Smart Waste Management Tracker – Salesforce Project

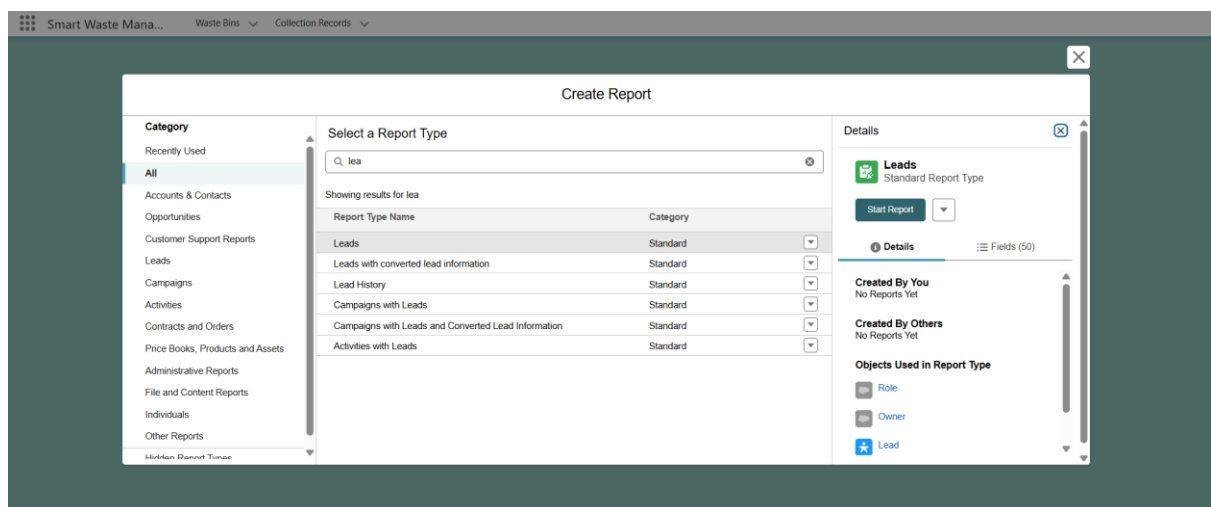**Phase 9 – Reporting, Dashboards & Security Review**

Step 1: Create Reports

**1. Leads Report**

- Go to **Reports → New Report**

- Select **Lead** object

- Add Fields:

    o Lead Name

    o Status

    o Assigned Agent

    o Created Date

- Filters:

    o Status = All

    o Created Date = All Time

- Save Report:

    o Report Name: Leads Report – Phase 9

    o Folder: Private Reports (or Public if allowed)

- Run Report to verify data

2. Property Visits Report

- Go to **Reports → New Report**

- Select **Property Visits** object

- Add Fields:

  - Property Name

  - Customer Name

  - Visit Date

  - Status

  - Assigned Agent

- Filters: All Time

- Save Report:

