

Property Management Application

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Phase 9: Reporting, Dashboards & Security Review

Salesforce Rental Management System - Project Report

1. Introduction

Role of Reporting & Dashboards in Salesforce

Reports and dashboards are essential business intelligence tools in Salesforce that transform raw data into actionable insights. In the Rental Management System:

- **Reports** provide detailed data analysis across Rental Units, Agreements, Statements, and Payments
- **Dashboards** offer visual, real-time snapshots of key performance indicators (KPIs)
- **Custom Report Types** enable complex data relationships to surface meaningful patterns
- **Dynamic Dashboards** ensure role-based data visibility for managers and property owners

Why Security Review is Critical in Real Projects

A comprehensive security review ensures:

- **Data Privacy:** Protecting sensitive tenant and payment information (PII, credit card details)
- **Compliance:** Meeting regulatory requirements like GDPR, PCI-DSS for financial data
- **Access Control:** Preventing unauthorized access to rental agreements and financial records
- **Audit Trail:** Maintaining accountability through configuration change tracking

- **Risk Mitigation:** Identifying and closing security vulnerabilities before production deployment

In rental management, protecting tenant financial data and ensuring only authorized personnel access sensitive information is not just best practice—it's a legal requirement.

2. Reports

2.1 Tabular Report

Purpose: Display a straightforward list of records with selected fields in columns.

Example Use Case: List all Payments with Payment Date, Amount, and Status

Steps to Create:

1. Navigate to **Reports Tab** → Click **New Report**
2. Select **Payments** as the Report Type
3. Choose **Tabular Format**
4. Add columns:
 - Payment No (Name)
 - Payment Date (Payment_Date__c)
 - Amount (Amount__c)
 - Status (Status__c)
 - Statement (Statement__c)
5. Apply filters (e.g., Payment Date = THIS_MONTH)
6. Click **Run Report** → **Save**

Key Features:

- Simple row-and-column format
- Best for detailed record lists

- Easy to export to Excel
- Quick filtering and sorting capabilities

REPORT ▾
New Rental Units Report Rental Units

Outline Filters 1

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Record ...

a00gl00000Kish9
Rental Unit ID

Rental Unit ID ▾	Rental Unit: Rental Unit ▾	Air Conditioning ▾	Garage ▾	Laundry ▾	Monthly Rent ▾
a00gl00000Kish9 (1)	jaisutram bhargav	Window Unit	Attached	In-unit hook-ups	\$20,000.00
Subtotal					\$20,000.00
Total (1)					\$20,000.00

2.2 Summary Report

Purpose: Group records and calculate subtotals, averages, or other aggregate functions.

Example Use Case: Total Payments grouped by Rental Agreement

Steps to Create:

1. Create a new Report with **Payments** Report Type
2. Select **Summary Format**
3. Add grouping: Group rows by **Statement > Rental Agreement** (Statement__c.Rental_Agreement__c)
4. Add columns:
 - Payment Date (Payment_Date__c)
 - Amount (Amount__c)
 - Status (Status__c)
5. Add Summary Field: **SUM of Amount** at Rental Agreement level
6. Optionally add chart (Bar Chart showing Total Payment by Rental Agreement)
7. **Run Report → Save**

Key Features:

- Calculates totals, averages, min/max values
 - Multiple grouping levels (up to 3)
 - Ideal for financial summaries and KPI tracking
 - Supports inline charting
-

2.3 Matrix Report

Purpose: Cross-tabulate data with both row and column groupings for multi-dimensional analysis.

Example Use Case: Monthly Rent distribution across Unit Status categories

Steps to Create:

1. Create new Report with **Rental Units** Report Type
2. Select **Matrix Format**
3. Configure groupings:
 - **Row Grouping:** Unit Status (Unit_Status__c) → e.g., Available, Occupied, Maintenance
 - **Column Grouping:** Property Type (Property_Type__c) → e.g., Apartment, House, Condo
4. Add Summary Field: **Average of Monthly Rent** (Monthly_Rent__c)
5. Customize format: Show Grand Totals for both rows and columns
6. Add conditional highlighting (e.g., highlight units with rent > \$2000)
7. **Run Report → Save**

Key Features:

- Two-dimensional data analysis
- Intersection-based calculations
- Perfect for comparing metrics across categories

- Advanced visual insights with color coding
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2.4 Joined Report

Purpose: Combine multiple report blocks with different data sources into a single view.

