

# Phase 9: Reporting, Dashboards & Security Review

**Project:** Retail Customer Complaint Hub

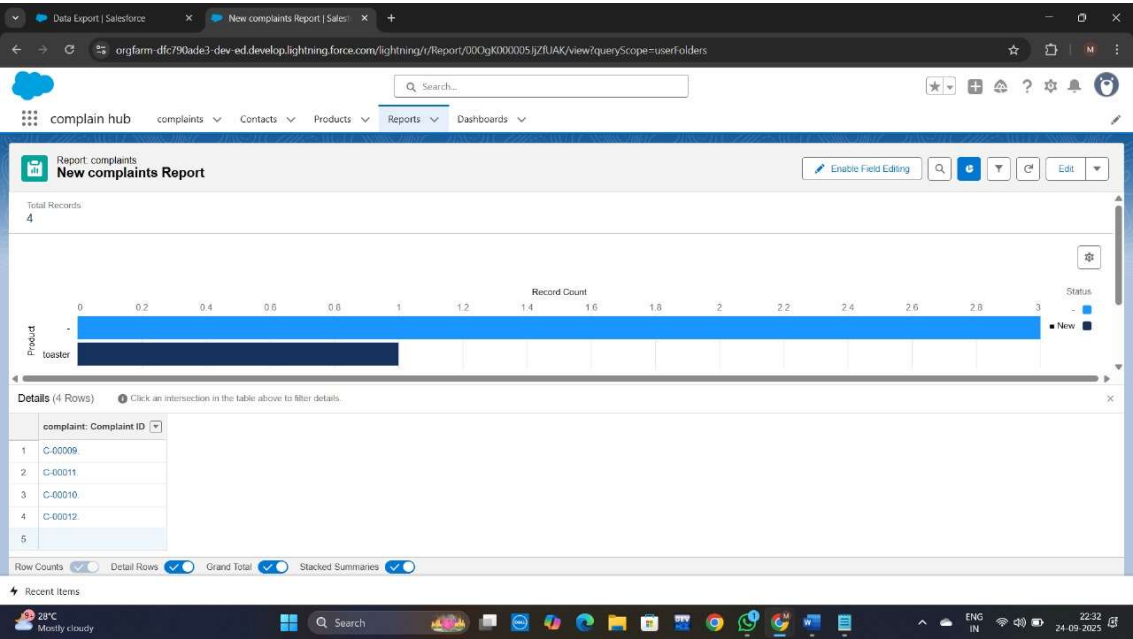
**Purpose:** This phase focuses on providing business insights through analytics and demonstrating key security configurations. Custom **Reports** and a **Dashboard** were built to visualize complaint data for management. Additionally, a security review was performed, focusing on **Object Permissions** and the **Setup Audit Trail**.

