Phase 9: Reporting, Dashboards & Security Review

A. Reports
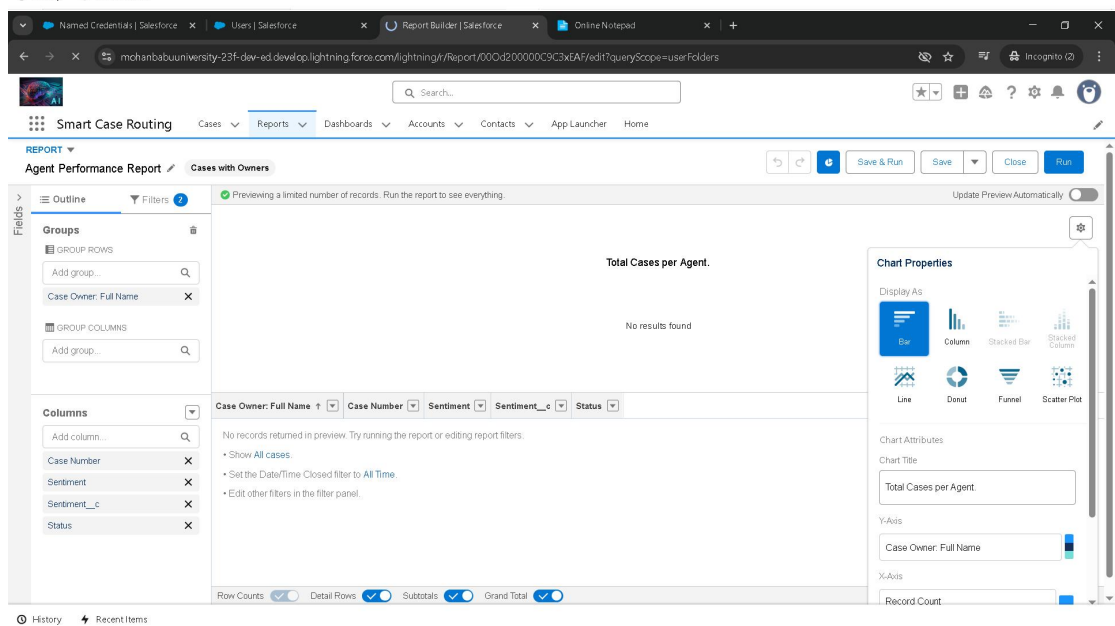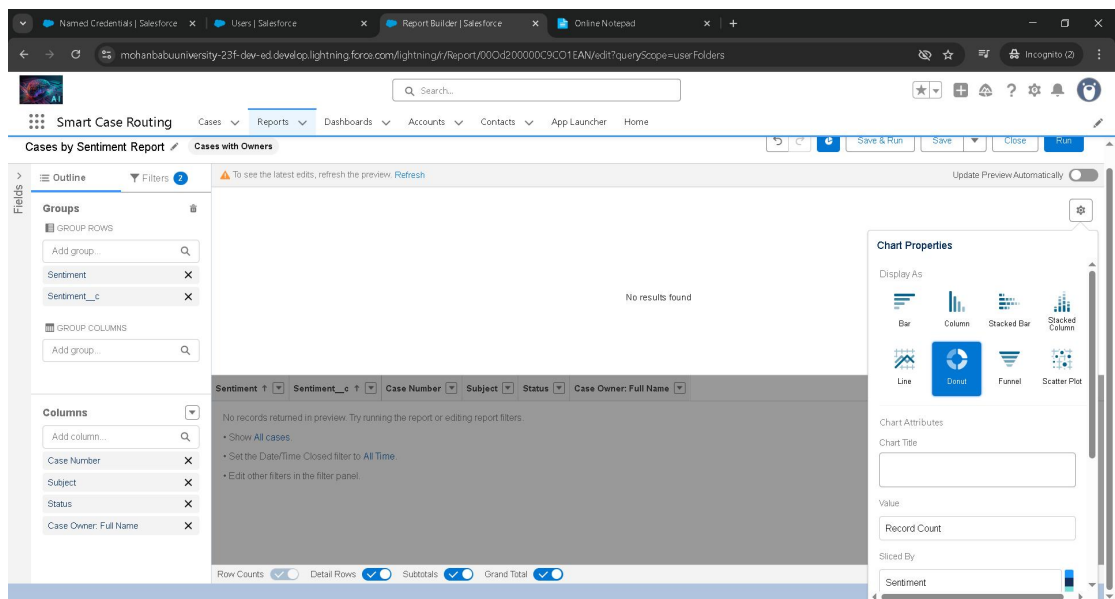
Key Reports:

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

C. Dashboards

Smart Support Dashboard

