

# Phase 9: Reporting, Dashboards & Security Review

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## • 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

Customer Feedback...
Home
Cases
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Home

REPORT
tabular complaint report
Complaints

Outline
Edit Report Name

Groups
GROUP ROWS
Add group...

Columns
Add column...
Complaint: Complaint Number
Customer Name
Complaint Type
Status
Priority
Resolution

1
2
3
4
5
6
7
8
9
10
11
12

Complaint: Complaint Number
Customer Name
Complaint Type
Status
Priority
Resolution

CMP-0005
CMP-0004
CMP-0009
CMP-0019
CMP-0021
CMP-0015
CMP-0013
CMP-0017
CMP-0018
CMP-0020
CMP-0014
CMP-0016

somu momu
roxa prety
rvikumar
Tom Harris
Emily Scott
Mark Lee Mark Lee
jane smith
Bob White
Sarah Khan
David Clark
Jane Smith
Alice Brown

Product
Product
Product
Service
Delivery
Service
Product
Delivery
Service
Other
Service
Other

Resolved
Closed
Resolved
Resolved
Closed
Resolved
New
In Progress
Resolved
Closed
New
In Progress

Medium
High
High
Low
Low
Low
High
Low
Low
Low
High
Medium

-
closed
-
-
the product is delivered
-
-
-
closed its account related
-
-
-

Chatter Feed
Report Chart
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List View

- Filter data if needed
- Save report → Name: All Complaints Tabular
- Run → displays all complaints in a list

Report: Complaints
**All Complaints Tabular Report**

Total Records  
12

	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	-

Chatter Feed
Report Chart
Notes
List View

## 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, Resolution, Complaint Numer, Complaint Type

Customer Feedback...

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Report: Complaints

Complaints Summary by Status And priority

Total Records

12

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

Row Counts

☒

Detail Rows

☒

Subtotals

☒

Grand Total

☒

Chatter Feed

Report Chart

Notes

List View

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

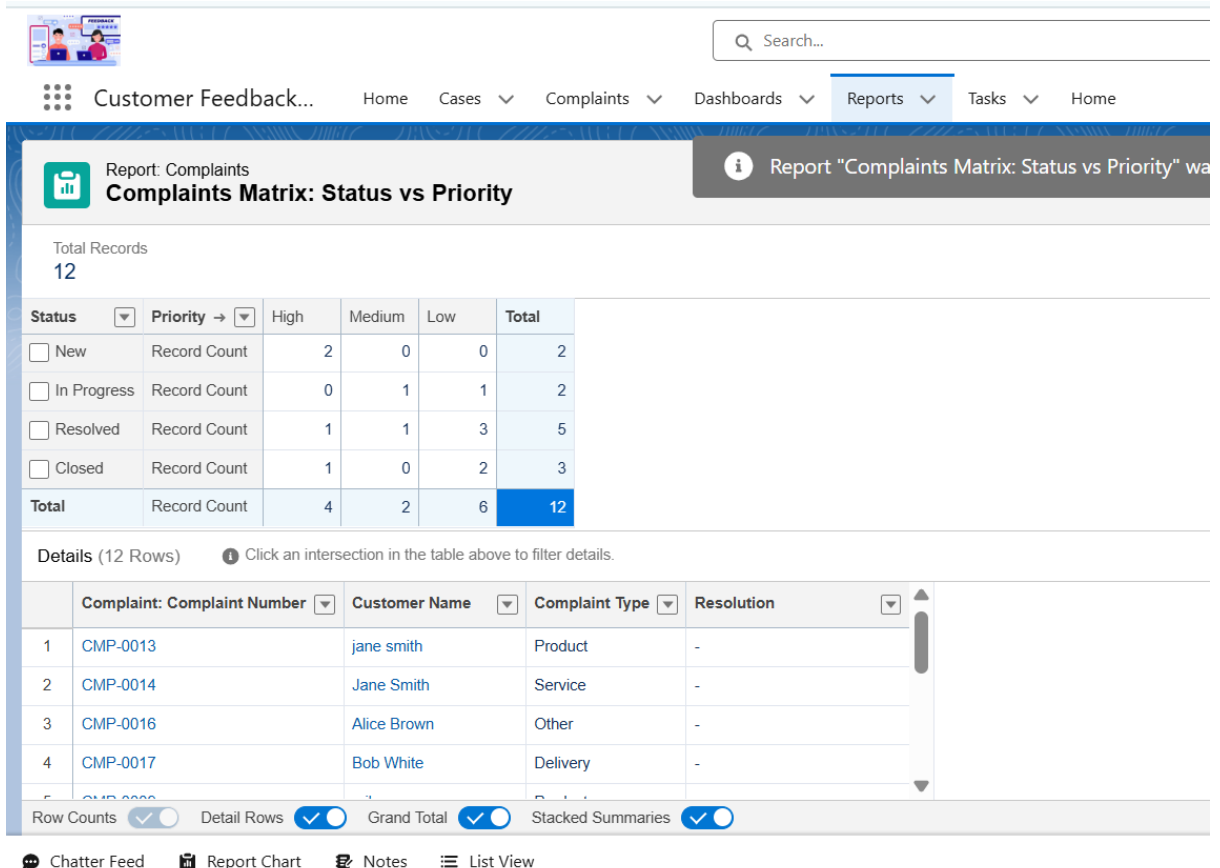
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## Matrix Report

