FinSmart CRM Project – Phase 9:

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

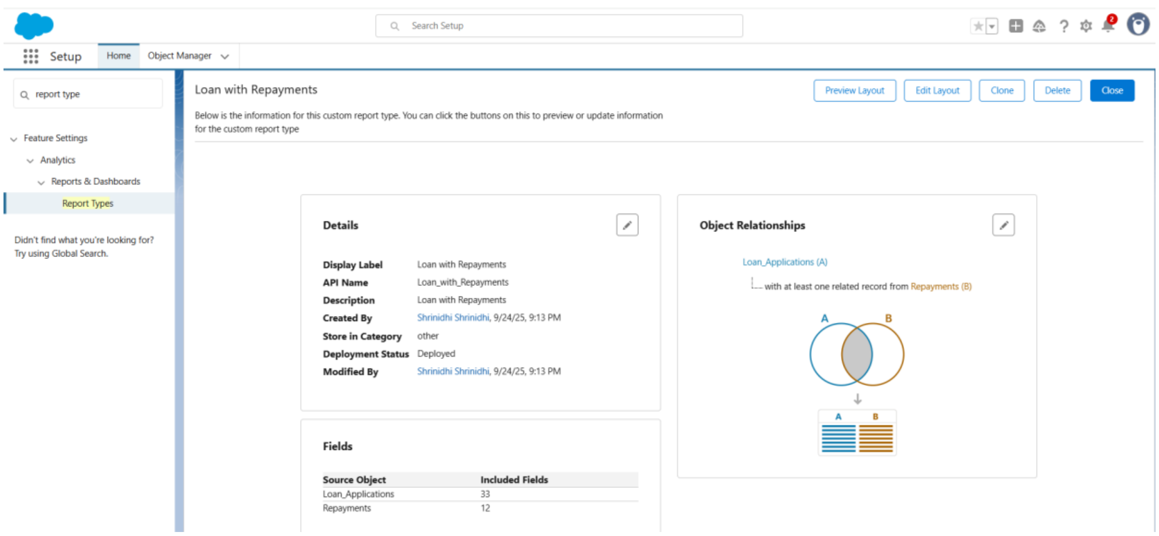
Step 1: Create Custom Report Types

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.

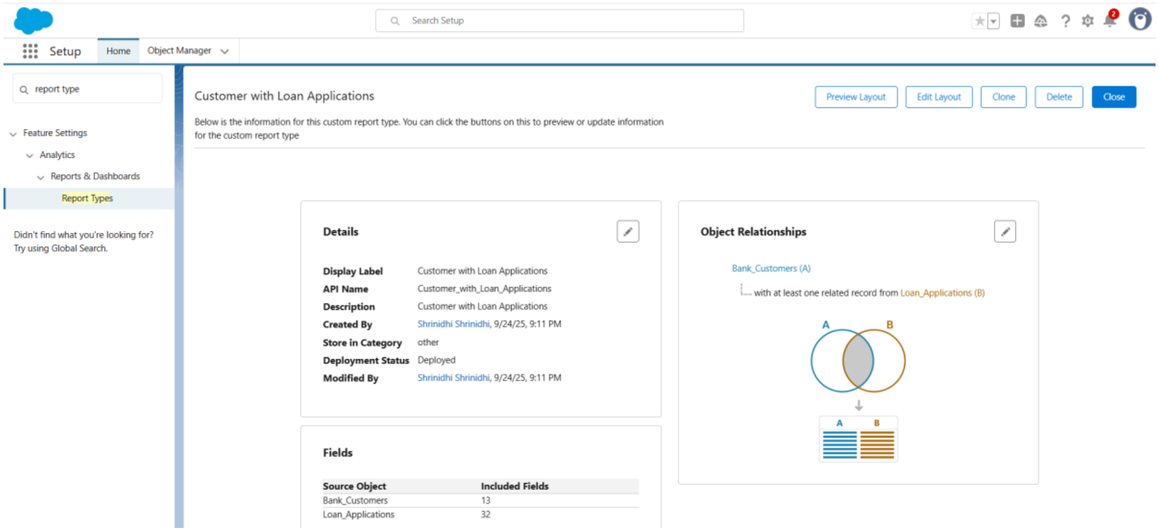
Steps:

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.



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

Outcome: These report types enable building combined reports.

