

Phase 4: Reports & Dashboards

1. Objective

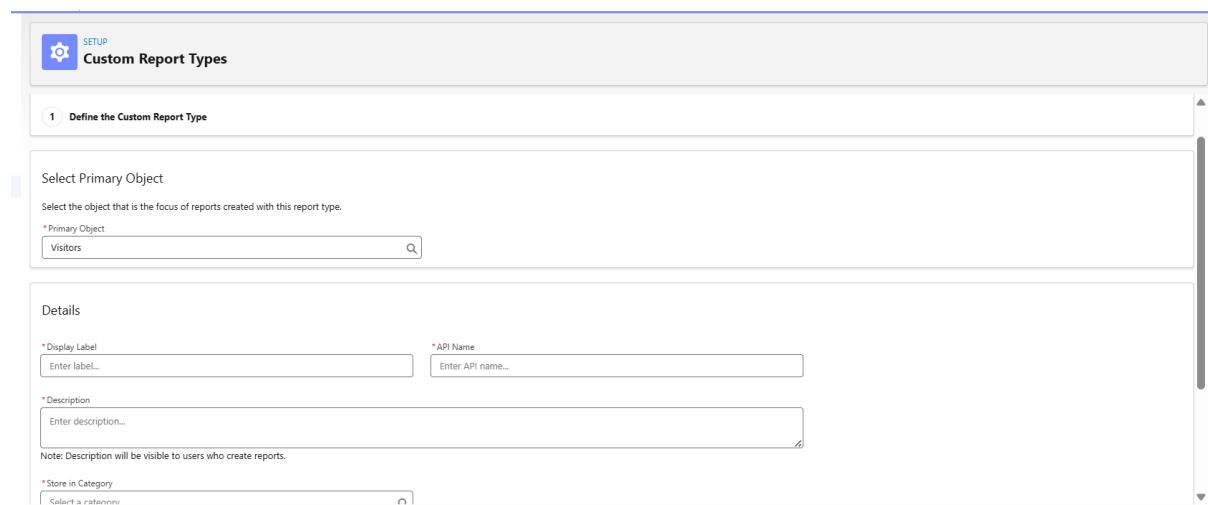
Phase 4 focuses on building **reports and dashboards** to visualize visitor activity, monitor check-ins/check-outs, analyze host performance, and support decision-making.

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:
 - o Primary Object: Visitor
 - o Report Type Label: Visitor Report
 - o Deployment Status: Deployed
4. Save.



The screenshot shows the Salesforce Setup interface for creating a new custom report type. The top navigation bar has 'SETUP' and the page title 'Custom Report Types'. A progress bar indicates '1 Define the Custom Report Type'. The main form has a step indicator '1'. The first section, 'Select Primary Object', asks to choose the object for reports. A search bar contains 'Visitors'. The second section, 'Details', includes fields for 'Display Label' (with placeholder 'Enter label...'), 'API Name' (placeholder 'Enter API name...'), 'Description' (placeholder 'Enter description...'), and 'Store in Category' (placeholder 'Select a category'). A note at the bottom of the details section states: 'Note: Description will be visible to users who create reports.'

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