Phase 9: Reporting, Dashboards & Security Review – Must-Have Documentation

Goal: Enable Managers and Agents to track performance, monitor customer requests, and maintain data security in Salesforce.

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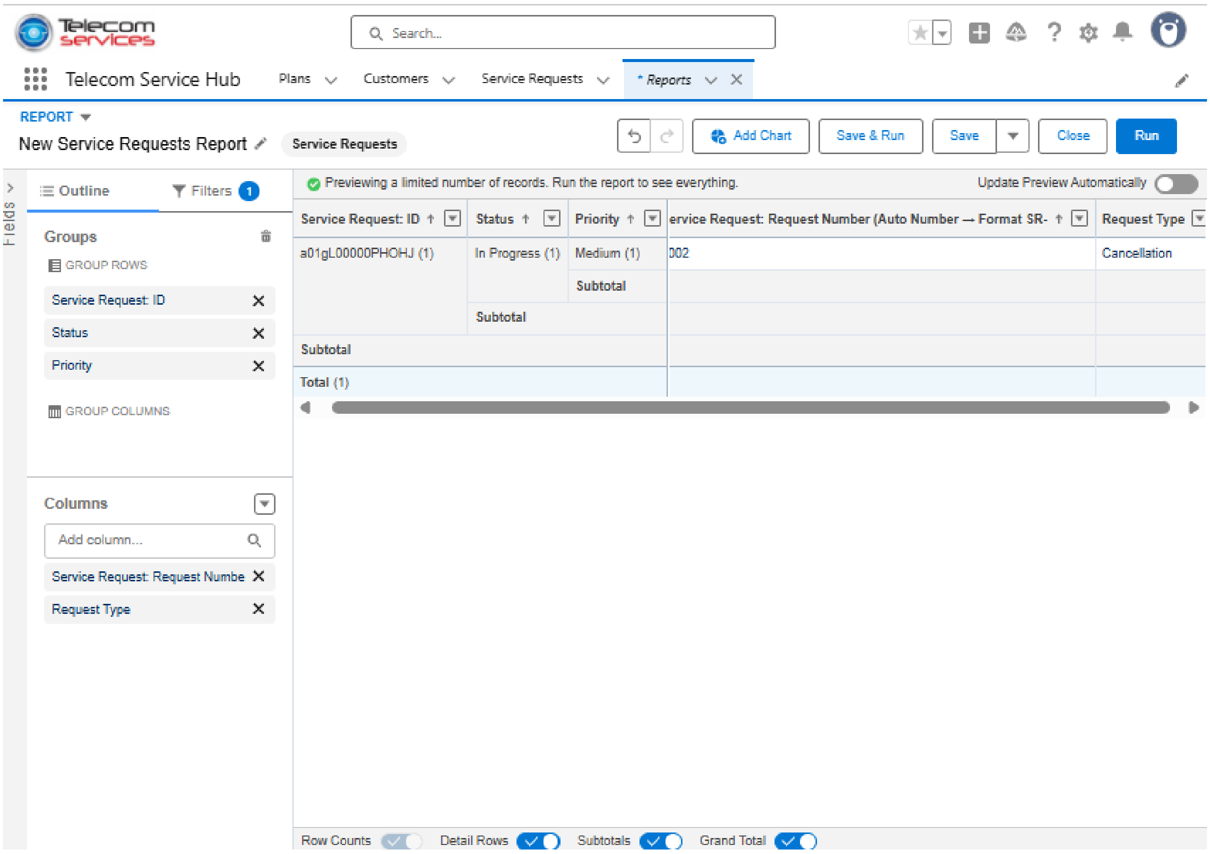
1. Reports

