Phase 9: Reporting, Dashboards & Security Review

- ## Report Types

Explanation:

- Report Type defines **which object and fields** are available in a report.
- Determines if report can be **Tabular, Summary, Matrix, or Joined**.

Steps to Create Report Type

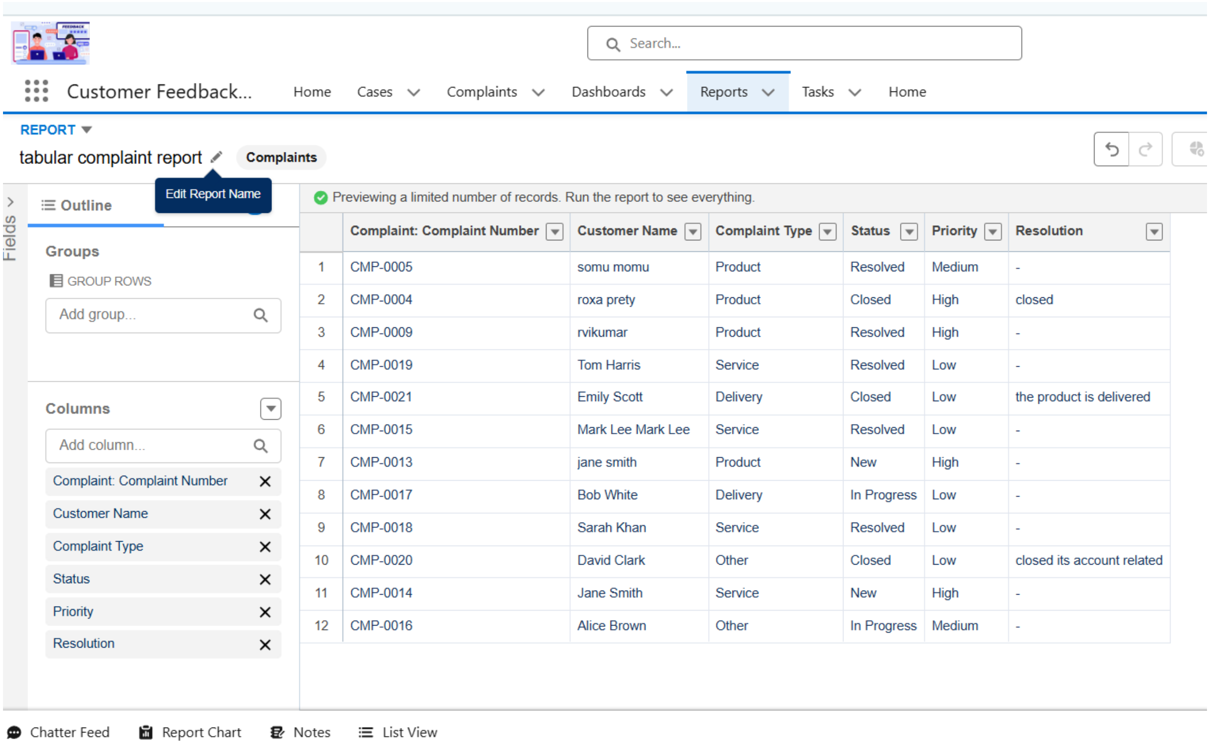
1. Setup → Report Types → New Custom Report Type
2. Primary Object → Complaint
3. Report Type Label → e.g., Complaint Report Type
4. Description → optional
5. Store in Category → Select “Other Reports” or “Complaints”
6. Deployment Status → Deployed
7. Click Save

