

# Phase 8: Reports & Dashboards

## Visitor Management System – Salesforce CRM Project

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### 8.1 Objective

The purpose of Phase 8 is to:

- ✓ Summarize visitor data
- ✓ Track daily, weekly, monthly visits
- ✓ Monitor check-ins and check-outs
- ✓ Provide management-level insights

Reports and Dashboards help visualize activity happening in your organization.

### 8.2 Reports Created

You will build three reports in this phase:

1. Daily Visitor Report
2. Visitors by Purpose of Visit
3. Check-In vs Check-Out Summary

#### 8.2.1 Report 1: Daily Visitor Report

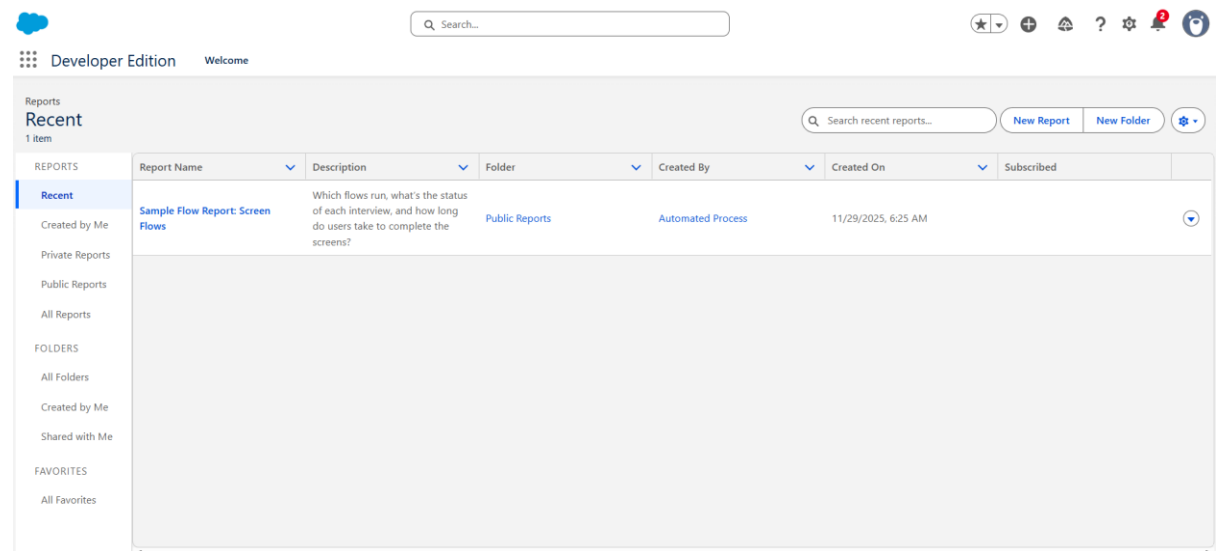
##### **Purpose:**

Shows total visitors who checked in today.

Steps:

1. Go to Reports → New Report
2. Select Visitor report type
3. Apply filter:
  - Check-In Time = TODAY

4. Add columns:
  - Visitor Name
  - Phone Number
  - Check-In Time
  - Host
  - Purpose of Visit
5. Click Save & Run
6. Report Name: Daily Visitor Report



## 8.2.2 Report 2: Visitors by Purpose of Visit

### Purpose:

Shows how many visitors came for each purpose (Interview, Delivery, Meeting, etc.)

### Steps:

1. Reports → New Report
2. Report Type: Visitor
3. Group Rows by: Purpose of Visit
4. Add Summary:
  - Count of Visitors
5. Save:
  - Visitors by Purpose Report

