

Phase 8: Reports & Dashboards

Visitor Management System – Salesforce CRM Project

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:

- o Visitor Name
- o Phone Number
- o Check-In Time
- o Host
- o Purpose of Visit

5. Click Save & Run

6. Report Name: Daily Visitor Report

A screenshot of the Salesforce Developer Edition interface. The top navigation bar includes a cloud icon, a search bar, and various global buttons. The main area is titled 'Developer Edition' and 'Welcome'. On the left, there's a sidebar with sections for 'Reports', 'Recent' (which has 1 item), 'RECENT' (with sub-sections like 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports'), 'FOLDERS' (with 'All Folders'), and 'FAVORITES' (with 'All Favorites'). The main content area shows a table for 'RECENT' reports. The table has columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: 'Sample Flow Report: Screen Flows'. The description for this report is: 'Which flows run, what's the status of each interview, and how long do users take to complete the screens?'. It is categorized under 'Public Reports' and was created by 'Automated Process' on '11/29/2025, 6:25 AM'. There are also buttons for 'Search recent reports...', 'New Report', 'New Folder', and a gear icon.

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:
 - o Count of Visitors
5. Save:
 - o 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:
 - o Check-In Time
 - o Check-Out Time
5. Summary: Count by Status
6. Save as:
 - o Check-In/Check-Out Summary Report

The screenshot shows the Oracle Reports Developer Edition interface. At the top, there's a search bar and a toolbar with various icons. Below that, the title 'Developer Edition' and 'Welcome' are visible. The main area is titled 'REPORT' with a dropdown menu, and the specific report is named 'New Visitors Report'. A 'Visitors' tab is selected. On the left, there's a sidebar with sections for 'Outline', 'Filters', 'Groups', 'Check-In Time', 'Check-Out Time', and 'Columns'. Under 'Groups', there's a 'GROUP ROWS' section with an 'Add group...' button. Under 'Check-In Time' and 'Check-Out Time', there are 'Add group...' buttons. Under 'Columns', there's a 'GROUP COLUMNS' section with an 'Add group...' button. The main preview area shows a single row with the header 'Visitor: Visitor Name' and a data row with '1 Kairanshi'. At the bottom of the preview area, there are several toggle buttons: 'Row Counts' (off), 'Detail Rows' (on), 'Grand Total' (on), and 'Stacked Summaries' (on). To the right of the preview area, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'.

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:
 - o 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