

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 to create a custom one, the standard record type with relationship between the Account Object, Contact Object and Rentals Object gives me

Account information (Wedding parties/customers)

Contact details (Individual renters)

All Rental custom fields

Relationship data between all three objects

The screenshot shows the 'Create Report' interface. On the left, there's a sidebar with a 'Category' section and a 'Recently Used' section. The 'All' category is selected. Below it is a list of various report categories: Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, and Individuals. The main area is titled 'Select a Report Type' with a search bar containing 'rentals'. Below the search bar, it says 'Showing results for rentals'. A table lists report types under 'Report Type Name': 'Accounts with Rentals' (Category: Standard), 'Accounts with Rentals and Contact' (Category: Standard), 'Accounts with Rentals and Product' (Category: Standard), and 'Activities with Rentals' (Category: Standard).

I planned on creating a report that shows 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

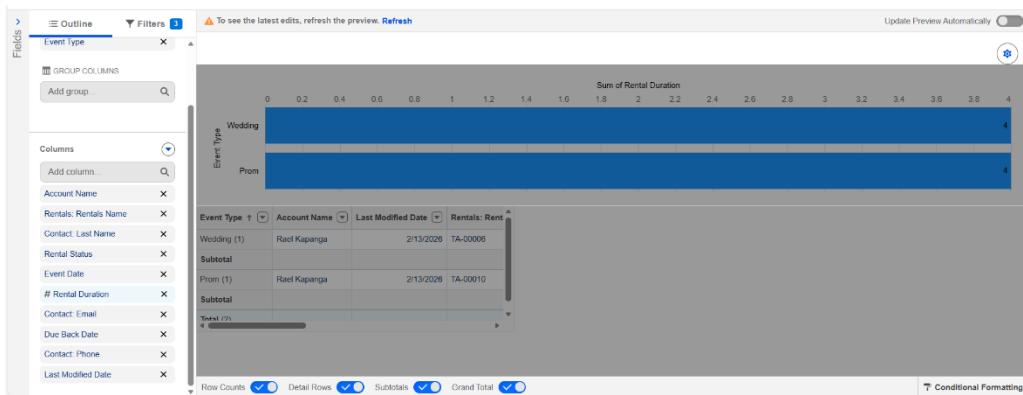
Phone

Email

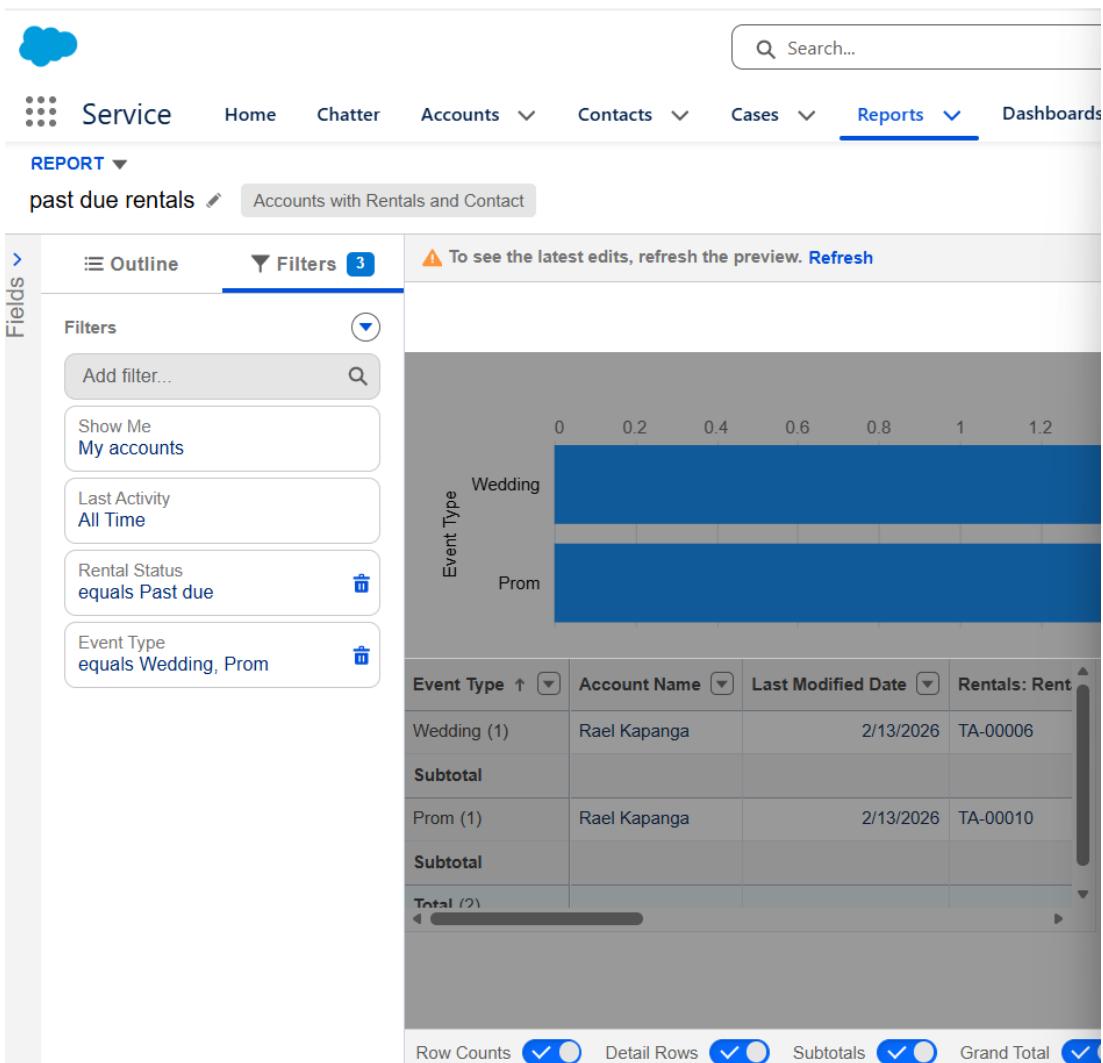
Event date

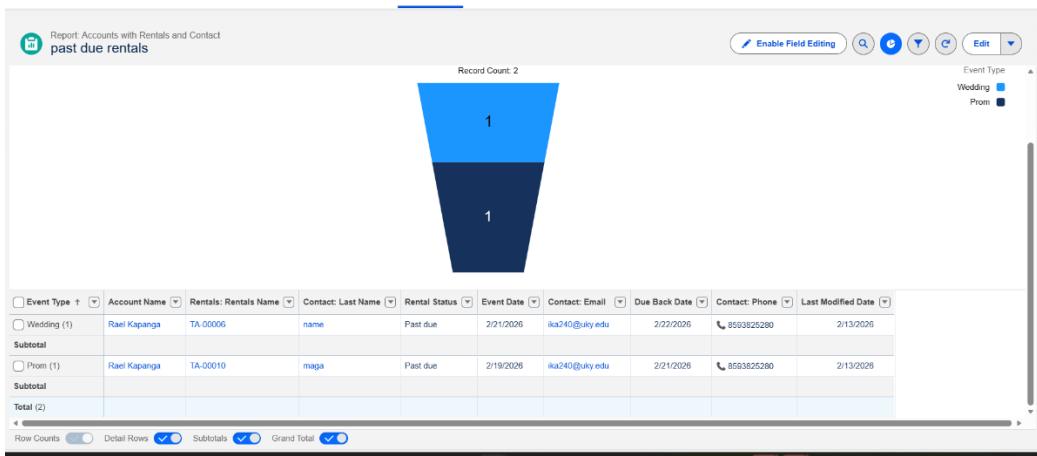
Due back date

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

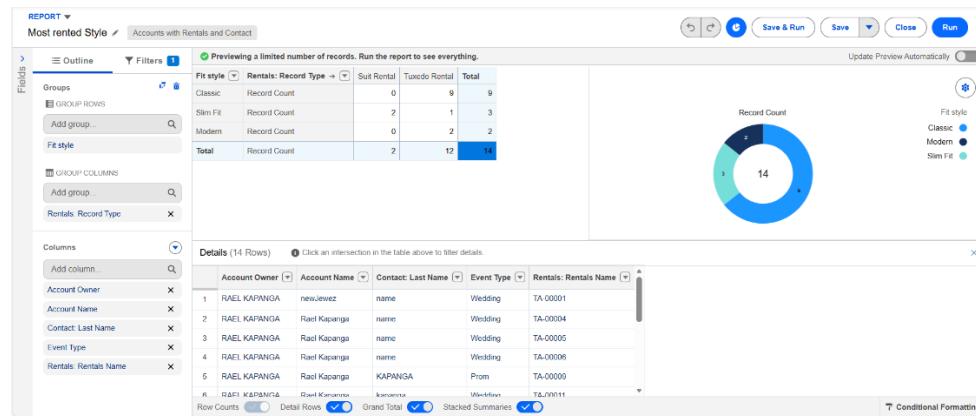
Account Owner

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.

Account Name	Total Rentals	8	9	Total
<input type="checkbox"/> newJewez	Sum of returned Record Count	3	0	3