Case Sentiment Dashboard

Pie chart: Cases by Sentiment

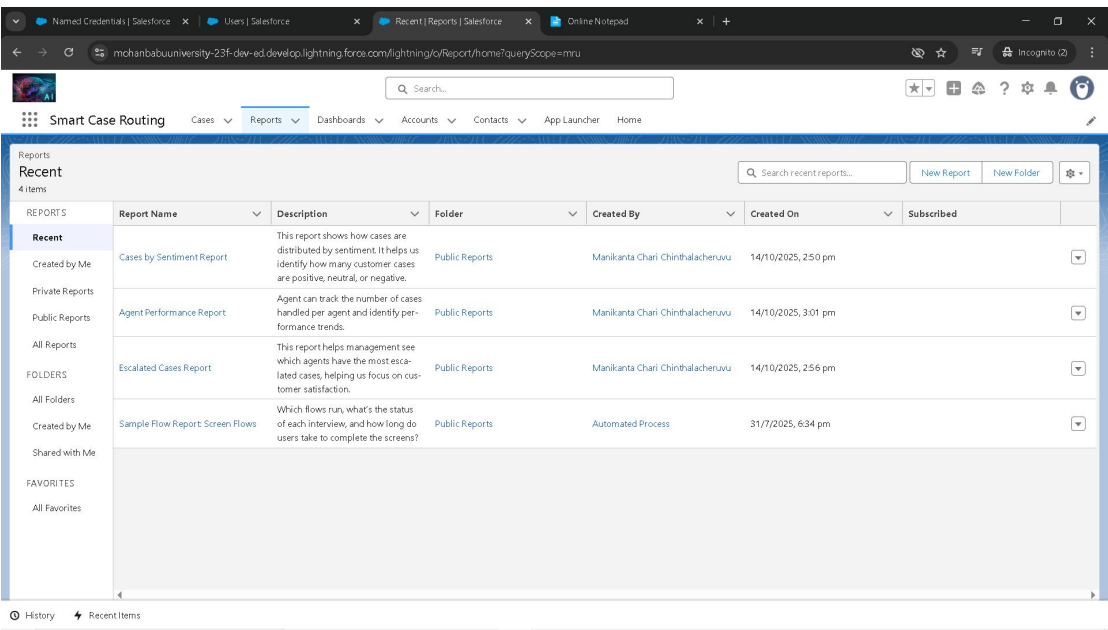Metric: % Negative Cases this month

Escalation Dashboard

Table: High Priority Escalated Cases

Metric: Avg escalation resolution time

