

Project Title: Smart Customer Retention & Loyalty Management System

Phase 9: Reporting, Dashboards & Security Review

1. Reports

Tabular Report (All Customers)

1. Click **App Launcher** (waffle icon) → **Reports**.
2. Click **New Report**.
3. Search and select **Customer Retention Data** → click **Continue**.
4. In the report builder:
 - Drag columns: Customer Name, Email, Loyalty Tier, Points Balance, Last Interaction Date.
 - Remove any unwanted filters.
5. Click **Save & Run**.
 - Report Name: All Customers (Tabular) → Save.

Smart Retention App Customer Retention Data Properties Favorites Customer Loyalty Enrollments Reports Analytics

Home > Lightning Report

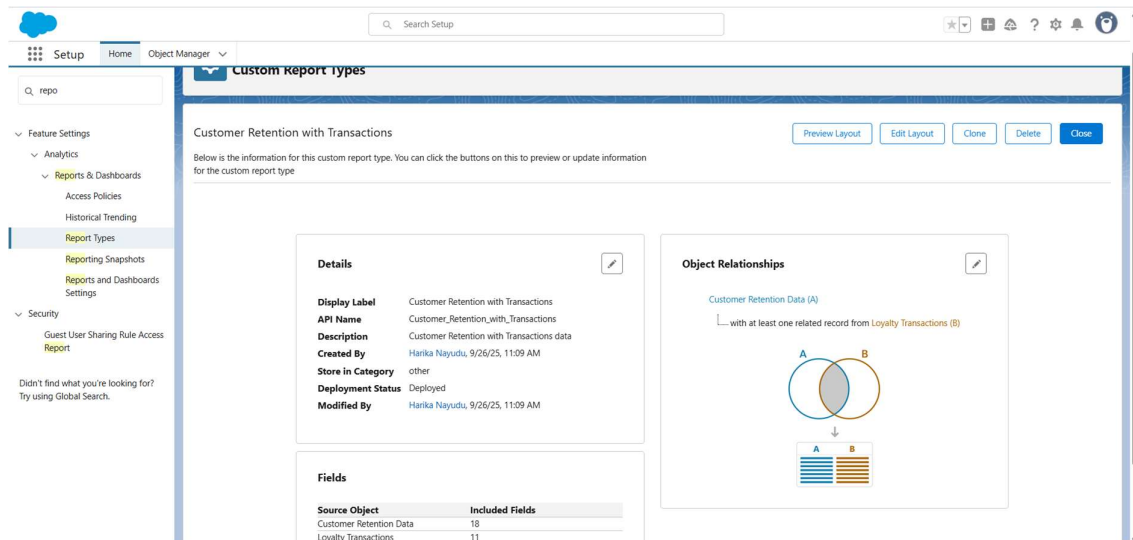
Report: Customer Retention Data
All Customers (Tabular)

Total Records: 5 Total Points Balance: 67

	Customer Retention Data: Owner Name	Customer Email	Loyalty Tier	Points Balance	Last Interaction Date	Customer Retention Data: ID	Customer Retention Data: Created Date
1	Harika Nayudu	abc@gmail.com	Silver	67	9/9/2025	a05gK000008GubG	9/25/2025
2	Harika Nayudu	-	-	-	-	a05gK000008HLQ2	9/25/2025
3	Harika Nayudu	-	-	-	-	a05gK000008HLQ3	9/25/2025
4	Harika Nayudu	-	-	-	-	a05gK000008HLQ4	9/25/2025
5	Harika Nayudu	-	-	-	-	a05gK000008HLQ5	9/25/2025
6				67			

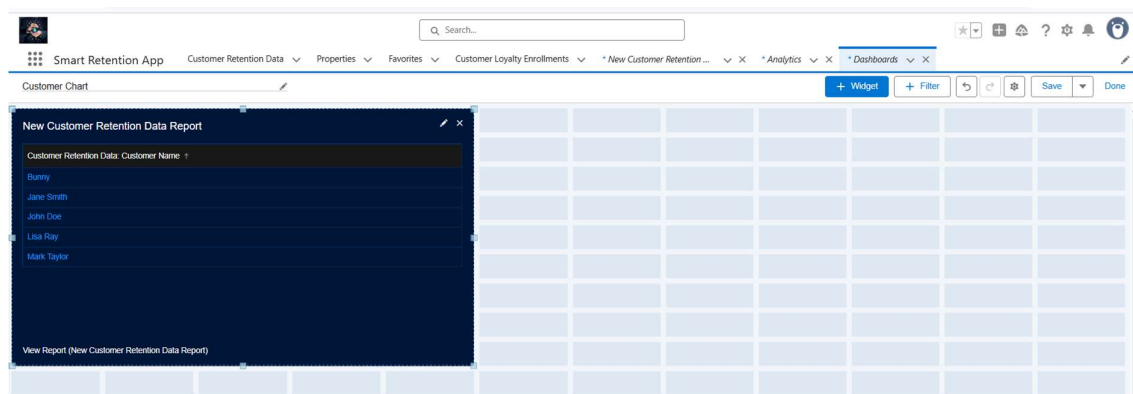
2. Report Types

1. Go to **Setup** → **Report Types** → **New Custom Report Type**.
2. Fill details:
 - **Primary Object:** Customer Retention Data.
 - **Report Type Label:** Customer Retention with Transactions.
 - **Category:** Other Reports.
 - **Deployment Status:** Deployed.
3. Click **Next**.
4. Click **Edit Layout** → Add **Loyalty Transaction** as related object.
5. Save.



3. Dashboards

1. App Launcher → **Dashboards** → **New Dashboard**.
2. Dashboard Name: Retention & Loyalty Dashboard.
3. Click + **Component** → Select report Points by Loyalty Tier (Summary) → choose **Bar Chart**.
4. Click + **Component** → Select report Churn vs Retained → choose **Pie Chart**.
5. Arrange charts → Click **Save**.



4. Sharing Settings

1. Setup → Search **Sharing Settings**.
2. Scroll to **Organization-Wide Defaults**.
3. Find **Customer Retention Data** → Set **Default Internal Access** = **Private**.
4. Save.