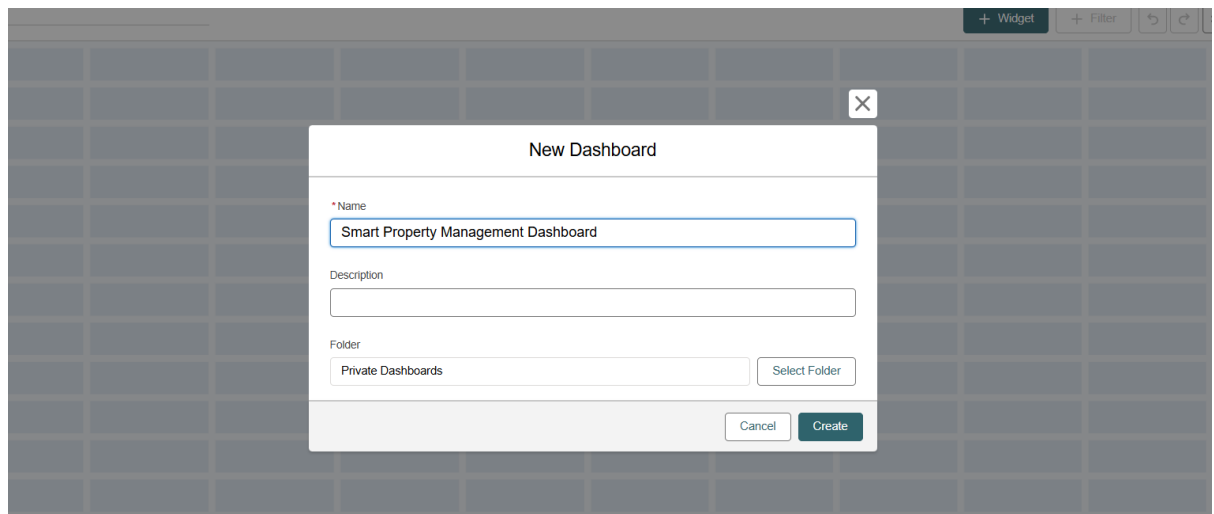 - Report Name: Property Visits Report – Phase 9
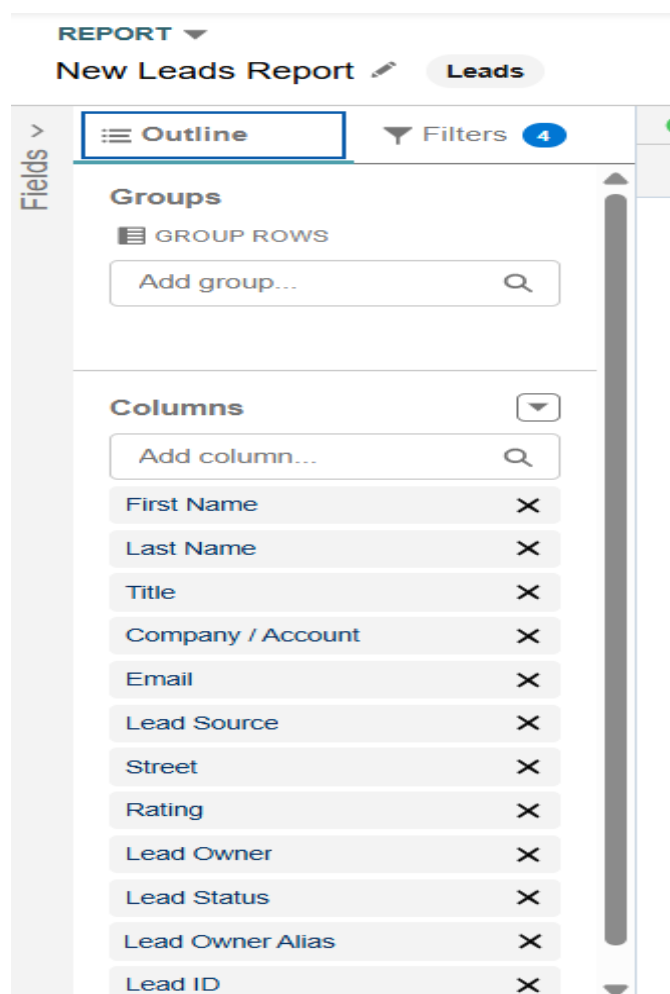