Example Use Case: Compare Statements (billing) with Payments (collections) side-by-side

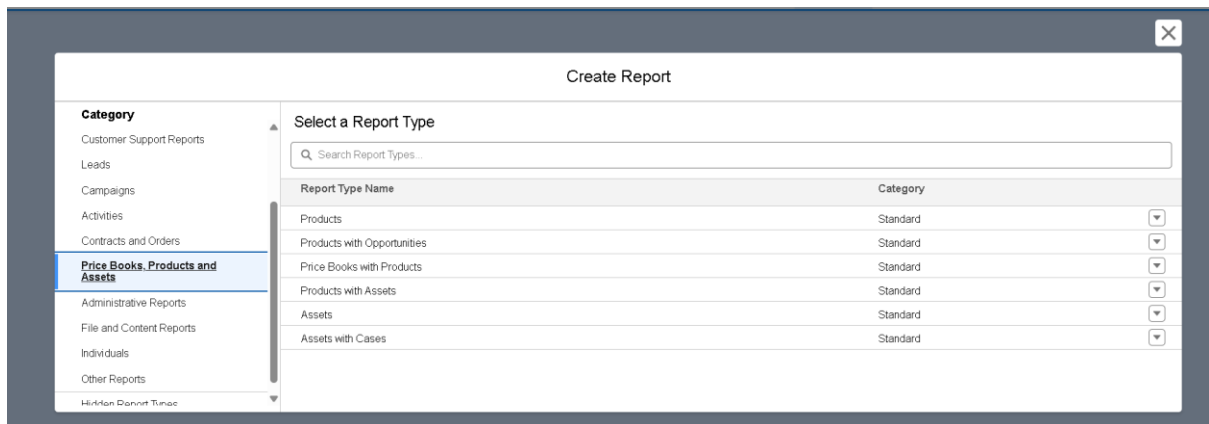
Steps to Create:

1. Create new Report → Select **Joined Report** format
2. **Block 1 - Statements:**
 - Report Type: Statements
 - Group by: Rental Agreement (Rental_Agreement__c)
 - Add columns: Statement Date, Total Amount, Due Date, Status
 - Add Summary: SUM of Total Amount
3. **Block 2 - Payments:**
 - Report Type: Payments with Statements
 - Group by: Statement > Rental Agreement
 - Add columns: Payment Date, Amount, Status
 - Add Summary: SUM of Amount
4. Configure **Common Grouping**: Rental Agreement (to align both blocks)
5. Add a **Formula Field**: Outstanding Balance = Block1.Total_Amount - Block2.Amount_Paid
6. **Run Report** → **Save**

Key Features:

- Compare related datasets in unified view
- Up to 5 report blocks

- Custom formulas across blocks
- Powerful for reconciliation and variance analysis



3. Custom Report Types

Why Custom Report Types?

Standard report types may not include all object relationships needed for complex rental management reporting. Custom report types allow you to:

- Define parent-child-grandchild relationships
- Include related objects not available in standard types
- Control which fields appear in report builder
- Create organization-specific reporting structures

Example: Rental Agreement with Statements and Payments

Business Need:

Generate comprehensive reports showing:

- Each Rental Agreement
- Associated Statements (billing)
- Payments received against those statements

Steps to Create Custom Report Type:

1. Navigate to **Setup** → **Report Types** → **New Custom Report Type**

Custom Report Types

New Custom Report Type

1 Define the Custom Report Type

Select Primary Object

Select the object that is the focus of reports created with this report type.

* Primary Object

Select an object...

Select a primary object.

Details

* API Name

2. Primary Object Configuration:

- Primary Object: Rental Agreement (Rental_Agreement__c)
- Report Type Label: Rental Agreements with Statements and Payments
- Report Type Name: Rental_Agreements_Statements_Payments
- Description: "Comprehensive view of rental agreements, billing statements, and payment history"
- Category: Rental Management

3. Define Object Relationships:

- **A to B Relationship:** Rental Agreement → Statements
 - Relationship: "Each Rental Agreement may or may not have related Statements"
- **B to C Relationship:** Statements → Payments
 - Relationship: "Each Statement may or may not have related Payments"

4. Field Selection:

- From Rental Agreement: Include Agreement Status, Start/End Dates, Rental Amount, Balance
- From Statement: Include Statement Date, Total Amount, Due Date, Status

