Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Project Title: Manufacturing After-Sales & Service CRM

Phase 9: Reporting, Dashboards & Security Review

This phase focuses on providing visibility into the after-sales service process through reports and dashboards, as well as implementing a robust security model to protect the data and ensure that users only have access to the information they need.
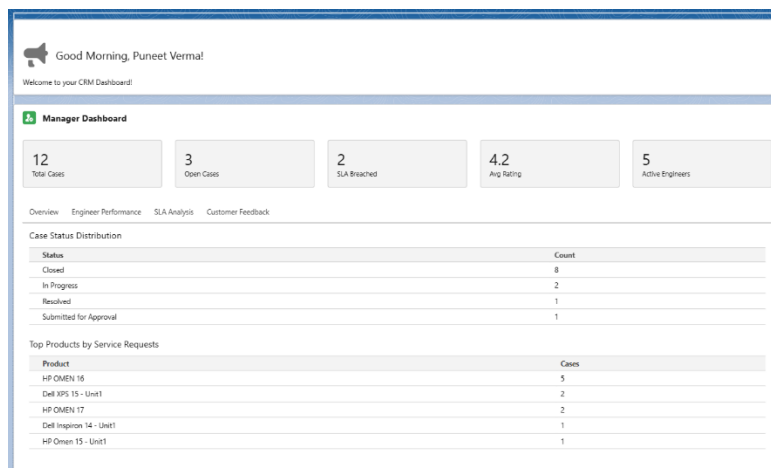
Reports and Report Types

- **Use Case**: Reports are essential for analyzing data, identifying trends, and making data-driven decisions. Custom report types are created to provide flexible and tailored reporting options that meet the specific needs of the business.
- **Implementation Details**:
    - The following custom report types have been created to support a variety of reporting needs:
        - **Product with Service Cases**: To analyze which products have the most service requests.
        - **Service Case with Dispatch**: To track the time from case creation to engineer dispatch.
        - **Engineer with Dispatch**: To monitor engineer workload and performance.
        - **Service Case with Feedback**: To correlate customer satisfaction with service case details.

Report Name	Description	Folder	Created By	Created On	Subscribed
Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	22/9/2025, 4:31 pm	
SLA Compliance Rate	Measure % of cases resolved within SLA.Matrix showing SLA compliance per priority, percentage met vs breached.	Public Reports	Puneet Verma	28/9/2025, 5:18 am	
Open Cases by Product Model	Purpose: Track open service cases by Product2 model.Output: Matrix report showing number of open cases per product model, split by priority.	Public Reports	Puneet Verma	28/9/2025, 7:03 am	
Engineer Utilization	Purpose: Track workload & SLA breaches per engineer. Output: Matrix report showing per-engineer workload and SLA breach ratio.	Public Reports	Puneet Verma	28/9/2025, 5:28 am	
Average Resolution Time	Find how long it takes to close cases. Summary report showing average resolution time by engineer and priority.	Public Reports	Puneet Verma	28/9/2025, 5:21 am	

Dashboards

- **Use Case**: Dashboards provide a real-time, visual representation of key performance indicators (KPIs) and other important metrics. Custom dashboards have been created for different user roles to provide them with the information they need at a glance.
- **Implementation Details**:
  - **Manager Dashboard**: This dashboard, powered by the managerDashboard LWC and the ManagerController Apex class, provides a high-level overview of the service operation. It includes components to display:
    - Total cases, open cases, SLA breaches, and average customer rating.
    - Case status distribution.
    - Top products by service requests.
    - Engineer performance metrics.
  - **Service Agent Dashboard**: This dashboard, powered by the serviceAgentDashboard LWC and the ServiceAgentController Apex class, is designed to help service agents manage their daily workload. It includes components to display:
    - Key stats such as total cases, open cases, and SLA breaches.
    - Recent service cases and customer feedback.
    - Product warranty and AMC status.

Security Review

A comprehensive security model has been implemented to ensure that data is protected and that users have the appropriate level of access.

- **Profiles**
    - **Use Case**: Custom profiles are created to define the object and field-level security for different user roles.
    - **Implementation Details**:
        - **Customer Profile**: For external users (customers), with read-only access to their own cases and products.
        - **Service Agent Profile**: For internal users who manage service cases, with read/write access to cases, products, and feedback.
        - **Field Engineer Profile**: For field engineers, with access to their assigned cases.
        - **Manager Profile**: For managers, with full access to cases, products, feedback, and reporting features.

	Action	Profile Name ↑	Custom	User License
☐	Edit | Del |...	B2B Reordering Portal Buyer Profile	✓	External Apps Login
☐	Edit | Del |...	Custom: Marketing Profile	✓	Salesforce
☐	Edit | Del |...	Custom: Sales Profile	✓	Salesforce
☐	Edit | Del |...	Custom: Support Profile	✓	Salesforce
☐	Edit | Del |...	Customer Profile	✓	Customer Community Login
☐	Edit | Del |...	Field Engineer Profile	✓	Salesforce Platform
☐	Edit | Del |...	Manager Profile	✓	Salesforce
☐	Edit | Del |...	Service Agent Profile	✓	Salesforce Platform

- **Roles**
    - **Use Case**: A role hierarchy is established to control record visibility and to enable managers to view the records of their subordinates.
    - **Implementation Details**:
        - **Manager**: Top-level role in the service department.
        - **Service Agent**: Reports to the Manager.
        - **Field Engineer**: Reports to the Service Agent.