- ## Reports

Tabular Report

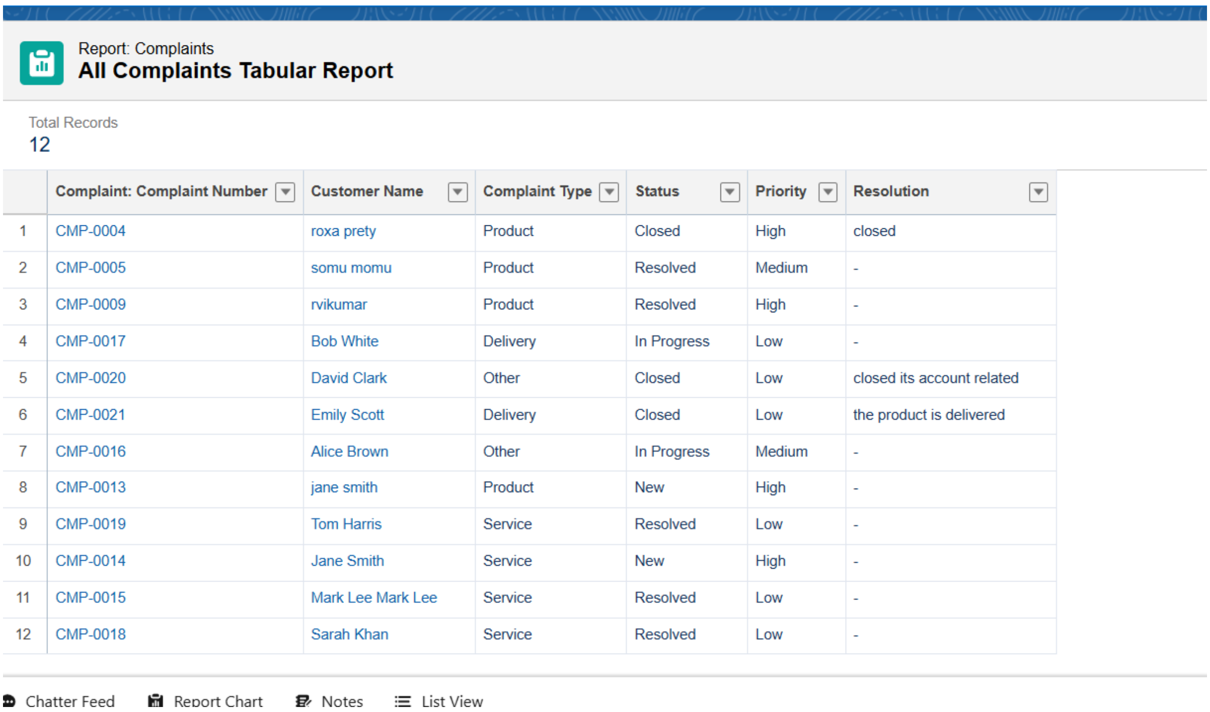
Steps:

1. Setup → Reports → New Report
2. Select **Complaint** object
3. Choose **Tabular** report type
4. Add fields: Complaint Number, Customer Name, Contact, Complaint Type, Status, Priority, Resolution



	Complaint: Complaint Number	Customer Name	Complaint Type	Status	Priority	Resolution
1	CMP-0005	somu momu	Product	Resolved	Medium	-
2	CMP-0004	roxa prety	Product	Closed	High	closed
3	CMP-0009	rvikumar	Product	Resolved	High	-
4	CMP-0019	Tom Harris	Service	Resolved	Low	-
5	CMP-0021	Emily Scott	Delivery	Closed	Low	the product is delivered
6	CMP-0015	Mark Lee Mark Lee	Service	Resolved	Low	-
7	CMP-0013	jane smith	Product	New	High	-
8	CMP-0017	Bob White	Delivery	In Progress	Low	-
9	CMP-0018	Sarah Khan	Service	Resolved	Low	-
10	CMP-0020	David Clark	Other	Closed	Low	closed its account related
11	CMP-0014	Jane Smith	Service	New	High	-
12	CMP-0016	Alice Brown	Other	In Progress	Medium	-