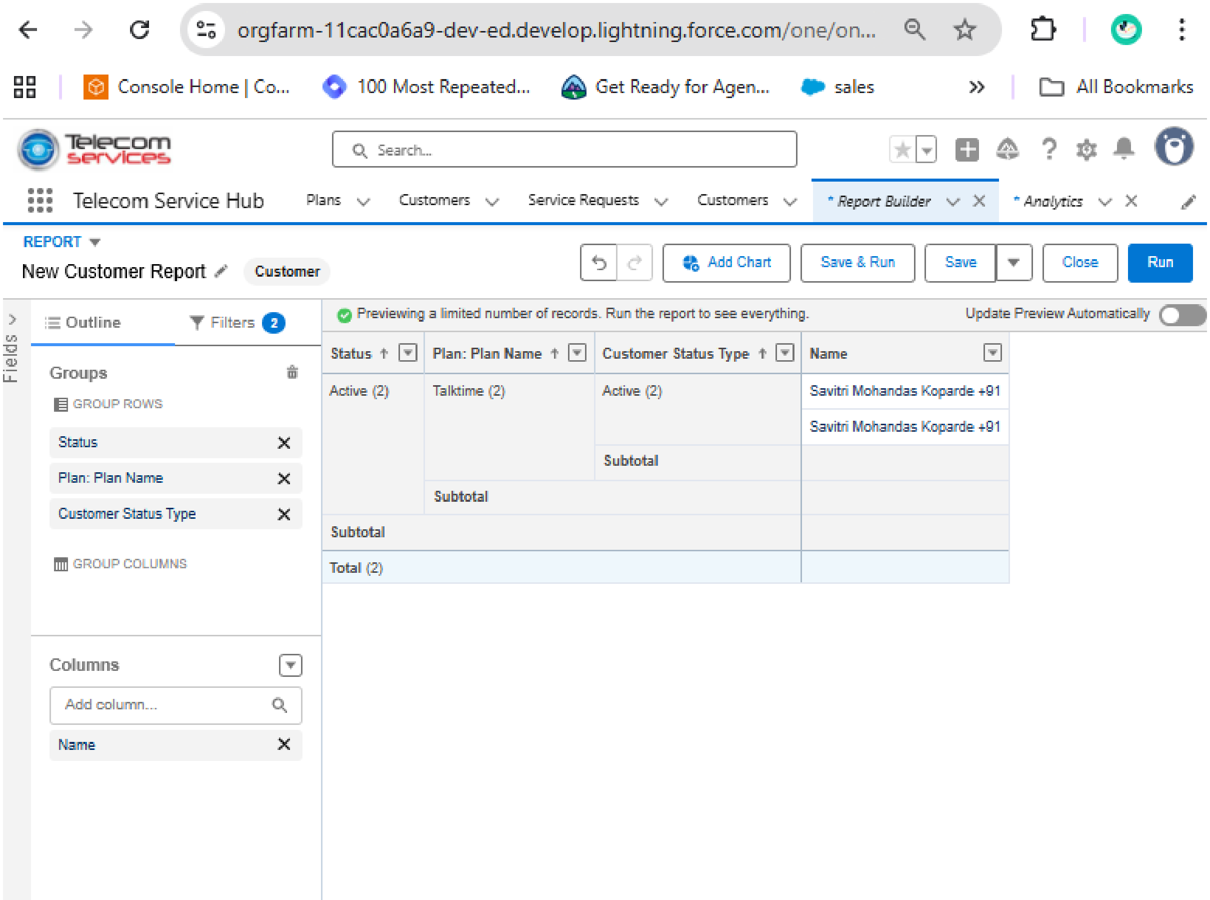
Purpose: Summarize and analyze data for decision-making.

Steps (must-have reports):

