

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

Real Estate Agent

Home

Reports

Dashboards

Accounts

Contacts

Opportunities

Propertys

Transactions

Clients

REPORT

New Propertys Report

Propertys

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

Update Preview Automatically

Fields

Outline

Filters

GROUP ROWS

Address

City

State

GROUP COLUMNS

Columns

Add column

Property: Property Name

Property: ID

Property Type

Address

City

State

Property: Property Name

Property: ID

Property Type

123 Main Street (1)

San Francisco (1)

CA (1)

Beautiful Family Home

a00NS0001yASj7

Single Family

Subtotal

Subtotal

Total (1)

Real Estate Agent Home Reports Dashboards Accounts Contacts Opportunities Propertys Transactions Clients

REPORT New Deals Report Deals Report "New Deals Report" was saved Add Chart Save & Run Save Close Run

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

Deal: Owner Role → Total

Deal: Deal Name	Deal: ID	Deal: Owner Name	
Your report returned no records.			

Details (0 Rows) Click an intersection in the table above to filter details.

Fields: Outline Filters

Groups

- GROUP ROWS
 - Deal: Deal Name X
 - Deal: ID X
- GROUP COLUMNS
 - Deal: Owner Role X
 - Deal: Owner Name X

Columns

Add column...

Real Estate Agent Home Reports Dashboards Accounts Contacts Opportunities Propertys Transactions Clients

REPORT New Clients Report Clients Report "New Clients Report" was saved Add Chart Save & Run Save Close Run

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

Client: Client Name	Client: ID	City	Address	Subtotal	Total
Your report returned no records.					

Details (1 Rows) Click an intersection in the table above to filter details.

Fields: Outline Filters

Groups

- GROUP ROWS
 - Client: Client Name X
 - Client: ID X
- GROUP COLUMNS
 - Address X
 - City X

Columns

Add column...

Row Counts Detail Rows Subtotals Grand Total Stacked Summaries Conditional Formatting

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 Pipeline

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

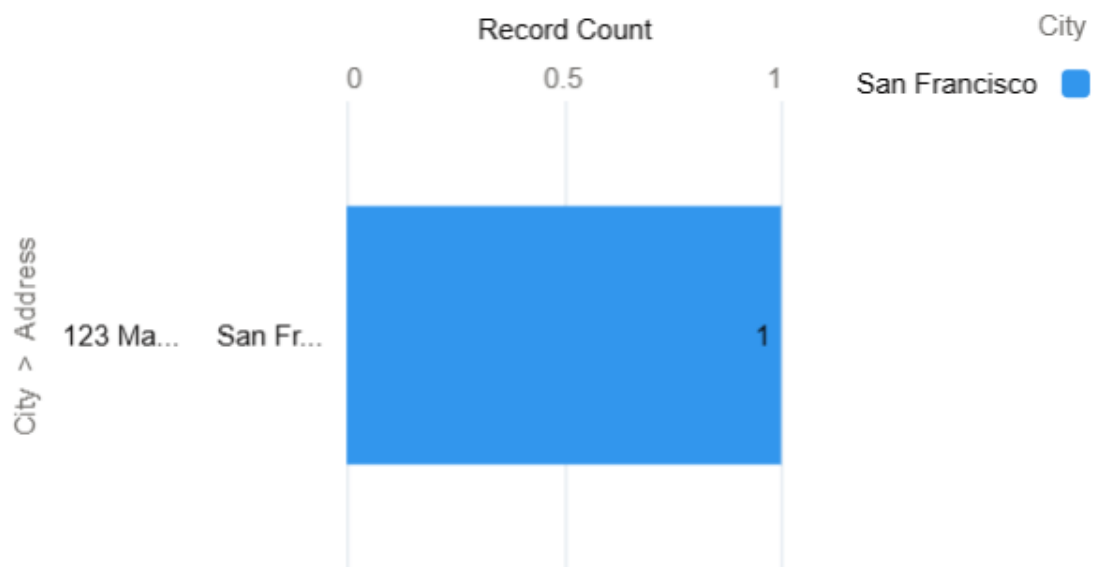


Sales Pipeline Dashboard



View Report (New Deals Report)

New Propertys Report



View Report (New Propertys Report)

D. Dynamic Dashboards

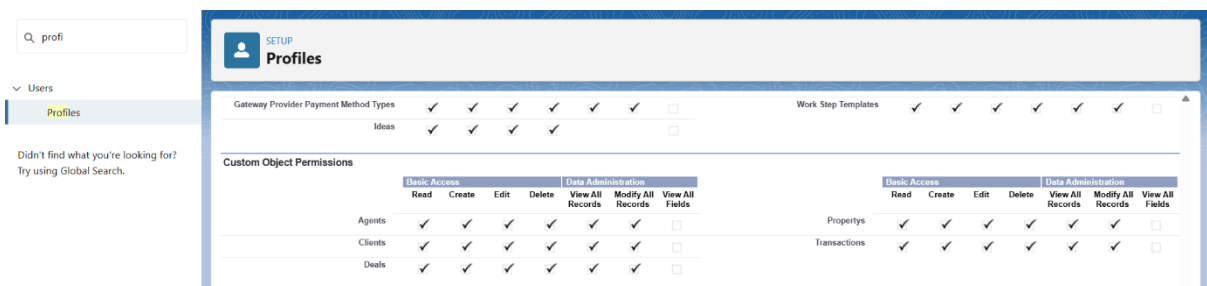
- **Use Case:** Each agent/manager sees only relevant data
- Setup → Dashboard → Dynamic → Run as logged-in user
- Example:
 - Sales Manager sees all team deals
 - Individual Agent sees only their deals
 -