5. Filter data if needed
6. Save report → Name: All Complaints Tabular
7. Run → displays all complaints in a list

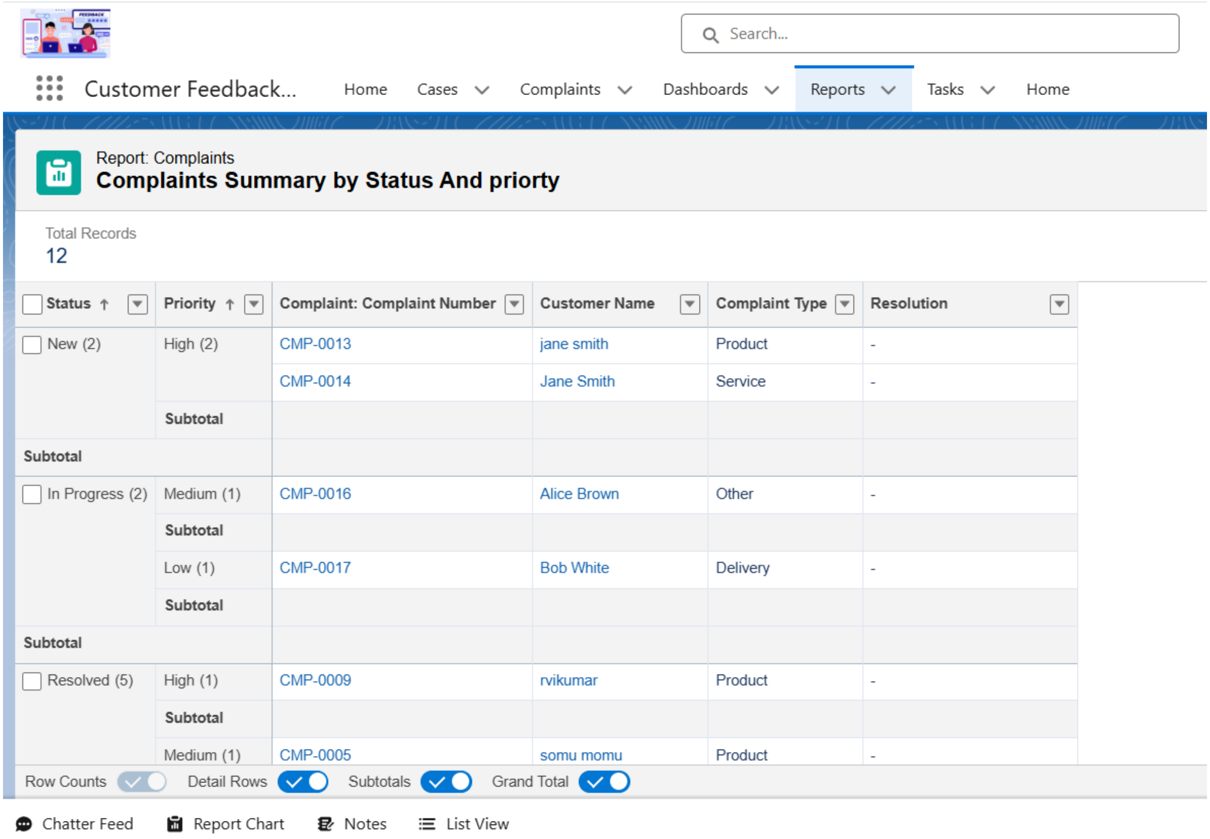


	Complaint: Complaint Number	Customer Name	Complaint Type	Status	Priority	Resolution
1	CMP-0004	roxa prety	Product	Closed	High	closed
2	CMP-0005	somu momu	Product	Resolved	Medium	-
3	CMP-0009	rvikumar	Product	Resolved	High	-
4	CMP-0017	Bob White	Delivery	In Progress	Low	-
5	CMP-0020	David Clark	Other	Closed	Low	closed its account related
6	CMP-0021	Emily Scott	Delivery	Closed	Low	the product is delivered
7	CMP-0016	Alice Brown	Other	In Progress	Medium	-
8	CMP-0013	jane smith	Product	New	High	-
9	CMP-0019	Tom Harris	Service	Resolved	Low	-
10	CMP-0014	Jane Smith	Service	New	High	-
11	CMP-0015	Mark Lee Mark Lee	Service	Resolved	Low	-
12	CMP-0018	Sarah Khan	Service	Resolved	Low	-

Summary Report

Steps:

1. Setup → Reports → New Report
2. Select **Complaint** object
3. Choose **Summary** report type
4. Group by **Status** or **Complaint Type**
5. Add fields: Customer Name,Resultion,Complaint Numer,Complaint Type



Status ↑	Priority ↑	Complaint: Complaint Number	Customer Name	Complaint Type	Resolution
New (2)	High (2)	CMP-0013	jane smith	Product	-
		CMP-0014	Jane Smith	Service	-
	Subtotal				
Subtotal					
In Progress (2)	Medium (1)	CMP-0016	Alice Brown	Other	-
	Subtotal				
	Low (1)	CMP-0017	Bob White	Delivery	-
	Subtotal				
Subtotal					
Resolved (5)	High (1)	CMP-0009	rvikumar	Product	-
	Subtotal				
	Medium (1)	CMP-0005	somu momu	Product	-

