SALESFORCE PROJECT

PROJECT TITTLE :RealEstate CRM (Property & Agent Management)

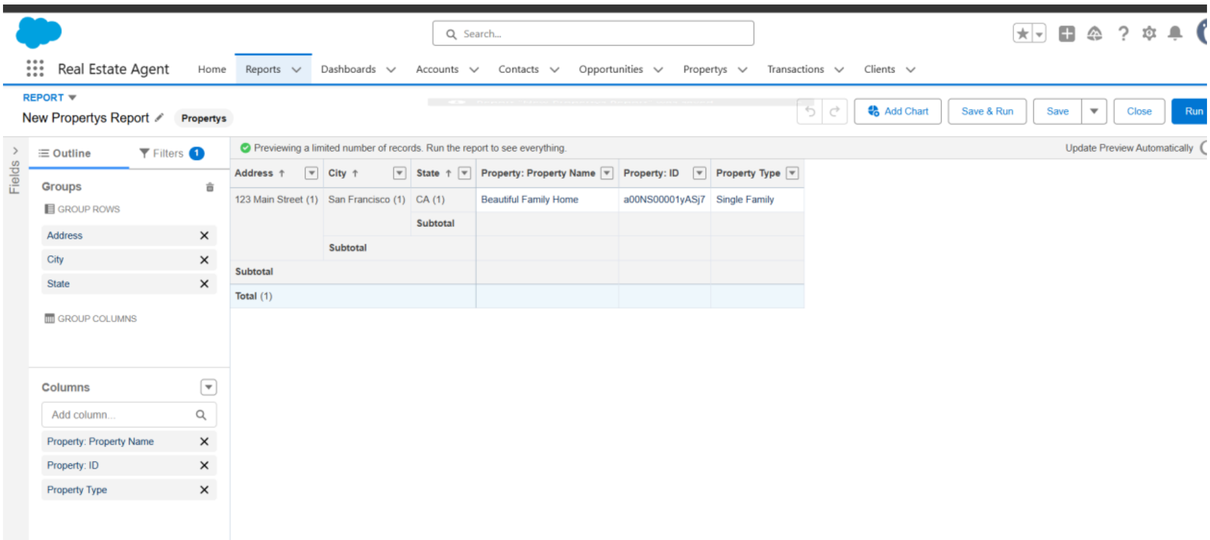
PROBLEM: Real estate firms struggle with property listings, agent performance, and client leads. Solution

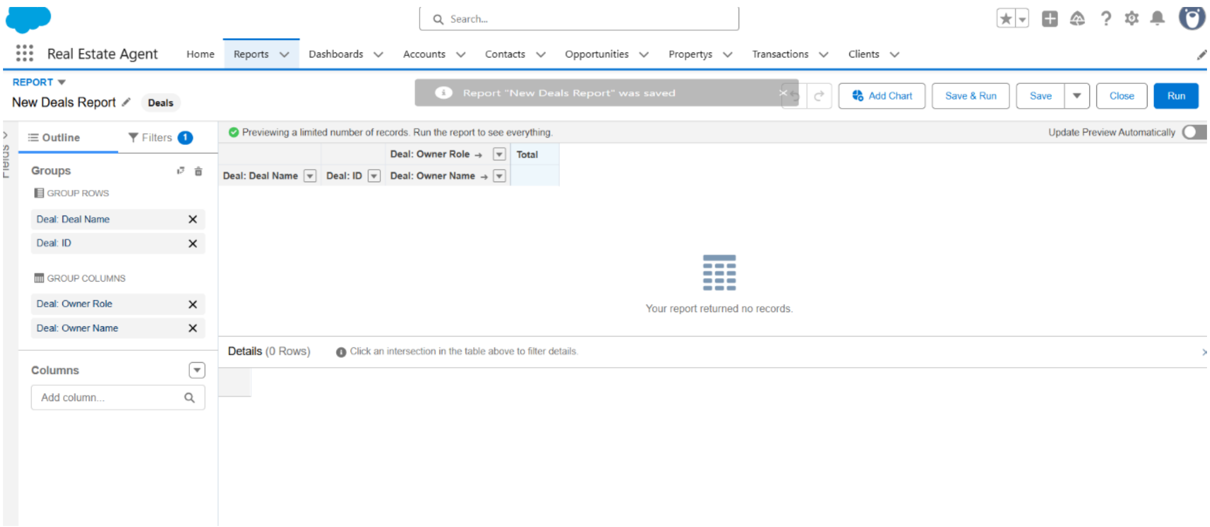
# Phase 9: Reporting, Dashboards & Security Review

