

# Phase 9: Reporting, Dashboards & Security Review

## A. Reports

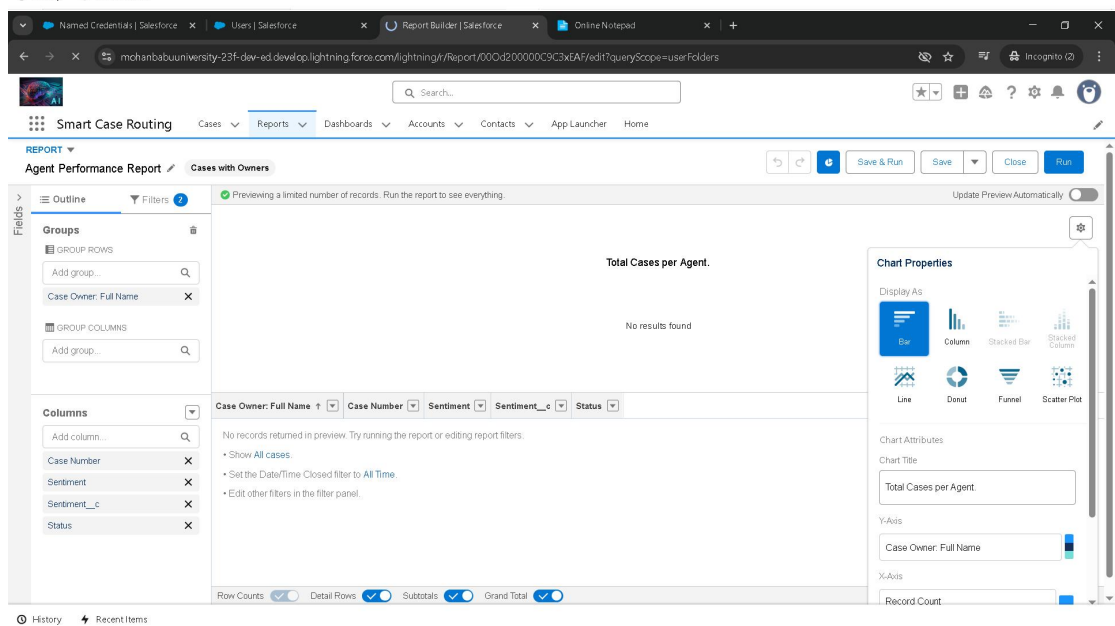
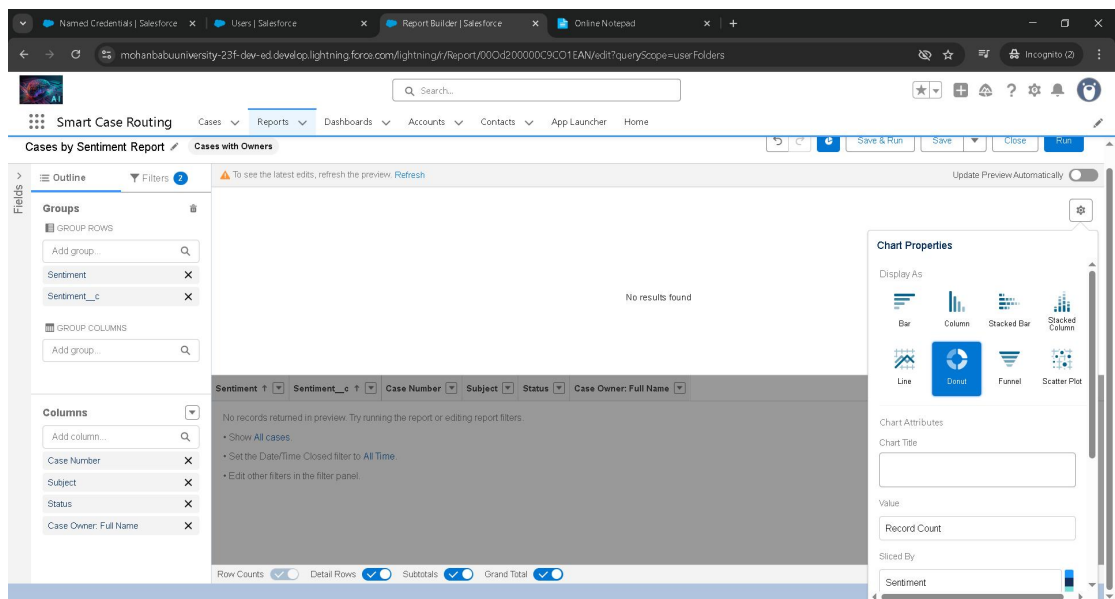
### Key Reports:

Cases by Sentiment (Pie chart)

Cases by Priority (Bar chart)

Escalated Cases (List report)

Agent Case Resolution Time (Matrix by Agent + Status)



*Screenshot: Report builder – Cases by Sentiment*

## B. Report Types

**Standard Report Type: Cases**

**Custom Report Types:**

Case with Escalation History

Case with Sentiment Logs

The screenshot shows the Salesforce Setup interface for a custom report type. The left sidebar contains the Setup menu with options like Feature Settings, Analytics, Reports & Dashboards, and Security. The main content area is titled 'Cases with Owners' and includes a search bar, a 'Search Setup' button, and a 'Search Setup' dropdown. Below the title, there are buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. The main content area displays the details of the custom report type, including a description, a table of fields, and an object relationship diagram.

**Cases with Owners**

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

**Details**

<b>Display Label</b>	Cases with Owners
<b>API Name</b>	Cases_with_Owners
<b>Description</b>	We can view case sentiment data grouped by the assigned user.
<b>Created By</b>	Manikanta Chari Chinthalachervu, 10/14/25, 2:21 PM
<b>Store in Cate...</b>	other
<b>Deployment ...</b>	Deployed
<b>Modified By</b>	Manikanta Chari Chinthalachervu, 10/14/25, 2:21 PM

**Object Relationships**

Cases (A)