- From Payment: Include Payment Date, Amount, Status, Payment Method

5. Set Layout Options:

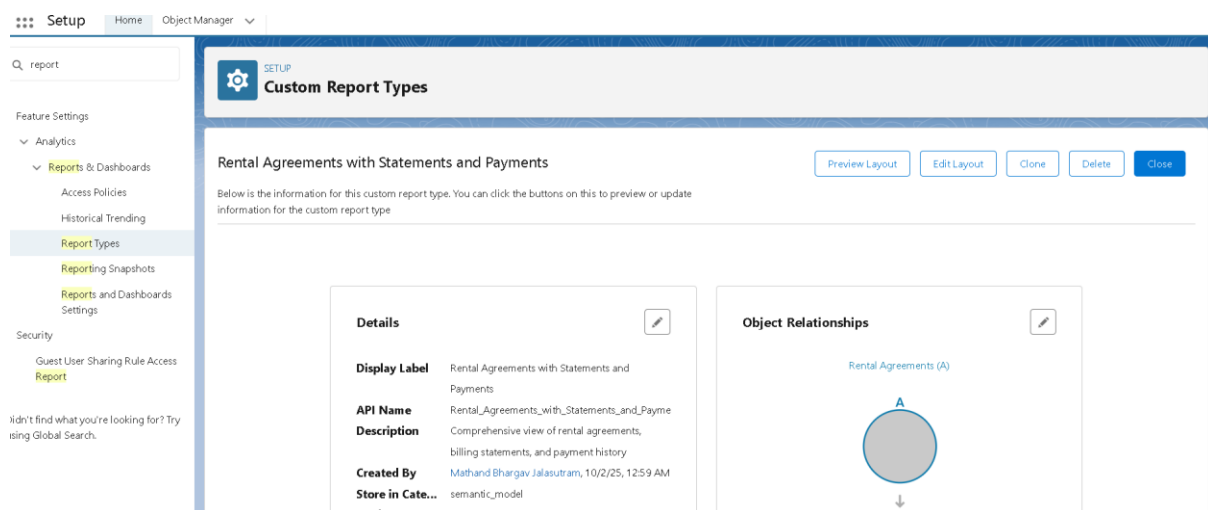
- Choose which fields appear by default in report builder
- Set field categories for easy navigation

6. Save & Deploy

Using the Custom Report Type:

Once created, users can:

- Build reports showing unpaid balances across all agreements
- Track payment history per rental unit
- Identify overdue statements by tenant
- Generate financial summaries for tax purposes



The screenshot shows the Salesforce Setup interface for Custom Report Types. The left sidebar includes a search bar and navigation links for Setup, Home, and Object Manager. The main content area is titled 'Custom Report Types' and displays the configuration for a report type named 'Rental Agreements with Statements and Payments'. The report type details are shown in a table, and the object relationships are visualized as a diagram.

Details	
Display Label	Rental Agreements with Statements and Payments
API Name	Rental_Agreements_with_Statements_and_Payme
Description	Comprehensive view of rental agreements, billing statements, and payment history
Created By	Mathand Bhargav Jalasutram, 10/2/25, 12:59 AM
Store in Cate...	semantic_model
Deployment	In Deployment

Object Relationships

Rental Agreements (A)

A diagram showing a circle labeled 'A' with a downward arrow pointing to a box labeled 'Rental Agreements (A)'.

4. Dashboards

Purpose of Dashboards

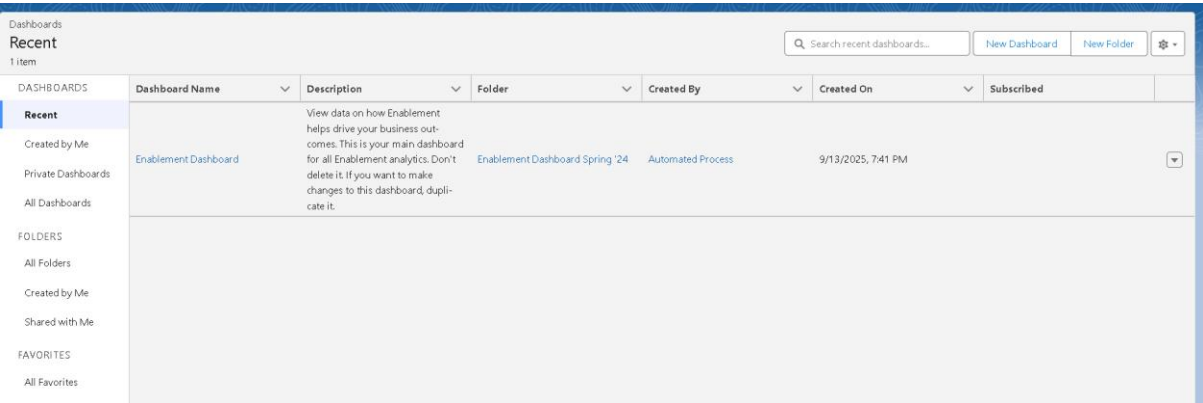
Dashboards provide real-time visual analytics, transforming report data into interactive charts, graphs, and metrics. For rental management:

- Track occupancy rates across properties
- Monitor payment collection vs outstanding balances
- Identify maintenance requests and unit availability
- Analyze revenue trends by property type