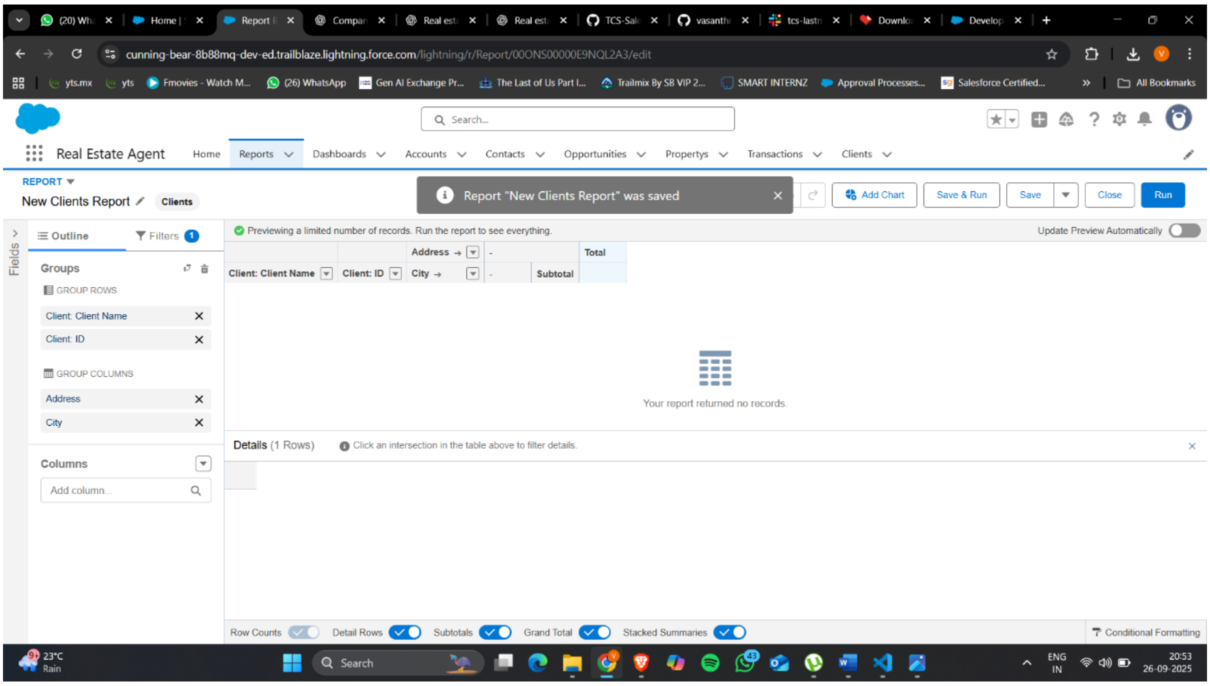
## A. Reports

**Purpose:** Extract actionable insights from Salesforce data.

| Report Name | Object | Type | Description |
|---|---|---|---|
| Properties by Status | Property__c | Summary | Count of Available, Sold, Rented properties per city/region |
| Deals Pipeline | Deal__c | Matrix | Deals grouped by Stage and Agent |
| Client Leads | Client__c | Tabular | List of clients, assigned agent, lead status |







## Report Features:

- **Filters:** E.g., Stage = Open or Closed, Status = Available
- **Grouping:** By Agent, Property Type, Region
- **Formulas:** Total Amount, Average Deal Size
- **Conditional Highlighting:** Highlight high-value deals

