PHASE 6) Creating Reports

Report 1: Rentals Past Due

Setup Process:

1. Report Type: Select "Rentals"
2. Report Format: Tabular Report

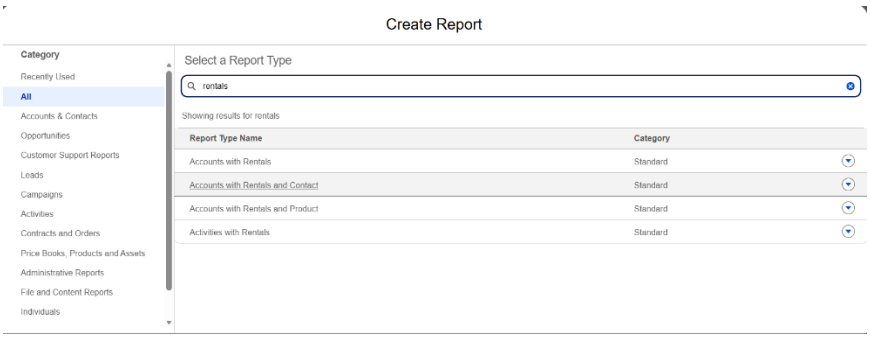
I use a standard report type, did not need create a custom one, the standard record type with relationship between the Account Object, Contact Object and Rentals Object gives m

Account information (Wedding parties/customers)

Contact details (Individual renters)

All Rental custom fields

Relationship data between all three object



I planned on creating a report that show all rentals that have not been returned after the due back date. On this report we will display the following field:

Account name

Last modified date

Rentals name

Last name

Rental status

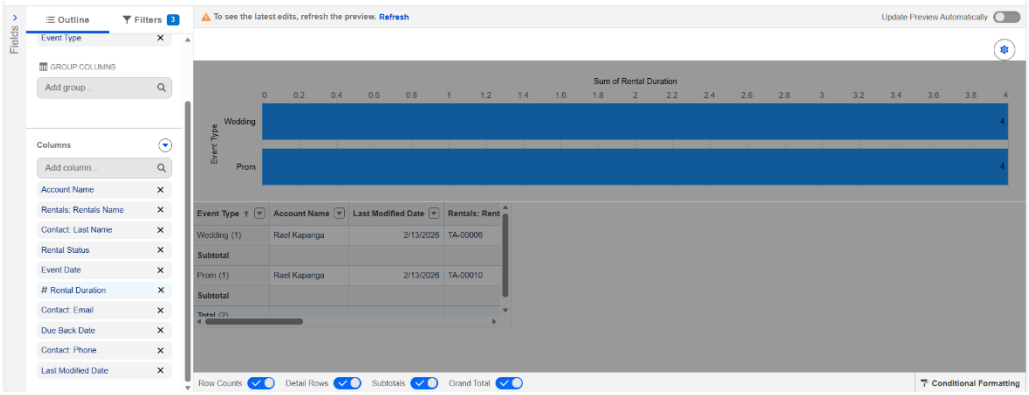
phone

email

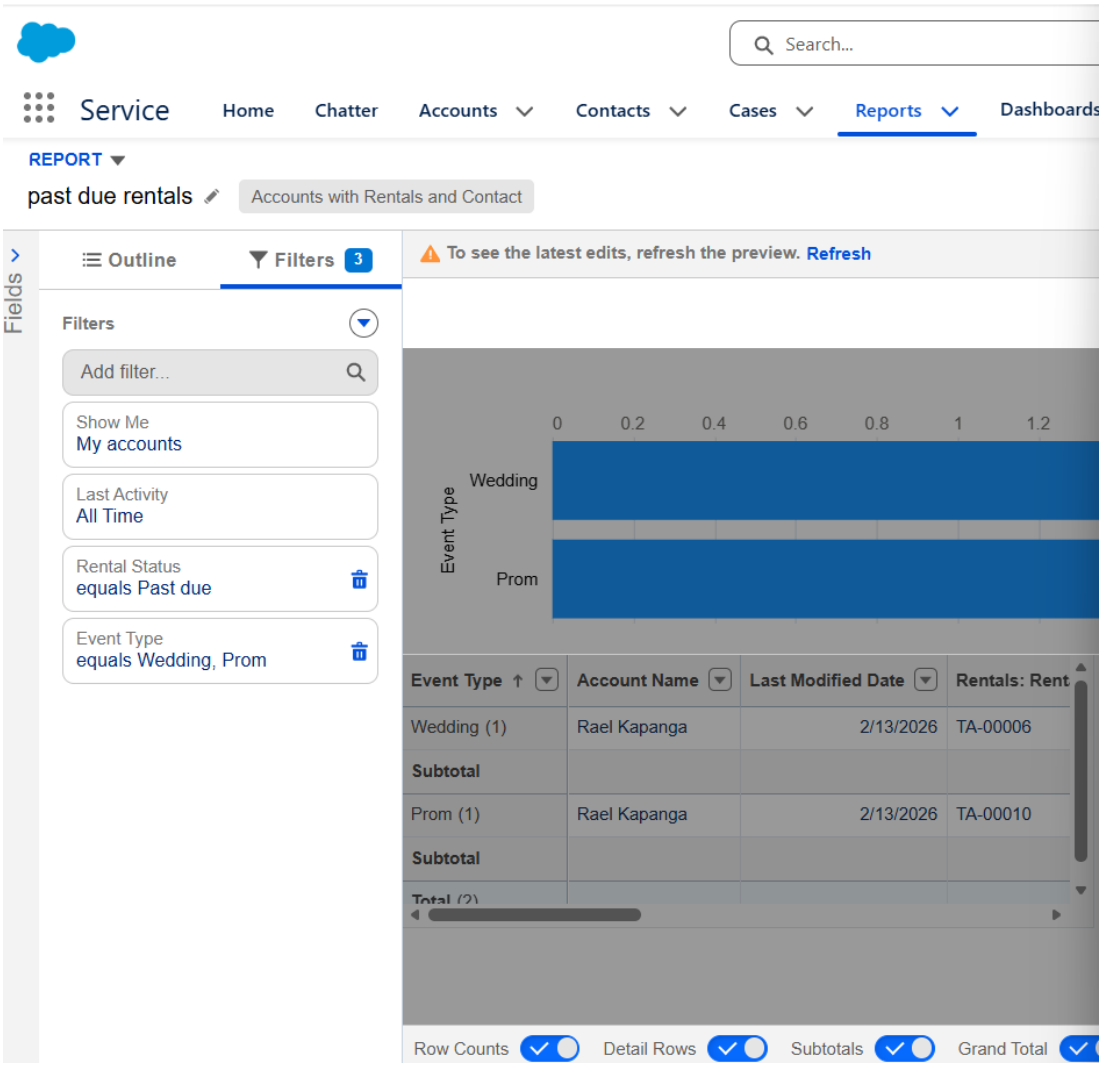
Event date

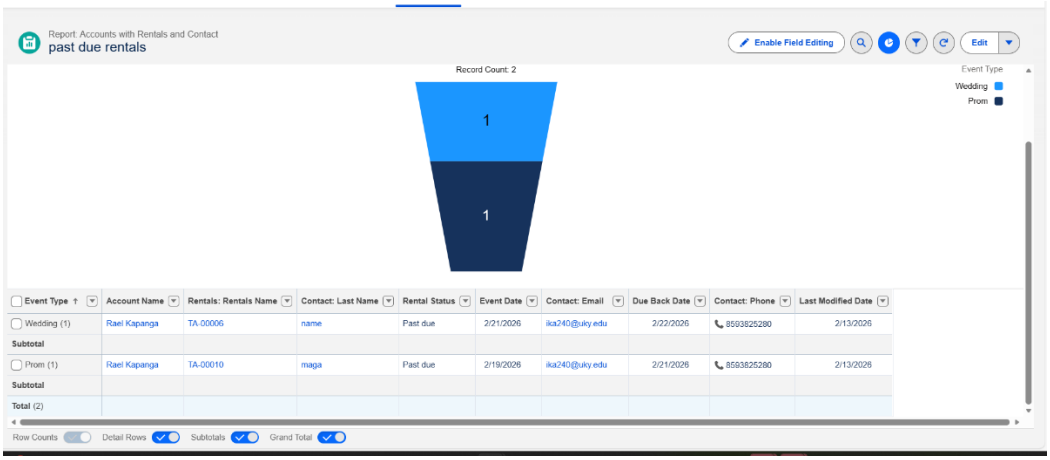
Due back date

Rental duration



Filter: rentals status equals past due and I will group by event type to analyze which event does not return most of the rentals.





