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:

    o Drag columns: Customer Name, Email, Loyalty Tier, Points Balance, Last Interaction Date.

    o Remove any unwanted filters.

5. Click **Save & Run**.

   o Report Name: All Customers (Tabular) → Save.

2. Report Types

1. Go to **Setup → Report Types → New Custom Report Type**.

2. Fill details:

    o **Primary Object**: Customer Retention Data.

    o **Report Type Label**: Customer Retention with Transactions.

    o Category: Other Reports.

    o Deployment Status: Deployed.

3. Click **Next**.

4. Click **Edit Layout** → Add **Loyalty Transaction** as related object.

5. Save.
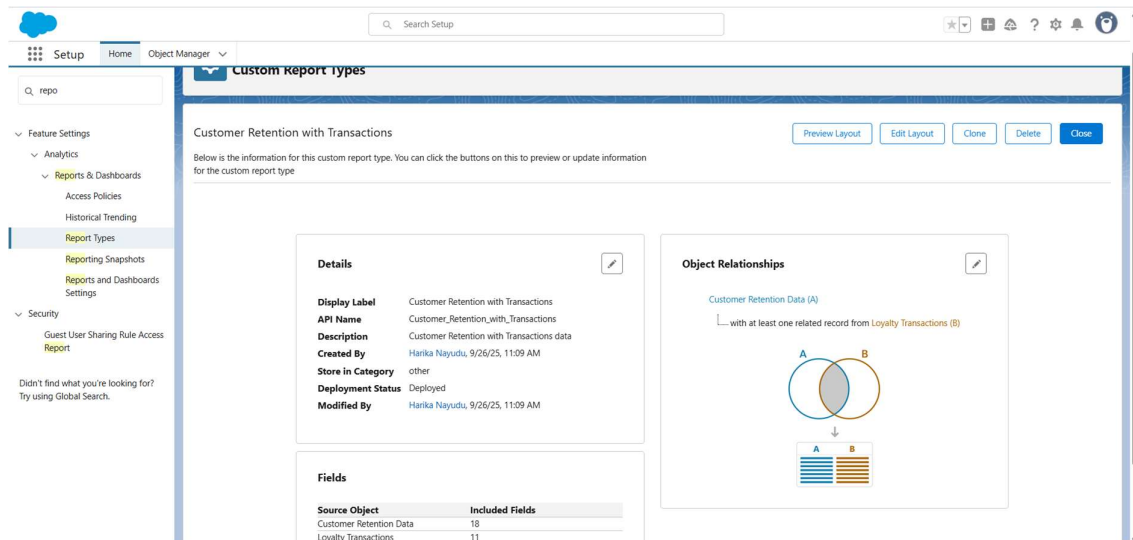
3. Dashboards

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**.
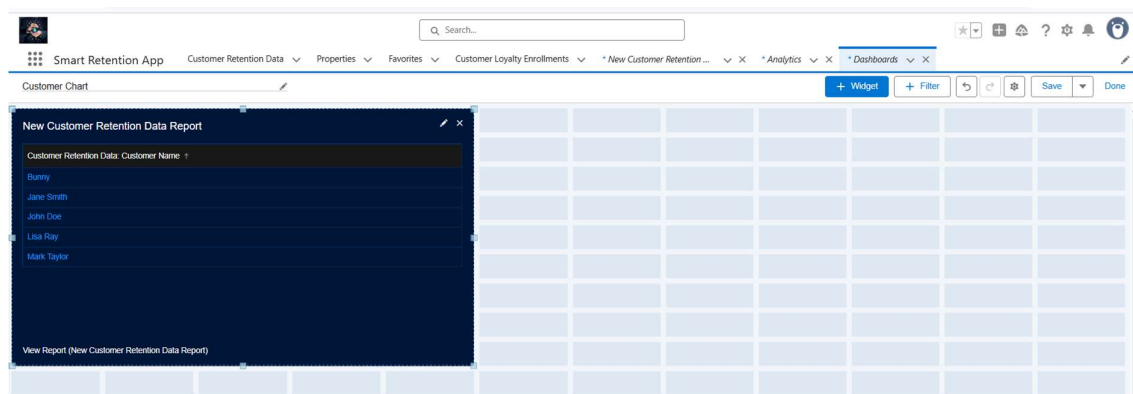
4. Sharing Settings

1. Setup → Search **Sharing Settings**.

2. Scroll to **Organization-Wide Defaults**.

3. Find **Customer Retention Data** → Set **Default Internal Access = Private**.

4. Save.