⊟ **Manager**   Edit | Del | Assign
     Add Role
    ⊟ **Service Agent**   Edit | Del | Assign
        Add Role
       ⊞ **Field Engineer**   Edit | Del | Assign
          Add Role

- **Organization-Wide Defaults (OWD)**
  - **Use Case**: OWD settings define the baseline level of access for all records of a given object.
  - **Implementation Details**:
    - **Service Case**:
      - **Internal Access**: Public Read/Write
      - **External Access**: Private
    - **Registered Product**:
      - **Internal Access**: Public Read/Write
      - **External Access**: Read Only

Dispatch	Public Read/Write	Private
Engineer	Public Read/Write	Private
Error Log	Public Read/Write	Private
Feedback	Controlled by Parent	Controlled by Parent
Registered Product	Public Read/Write	Public Read Only
Service Agent	Public Read/Write	Private
Service Case	Public Read Only	Private

- **Audit Trail**
  - **Use Case**: The Setup Audit Trail is used to track all administrative changes made to the Salesforce org, such as changes to profiles, permission sets, and automation rules. This is essential for security and compliance purposes.
  - **Implementation Details**: The Setup Audit Trail is enabled by default in Salesforce and can be reviewed in the Setup menu.

SETUP
View Setup Audit Trail

View Setup Audit Trail

The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
17/10/2025, 10:58:46 am IST	verma0404project@agentforce.com		Activated flow with Name "Publish High-Priority Case Event" and Unique Name "Publish_High_Priority_Case_Event"	Flows	
17/10/2025, 10:58:36 am IST	verma0404project@agentforce.com		Created flow with Name "Publish High-Priority Case Event" and Unique Name "Publish_High_Priority_Case_Event"	Flows	
17/10/2025, 10:51:56 am IST	verma0404project@agentforce.com		The custom field option Required for Case Subject on object High-Priority Cases has changed from on to off	Custom Objects	
17/10/2025, 10:51:41 am IST	verma0404project@agentforce.com		Created custom field Priority (Text) on High-Priority Cases	Custom Objects	
17/10/2025, 10:51:12 am IST	verma0404project@agentforce.com		Created custom field Case Subject (Text) on High-Priority Cases	Custom Objects	
17/10/2025, 10:50:49 am IST	verma0404project@agentforce.com		Created custom field Case ID (Text) on High-Priority Cases	Custom Objects	
17/10/2025, 10:50:14 am IST	verma0404project@agentforce.com		Created custom object: High-Priority Case	Custom Objects	
17/10/2025, 10:34:07 am IST	verma0404project@agentforce.com		Changed PartsInventoryServiceTest Apex Class code	Apex Class	
17/10/2025, 10:30:05 am IST	verma0404project@agentforce.com		Deleted the parameter: ExternalCredential for Parts_Inventory_API	Named Credentials	
17/10/2025, 10:30:05 am IST	verma0404project@agentforce.com		Deleted the parameter: Url for Parts_Inventory_API	Named Credentials	
17/10/2025, 10:30:04 am IST	verma0404project@agentforce.com		Password changed for named credential Parts_Inventory_API	Named Credentials	
17/10/2025, 10:30:04 am IST	verma0404project@agentforce.com		Username changed for named credential Parts_Inventory_API from null to demo-user	Named Credentials	
17/10/2025, 10:30:04 am IST	verma0404project@agentforce.com		Authentication Protocol changed for named credential Parts_Inventory_API from null to Password Authentication	Named Credentials	
17/10/2025, 10:30:04 am IST	verma0404project@agentforce.com		Identity Type changed for named credential Parts_Inventory_API from null to Named Principal	Named Credentials	
17/10/2025, 10:30:04 am IST	verma0404project@agentforce.com		URL changed for named credential Parts_Inventory_API from null to https://httpbin.org/anything	Named Credentials	
17/10/2025, 10:30:04 am IST	verma0404project@agentforce.com		Named Credential Type changed for named credential Parts_Inventory_API from Secured Endpoint to Legacy	Named Credentials	
17/10/2025, 10:22:34 am IST	verma0404project@agentforce.com		Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Parts_Inventory_Auth) for Parts_Inventory_API	Named Credentials	
17/10/2025, 10:22:34 am IST	verma0404project@agentforce.com		Created a new parameter: Url (Parameter Type: Url, Parameter Value: https://api.parts-inventory.example.com/v1) for Parts_Inventory_API	Named Credentials	
17/10/2025, 10:22:34 am IST	verma0404project@agentforce.com		Created a new named credential: Parts_Inventory_API	Named Credentials	
17/10/2025, 10:21:42 am IST	verma0404project@agentforce.com		Created a new parameter: Default (Parameter Type: Named Principal, Sequence Number: 1) for Parts_Inventory_Auth	External Credentials	

Download setup audit trail for last six months (Excel .csv file).