

Phase 9: Reporting, Dashboards & Security Review

❖ PART A: Reports

🎯 Purpose:

Reports in Salesforce help visualize and analyze data from standard and custom objects. They are used in this project to monitor Onboarding progress, Case resolution, and Account health.

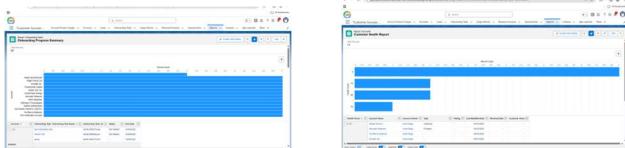
📋 Steps:

1. Go to App Launcher → Reports → New Report.
2. Select Report Type (Accounts, , Onboarding Tasks).
3. Choose Report Format:
 - Tabular – Simple lists
 - Summary – Group by field (e.g., Status)
 - Matrix – Compare data (e.g., Industry vs Health Score)
 - Joined – Combine multiple reports
4. Add columns like Account Name, Industry, Health Score, and Case Status.

Make the report name – 1.) [Onboarding Progress Summary](#) 2.) [Customer Health Report](#).

5. Apply filters (e.g., My Accounts, Open Cases).
6. Click Save & Run.
7. Save in folder: Customer Success Reports.

🖼 Screenshot Placeholder: (Report Builder view)



❖ PART B: Report Types

🎯 Purpose:

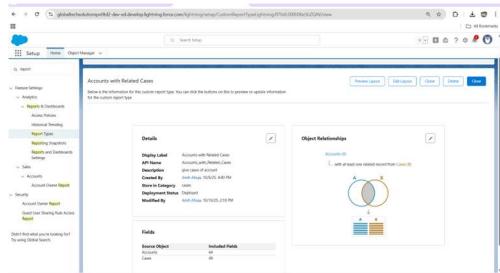
Report Types define which objects and fields are available in reports.

📋 Steps:

1. Setup → Report Types → New Custom Report Type.
2. Primary Object: Account
3. Related Object: Case
4. Label: Accounts with Related Cases
5. Category: Customer Success Reports

6. Deployment: Deployed.

 Screenshot Placeholder: (Report Type creation page)



PART C: Dashboards

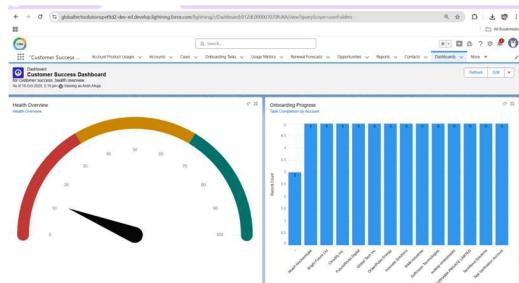
 Purpose:

Dashboards display report data visually using charts, gauges, and tables.
Used in this project to show Health Scores, Case Distribution, and Task Completion.

 Steps:

1. Go to App Launcher → Dashboards → New Dashboard.
2. Name: Customer Success Dashboard.
3. Folder: Customer Success Reports.
4. Add components:
 - Bar Chart – Onboarding Progress
 - Gauge –Health Overview.
5. Click Save & Done.

 Screenshot Placeholder:



PART D: Dynamic Dashboards

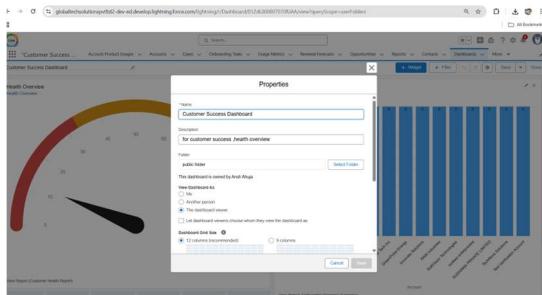
 Purpose:

Dynamic Dashboards display data according to the logged-in user's access.

Steps:

1. Open the Dashboard → Edit.
2. Click Dashboard Properties.
3. Under "View Dashboard As", select "The dashboard viewer".
4. Save.

Screenshot Placeholder:



❖ PART E: Security Review

⌚ Purpose:

Ensures only authorized users can view or modify customer data.

Steps:

1. Field-Level Security:

- Setup → Object Manager → Account → Fields & Relationships → Select Field → Set Field-Level Security.
- Hide Health Score from unauthorized profiles.

2. Profile Permissions:

- Setup → Profiles → Standard User.
- Grant Read/Edit permissions for Account, Case, Contact.

3. Session Settings:

- Setup → Session Settings → Set timeout = 60 minutes.

4. Login IP Ranges:

- Setup → Profiles → Select Profile → Login IP Ranges → Add your trusted range.

5. Organization-Wide Defaults (OWD):

- Setup → Sharing Settings.

- Default Internal Access:
 - Account → Private
 - Contact → Controlled by Parent
 - Case → Private
- Default External Access → Same.
- Save.

 Screenshot Placeholder: (Sharing Settings page)

Object	Default Internal Access	Default External Access	Grant Access Using Standard Roles
Account	Private	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Case	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Lead	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Event	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Task	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Call	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Attachment	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Comment	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Custom Object Member	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Meet	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Activity	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Calendar	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Phone Block	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Phone Record	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Relationship	Private	Controlled by Parent	<input checked="" type="checkbox"/>
Video Call	Private	Controlled by Parent	<input checked="" type="checkbox"/>