

Phase 9: Reports & Dashboards – SmartPropertyPortal

Goal

Design and deploy real-time reports and dashboards in Salesforce to visualize property listings, appointment activity, lead trends, and agent performance.

Step-by-Step Deployment Summary

Custom Report Type – Property with Appointments

- ****Path****: Setup → Report Types → New Custom Report Type
- ****Primary Object****: Property__c
- ****Related Object****: Appointment__c
- ****Label****: Property with Appointments
- ****Category****: Other Reports
- Deployed for user access

Purpose: Enables cross-object reporting between properties and their scheduled appointments.

Tabular Report – Property Listings

- ****Path****: Reports → New Report → Property__c
- ****Columns****: Property Name, Location, Price, Status, Agent Assigned
- ****Filter****: Status = Available
- Saved in shared folder

Purpose: Displays all available properties for quick reference and dashboard use.

Summary Report – Appointments by Agent

- **Path**: Reports → New Report → Appointment__c
- **Group Rows**: Agent Assigned
- **Columns**: Appointment Date, Status
- **Summary Field**: Row Count
- **Filter**: Appointment Date = THIS MONTH

Purpose: Tracks agent-wise appointment load and performance.

Matrix Report – Leads by Source & Status

- **Path**: Reports → New Report → Lead__c
- **Group Rows**: Lead Source
- **Group Columns**: Status
- **Summary Field**: Row Count
- **Filter**: Created Date = LAST 30 DAYS

Purpose: Analyzes lead conversion trends by acquisition source.

Dashboard – SmartProperty Overview

- **Path**: Dashboards → New Dashboard
- **Name**: SmartProperty Overview
- **Folder**: Sales Dashboards
- **Components**:
 - Bar Chart: Appointments by Agent
 - Line Chart: Lead Growth Trend

- Table: Available Listings
- Gauge: Monthly Appointment Target
- ****Filters****: Agent Assigned, Property Status, Lead Source

Purpose: Real-time visual summary of portal performance for stakeholders and recruiters.

Report Scheduling

- ****Path****: Reports → Select Report → Subscribe/Schedule
- ****Frequency****: Weekly or Monthly
- ****Recipients****: Admins, Agents, Stakeholders
- ****Format****: Excel or PDF

Purpose: Automates reporting for team visibility and decision-making.

Dashboard Screenshot



Smart Property Overview Dashboard

