Phase 9: Reporting, Dashboards & Security Review

Objective:

To implement reporting, dashboards, and security measures in Salesforce for efficient monitoring and management of service requests, invoices, technicians, and inventory.

1 Reports

Purpose:

Generate actionable insights by displaying data from Salesforce objects such as Service Requests, Invoices, Technicians, and Parts Inventory.

Report Types:

- **Tabular:** Simple lists (e.g., all open Service Requests).
- Summary: Grouped data (e.g., Service Requests by Technician).
- Matrix: Cross-tab reports (e.g., Invoice amount per Vehicle per Technician).
- **Joined:** Multiple report blocks (e.g., Vehicles + Parts Inventory).

Steps to Create a Report:

- 1. Navigate to App Launcher \rightarrow Reports \rightarrow New Report.
- 2. Select the object (e.g., Service Request c).
- 3. Choose report format: Tabular / Summary / Matrix / Joined.
- 4. Drag required fields:
 - Example for Service Requests per Technician:
 - Group Rows: Technician c
 - Columns: Vehicle c, Service Date c, Status c
- 5. Add filters:

```
o Status__c = Open
o Service Date c = THIS MONTH
```

6. Save and run the report.

Example Report Layout:

Technician Vehicle Service Date Status

```
John Doe Car A 26-Sep-2025 Open
Jane Smith Car B 25-Sep-2025 Closed
```

2. Custom Report Types

Purpose:

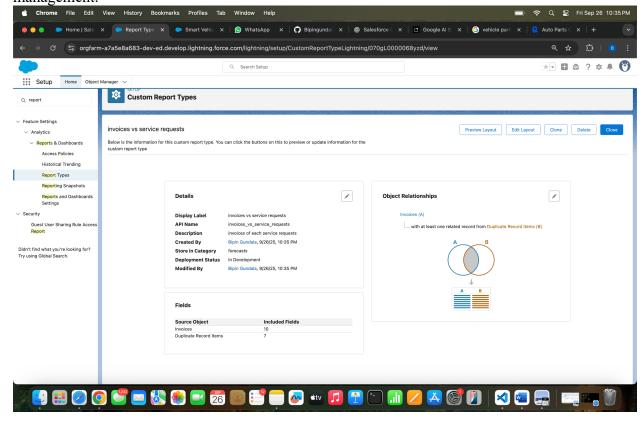
Enable reporting across multiple objects and relationships that standard report types do not provide.

Steps to Create Custom Report Types:

- 1. Go to Setup \rightarrow Report Types \rightarrow New Custom Report Type.
- 2. Select Primary Object: e.g., Service Request c.
- 3. Optionally, add Related Objects: Technician c, Vehicle c.
- 4. Define layout and choose fields to display.
- 5. Save and deploy the report type.

Use Case:

 Report combining Service Requests with Technician availability for better resource management.



3. Security Review

Sharing Settings

- Navigate: Setup → Sharing Settings
- Set default access for objects:
 - o Vehicle c: Private
 - o Service Request c: Controlled by Parent / Public Read Only

