields (e.g., Total Amount, Discount).

Procedure:

1. Setup → Object Manager → Rental_Agreement__c.
2. Click **Fields & Relationships**.
3. Select Total_Amount__c.
4. Click **Set Field-Level Security**.
5. For all profiles:
 -  Visible
 -  Editable (Read-Only checked)
6. Repeat for Discount_Percentage__c.
7. Click **Save** 