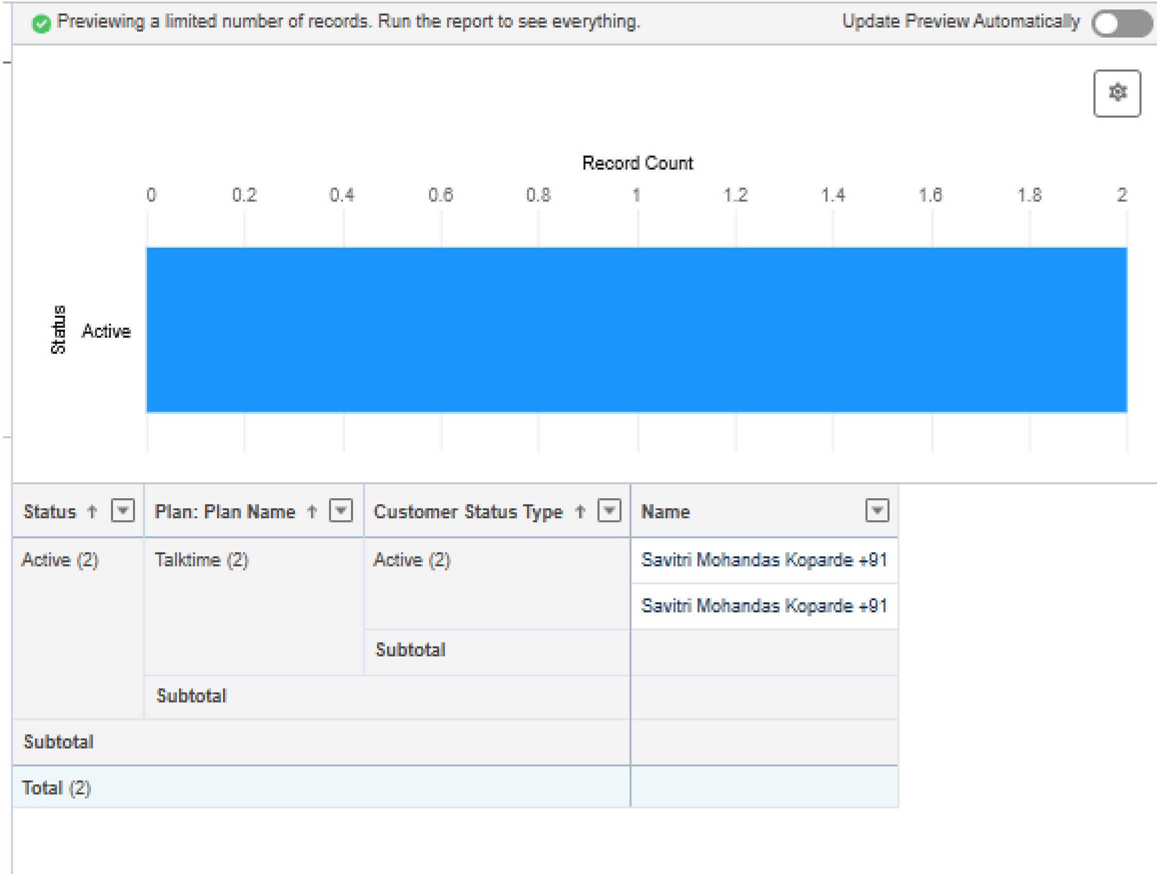
1. **Service Requests by Type**
    - Object: Service_Request__c
    - Type: Summary Report
    - Group by: Request_Type__c
    - Show: Count of records, Status, Priority



2. **Active vs Cancelled Customers (Churn Analysis)**
    - Object: Customer__c
    - Type: Summary Report
    - Group by: Status__c
    - Metrics: Count



Anlysis of report using bar chart:



Status	Plan: Plan Name	Customer Status Type	Name
Active (2)	Talktime (2)	Active (2)	Savitri Mohandas Koparde +91
			Savitri Mohandas Koparde +91
		Subtotal	
	Subtotal		
Subtotal			
Total (2)			

3. **Agent Performance Report**
   - Object: Service_Request__c
   - Type: Summary Report
   - Group by: Owner (Agent)
   - Show: Count of resolved requests

Impact: Real-time insights into requests, customer churn, and agent efficiency.

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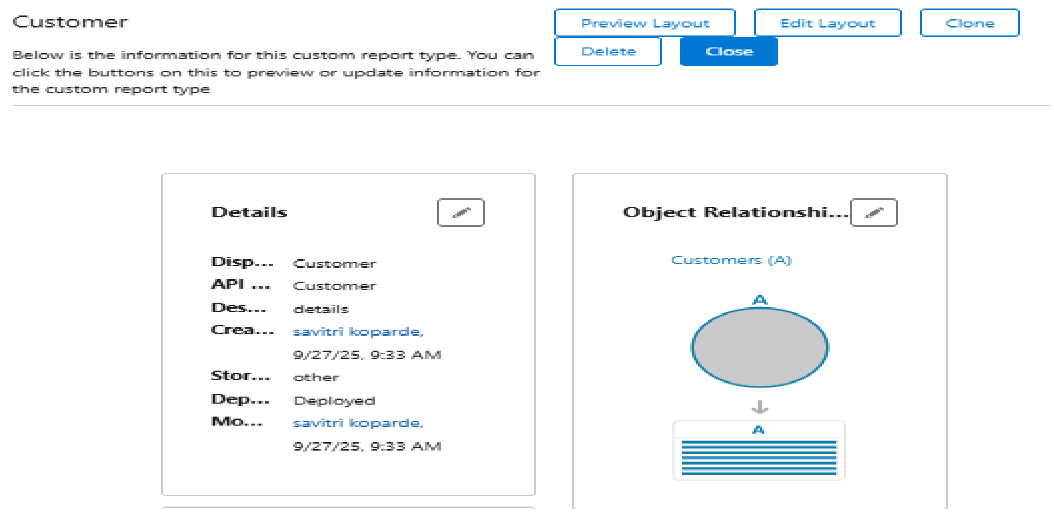
2. Report Types