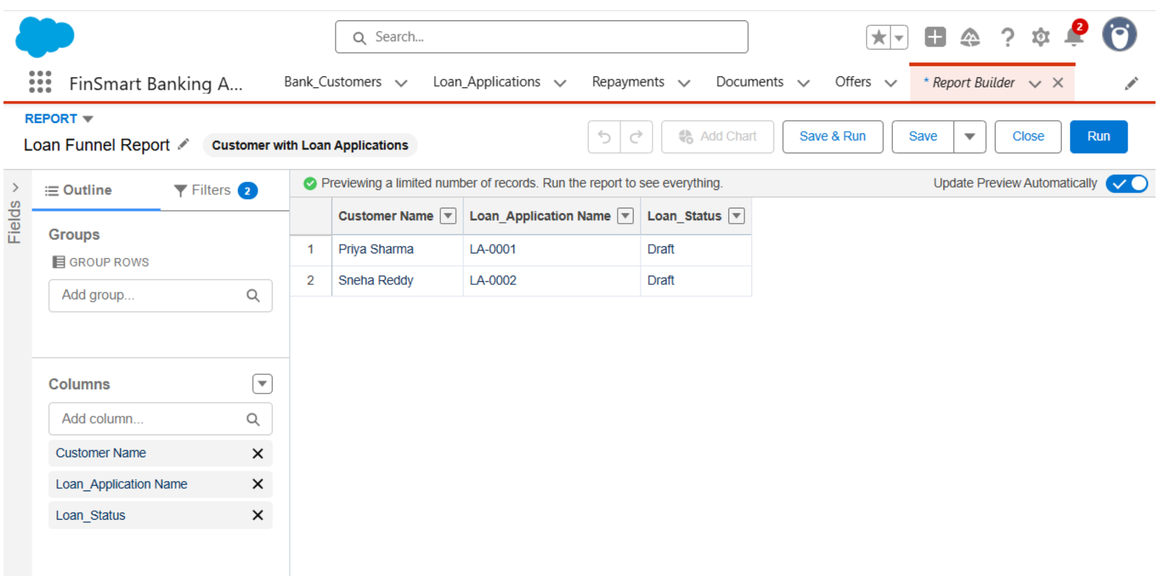


Step 2: Create Reports

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

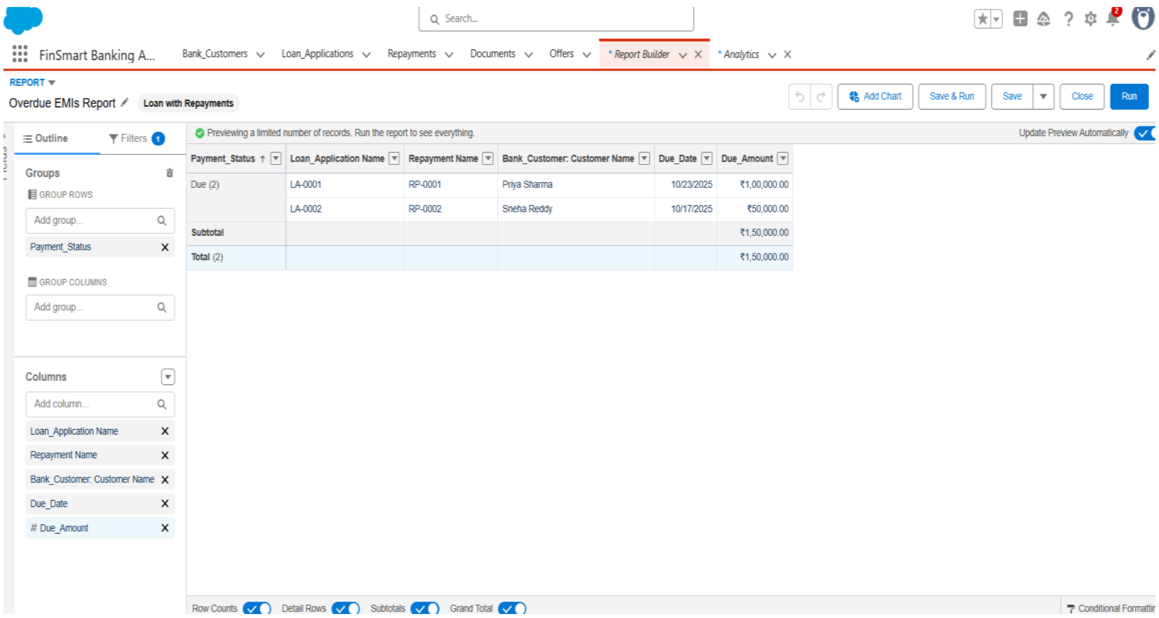
Reason: Reports summarize data and provide detailed views for decision-making.

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.