↓

**Fields**

Source Object	Included Fields
Cases	41

# C. Dashboards

## Smart Support Dashboard

### Case Sentiment Dashboard

Pie chart: Cases by Sentiment

Metric: % Negative Cases this month

### Escalation Dashboard

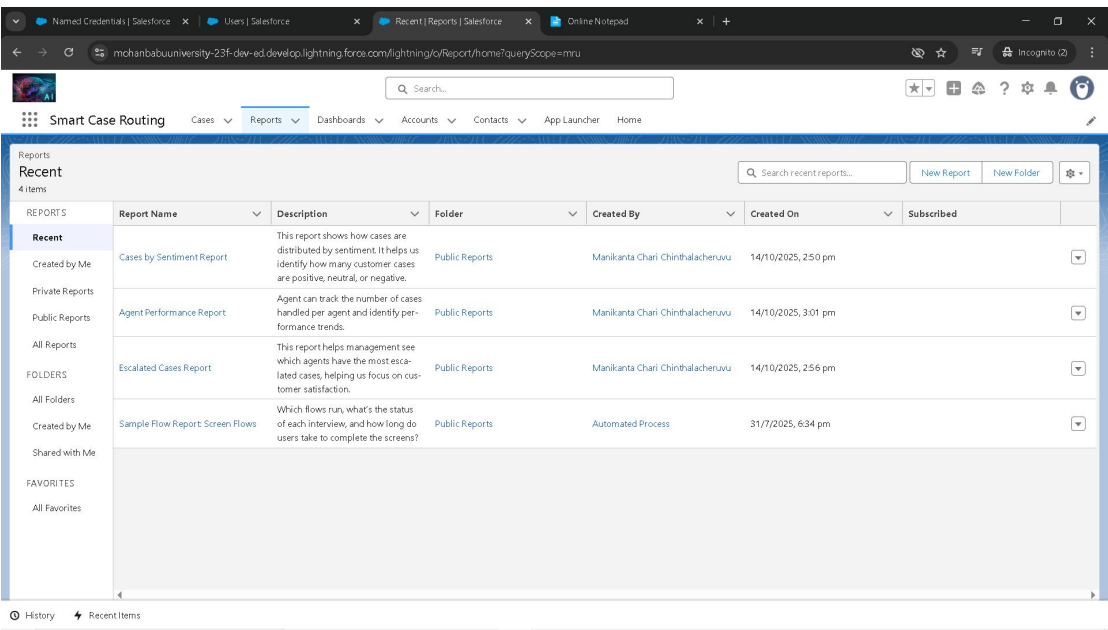
Table: High Priority Escalated Cases

Metric: Avg escalation resolution time

### Agent Performance Dashboard

Bar chart: Cases resolved per Agent

Metric: Average resolution time per Agent

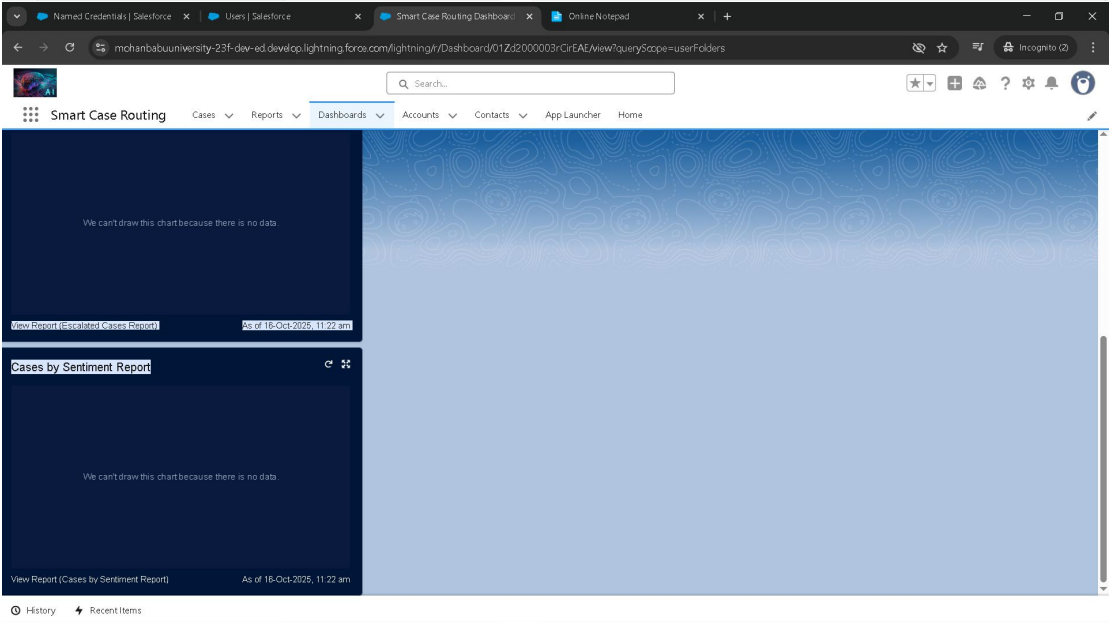
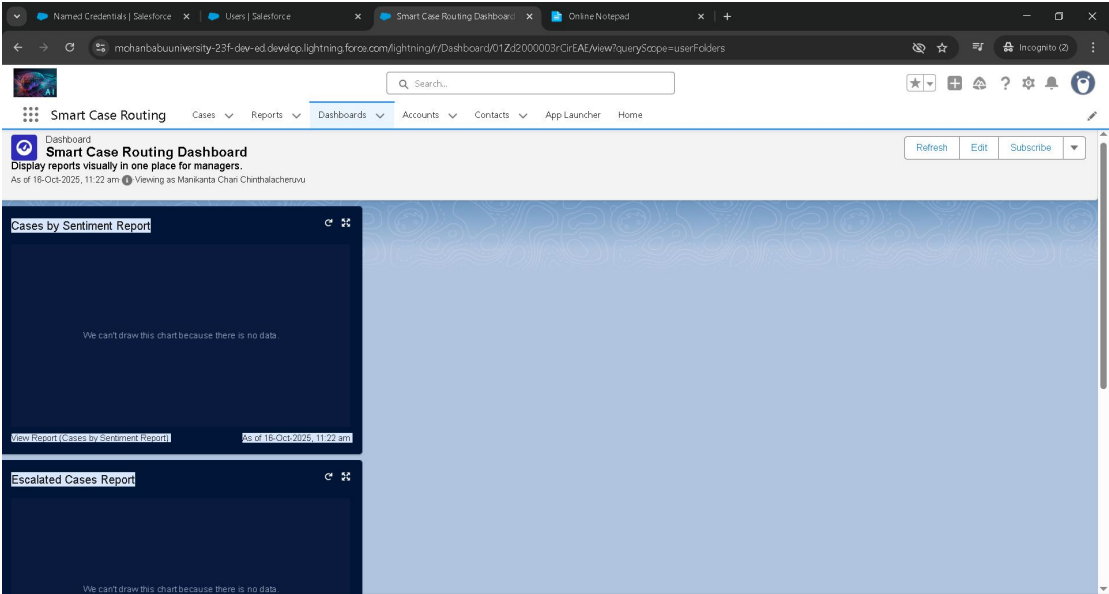


*Screenshot: Dashboard with Sentiment and Escalation charts*

# D. Dynamic Dashboards

Agents see only their cases.

Managers see all team cases.



## **E. Security Review**

### **Object & Field-Level Security:**

Agents: Read/Write on own Cases.

Managers: Read/Write on team Cases.

Admin: Full access.

**OWD:** Cases = Private (ensures assignment-based visibility).

### **Sharing Rules:**

Escalated Cases shared with Support Managers.

**FLS:** Hide sensitive fields (e.g., API Response Log) from Agents.

### **Policies:**

2FA for Admins/Managers

Session Timeout = 30 minutes

Setup Audit Trail enabled