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

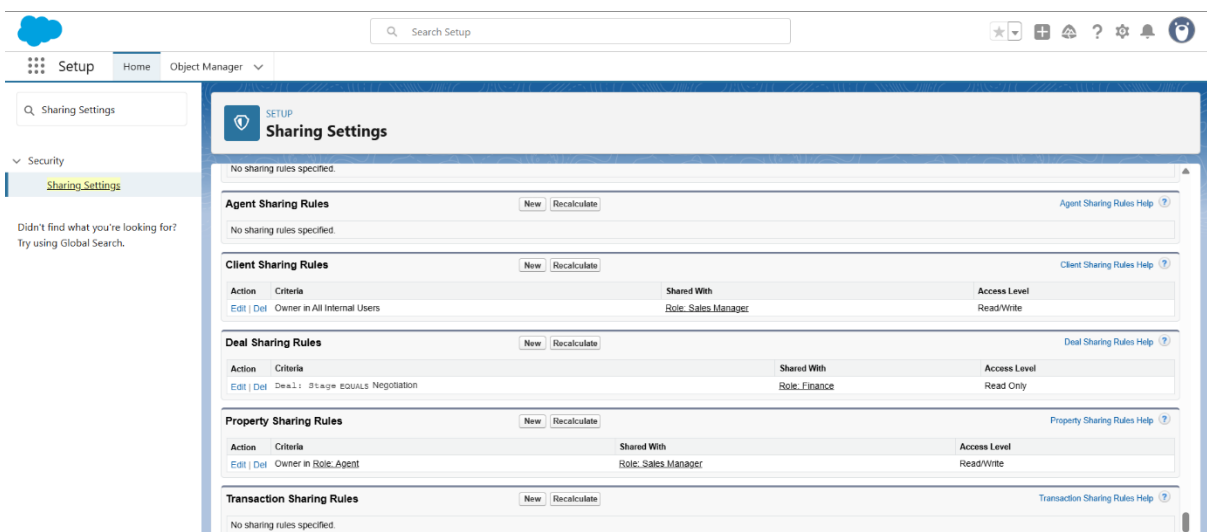


2. Review OWD (Organization-Wide Defaults)

- 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

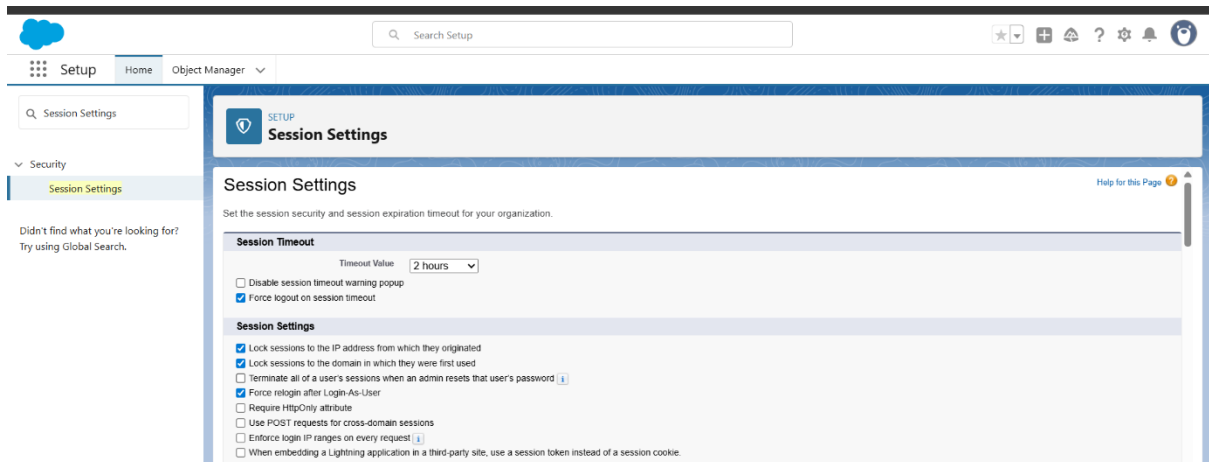


4. Field-Level Security

- 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

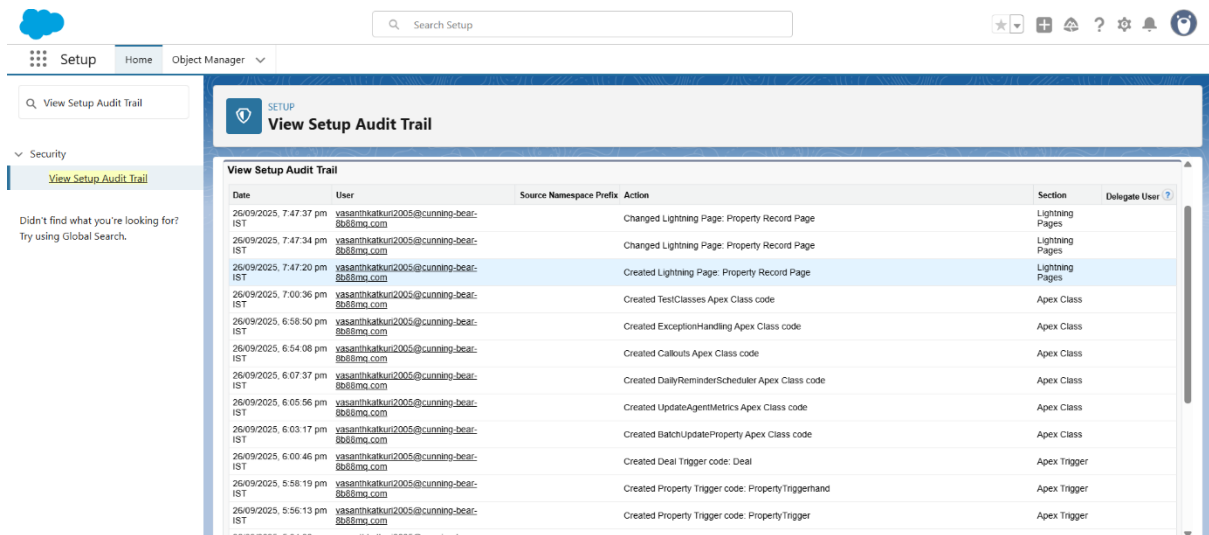


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Session Settings" entered. The main content area is titled "Session Settings" and includes a sub-header "Session Timeout". Below this, there are several settings:

- Session Timeout:**
 - Timeout Value: 2 hours (dropdown)
 - ☐ Disable session timeout warning popup
 - ☒ Force logout on session timeout
- Session Settings:**
 - ☒ Lock sessions to the IP address from which they originated
 - ☒ Lock sessions to the domain in which they were first used
 - ☐ Terminate all of a user's sessions when an admin resets that user's password
 - ☒ Force relogin after Login-As-User
 - ☐ Require HttpOnly attribute
 - ☐ Use POST requests for cross-domain sessions
 - ☐ Enforce login IP ranges on every request
 - ☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

6. Audit Trail

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



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "View Setup Audit Trail" entered. The main content area is titled "View Setup Audit Trail" and displays a table of audit trail entries:

Date	User	Source Namespace Prefix	Action	Section	Delegate User
26/09/2025, 7:47:37 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Changed Lightning Page: Property Record Page	Lightning Pages	
26/09/2025, 7:47:34 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Changed Lightning Page: Property Record Page	Lightning Pages	
26/09/2025, 7:47:20 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created Lightning Page: Property Record Page	Lightning Pages	
26/09/2025, 7:00:36 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created TestClasses Apex Class code	Apex Class	