Purpose: Define which objects and fields are available for reporting.

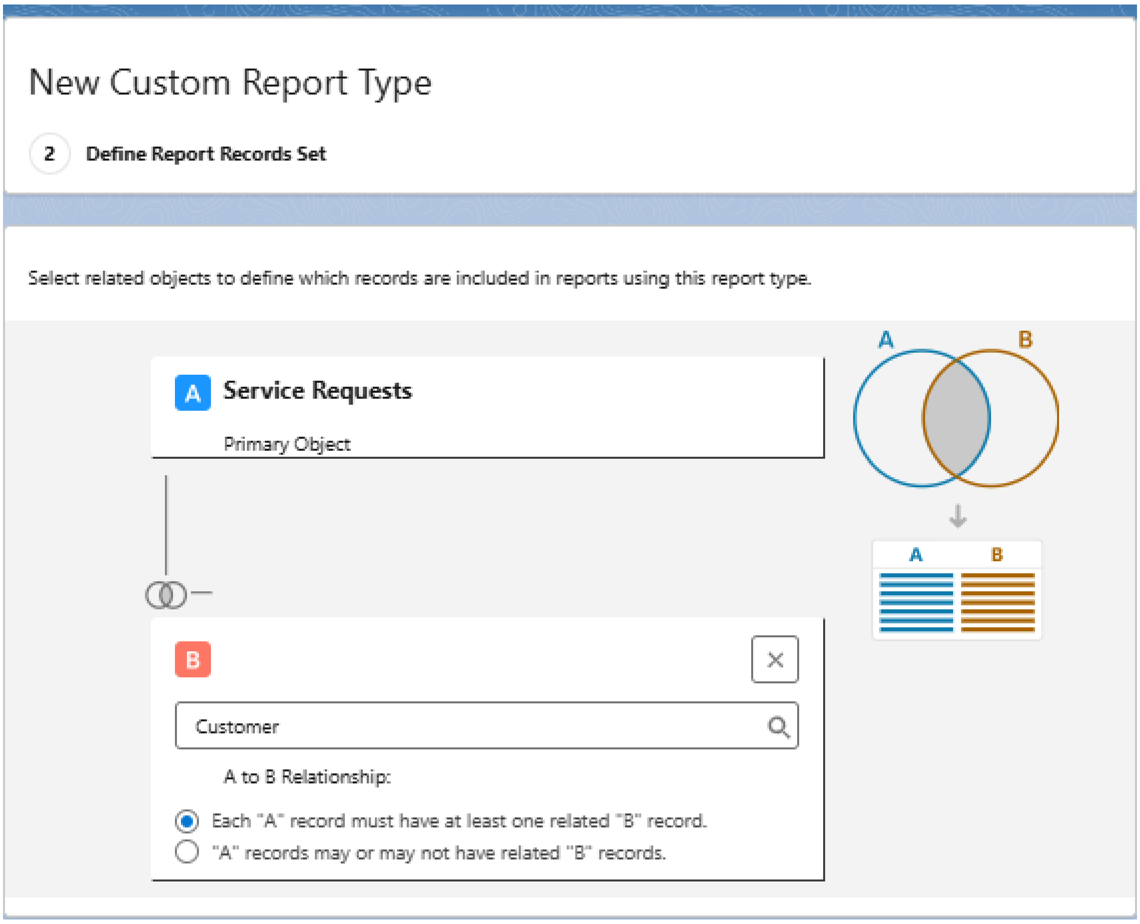
Steps:

1. Setup → Report Types → New Custom Report Type
2. Primary Object: Service_Request__c or Customer__c
3. Related Object: Optional (Customer__c for Service Requests)
4. Deploy → Make it available for reporting

Impact: Ensures all necessary fields and relationships are reportable.