## B. Report Types

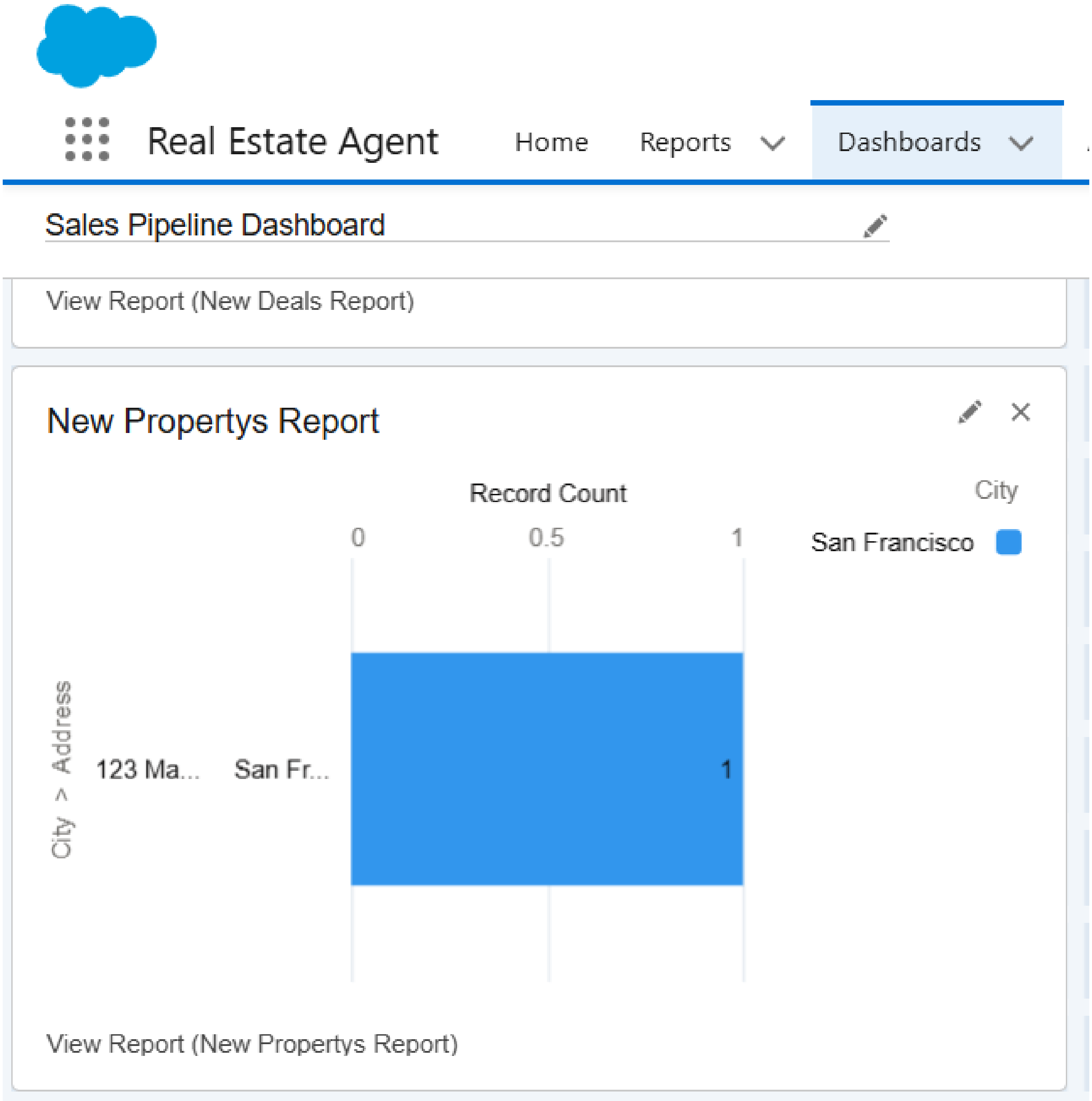
- **Standard Report Types:** Available for standard objects
- **Custom Report Types:**
  - Deal__c with related Contract__c
  - Property__c with related Deal__c and Visits
  - Client__c with related Deal__c and Visits