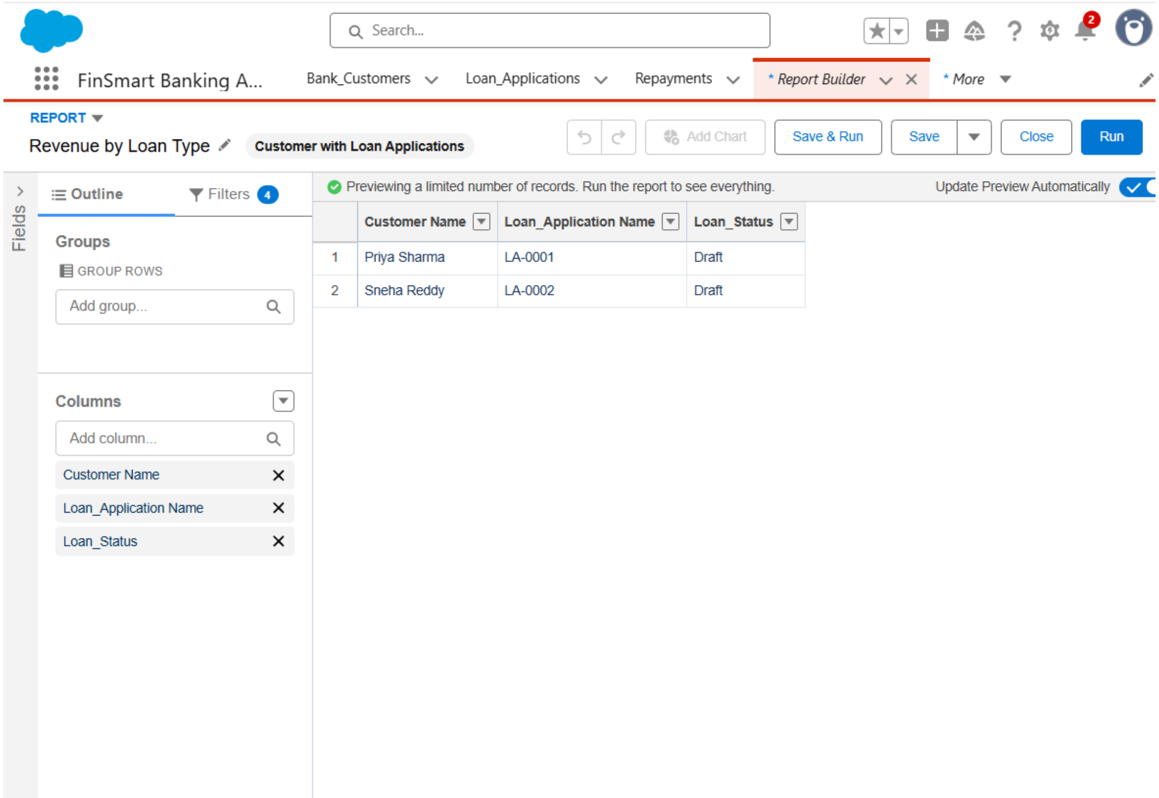
2. Overdue EMIs:

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



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.



