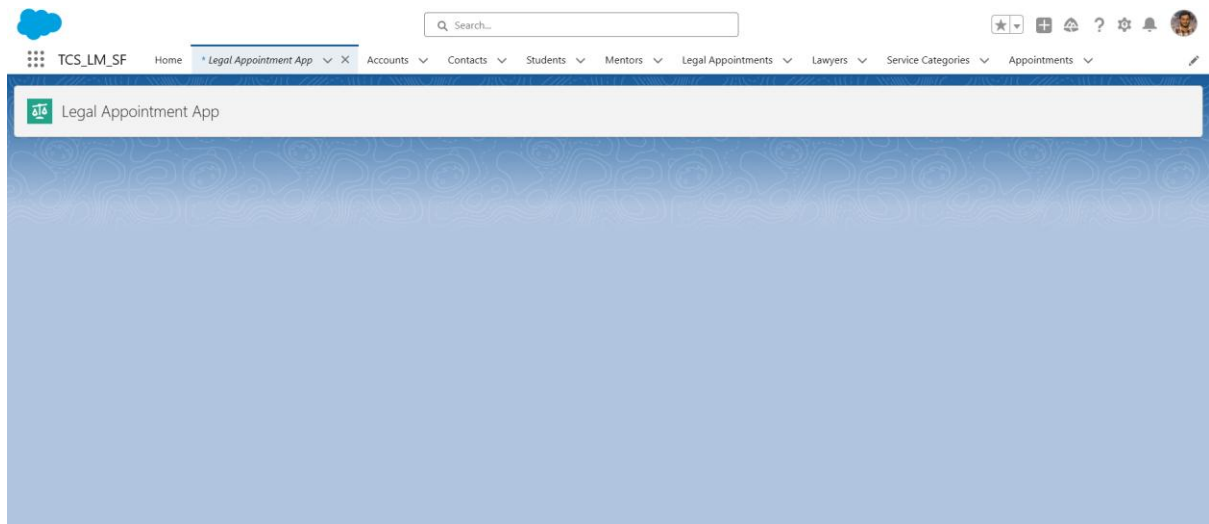


# Phase 9 — Reporting, Dashboards & Security Review (Online Appointment Booking for Legal Services)

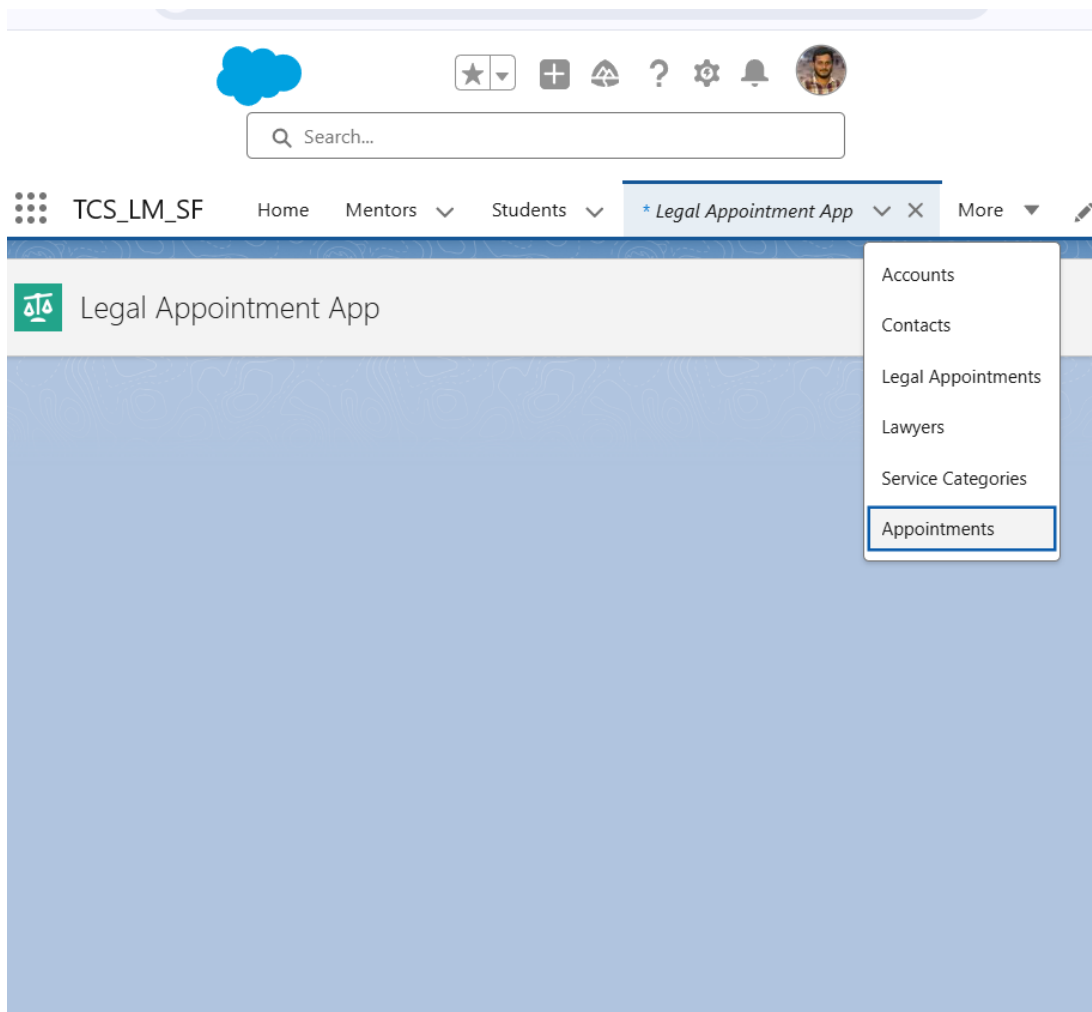
## 1. Reports

- Created **custom reports** to monitor appointment activity and lawyer performance:
  - **Tabular Reports:** Simple list of all appointments with Appointment\_Date\_\_c, Appointment\_Time\_\_c, Lawyer\_\_c, Contact\_\_c, Status\_\_c.
  - **Summary Reports:** Grouped appointments by **Lawyer\_\_c** or **Status\_\_c** to track confirmed, pending, and canceled appointments.
  - **Matrix Reports:** Cross-tab reports showing appointments per **Service Category** per lawyer.
  - **Joined Reports:** Combined data from multiple objects (Appointments + Contacts + Lawyers) for holistic insights.



## 2. Report Types

- Created **custom report types** to include related objects:
  - Appointment\_\_c with related Contact and Lawyer\_\_c
  - Lawyer\_\_c with related Appointment\_\_c
- Enabled reporting on fields like **Appointment\_Date\_\_c**, **Status\_\_c**, **Contact Email**, **Lawyer Location**, **Service Category**.

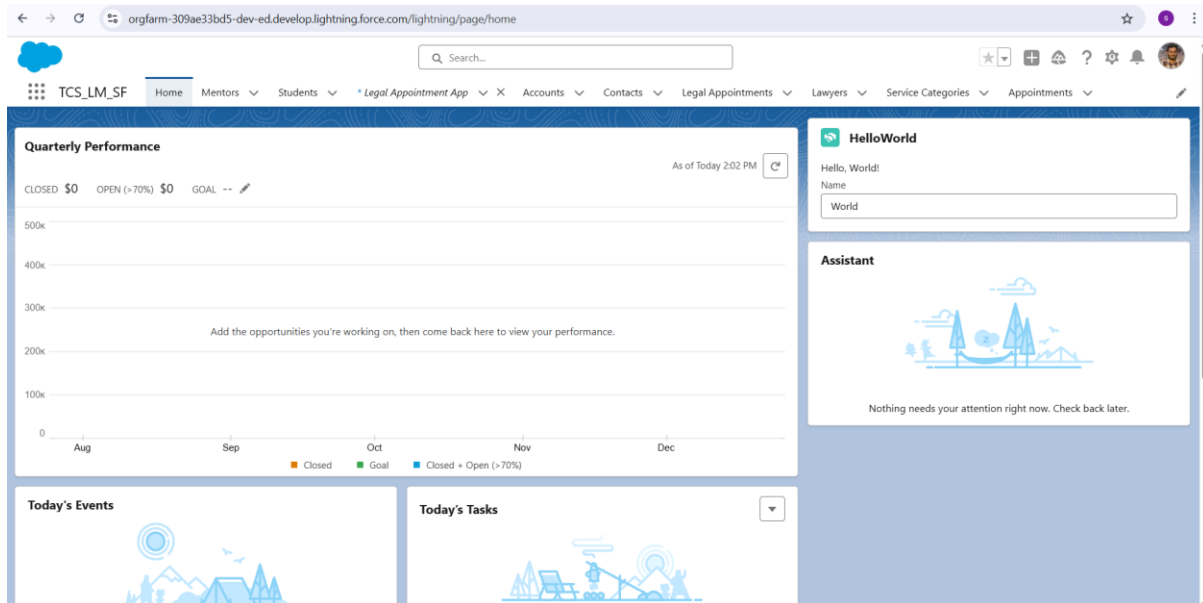


### 3. Dashboards

- Built dashboards to visualize key metrics:
  - Total appointments per day/week/month
  - Number of confirmed vs. pending appointments
  - Lawyer workload and availability
- Used **charts, gauges, and tables** for visual insights.