<input type="checkbox"/> Rael Kapanga	Sum of returned Record Count	0	4	4

Last Activity	Account Owner	Contact: Last Name	Last Modified Date	Rentals: Rentals Name	Event Date	returned
1	-	RAEL KAPANGA	Backer	2/18/2026 TA-00014	2/27/2026	<input checked="" type="checkbox"/>
2	-	RAEL KAPANGA	name	2/18/2026 TA-00001	2/25/2026	<input checked="" type="checkbox"/>
3	-	RAEL KAPANGA	name	2/18/2026 TA-00002	2/18/2026	<input checked="" type="checkbox"/>
4	-	RAEL KAPANGA	Thomas	2/13/2026 TA-00012	2/21/2026	<input checked="" type="checkbox"/>
5	-	RAEL KAPANGA	KAPANGA	2/13/2026 TA-00009	2/21/2026	<input checked="" type="checkbox"/>
6	-	RAEL KAPANGA	name	2/13/2026 TA-00007	2/20/2026	<input checked="" type="checkbox"/>

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

The screenshot shows a report interface with the title "REPORT" and "Today's Pickups". The report preview displays one record:

Account Owner	Account Name	Rentals: Rentals Name	Contact: Last Name	Event Date	Event Type	Pickup Date
RAEL KAPANGA	Rael Kapanga	TA-00008	name	2/21/2026	Prom	2/19/2026

The left sidebar shows fields grouped by "Groups" (Group Rows) and "Columns". Fields listed include Account Owner, Account Name, Rentals: Rentals Name, Contact: Last Name, Event Date, Event Type, and Pickup 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

The screenshot shows a Salesforce report interface. At the top, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'. Below the header, there's a preview message: 'Previewing a limited number of records. Run the report to see everything.' On