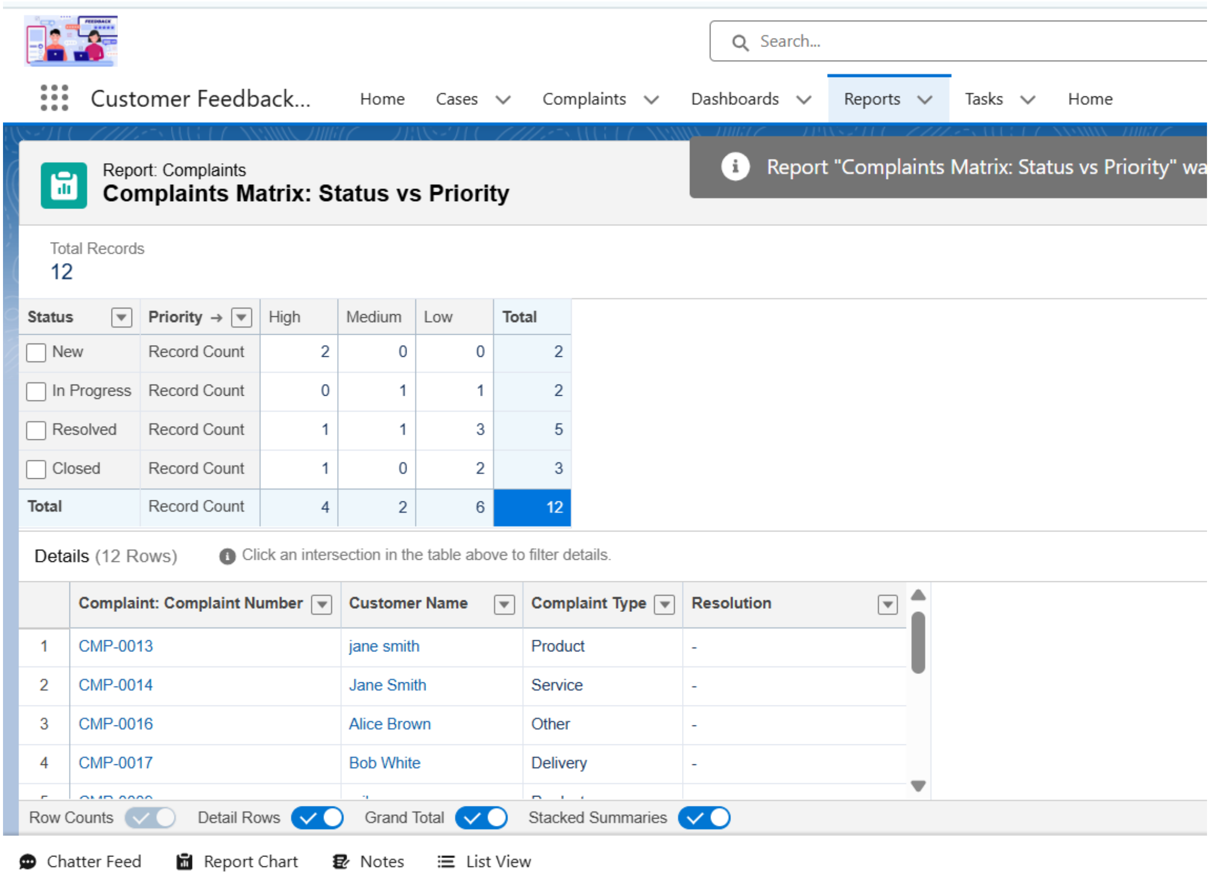
6. Filter data if needed
7. Save report → Name: Complaints Summary by Status
8. Run → displays complaints grouped by Status

Matrix Report

Steps:

1. Setup → Reports → New Report
2. Select **Complaint** object
3. Choose **Matrix** report type

4. Group rows by **Status**, columns by **Priority**
5. Add fields: Complaint Number, Customer Name, Resultion,Complaint Numer,Complaint Type
6. Save report → Name: Complaints Matrix Report
7. Run → displays complaints cross-tabulated by Status and Priority