26/09/2025, 6:58:50 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created ExceptionHandling Apex Class code	Apex Class	
26/09/2025, 6:54:08 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created Callouts Apex Class code	Apex Class	
26/09/2025, 6:07:37 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created DailyReminderScheduler Apex Class code	Apex Class	
26/09/2025, 6:05:56 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created UpdateAgentMetrics Apex Class code	Apex Class	
26/09/2025, 6:03:17 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created BatchUpdateProperty Apex Class code	Apex Class	
26/09/2025, 6:00:46 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created Deal Trigger code: Deal	Apex Trigger	
26/09/2025, 5:58:19 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created Property Trigger code: PropertyTriggerhand	Apex Trigger	
26/09/2025, 5:56:13 pm IST	vasanthkalkun2005@cunning-bear-@b68mq.com		Created Property Trigger code: PropertyTrigger	Apex Trigger	

26/09/2025, 5:34:06 pm IST	vasanthkalkun2005@cunning-bear-8b68mq.com	Activated flow with Name "Auto-Create Contract" and Unique Name "Auto_Create_Contract"	Flows
26/09/2025, 5:34:04 pm IST	vasanthkalkun2005@cunning-bear-8b68mq.com	Created flow with Name "Auto-Create Contract" and Unique Name "Auto_Create_Contract"	Flows
26/09/2025, 5:30:42 pm IST	vasanthkalkun2005@cunning-bear-8b68mq.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	vasanthkalkun2005@cunning-bear-8b68mq.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	vasanthkalkun2005@cunning-bear-8b68mq.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	vasanthkalkun2005@cunning-bear-8b68mq.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	vasanthkalkun2005@cunning-bear-8b68mq.com	Added Action: SetStageRejection for Approval Process: High_Value_Deal_Approval for Object: Deal	Approval Process
26/09/2025, 5:08:59 pm IST	vasanthkalkun2005@cunning-bear-8b68mq.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