the left, the 'Fields' sidebar is open, showing sections for 'Event Type', 'GROUP COLUMNS', and 'Columns'. The 'Columns' section lists fields like Account Name, Rentals: Rentals Name, Contact: Last Name, Rental Status, Rentals: Record Type, Event Date, Due Back Date, Pickup Date, and Fit style. A donut chart titled 'Record Count' is displayed at the top right, showing four segments. The main table below has columns for Event Type, Account Name, Rentals: Rentals Name, Contact: Last Name, Rental Status, Rentals: Record Type, Event Date, Due Back Date, Pickup Date, and Fit style. The data shows four rows corresponding to the donut chart segments: Wedding (1), Prom (1), Business Event (1), and Other (1). Each row includes a 'Subtotal' row.

PHASE 7) Creating Dashboard

Dashboard name: Rental Management Dashboard

The dashboard consists of five cards:

- past due rentals:** Shows two rows of rental data. The first row is for a Wedding dress (Style: TUXE DOS) and the second for a Prom dress (Style: ACCE SSOR IES).
- Today's Pickups:** Shows a single pickup entry for a Business Event dress (Style: RUEL KAPANGA).
- Order currently placed:** A donut chart showing the distribution of event types: Wedding (blue), Prom (light blue), Business Event (purple), and Other (pink).
- Most rented Style:** A funnel chart showing the count of 18 dresses rented, with 11 dresses in the final stage.
- Returned Orders:** A bar chart showing the count of 4 returned orders, with 3 in the first stage and 1 in the second.

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.

