

FinSmart CRM Project – Phase 9:

Reporting, Dashboards & Security Review (Step by Step Procedure)

Step 1: Create Custom Report Types

What I did: I created custom report types to combine related objects for reporting.

Reason: Custom Report Types allow users to generate insights that span multiple objects, such as Customers with their Loans or Loans with their Repayments.

Steps:

1. Go to Setup → Report Types → New Custom Report Type.
2. Customer with Loan Applications:
 - Primary Object: Customer__c
 - Child Object: Loan_Application__c (Each ‘A’ record must have at least one related ‘B’ record)
 - Save & Deploy.

The screenshot shows the Salesforce Setup interface for a custom report type. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Loan with Repayments' and includes buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. Below the title, a message states: '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'.

The 'Details' section lists the following information:

- Display Label: Loan with Repayments
- API Name: Loan_with_Repayments
- Description: Loan with Repayments
- Created By: Shrinidhi Shrinidhi, 9/24/25, 9:13 PM
- Store in Category: other
- Deployment Status: Deployed
- Modified By: Shrinidhi Shrinidhi, 9/24/25, 9:13 PM

The 'Fields' section shows a table with the following data:

Source Object	Included Fields
Loan_Applications	33
Repayments	12

The 'Object Relationships' section displays a Venn diagram with two overlapping circles labeled 'A' and 'B'. Circle 'A' is blue and labeled 'Loan_Applications (A)'. Circle 'B' is orange and labeled 'Repayments (B)'. The intersection of the two circles is shaded gray. Below the diagram, a message states: '... with at least one related record from Repayments (B)'. Below the message, there are two icons representing the objects: a blue icon for 'A' and an orange icon for 'B'.

3. Loan with Repayments:
 - Primary Object: Loan_Application__c
 - Child Object: Repayment__c
 - Save & Deploy.

Outcome: These report types enable building combined reports.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. Under 'Object Manager', 'Report Types' is selected. The main content area displays the configuration for the 'Customer with Loan Applications' custom report type. It includes buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. Below these buttons, there are two panels: 'Details' and 'Object Relationships'. The 'Details' panel shows the following information:

- Display Label:** Customer with Loan Applications
- API Name:** Customer_with_loan_applications
- Description:** Customer with Loan Applications
- Created By:** Shrinidhi Shrinidhi, 9/24/25, 9:11 PM
- Store in Category:** other
- Deployment Status:** Deployed
- Modified By:** Shrinidhi Shrinidhi, 9/24/25, 9:11 PM

The 'Object Relationships' panel shows a Venn diagram with two overlapping circles, 'A' (Bank_Customers) and 'B' (Loan_Applications), with the text '... with at least one related record from Loan_Applications (B)'.

Below the panels, there is a table showing the source objects and included fields:

Source Object	Included Fields
Bank_Customers	13
Loan_Applications	32

Step 2: Create Reports

What I did: I created reports using the custom report types for business insights.

Reason: Reports summarize data and provide detailed views for decision-making.

1. Loan Funnel:

- Report Type: Customer with Loan Applications
- Group by Loan_Status__c
- Columns: Customer Name, Loan Amount, Status
- Save as Loan Funnel Report.

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'FinSmart Banking A...', 'Bank_Customers', 'Loan_Applications', 'Repayments', 'Documents', 'Offers', and 'Report Builder'. The main content area displays the configuration for the 'Loan Funnel Report' using the 'Customer with Loan Applications' report type. It includes buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. Below these buttons, there is a table showing the preview of the report data:

Customer Name	Loan_Application Name	Loan_Status
1 Priya Sharma	LA-0001	Draft
2 Sneha Reddy	LA-0002	Draft

On the left side, there is a sidebar with 'Outline' and 'Filters' sections. The 'Columns' section shows the following columns selected:

- Customer Name
- Loan_Application Name
- Loan_Status

2. Overdue EMIs:

- Report Type: Loan with Repayments
- Filter: Payment_Status__c = Overdue
- Columns: Loan Name, Customer, Due Date, Amount
- Save as Overdue EMIs Report.

The screenshot shows the Salesforce Report Builder interface for a report titled 'Overdue EMIs Report'. The report is configured with the following settings:

- Report Type:** Loan with Repayments
- Filter:** Payment_Status__c = Overdue
- Columns:** Loan_Application Name, Repayment Name, Bank_Customer: Customer Name, Due_Date, Due_Amount

The preview table displays the following data:

Payment_Status	Loan_Application Name	Repayment Name	Bank_Customer: Customer Name	Due_Date	Due_Amount
Due (2)	LA-0001	RP-0001	Priya Sharma	10/23/2025	₹1,00,000.00
	LA-0002	RP-0002	Sneha Reddy	10/17/2025	₹50,000.00
Subtotal					₹1,50,000.00
Total (2)					₹1,50,000.00

3. Revenue by Loan Type:

- Report Type: Customer with Loan Applications
- Filter: Loan_Status__c = Disbursed
- Summarize Loan_Amount__c by Loan_Type__c
- Save as Revenue by Loan Type Report.

FinSmart Banking A... Bank_Customers Loan_Applications Repayments Report Builder More

REPORT Revenue by Loan Type Customer with Loan Applications

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

	Customer Name	Loan_Application Name	Loan_Status
1	Priya Sharma	LA-0001	Draft
2	Sneha Reddy	LA-0002	Draft

Fields > Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Customer Name X

Loan_Application Name X

Loan_Status X

Step 3: Create Dashboard

What I did: I created a dashboard to visualize loan performance and repayment trends.

Reason: Dashboards provide management with quick access to KPIs and visual trends for better decision-making.

Steps:

1. Go to Dashboards → New Dashboard.
2. Name: Loan Management Dashboard, choose a folder.
3. Add Components:
 - KPI Tiles:
 - Total Disbursed Loans
 - Overdue Count
 - Average Credit Score
 - Charts:
 - Loans by Type → Pie/Bar chart
 - Overdue Trend → Line chart
4. Configure components to use reports from Step 2.
5. Save & Refresh Dashboard.

Add Widget

Report

Loan Funnel Report

☐ Use chart settings from report

Display As

123

Groups

Add group...

Columns

Add column...

Customer Name

Preview

Loan Funnel Report

Customer Name ↑	Loan_Application Name	Loan_Status
Priya Sharma	LA-0001	Draft
Sneha Reddy	LA-0002	Draft

View Report (Loan Funnel Report)

Cancel

Add

FinSmart Banking A...

Bank_Customers

Loan_Applications

Repayments

Loan Management Dashb...

More

Dashboard

Loan Management Dashboard

As of Sep 24, 2025, 9:07 AM

Viewing as Shrinidhi Shrinidhi

Refresh

Edit

Subscribe

Loan Funnel Report

Customer Nam...	Loan_Application N...	Loan_St...
Priya Sharma	LA-0001	Draft
Sneha Reddy	LA-0002	Draft

View Report (Loan Funnel ... As of Sep 24, 2025, 9:07 AM

Overdue EMIs Report

Sum of Due_Amount

Payment_Status

Due

₹150k

₹150k

View Report (Overdue EMI... As of Sep 24, 2025, 9:07 AM

Outcome

- Reports summarize business data and provide insights.
- Dashboards visualize key loan and repayment metrics for managers.
- Sensitive fields are protected and security issues reviewed, ensuring data privacy.