Record 2: Most rented style

This record will show the most rented style between slim fit, classic fit and modern fit

Record type: Account, Contact with rental

Filter: I will group them by style and record type to show how , many rental there are by style

Group rows: Fit Style

Group Type : Record Type

Filed displayed

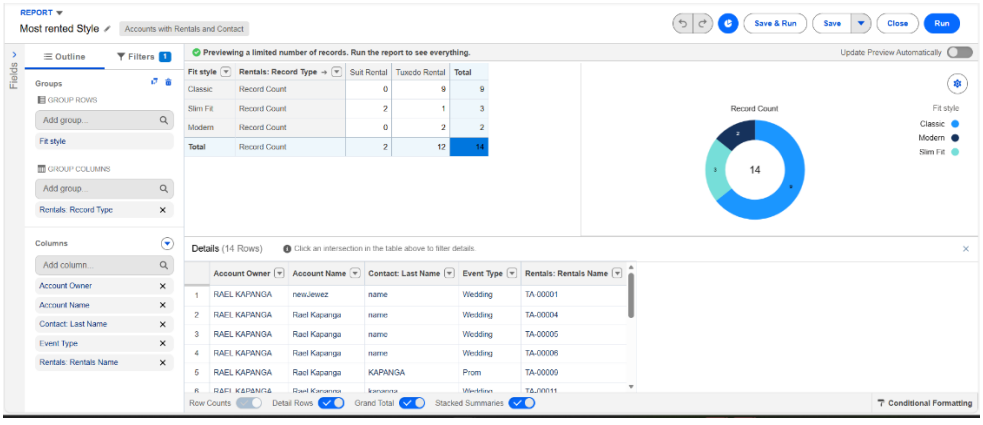
Account Owner

Account name

Last Name

Event type

Rentals name



Record 3: Returned Rentals

This report will help overview returned Rentals, and all will be grouped by account and due back date.

Field displayed in the report:

Account owner

Last Name

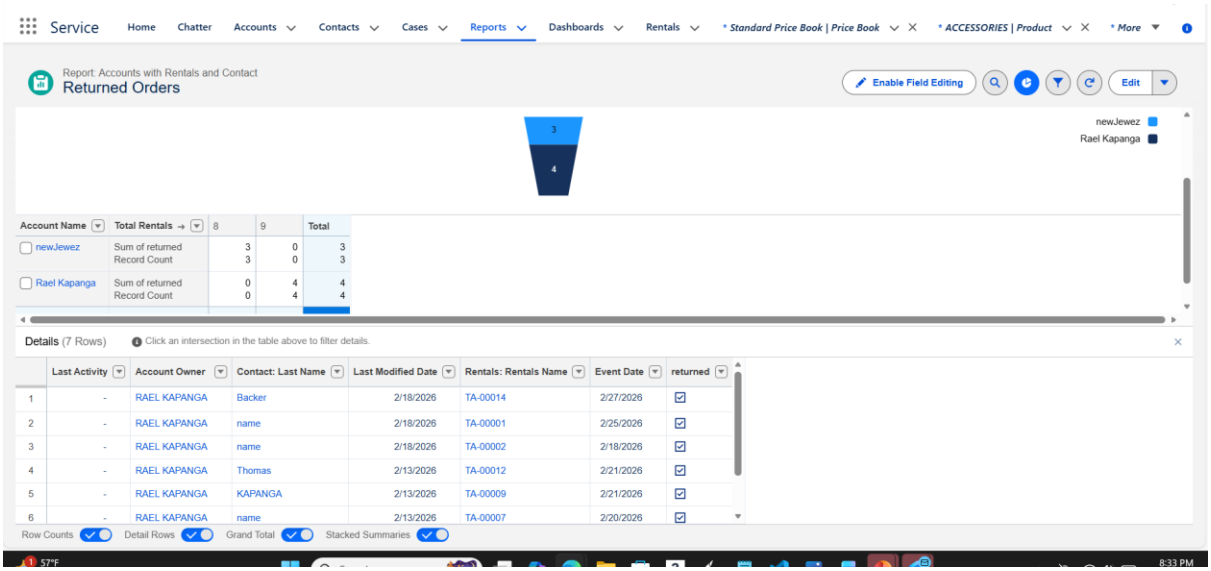
Rentals Name

Totals Rentals by account

Returned check box

Filter: Rental Status equals Returned, returned check box equals true

Adding rental total to the group columns and account name to Group rows will give me more details on how many rentals an account has and how many have been returned so far.



Record 4: Ready Pickups

This report will display all rentals that are ready to be picked up. With this report, salesman will have an overview on all ready rentals and being able to update customer if their rental is ready for pick up.

Filter apply to the report: rental status equals Ready For Pick up

Field display:

Account owner

Account name

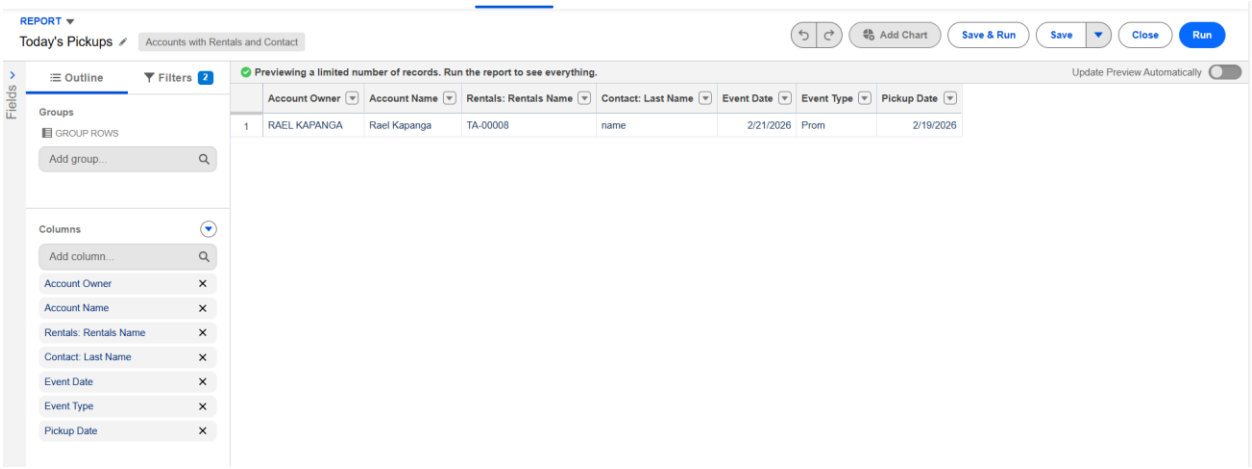
Last name

Rental names

Event date

Event type

Pick up date



Report 5: Placed orders

This report will display orders that have just been placed and all of them grouped by event type