Service Request Custom Report:



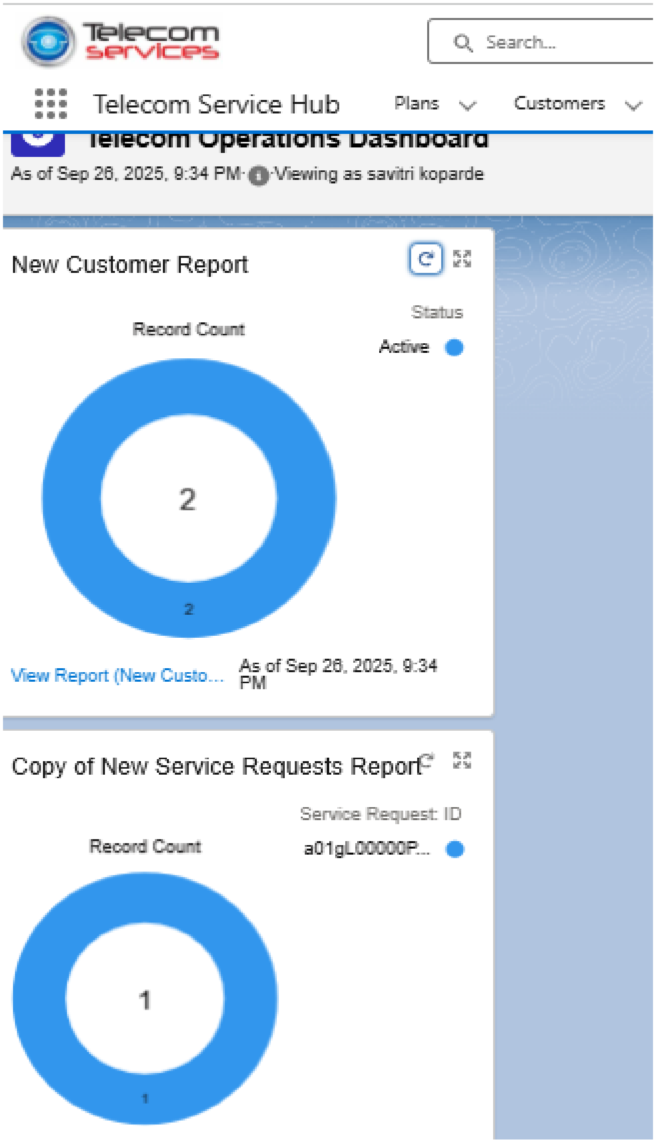
3. Dashboards

Purpose: Visualize report data for quick insights.

Steps:

1. Setup → Dashboards → New Dashboard
2. Add Components:
   - Pie chart → Service Requests by Type
   - Bar chart → Active vs Cancelled Customers
   - Table → Top Agents by Resolved Requests
3. Assign running user: Manager (so dashboard shows data according to manager access)
4. Save & Activate

Impact: Provides Managers and Agents a quick snapshot of operations.



4. Sharing Settings

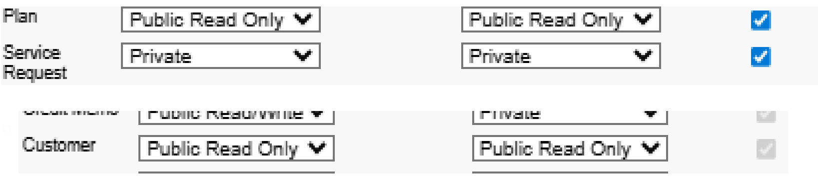
Purpose: Control who sees which records in Salesforce.