- # Dashboards

Create Dashboard

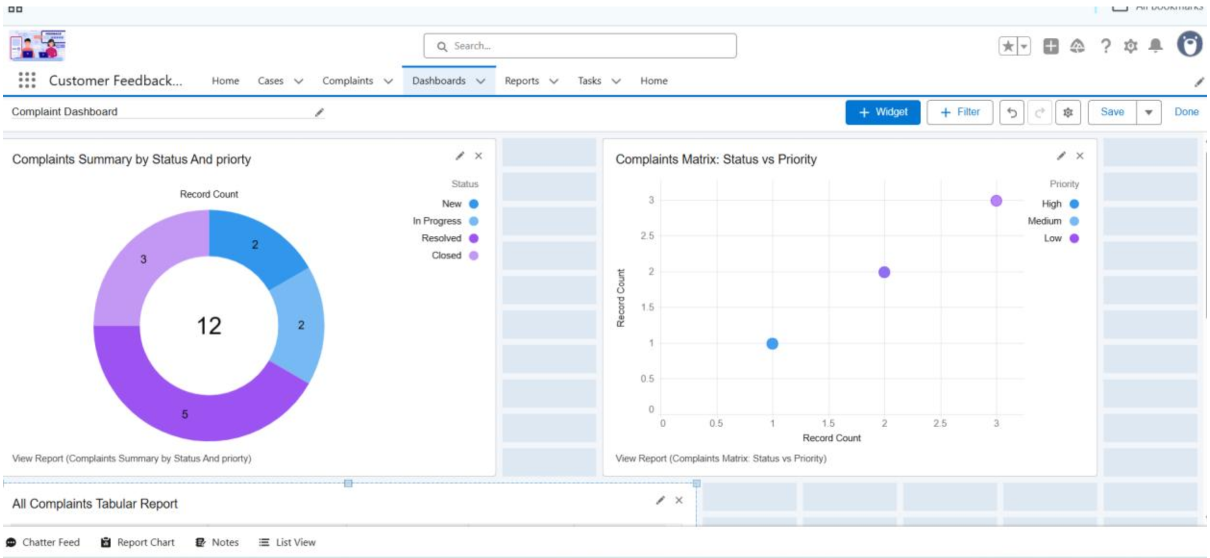
Steps:

1. Setup → App Launcher → Dashboards → New Dashboard
2. Name: Complaint Dashboard
3. Select folder → Private or Shared
4. Click Create

Add Widgets

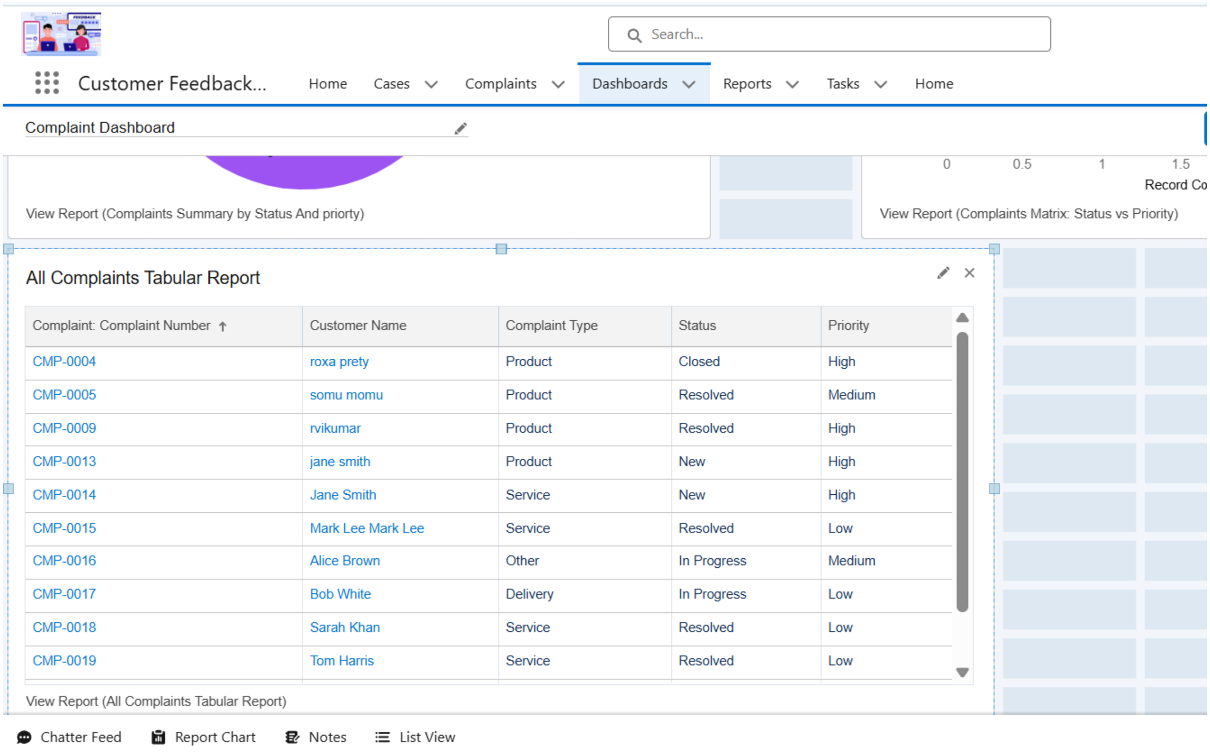
Steps:

1. Click **+ → Component**
2. Select report: Complaints Summary by Status
3. Choose chart type: Bar / Pie / Donut
4. Configure axes → X-axis: Status, Y-axis: Count of complaints
5. Click Add → chart appears on dashboard



Steps:

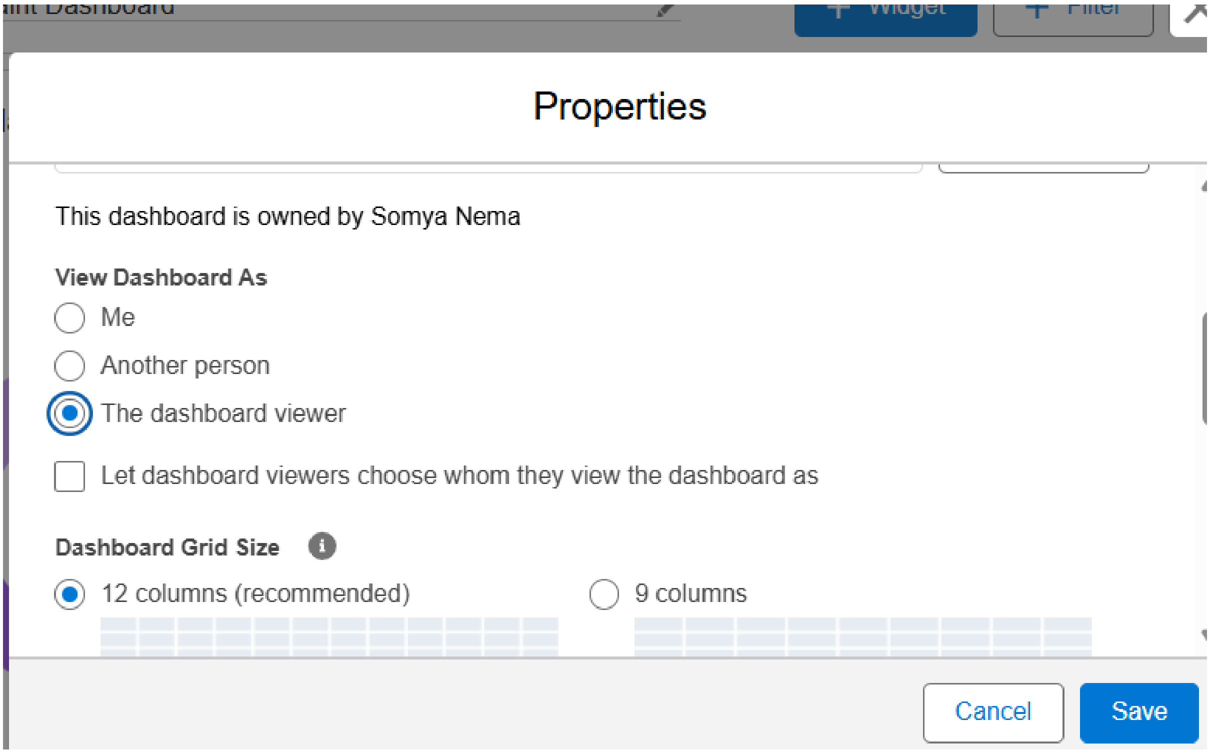
1. Click **+ → Component**
2. Select report: All Complaints Tabular
3. Choose **Table**
4. Click Add → detailed complaint list appears



- **Dynamic Dashboard**

Steps:

1. Click Dashboard Settings → View Dashboard As → The dashboard viewer
2. Save & Run → dashboard updates based on user viewing it
3. Verify by logging in as different roles

