



Phase 9: Reporting, Dashboards & Security Review

Objective

The purpose of this phase is to create **meaningful business insights** through Salesforce **Reports and Dashboards** while ensuring **data security and compliance** using sharing rules, field-level security, and login restrictions.

This phase ensures that the **Customer Complaint CRM** application delivers powerful analytics while keeping customer and agent data safe.

1. Reports

Description:

Reports in Salesforce help visualize and analyze CRM data such as **complaints, customers, agents, and performance**.

Types of Reports:

Type	Description	Use Case
Tabular Report	Simple table view, like Excel	List of all complaints
Summary Report	Grouped data with subtotals	Complaints grouped by Issue Type
Matrix Report	Grouped by rows and columns	Complaints by Agent and Status
Joined Report	Combines multiple report types	Compare Complaints and Customer data

Example:

Report Name: Complaints by Priority

- Object: Complaint__c
- Group by: Priority
- Show fields: Complaint Number, Issue Type, Status, Assigned Agent
- Add filter: Status != Closed

Outcome: Quickly identify high-priority issues that are still open.

2. Report Types

Description:

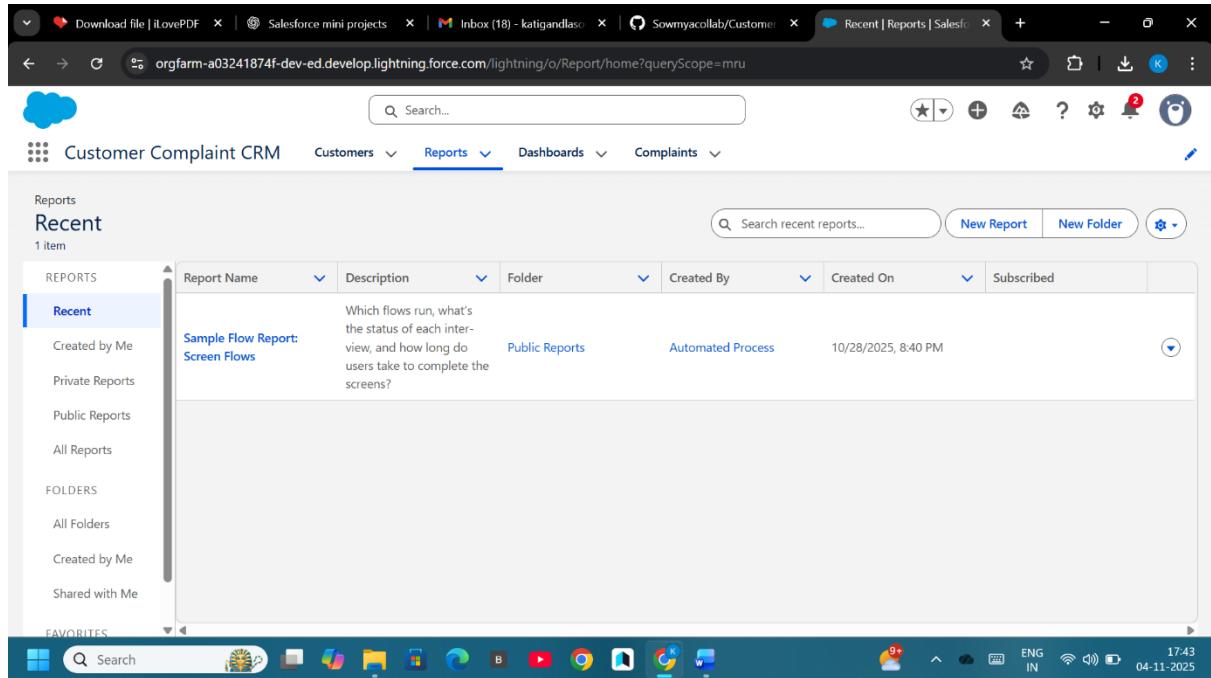
Report Types define which objects and fields are available for reporting.

Steps:

1. Setup → **Report Types** → **New Custom Report Type**
2. Primary Object: **Complaint__c**
3. Related Object: **Customer__c** (Each complaint has a customer)
4. Deploy the report type.

Use Case:

Allows reports combining both **Complaint** and **Customer** details (e.g., Complaints per Customer).



The screenshot shows the Salesforce Lightning interface with the URL <https://orgfarm-a03241874f-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru>. The top navigation bar includes tabs for 'Customers', 'Reports' (selected), 'Dashboards', and 'Complaints'. The main content area is titled 'Recent' under 'Reports' and shows one item: 'Sample Flow Report: Screen Flows'. The report details are as follows:

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	10/28/2025, 8:40 PM	(checkbox)

The sidebar on the left contains sections for 'RECENT', 'FOLDERS', and 'FAVORITES'. The taskbar at the bottom shows various application icons and system status.

