

## 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.

### 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

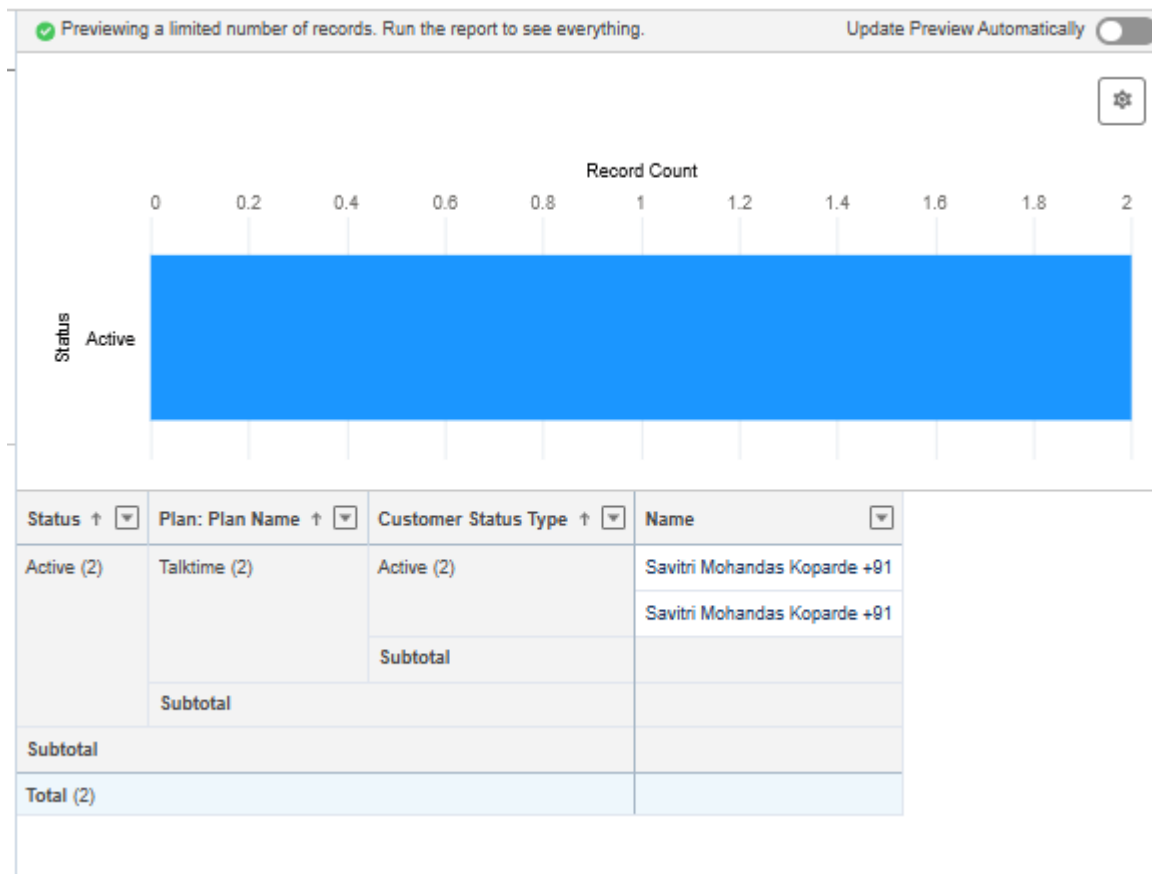
The screenshot shows the Salesforce Reports Builder interface for a report titled 'New Service Requests Report'. The report is based on the 'Service Requests' object. The left sidebar shows the 'Fields' panel with 'Groups' and 'Columns' sections. The 'Groups' section has 'Service Request: ID', 'Status', and 'Priority' selected. The 'Columns' section has 'Service Request: Request Number' and 'Request Type' selected. The main area displays a preview of the report data. The data is grouped by 'Request Type' (Cancellation) and shows counts for 'Status' (In Progress) and 'Priority' (Medium). The report is previewing a limited number of records.

Service Request: ID	Status	Priority	Service Request: Request Number (Auto Number → Format SR-)	Request Type
a01gL00000PHOHJ (1)	In Progress (1)	Medium (1)	002	Cancellation
Subtotal				
Subtotal				
Subtotal				
Total (1)				

#### 2. Active vs Cancelled Customers (Churn Analysis)

- Object: Customer\_\_c
- Type: Summary Report
- Group by: Status\_\_c
- Metrics: Count





### 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.

## Customer

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

[Preview Layout](#)[Edit Layout](#)[Clone](#)[Delete](#)[Close](#)

### Details

**Disp...** Customer  
**API ...** Customer  
**Des...** details  
**Crea...** savitri koparde,  
9/27/25, 9:33 AM  
**Stor...** other  
**Dep...** Deployed  
**Mo...** savitri koparde,  
9/27/25, 9:33 AM

### Object Relationshi...

Customers (A)



Service Request Custom Report:

## New Custom Report Type

### 2 Define Report Records Set

Select related objects to define which records are included in reports using this report type.