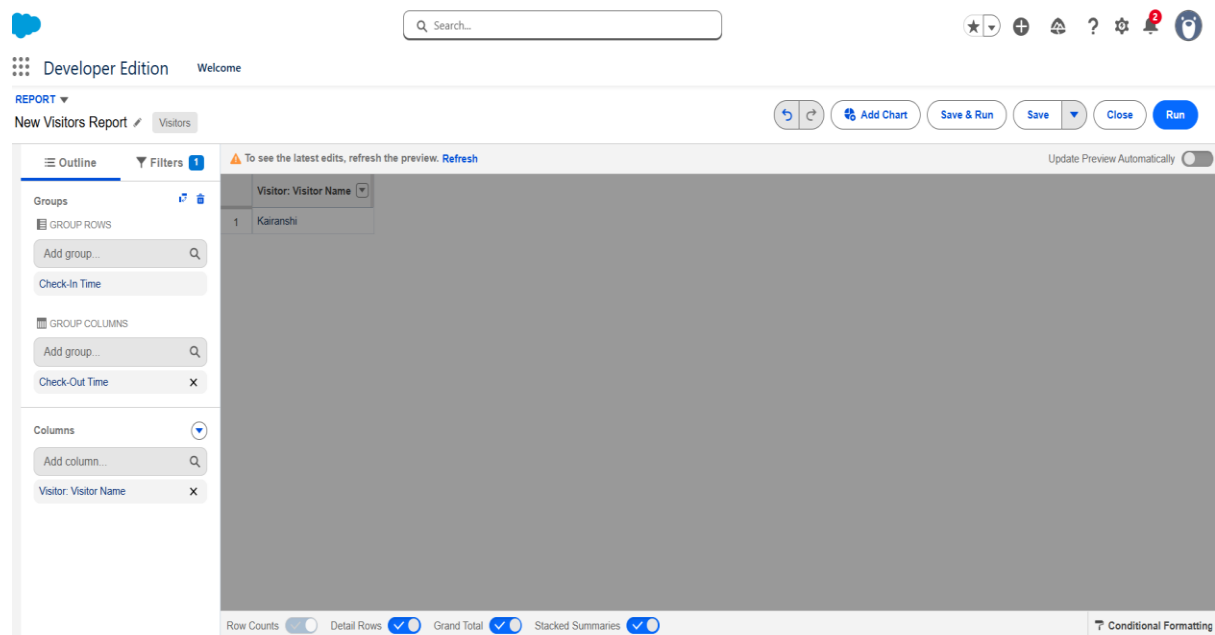
## 8.2.3 Report 3: Check-In vs Check-Out Summary

### Purpose:

Track how many visitors have checked in and checked out.

## Steps:

1. Reports → New Report
2. Type: Visitor
3. Add a Row Group: Status
4. Add columns:
  - Check-In Time
  - Check-Out Time
5. Summary: Count by Status
6. Save as:
  - Check-In/Check-Out Summary Report



## 8.3 Dashboard Creation

After creating reports, you will combine them into one dashboard.

### 8.3.1 Create Dashboard

## Steps:

1. Go to Dashboards
2. Click New Dashboard
3. Name:
  - Visitor Management Dashboard
4. Folder: Private Dashboard

## 5. Click Create

### 8.3.2 Add Components to Dashboard

Add the following:

#### Component 1: Daily Visitors

- Report: Daily Visitor Report
- Visualization: Bar Chart / Table
- Shows the number of visitors today.

#### Component 2: Visitors by Purpose

- Report: Visitors by Purpose Report
- Visualization: Donut Chart
- Shows distribution of visit purposes.

#### Component 3: Check-In vs Check-Out Count

- Report: Check-In/Check-Out Summary Report
- Visualization: Horizontal Bar Chart
- Shows count of current check-ins and check-outs.

### 8.4 Suggested Visual Layout for Dashboard

Component	Position
Daily Visitors	Top Left
Visitors by Purpose	Top Right
Check-In vs Check-Out	Bottom Full Width

## **8.5 Testing the Dashboard**

To test:

1. Create new visitor records
2. Checkout few visitors
3. Refresh Dashboard
4. Verify updated counts and chart.

## **8.6 Summary of Phase 8**

In this phase, you successfully created:

- ✓ Three reports
- ✓ One interactive dashboard
- ✓ Visual analytics for visitor management
- ✓ A clear overview of visitor traffic
- ✓ Data-driven insights for your system