## C. Dashboards

**Purpose:** Visual representation of metrics for quick decision-making

**Suggested Dashboards**

1. **Sales Pipeline Dashboard**
   - Components:
     - Funnel chart: Deals by Stage
     - Bar chart: Deals per Agent
     - Metric: Total Pipeli
2. **Agent Performance Dashboard**
   - Components:
     - Bar chart: Deals Closed per Agent
     - Pie chart: Revenue contribution per agent
     - Table: Top Properties sold/rented
3. **Property Insights Dashboard**
   - Components:
     - Map: Properties available per city/region
     - Donut chart: Property type distribution
     - Table: High-value properties
4. **Contract Status Dashboard**
   - Components:
     - Donut chart: Contracts by Status (Draft, Sent, Signed)
     - Metric: Total contracts signed this month



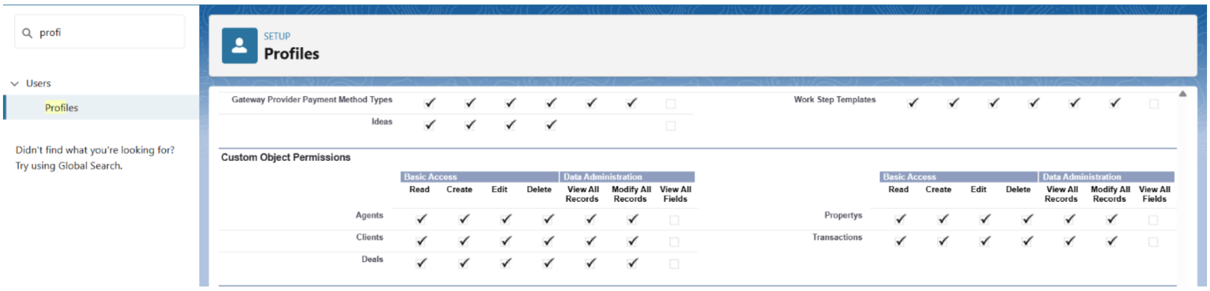

## D. Dynamic Dashboards

- **Use Case:** Each agent/manager sees only relevant data
- Setup → Dashboard → Dynamic → Run as logged-in user
- Example:
  - Sales Manager sees all team deals
  - Individual Agent sees only their deals
  -

