Phase 4: Reports & Dashboards

1. Objective

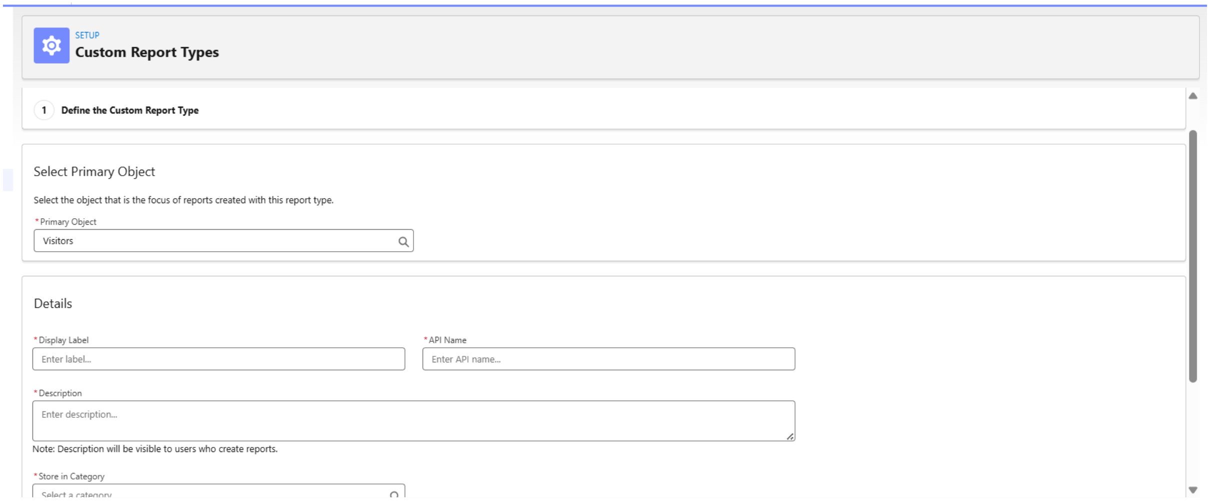
Phase 4 focuses on building **reports and dashboards** to visualize visitor activity, monitor check-ins/check-outs, analyze host performance, and support decision-making.

This makes your CRM project *analysis-ready* and improves tracking efficiency.

2. Reports Setup

2.1 Create a Custom Report Type

1. Go to Setup → Report Types**.**
2. Click New Custom Report Type.
3. Select:
   - Primary Object**:** Visitor
   - Report Type Label: Visitor Report
   - Deployment Status**:** Deployed
4. Save.



3. Create Required Reports

Below are recommended reports for your Visitor Management System.

3.1 Report 1 – Daily Visitor Check-In Report

Purpose: Shows all visitors who checked in today.

Steps:

1. New Report → Select **Visitor Report**.
2. Add filter:
   - Check-In Time = **Today**
3. Add columns: Visitor Name, Phone, Check-In Time, Host, Purpose.
4. Save the report.

3.2 Report 2 – Visitors by Host

Purpose: Shows how many visitors each host has.

Steps:

1. Create report → Visitor Report
2. Group rows by **Host**
3. Add summary: **Count of Visitor Name**
4. Create a bar chart (optional).
5. Save the report.

3.3 Report 3 – Visitor Check-Out Summary

Purpose: To see visitors who checked out successfully.

Steps:

1. Filter: Check-Out Time ≠ Blank
2. Columns: Visitor Name, Check-Out Time, Duration of Visit (Formula field if added).
3. Save report.

3.4 Report 4 – Visitors by ID Proof Type

Purpose: Security verification.

Steps:

1. Group by **ID Proof Type**
2. Show count of visitors per ID type.

4. Dashboard Setup

4.1 Create a Dashboard

1. Go to Dashboards → New Dashboard.
2. Name: Visitor Management Dashboard
3. Folder: Public or Private Folder
4. Click Create.

5. Add Dashboard Components

5.1 Component 1 – Today's Visitors (Metric)

- Report: Daily Visitor Check-In Report
- Visualization: **Metric**
- Shows the number of visitors checked in today.

5.2 Component 2 – Visitors by Host (Bar Chart)

- Report: Visitors by Host
- Visualization: **Vertical Bar Chart**

5.3 Component 3 – ID Proof Distribution (Donut Chart)

- Report: Visitors by ID Proof Type
- Visualization: **Donut Chart**

5.4 Component 4 – Visitor Status Overview (Pie Chart)

If you added a "Status" field (Checked In / Checked Out / Scheduled), use it to display distribution.

5.5 Component 5 – Recently Checked-Out Visitors (Table)

- Report: Check-Out Summary

- Visualization: Table

6. Dashboard Filters (Optional)

Add filters such as:

- Host
- Date Range
- Purpose of Visit
- Status

This makes dashboards interactive.

7. Testing

Test each dashboard component and ensure:

- Charts update correctly
- Filters work
- Reports show accurate data
- Dashboard refreshes properly

8. Summary

Phase 4 completes the **analytics layer** of the project:

- Created custom report types
- Built meaningful visitor reports
- Designed an interactive dashboard
- Enabled data visualization for check-ins, hosts, ID verification, and visit trends