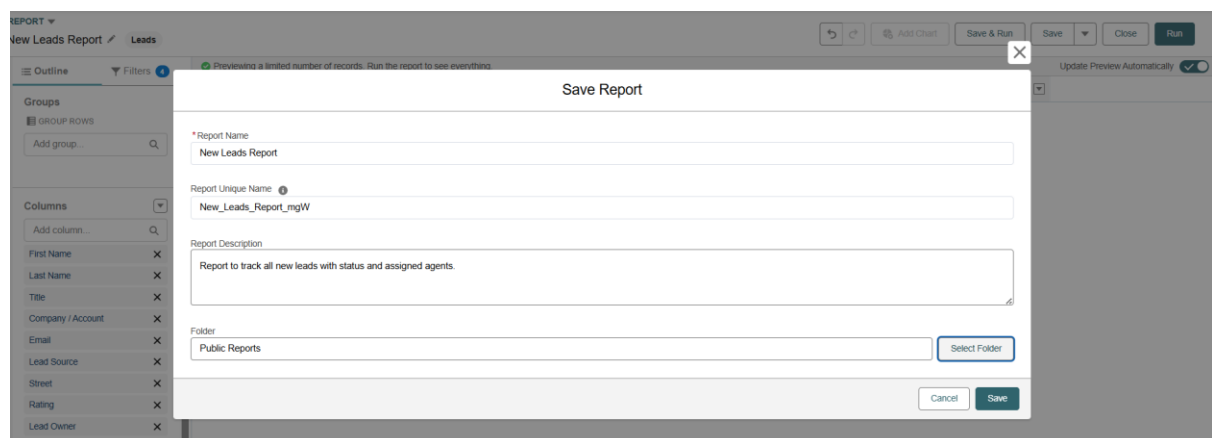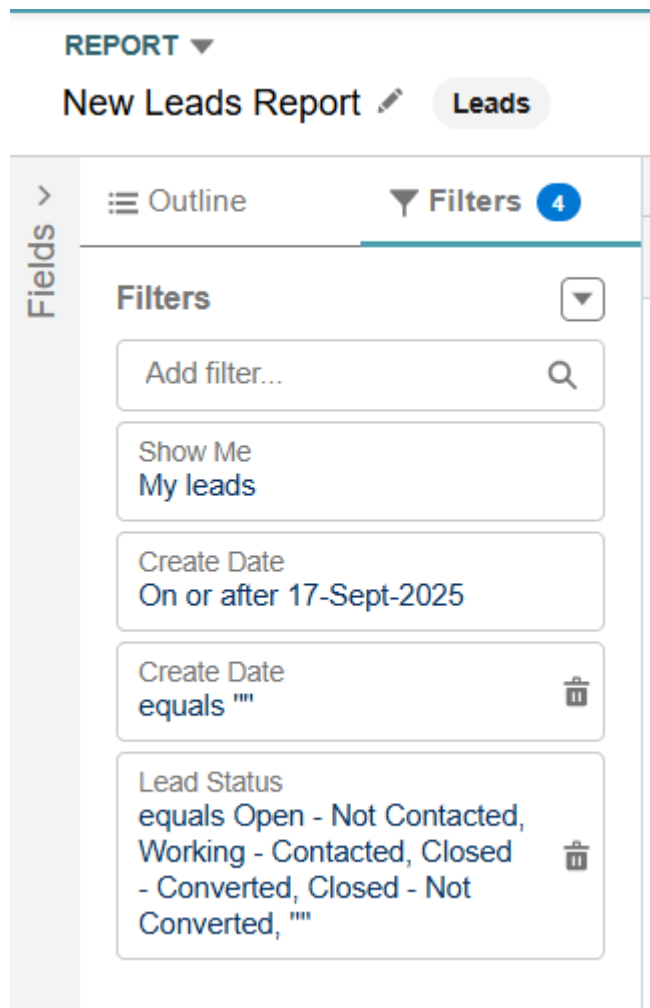
Step 2: Create Dashboard