#### A Service Requests

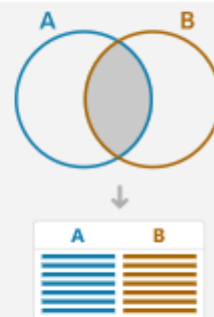
Primary Object

#### B

Customer

A to B Relationship:

- ☒ Each "A" record must have at least one related "B" record.  
☐ "A" records may or may not have related "B" records.



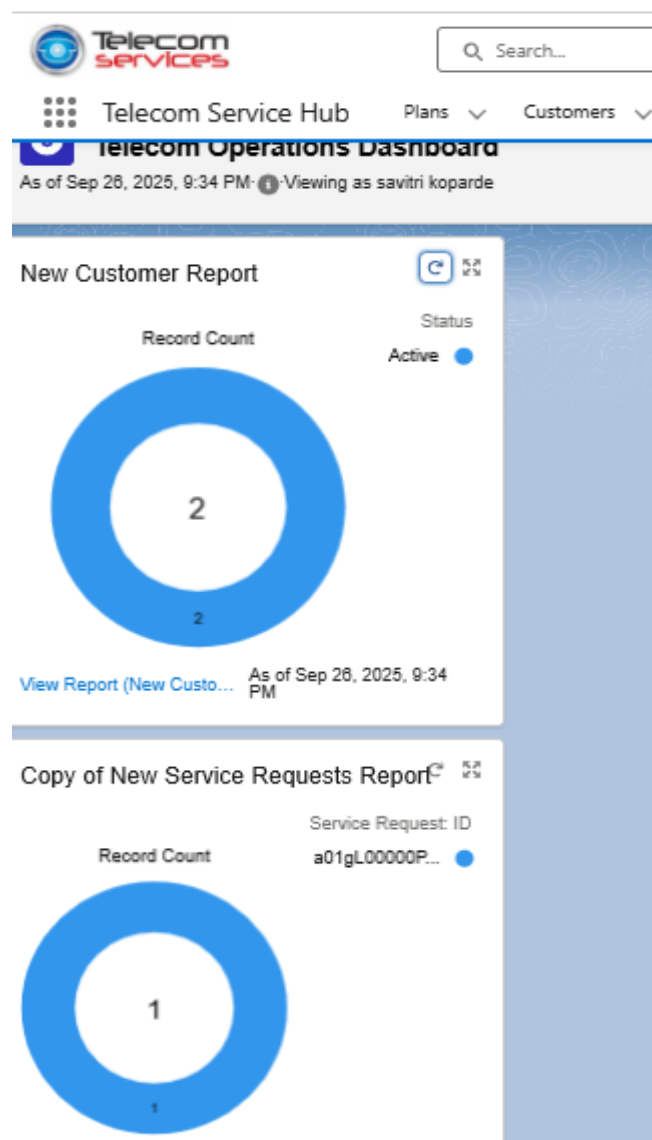
### 3. Dashboards

**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.



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## 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:

Plan	Public Read Only ▼	Public Read Only ▼	✓
Service Request	Private ▼	Private ▼	✓
Customer	Public Read Only ▼	Public Read Only ▼	✓

Role hierarchy:

The screenshot shows the 'Setup Roles' page in Salesforce. The page title is 'Roles' under the 'SETUP' menu. Below the title, there is a section 'Creating the Role Hierarchy' with a 'Help for this Page' link. The main content area displays 'Your Organization's Role Hierarchy' with a 'Show in tree view' button. The role hierarchy is shown as a tree structure for 'Telecom Service Hub Pvt. Ltd.' with the following roles and their actions:

- CEO (Edit, Del, Assign)
  - Service manager (Edit, Del, Assign)
    - ...

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## 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	<input type="checkbox"/>	<input type="checkbox"/>
Telecom Agent Profile	<input type="checkbox"/>	<input type="checkbox"/>
Telecom Agent Profile3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Telecom Manager Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Telecom Agent	<input type="checkbox"/>	<input type="checkbox"/>
Telecom Agent Profile2	<input type="checkbox"/>	<input type="checkbox"/>

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