Steps to Create a Rental Management Dashboard

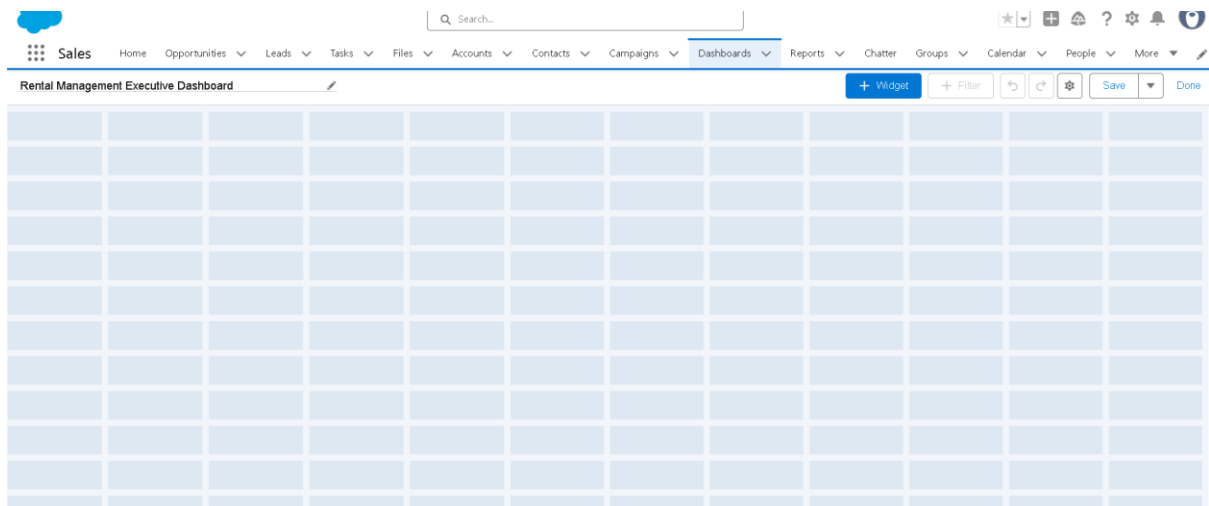
4.1 Dashboard Creation Process

1. Navigate to **Dashboards Tab** → Click **New Dashboard**



2. **Dashboard Configuration:**

- Name: Rental Management Executive Dashboard
- Folder: Rental Management Reports
- Description: "Key metrics for rental units, agreements, and financial performance"



3. **Add Components** (see sections below for each component)

4. **Set Refresh Schedule:**

- Manual refresh or scheduled (daily/weekly)
- For real-time needs: Enable auto-refresh

5. **Configure Dashboard Properties:**

- Dashboard Type: Dynamic (see Section 5)
- Running User: Set to logged-in user or specific user
- Mobile-ready: Enable for mobile access

6. **Save & Share** with appropriate users/roles

4.2 Dashboard Components

Component 1: Pie Chart - Unit Status Distribution

Purpose: Visualize rental unit availability at a glance

Configuration:

- **Source Report:** Rental Units grouped by Unit Status
- **Component Type:** Pie Chart
- **Grouping:** Unit_Status__c (Available, Occupied, Maintenance, Under Renovation)

- **Value:** Record Count
- **Display Options:**
 - Show percentages
 - Show legend with color codes
 - Total units in center (if donut chart)

Business Insight: Quickly identify vacancy rates and units requiring attention

Component 2: Bar Chart - Total Payments by Rental Agreement

Purpose: Track payment collection across active rental agreements

Configuration:

- **Source Report:** Summary Report of Payments grouped by Rental Agreement
 - **Component Type:** Horizontal Bar Chart
 - **Grouping:** Statement > Rental Agreement (Rental_Agreement__c)
 - **Value:** SUM of Amount (Amount__c)
 - **Display Options:**
 - Sort by value (highest to lowest)
 - Show values on bars
 - Color code by payment status if possible
-

Component 3: Gauge - Active Agreement Balance vs Target

Purpose: Monitor outstanding balances against collection targets

Configuration:

- **Source Report:** Summary Report of Rental Agreements
- **Component Type:** Gauge

- **Metric:** SUM of Balance (Balance__c) for Active Agreements
- **Ranges:**
 - Green (0 - \$5,000): Excellent - minimal outstanding balance
 - Yellow (\$5,000 - \$15,000): Caution - moderate balances
 - Red (\$15,000+): Critical - aggressive collection needed
- **Target:** \$10,000 (example target for total outstanding)
- **Display:** Show current value and percentage to target

Business Insight: At-a-glance financial health indicator for rental portfolio

Additional Recommended Components:

Component 4: Table - Overdue Statements

- List statements past due date with balance
- Quick action links to statements

Component 5: Line Chart - Monthly Revenue Trend

- Payment collection over last 12 months
- Compare to rental amount billed

Component 6: Metric - Key Statistics

- Total Active Agreements
- Total Monthly Recurring Revenue
- Average Occupancy Rate
- Outstanding Balance