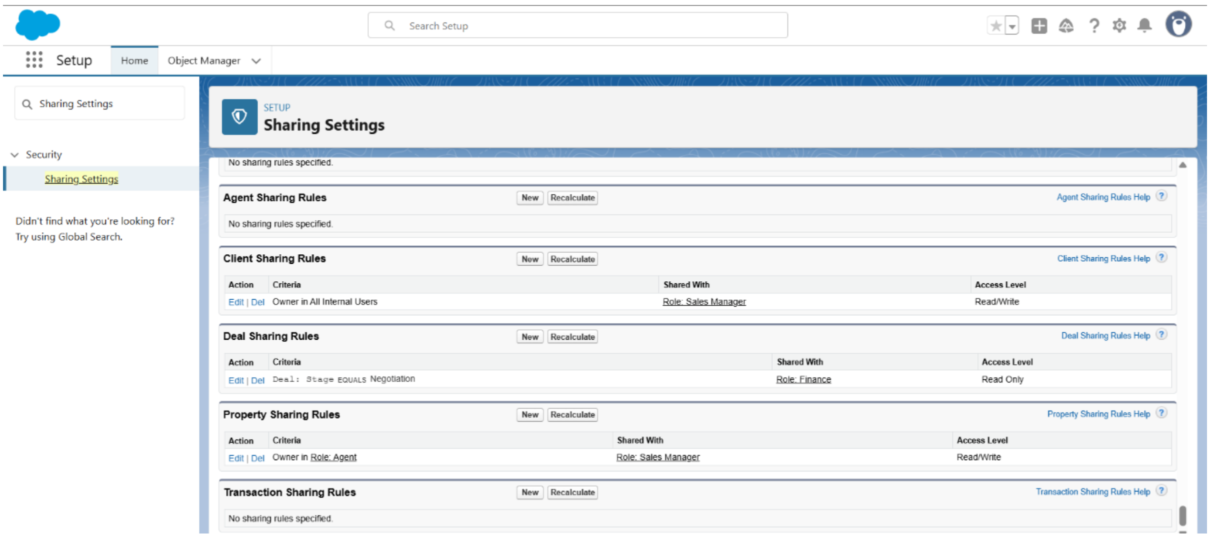
# E. Sharing Settings & Security Review

**Purpose:** Ensure proper access and data security.

1. **Review Object & Field-Level Security**
    - Profiles & Permission Sets define read/write access
    - Example:
        - Agent: Read/write own Deals, read-only other Deals
        - Sales Manager: Read/write all team Deals



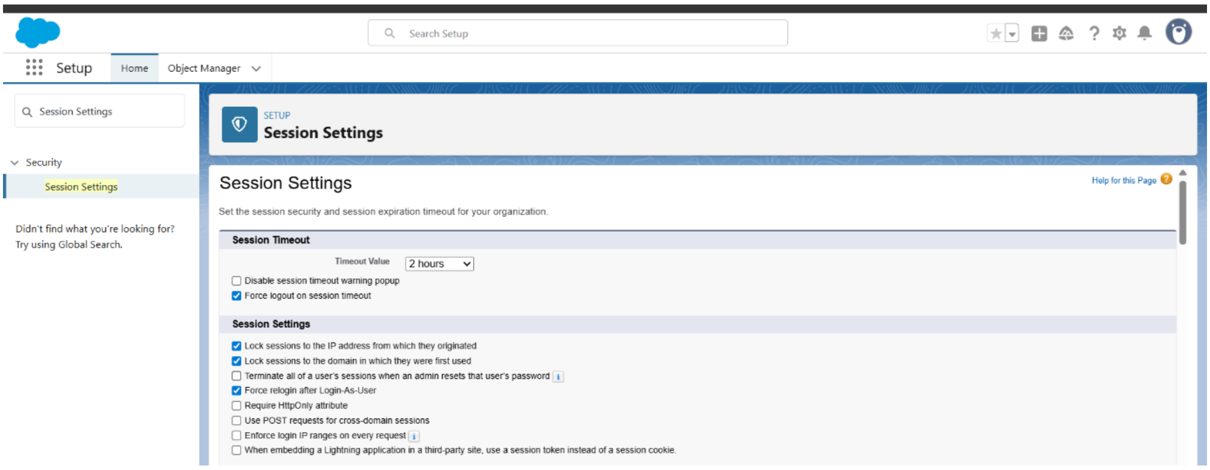

2. **Review OWD (Organization-Wide Defaults)**
    - Property__c: Public Read/Write
    - Client__c, Deal__c, Contract__c: Private
3. **Record-Level Sharing**
    - Sharing Rules:
        - Share Client__c with Sales Manager role
        - Share Deal__c (Stage = Negotiation/Closed) with Finance role



