1. REPORTS

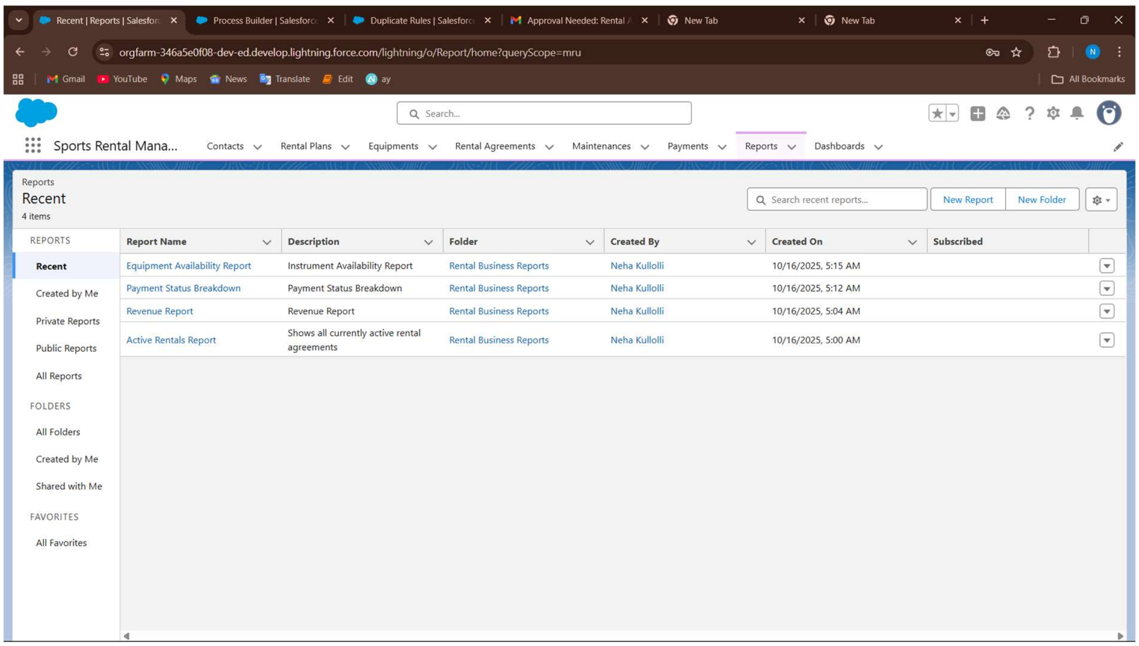
Goal:

Visualize business data such as rentals, payments, and customer activity.

Step-by-Step:

A. Create a New Report

1. Go to **App Launcher (9 dots)** → search **Reports** → click **New Report**.
2. Choose the **Report Type** (e.g., *Rental Agreements*, *Payments*, or your custom type).
3. Click **Continue**.



B. Choose Report Format

- **Tabular:** simple list → select columns like *Payment Name, Amount, Status*.
- **Summary:** click "Group Rows" → choose *Customer* or *Instrument*.
- **Matrix:** click "Group Columns" → compare *Instrument vs Rental Plan*.
- **Joined:** click **Report → Add Report Type** → combine *Rental Agreement + Payment*.

C. Add Filters & Columns

- Example filters:
  - *Status = Active*
  - *Start Date = THIS MONTH*
- Drag in needed columns and remove unnecessary ones.

D. Save & Run

- Name: Active Rentals Report
- Folder: Public Reports / My Personal Custom Reports
- Click **Save & Run** ✅