☒ 3. Dashboards

Description:

Dashboards visually display multiple reports in one place using charts, graphs, and tables.

Steps to Create:

1. Go to **Dashboards** → **New Dashboard**
2. Name: **Customer Complaint Dashboard**
3. Add components:
 - **Bar Chart:** Complaints by Status
 - **Pie Chart:** Complaints by Priority
 - **Gauge:** Agent Performance (% complaints closed)
 - **Table:** Top 5 Customers with Most Complaints
4. Save & Run.

Use Case:

Managers can monitor the CRM's overall performance in real time.

⌚ 4. Dynamic Dashboards

Description:

Dynamic Dashboards allow users to view data **according to their access level** — e.g., each agent only sees their own complaints.

Steps:

1. Open Dashboard → **Edit Properties**
2. Select: “View Dashboard As: Logged-in User”
3. Save & Activate

Use Case:

Ensures privacy — one agent can't see another's data.

The screenshot shows a browser window with multiple tabs open, including 'no subject', 'Download', 'Replastic...', 'Salesforce', 'Recent | D', 'Flows | Sal', 'Auto_Assi...', 'Sowmyacc...', and the current tab 'orgfarm-a03241874f-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru'. The main content area is titled 'Customer Complaint CRM' and shows a 'Dashboards' section. A 'Recent' card displays one item: 'Complaint Overview Dashboard' (Private Dashboards, Katigandla Sowmya, 11/3/2025, 7:55 AM). The sidebar on the left has sections for 'DASHBOARDS', 'RECENT', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES'. The top navigation bar includes 'Customers', 'Reports', 'Dashboards' (which is selected), and 'Complaints'.

5. Sharing Settings

Description:

Sharing Settings define **organization-wide data visibility** and **record access** between users.

Steps:

1. Setup → **Sharing Settings**
2. Set **Organization-Wide Defaults (OWD)**:
 - o Complaint__c: Private
 - o Customer__c: Controlled by Parent
3. Add **Sharing Rules**:
 - o Share complaints with same department users.

Use Case:

Agents can view only their assigned complaints, while admins see all.

The screenshot shows the Salesforce Sharing Settings page. At the top, there are several tabs: Download file, Salesforce mini pr..., Inbox (18) - katig..., Sowmyacollab/Cu..., Recent | Dashboard, and Sharing Settings. The Sharing Settings tab is active. Below the tabs is a navigation bar with icons for Setup, Home, and Object Manager, and a search bar labeled "Search Setup". The main content area has a title "Sharing Settings" with a "SETUP" icon. A sub-section titled "Sharing Settings" is highlighted. A message says, "Didn't find what you're looking for? Try using Global Search." Below this is a "Manage sharing settings for:" dropdown set to "All Objects". A "Disable External Sharing Model" button is visible. The "Default Sharing Settings" section contains a table titled "Organization-Wide Defaults". The table has columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. It lists four objects: Lead, Account and Contract, Contact, and Order. For each object, the access levels and hierarchy grants are specified. The table includes a "Edit" button and a "Organization-Wide Defaults Help" link. The URL in the browser bar is <https://orgfarm-a03241874f-dev-ed.develop.my.salesforce-setup.com/lightning/setup/SecuritySharing/home>. The system status bar at the bottom shows various icons and the date/time 04-11-2025.

□ 6. Field-Level Security (FLS)

Description:

Controls which fields a user can **view or edit** in an object.

Steps:

1. Setup → Object Manager → **Complaint_c** → **Fields & Relationships**
2. Click a field (e.g., “Customer Email”).
3. Set **Field-Level Security** for each Profile (hide from agents if needed).

Use Case:

Hide sensitive information (like billing details) from regular support agents.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links like Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and Administration (with sub-links for Users and Data). The main content area is titled "Field-Level Security for Profile" and displays a table with two columns: "Visible" and "Read-Only". The table lists various user profiles with checkboxes indicating their visibility and readability status.

	Visible	Read-Only
Analytics Cloud Integration User	✓	✓
Analytics Cloud Security User	✓	✓
Anypoint Integration	✓	✓
Complaint Agent Profile	✓	✓
Contract Manager	✓	✓
Cross Org Data Proxy User	✓	✓
Custom: Marketing Profile	✓	✓
Custom: Sales Profile	✓	✓
Custom: Support Profile	✓	✓
Einstein Agent User	✓	✓
Force.com - App Subscription User	✓	✓
Force.com - Free User	✓	✓
Gold Partner User	✓	✓
Identity User	✓	✓

🛡 7. Session Settings

Description:

Controls session timeouts, login hours, and authentication settings to improve security.