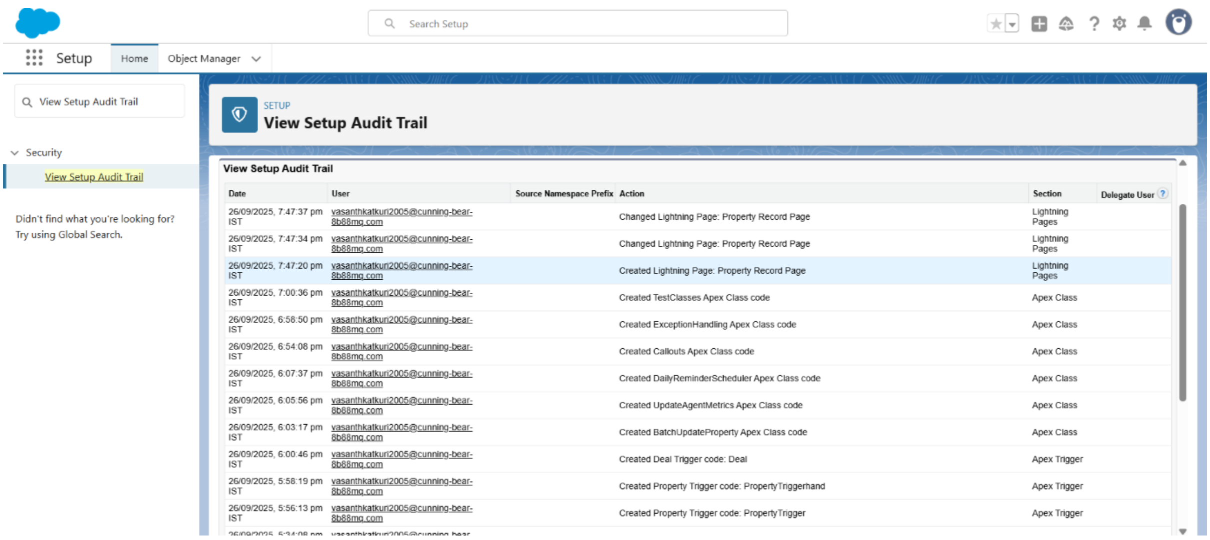

4. **Field-Level Security**

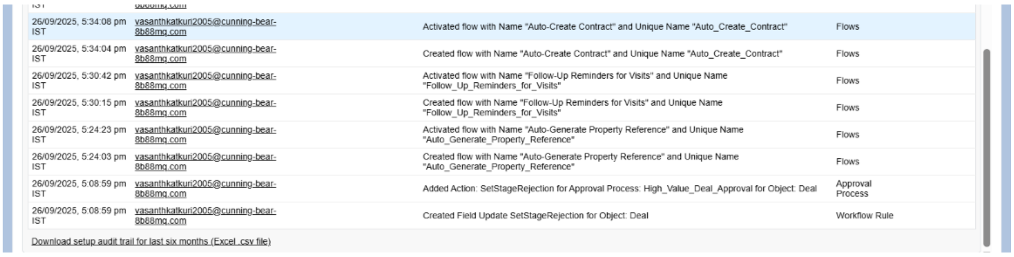
- Sensitive fields like Amount__c, Email__c visible only to Managers/Admin

5. **Session Settings & Login Policies**
   - Two-Factor Authentication for Admin/Manager
   - IP restrictions if needed
   - Session timeout: 30 minutes




6. **Audit Trail**
   - Setup → Security → View Setup Audit Trail
   - Track changes to objects, fields, flows, permissions





| | | | |
|---|---|---|---|
| 26/09/2025, 5:34:08 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Activated flow with Name "Auto-Create Contract" and Unique Name "Auto_Create_Contract" | Flows |
| 26/09/2025, 5:34:04 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Created flow with Name "Auto-Create Contract" and Unique Name "Auto_Create_Contract" | Flows |
| 26/09/2025, 5:30:42 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Activated flow with Name "Follow-Up Reminders for Visits" and Unique Name "Follow_Up_Reminders_for_Visits" | Flows |
| 26/09/2025, 5:30:15 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Created flow with Name "Follow-Up Reminders for Visits" and Unique Name "Follow_Up_Reminders_for_Visits" | Flows |
| 26/09/2025, 5:24:23 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Activated flow with Name "Auto-Generate Property Reference" and Unique Name "Auto_Generate_Property_Reference" | Flows |
| 26/09/2025, 5:24:03 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Created flow with Name "Auto-Generate Property Reference" and Unique Name "Auto_Generate_Property_Reference" | Flows |
| 26/09/2025, 5:08:59 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Added Action: SetStageRejection for Approval Process: High_Value_Deal_Approval for Object: Deal | Approval Process |
| 26/09/2025, 5:08:59 pm IST | vasanthkatkuri2005@cunning-bear-8b88mq.com | Created Field Update SetStageRejection for Object: Deal | Workflow Rule |

Download setup audit trail for last six months (Excel .csv file)

**Result**

- Baseline access controlled by **OWD**
- Extra access via **Profiles & Permission Sets**
- Sensitive data protected via **FLS**
- Record-level sharing ensures managers see team data
- Security policies: 2FA, IP restrictions, session timeout
- Audit trail tracks changes