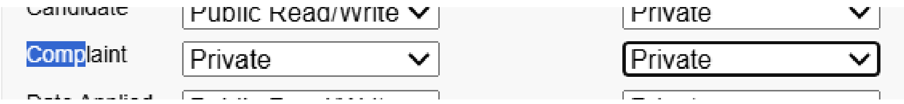


- ## Sharing Settings

Organization-Wide Defaults (OWD)

Steps:

1. Setup → Sharing Settings → Complaint Object
2. Internal Access → Private (only owners can see)
3. External Access → Private (customers see only their complaints)
4. Save

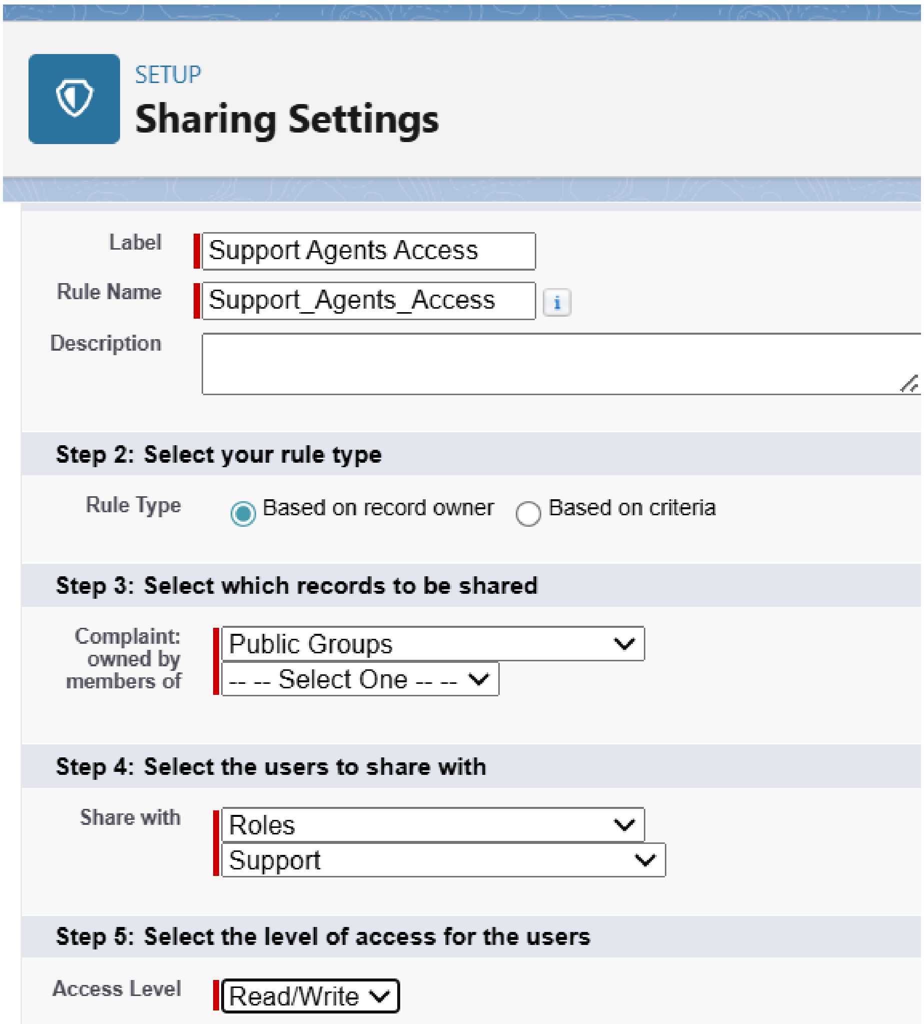


Create Complaint Sharing Rule

Steps:

1. Setup → Sharing Settings → Complaint Sharing Rules → New
2. Rule Name: Support Agents Access
3. Rule Type: Based on record owner

4. Records: Owned by members of → Role / Public Group: Support Agents
5. Share With → Role / Public Group: Support Agents
6. Access Level → Read/Write
7. Save → all complaints are now visible/editable to support agents



- # Field-Level Security (FLS)

Set FLS for Resolution Field

Steps:

1. Setup → Object Manager → Complaint → Fields & Relationships → Resolution → Set Field-Level Security
2. Select Permission Sets (or Profiles if available):
    - Admin Login Access → Read + Edit

    - Experience Profile Manager → Read only
    - Leave others unchecked
3. Save → field access is now role-based