Agent Performance Dashboard

Bar chart: Cases resolved per Agent

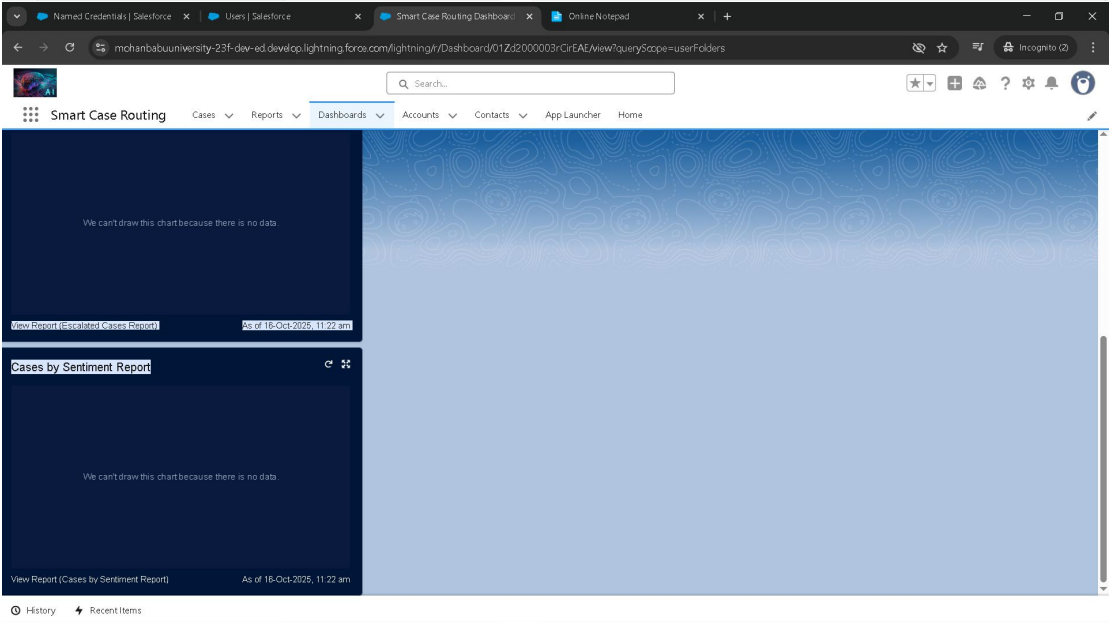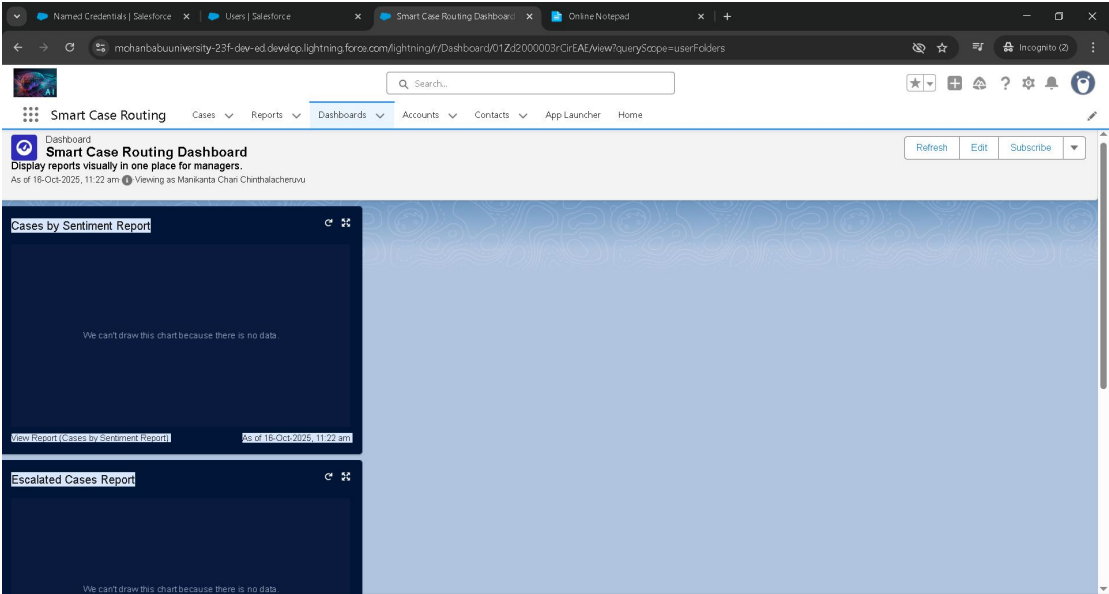Metric: Average resolution time per Agent

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