Steps (must-have):

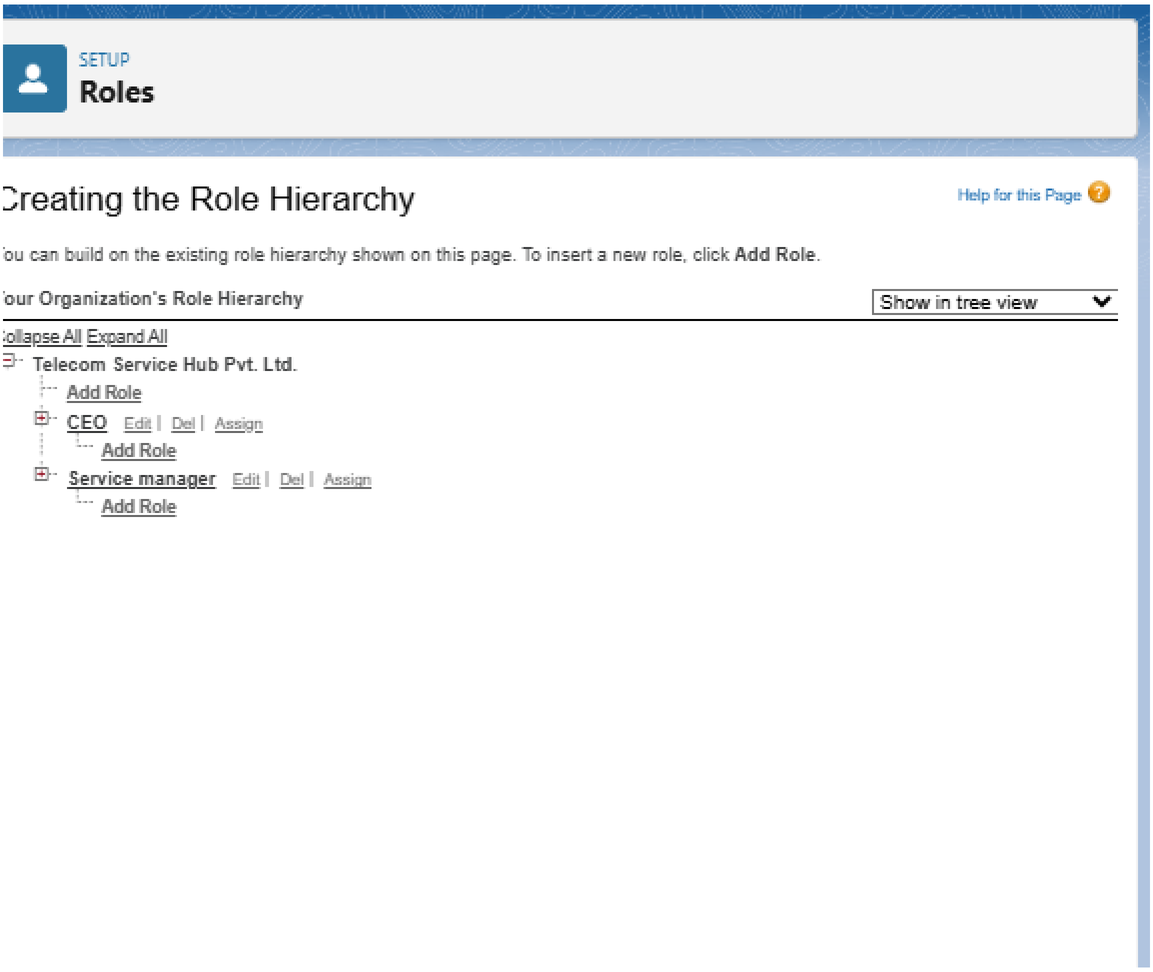
1. Setup → Sharing Settings
2. Ensure Customer__c and Plan__c → Public Read Only
3. Service_Request__c → Private
4. Role hierarchy ensures Managers see all requests, Agents see only their own

Impact: Protects sensitive customer data while enabling operational visibility.

Sharing setting:



Role hierarchy:



5. Field Level Security (FLS)

Purpose: Restrict access to specific fields on objects.

Steps (must-have):

1. Setup → Object Manager → Object → Fields & Relationships → Set Field-Level Security
2. Example: Hide Email from Agents if required
3. Ensure Managers have full visibility

Impact: Maintains confidentiality and enforces data access policies.

System Administrator	☐	☐
Telcom Agent Profile	☐	☐
Telcom Agent Profile3	☑	☐
Telcom Manager Profile	☑	☐
Telecom Agent	☐	☐
Telecom Agent Profile2	☐	☐