Salesforce Project: Smart Property Portal – Real Estate Customer Engagement & Lead Conversion

Phase 9: Reporting, Dashboards & Security Review

⬛ Goal: Monitor business performance and ensure data security.

1. Reports

• Property Utilization Reports – Track how many days a property is listed or rented.
• Revenue by Property Type – Analyze income generated from apartments, villas, and commercial spaces.
• Lead Conversion Reports – Measure the percentage of inquiries converted into confirmed sales or rentals.

2. Report Types

• Custom Report Type: Property + Customer Leads + Transactions.
• Example: Identify which property type generates the highest conversions.

3. Dashboards

• Property Engagement Dashboard – Visualize property views, inquiries, and conversions.
• Manager's Revenue Dashboard – Summarize sales/rental revenue per agent or property type.
• Lead Performance Dashboard – Track sales agents' lead follow-ups and closure rates.

4. Dynamic Dashboards

• Each Agent should see only their assigned leads and property deals.
• Management views should provide a consolidated company-wide picture.

5. Sharing Settings

• Properties: Public Read Only – visible to all.
• Leads/Deals: Private – only assigned agent and managers can access.

6. Field Level Security

• Restrict sensitive customer details (e.g., ID Proof, Bank Info) from sales agents.
• Allow only authorized roles (e.g., Finance Manager, Admin) to access financial fields.

7. Session Settings

• Implement auto-logout after 30 minutes of inactivity for security.
• Enable two-factor authentication for remote access.

8. Login IP Ranges

• Restrict access to office IP ranges for agents.
• Allow managers to log in from trusted remote IPs.

9. Audit Trail

• Maintain a record of changes to property listings, lead assignments, and financial records.

• Enable Field History Tracking for critical fields like deal amount, property status, and agent assignment.