1. Go to **Dashboards → New Dashboard**

2. Name: Phase 9 – Leads & Visits Dashboard

3. Folder: Private / Public

4. Click **Create**

Step 3: Add Components

Bar Chart

- Data Source: Leads Report – Phase 9

- X-axis: Agent Name

- Y-axis: Number of Leads

Pie Chart

- Data Source: Leads Report – Phase 9

- Segments: Lead Status (New, Contacted, Qualified, Converted)

Table

- Data Source: Property Visits Report – Phase 9

- Columns: Property, Customer, Visit Date, Status, Assigned Agent

- Limit: Show latest 5–10 records

Optional Funnel Chart

- Data Source: Leads Report – Phase 9

- Stage: Lead conversion funnel

- Adjust layout, size, and theme as needed

- Click **Save → Refresh** to verify charts

Select Folder

All Folders

🔍 Search folders…

All Folders	▶	📁 Enablement Dashboard Spring '24	▶
Created by Me	▶	📁 Enablement Dashboard Summer '24	▶
Shared with Me	▶	📁 PRM Dashboards	▶
Private Dashboards	▶		

📁 New Folder   Cancel   Select
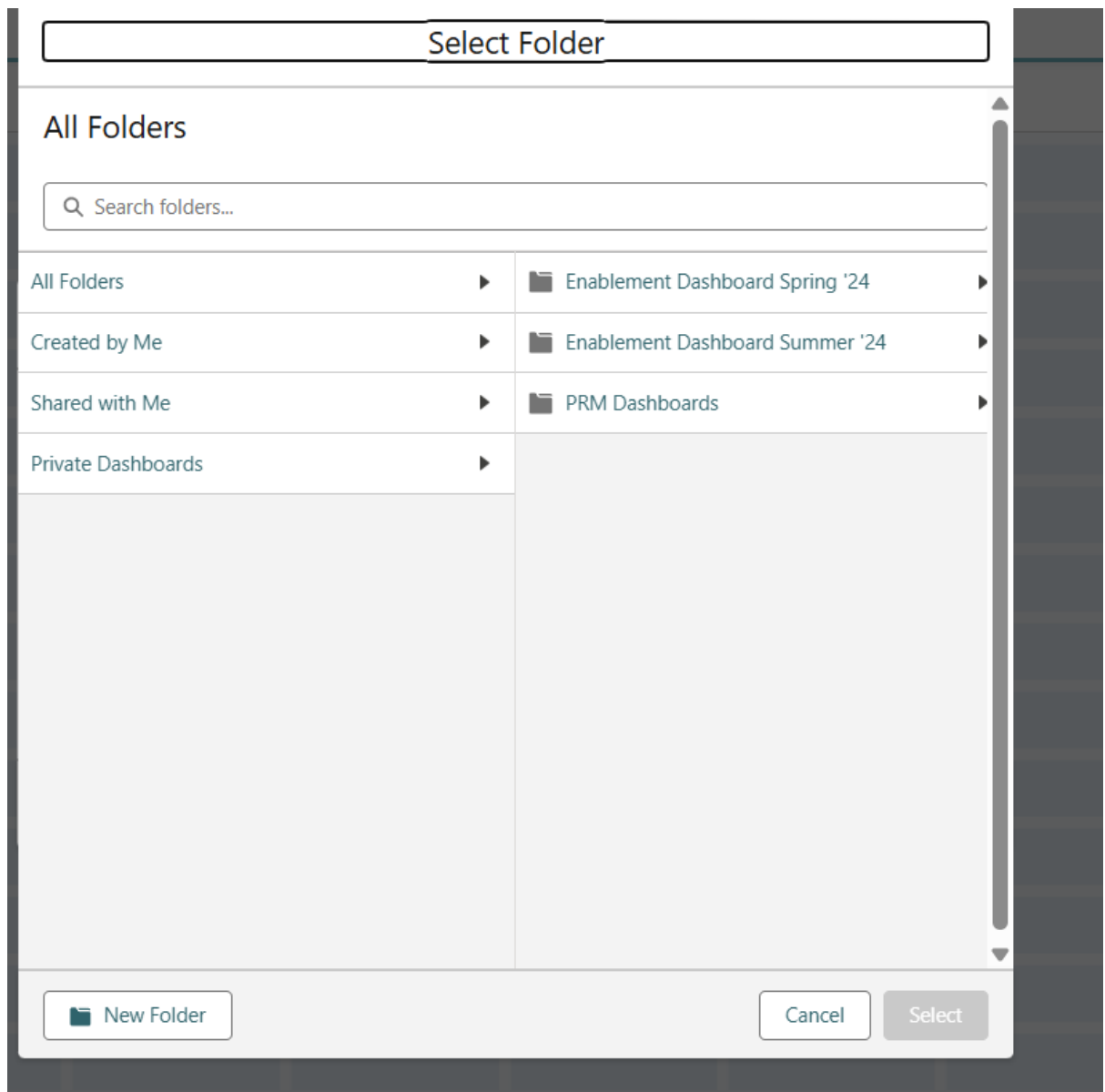
Step 4: Share & Security

- Open Dashboard → Click **Share**

- Share with Profiles / Roles:

    o   Sales Agents

    o   Property Managers

- Verify visibility by logging in as a user with assigned role

- Confirm users can view and interact with charts

Report: Leads
New Leads Report
Report to track all new leads with status and assigned agents.

Step 5: Expected Outcome

- Reports created for Leads and Property Visits

- Dashboard visualizes:

    o Leads per Agent

    o Lead Status distribution

    o Latest Property Visits

    o Optional Lead Funnel

- Users with correct permissions can view dashboards

- Management can track sales & engagement trends easily