### Steps:

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

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



Customer Feedback...

Home Cases Complaints Dashboards Reports Tasks Home

Report: Complaints  
**Complaints Matrix: Status vs Priority**

Total Records  
12

Status	Priority →	High	Medium	Low	Total
<input type="checkbox"/> New	Record Count	2	0	0	2
<input type="checkbox"/> In Progress	Record Count	0	1	1	2
<input type="checkbox"/> Resolved	Record Count	1	1	3	5
<input type="checkbox"/> Closed	Record Count	1	0	2	3
<b>Total</b>	Record Count	4	2	6	12

Details (12 Rows) ⓘ Click an intersection in the table above to filter details.

	Complaint: Complaint Number	Customer Name	Complaint Type	Resolution
1	CMP-0013	jane smith	Product	-
2	CMP-0014	Jane Smith	Service	-
3	CMP-0016	Alice Brown	Other	-
4	CMP-0017	Bob White	Delivery	-

Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒

Chatter Feed Report Chart Notes List View

## • Dashboards

### Create Dashboard

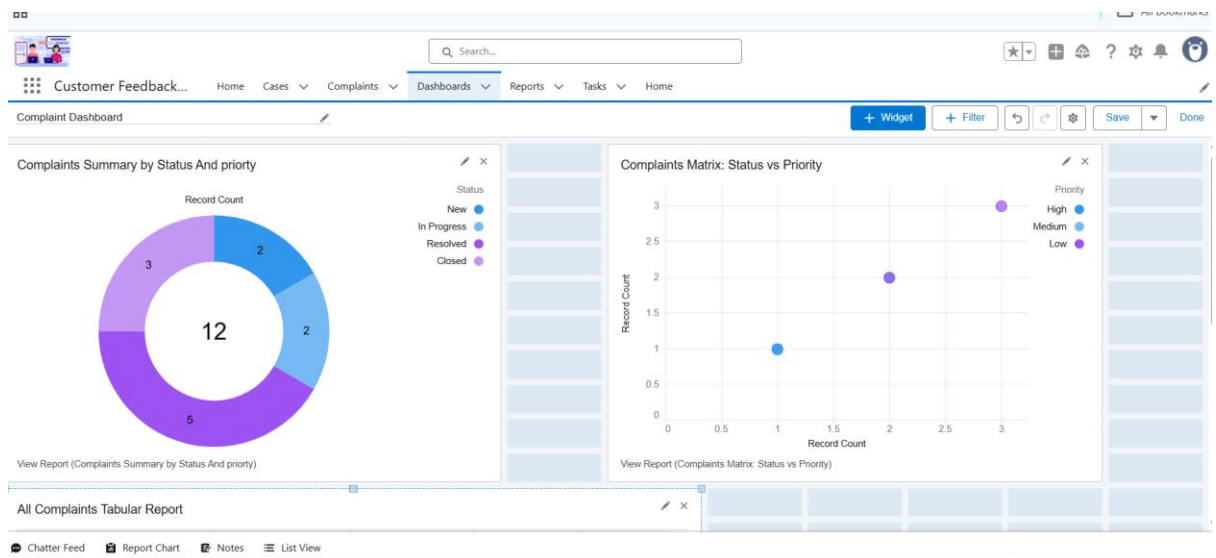
#### Steps:

- Setup → App Launcher → Dashboards → New Dashboard
- Name: Complaint Dashboard
- Select folder → Private or Shared
- Click Create