Steps:

1. Setup → Session Settings
2. Configure:
 - Session Timeout: 30 minutes
 - Disable “Stay Logged In”
 - Enable secure HTTPS connections

Use Case:

Prevents unauthorized access if a session is left open.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Home, Object Manager, and Session Settings. A search bar at the top right contains the text "Search Setup". Below the navigation, there's a sidebar with "Security" expanded, showing "Session Management" and "Session Settings" (which is selected). A global search bar below the sidebar contains the text "session". The main content area is titled "Session Settings" and includes sections for "Session Settings" and "Extended use of IE11 with Lightning Experience". The "Session Settings" section contains several checkboxes, with "Lock sessions to the domain in which they were first used" checked. The "Extended use of IE11 with Lightning Experience" section contains a message about the end of support for IE11.

8. Login IP Ranges

Description:

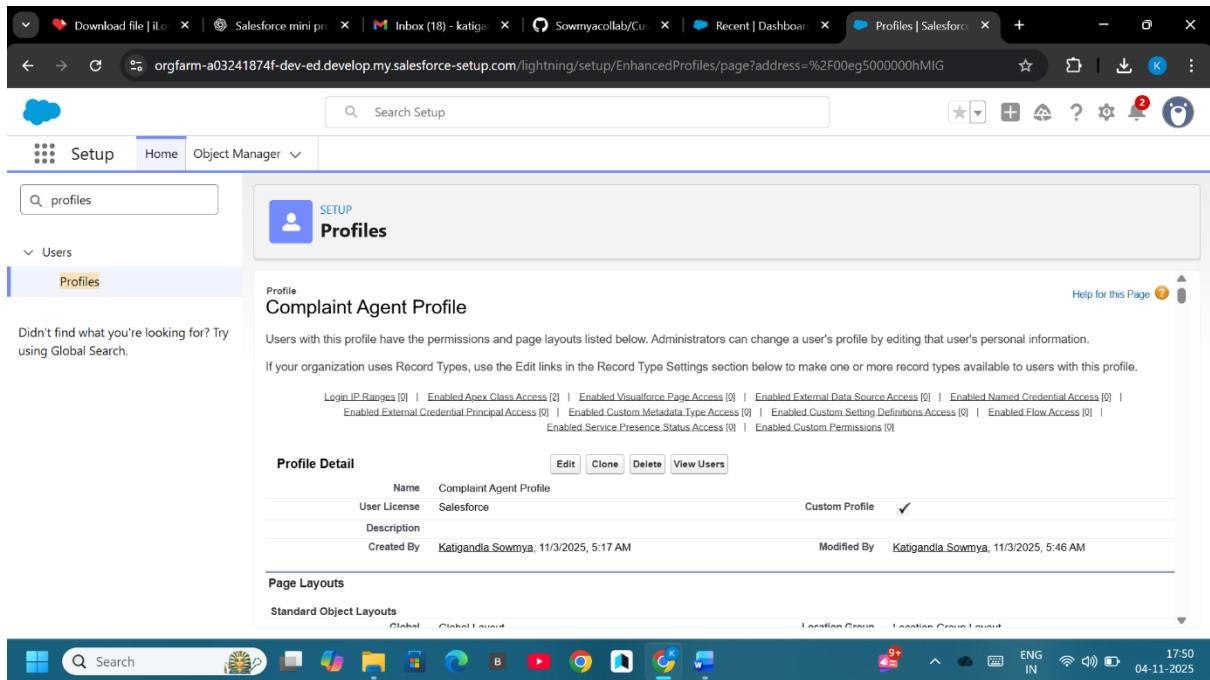
Restricts logins to specific IP ranges to prevent external access.

Steps:

1. Setup → Profiles → Select Profile (e.g., Support Agent)
2. Scroll to **Login IP Ranges** → New
3. Define allowed range (e.g., company's internal network IPs).

Use Case:

Only allow users to log in from office or company-approved networks.



□ 9. Audit Trail

Description:

Tracks configuration changes and admin activities.

Steps:

1. Setup → View Setup Audit Trail
2. Review the list of changes (who changed what and when).

Use Case:

Monitor admin changes to fields, flows, security settings, etc.

☒ Outcome

After completing Phase 9:

- You can generate detailed **reports and dashboards** for complaints and customers.
- Security configurations ensure that **only authorized users** can view or edit data.
- The system becomes **transparent, secure, and audit-ready**, ideal for real business CRM operations.