Phase 9: Reporting, Dashboards & Security Review

This phase ensures stakeholders can analyze property sales performance and that the CRM is secure for business use.

Step 1: Reports (Tabular, Summary, Matrix, Joined)

Tabular Report → Simple list (e.g., All Properties created this month).

Summary Report → Group data (e.g., Leads grouped by Source).

Matrix Report → Compare across rows/columns (e.g., Properties by Location vs Agent).

Joined Report → Combine multiple objects (e.g., Properties with Visits & related Leads).

Step 2: Report Types

Create custom report types to join multiple custom objects.

Example: Build a report type for Property__c + Visit__c + Lead__c to see which leads visited which property.

Step 3: Dashboards

Build dashboards to visualize KPIs.

Example Components:

Pie chart: Properties by Status (Available, Sold).

Bar chart: Leads by Campaign.

Metric: Total Revenue from closed deals.

Step 4: Dynamic Dashboards

Create dashboards that show data based on the logged-in user.

Example: Sales Agent sees only their Leads & Properties, while Manager sees all team data.

Step 5: Sharing Settings

Go to Setup → Sharing Settings.

Set Org-Wide Defaults (OWD) (e.g., Properties = Private, Leads = Public Read/Write).

Create Sharing Rules so managers can view all properties, but agents only see their own.

Step 6: Field-Level Security (FLS)

Restrict sensitive fields (e.g., Property Owner Contact, Commission Rate).

Ensure only authorized roles can view/edit.

Step 7: Session Settings

Define timeouts, session security, and logout policies.

Example: Auto-logout after 30 mins inactivity.

Step 8: Login IP Ranges

Restrict logins to company-approved networks.

Example: Agents can only log in from India HQ IP range.

Step 9: Audit Trail

Track configuration changes.

Example: If a validation rule was modified, see who changed it and when.

✅ Outcome of Phase 9:

Stakeholders have clear, role-based insights through reports & dashboards.

Security policies ensure data protection and compliance.

CRM is both data-driven and secure for real estate operations.