## Add Widgets

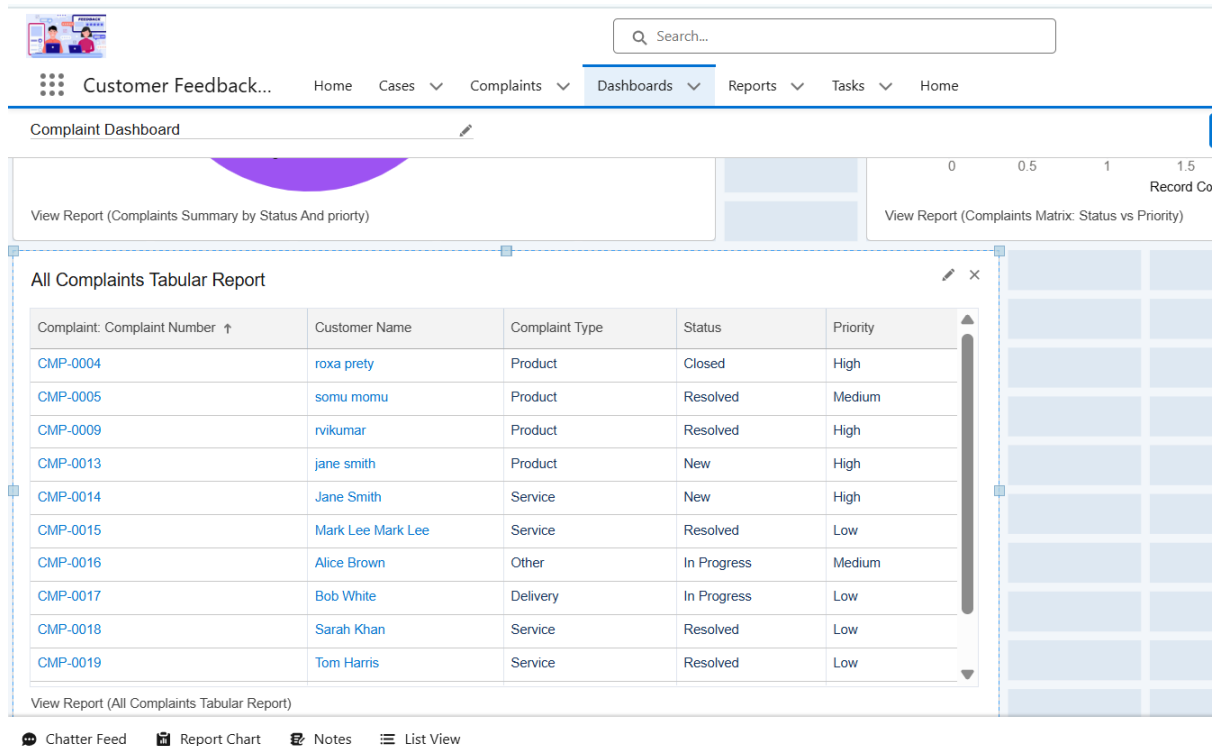
### Steps:

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

Properties

This dashboard is owned by Somya Nema

**View Dashboard As**

☐ Me

☐ Another person

☒ The dashboard viewer

☐ Let dashboard viewers choose whom they view the dashboard as

**Dashboard Grid Size** ⓘ

☒ 12 columns (recommended) ☐ 9 columns

Cancel Save

## • 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

Calculate	PUBLIC Read/Write	Private
Complaint	Private	Private

### 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

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. At the top, there's a 'SETUP' header and a 'Sharing Settings' title. Below this, the 'Label' is 'Support Agents Access' and the 'Rule Name' is 'Support\_Agents\_Access'. The 'Description' field is empty. The page is divided into five steps: Step 2: Select your rule type (Based on record owner is selected), Step 3: Select which records to be shared (Complaint: owned by members of is set to Public Groups), Step 4: Select the users to share with (Roles and Support are selected), and Step 5: Select the level of access for the users (Read/Write is selected).

**Label** Support Agents Access

**Rule Name** Support\_Agents\_Access [i](#)

**Description**

**Step 2: Select your rule type**

**Rule Type** ☒ Based on record owner ☐ Based on criteria

**Step 3: Select which records to be shared**

**Complaint: owned by members of** Public Groups [v](#)  
-- -- Select One -- -- [v](#)

**Step 4: Select the users to share with**

**Share with** Roles [v](#)  
Support [v](#)

**Step 5: Select the level of access for the users**

**Access Level** Read/Write [v](#)

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## • 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

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