Filter: rental status equals order placed

Field included

Account name

Rental name

Last name

Status

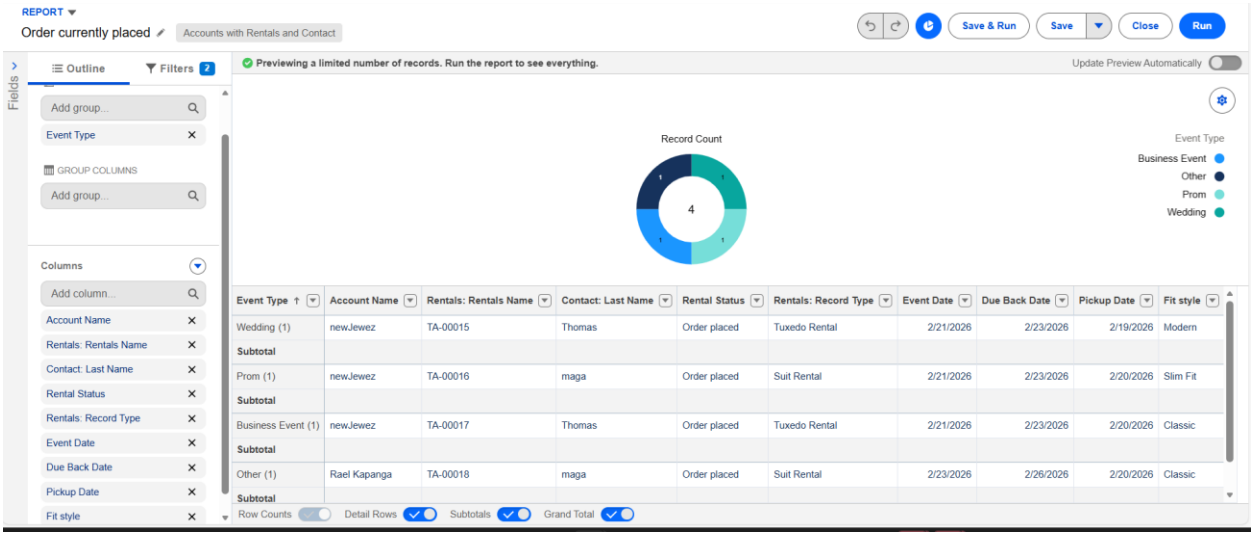
Record type

Event date

Due back date

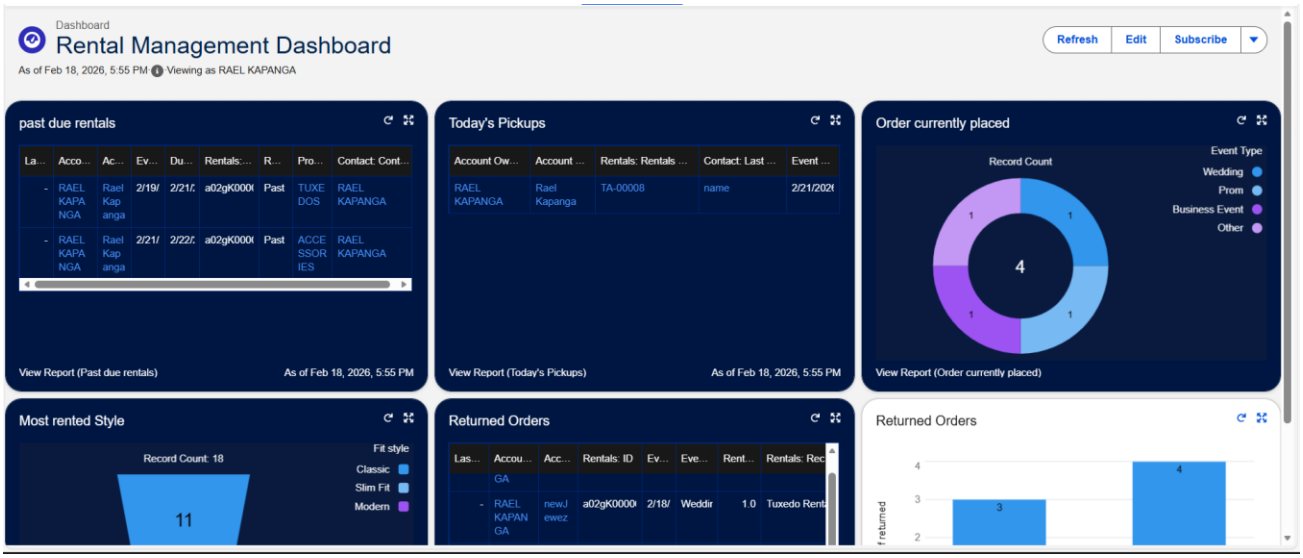
Pick up date

Fit style



PHASE 7) Creating Dashboard

Dashboard name: Rental Management Dashboard



The Rental Operations Dashboard provides real-time operational visibility into rental activities, overdue rentals, rentals that have been return, rental orders that been placed, rental that are ready to be picked up, most rented style and returned orders, I always add chart component like donut, table, funnel and vertical bar chart, having each of them displaying showing values to enhanced data visibility. It supports proactive decision-making and improves customer service.