### 4. Dynamic Dashboards

- Configured **dynamic dashboards** for different users:
  - Lawyers see only their own appointments
  - Admins see all appointments and metrics
- Enabled **role-based views** without creating multiple dashboards.



## 5. Sharing Settings

- Configured **Org-wide defaults**:
  - Appointment\_\_c — Private
  - Lawyer\_\_c — Private/Read-only for other users
- Used **sharing rules** so lawyers can view their own appointments.

## 6. Field Level Security (FLS)

- Restricted sensitive fields from unauthorized users:
  - Lawyer Email\_\_c and Contact Email\_\_c visible only to relevant roles
  - Appointment\_Status\_\_c editable only by admin or system processes

## 7. Session Settings

- Ensured **session timeout** and secure session handling to prevent unauthorized access.

## 8. Login IP Ranges

- Restricted access for sensitive roles (e.g., Admin, Lawyers) to trusted IP ranges where applicable.

## 9. Audit Trail

- Enabled **Setup Audit Trail** to track changes to objects, fields, and flows.
- Useful for compliance and troubleshooting data/security issues.

## Outcome:

- Reports and dashboards provide **real-time insights** into appointment bookings, lawyer availability, and client engagement.

- Security settings ensure **data privacy and role-based access** for sensitive client and lawyer information.
- Admins can monitor changes and user activity for **compliance and operational control**.