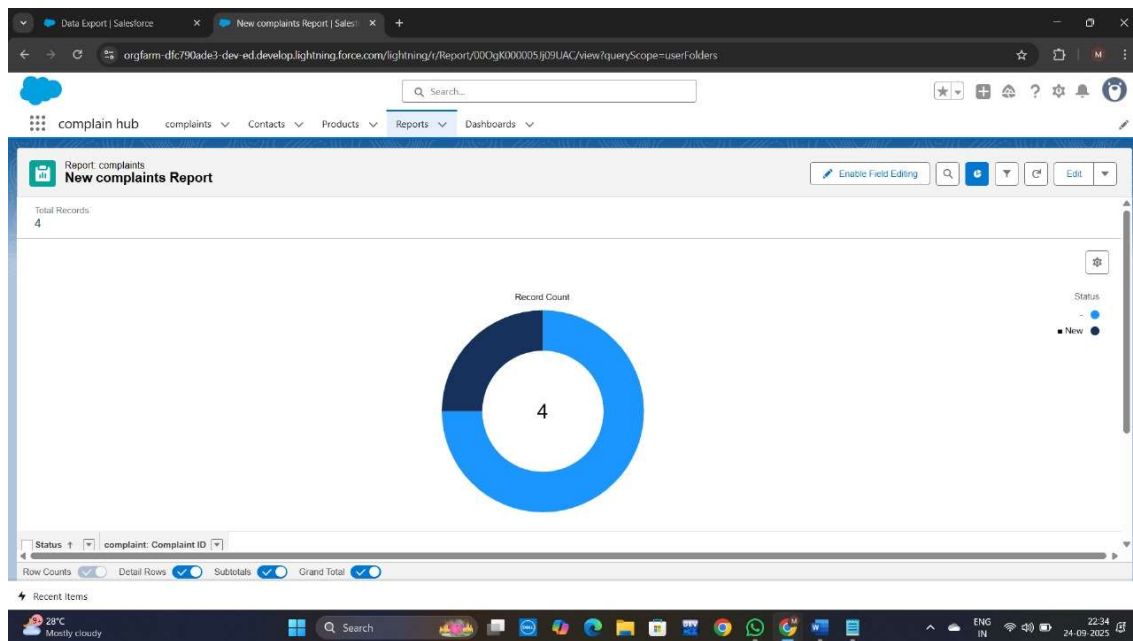
## 1. Reporting & Analytics

To fulfill the project requirement of generating customer satisfaction reports, custom reports and a central dashboard were created.

### A. Custom Reports

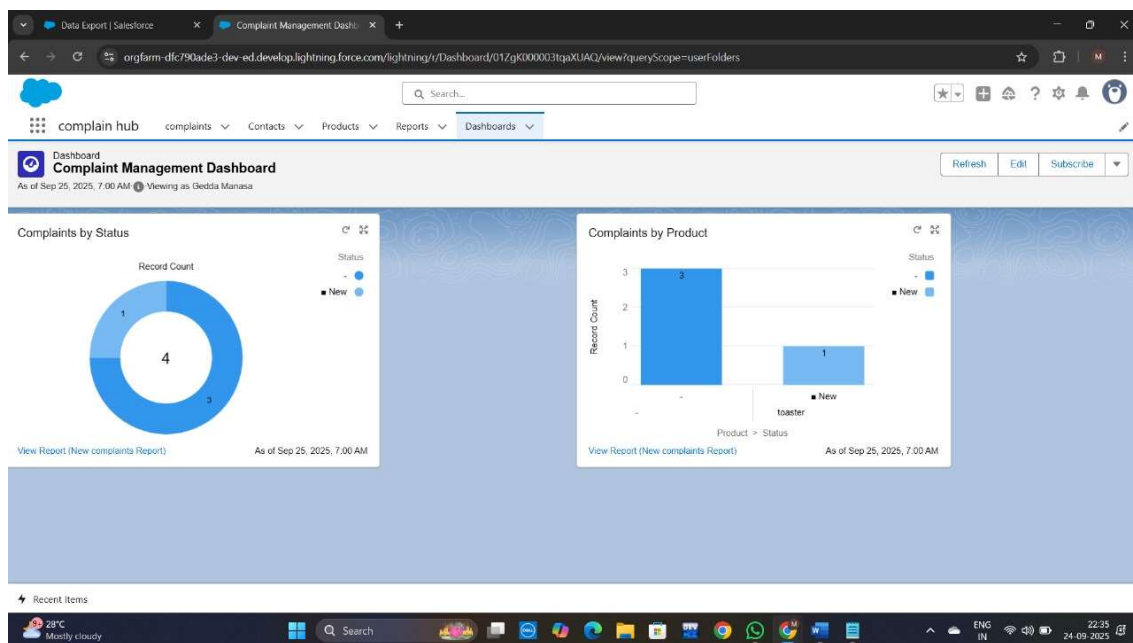
Custom reports were built on the Complaint object to analyze data by different criteria. The screenshot below shows a report summarizing all complaints, grouped by their current status and visualized with a chart to provide an immediate understanding of the support team's workload.





## B. Management Dashboard

A central dashboard was created to provide managers with an at-a-glance view of key metrics. Components from the custom reports, such as "Complaints by Status" and "Complaints by Product," were added to visualize the data, allowing for quick analysis and decision-making.

