

# 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.

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## 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** → **Reports** → **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:
  - `Status__c = Open`
  - `Service Date__c = THIS MONTH`
6. Save and run the report.

### Example Report Layout:

Technician	Vehicle	Service Date	Status
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John Doe	Car A	26-Sep-2025	Open
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Jane Smith	Car B	25-Sep-2025	Closed
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## 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** → **Report Types** → **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.

The screenshot shows the Salesforce Setup interface for creating a custom report type. The browser address bar indicates the URL: `orgfarm-a7a5e8a683-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypeLightning/070gL0000068yzd/view`. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Custom Report Types' and displays the configuration for a report type named 'invoices vs service requests'.

**Details**

Display Label	invoices vs service requests
API Name	invoices_vs_service_requests
Description	invoices of each service requests
Created By	Bipin Gundala, 9/26/25, 10:35 PM
Store in Category	forecasts
Deployment Status	In Development
Modified By	Bipin Gundala, 9/26/25, 10:35 PM

**Fields**

Source Object	Included Fields
Invoices	10
Duplicate Record Items	7

**Object Relationships**

Invoices (A)

with at least one related record from Duplicate Record Items (B)

The diagram shows two overlapping circles, A and B, representing the relationship between Invoices and Duplicate Record Items. Below the diagram is a table with columns A and B, showing the relationship between the two objects.

## Sharing Settings

- **Navigate: Setup → Sharing Settings**
- **Set default access for objects:**
  - `Vehicle__c`: **Private**
  - `Service_Request__c`: **Controlled by Parent / Public Read Only**