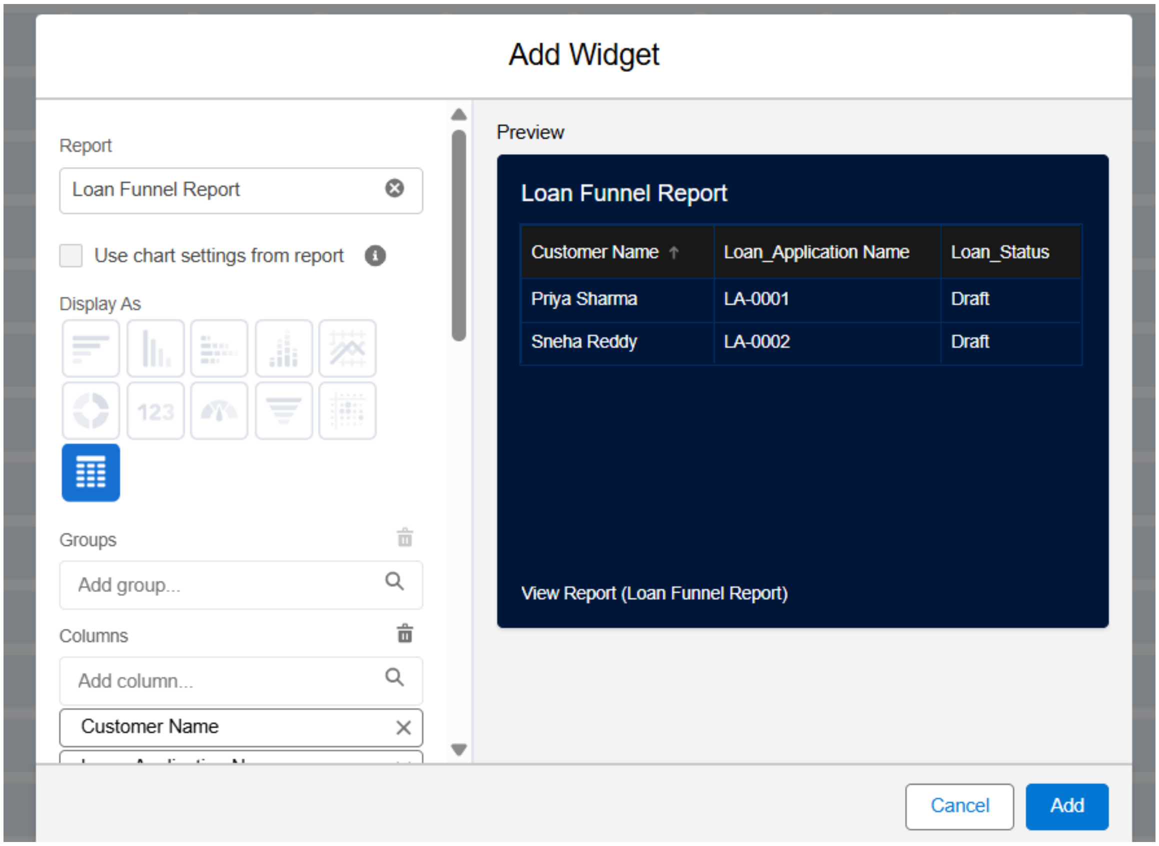
Step 3: Create Dashboard

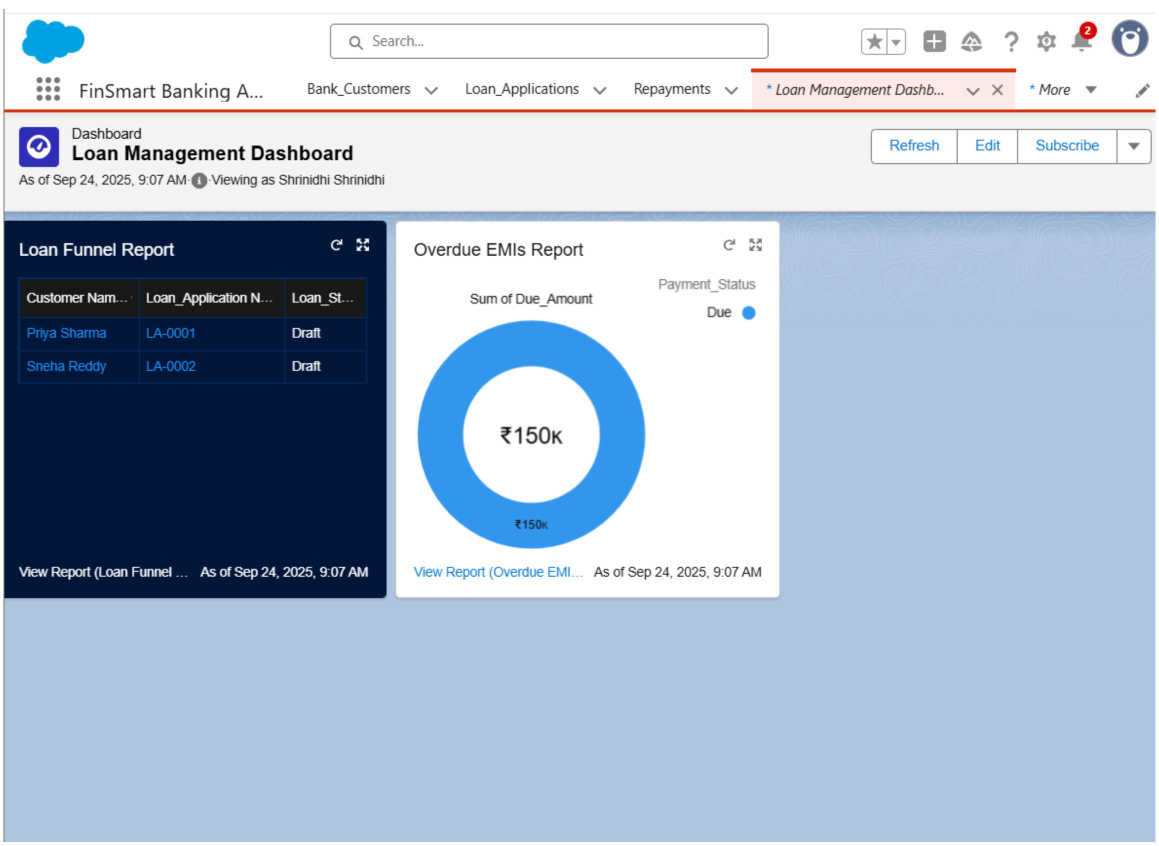
What I did: I created a dashboard to visualize loan performance and repayment trends.

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


Search...
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.