

## Phase 9: Reports & Dashboards – SmartPropertyPortal

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#### Goal


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

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### ## Step-by-Step Deployment Summary


#### ### 1 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.

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#### ### 2 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.

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### ### 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.

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### ### 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.

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### ### 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.

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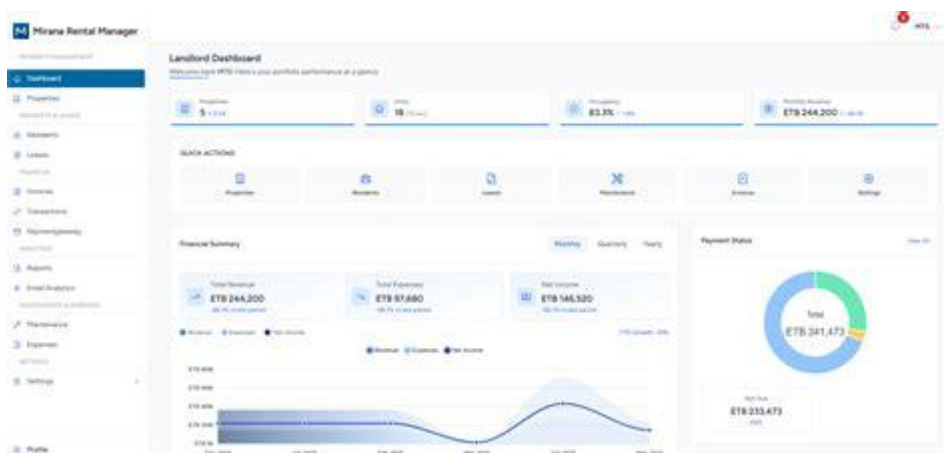
### ### 6 Report Scheduling

- \*\*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.

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## ## 🖼️ Dashboard Screenshot



## Smart Property Overview Dashboard