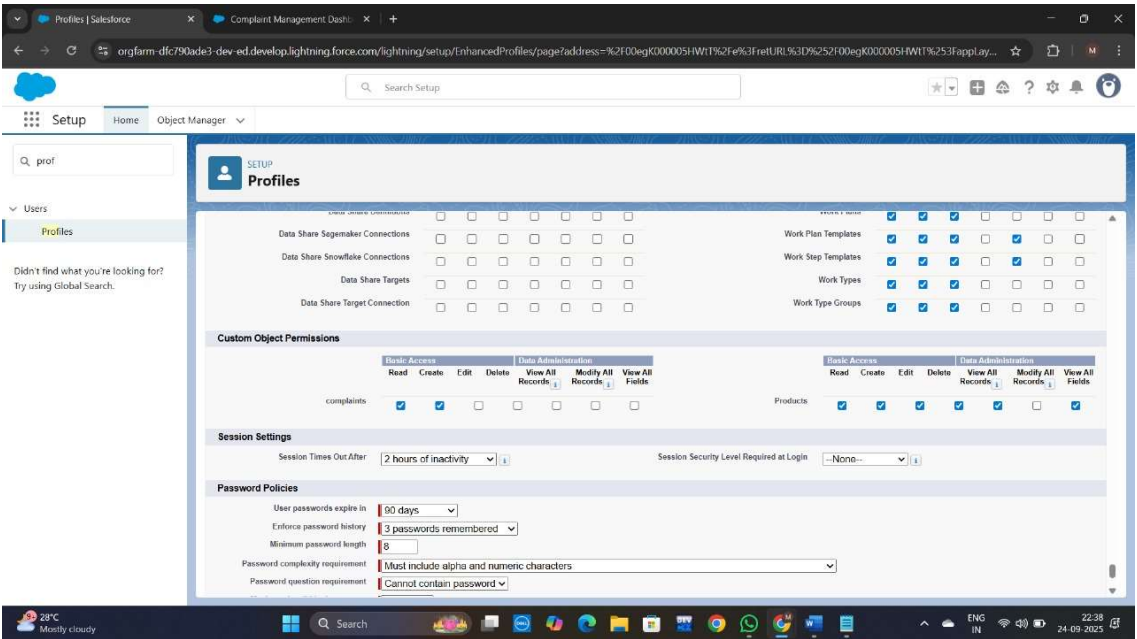


## 2. Security Review

A security review was performed to demonstrate how to control data access at a granular level.

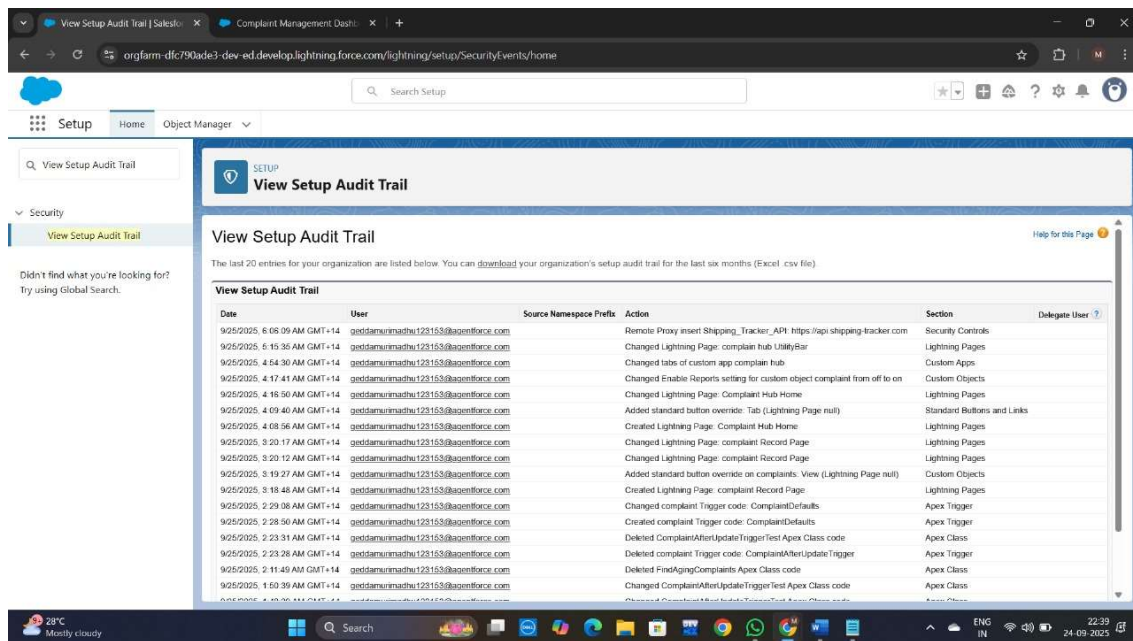
**A. Object Permissions**

Profile permissions were reviewed to control user access to the custom objects. The screenshot below shows the configuration for the custom profiles, ensuring users have the appropriate level of access (Read, Create, Edit, Delete) to the complaints and Products objects based on their roles.



**B. Setup Audit Trail**

The **Setup Audit Trail** was reviewed as a key tool for monitoring security and troubleshooting configuration issues. The screenshot below shows the audit log, which tracks all recent administrative changes made to the org during the project's development, providing accountability and a history of modifications.



## Conclusion

The project's reporting and security review requirements have been met, providing both business insights for management and demonstrating administrative control over the application's data and metadata.