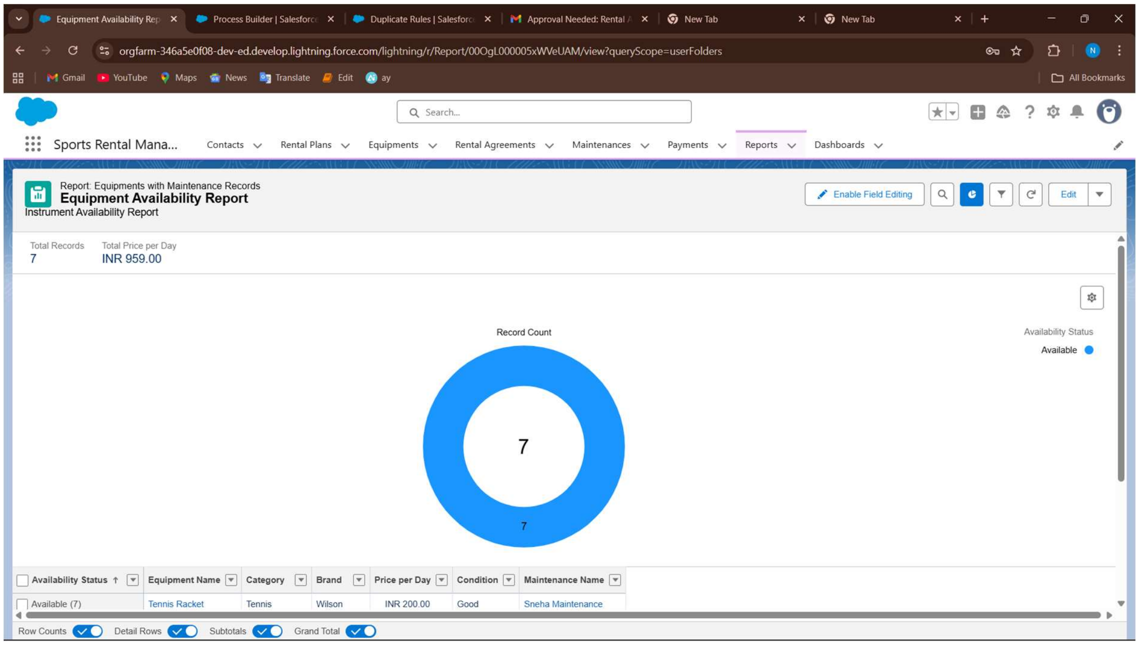
📍 2. REPORT TYPES

Goal:

Enable cross-object reporting.

Procedure:

1. Setup ⚙️ → Quick Find → **Report Types**.
2. Click **New Custom Report Type**.
3. **Primary Object:** Rental_Agreement__c.
4. **Report Type Label:** Rental Agreements with Payments and Customers.
5. **Store in Category:** Custom Reports.
6. Click **Next**.
7. **Define Relationships:**
    - Add related object Contact (lookup = Customer).
    - Add Instrument__c.
    - Add Payment__c.
8. Save.
   You can now build reports combining these objects. ✅



📍 3. DASHBOARDS

Goal:

Visual summary of KPIs such as revenue, rentals, and status.

Procedure:

1. Open **App Launcher → Dashboards → New Dashboard**.
2. **Name:** Store Performance Dashboard.
3. **Folder:** Public Dashboards.
4. Click **Create**.

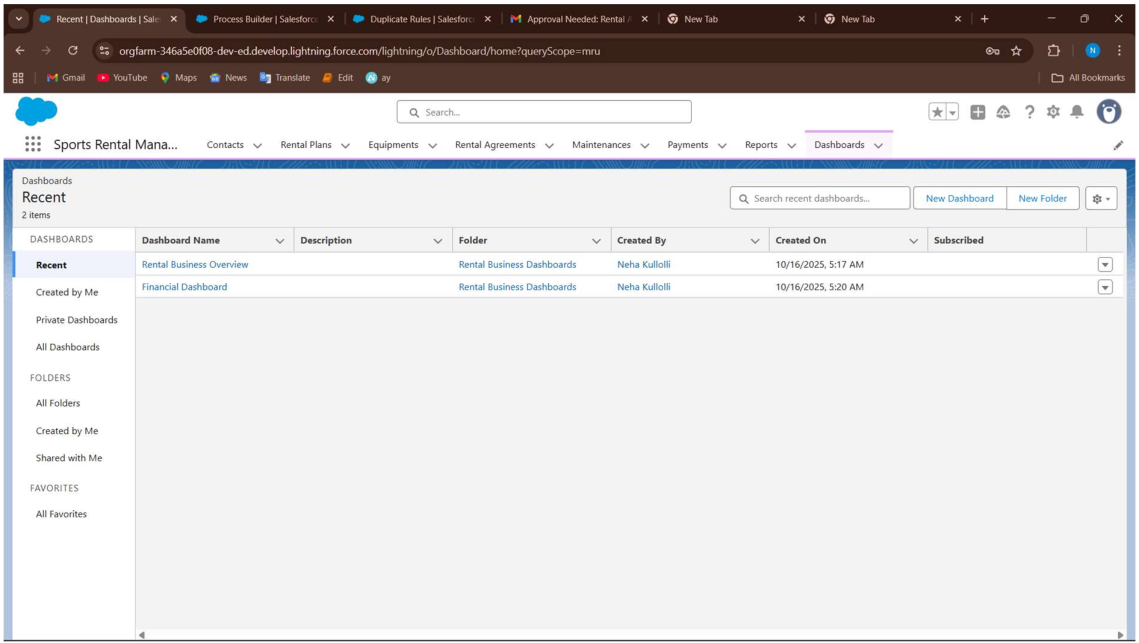
Add Components:

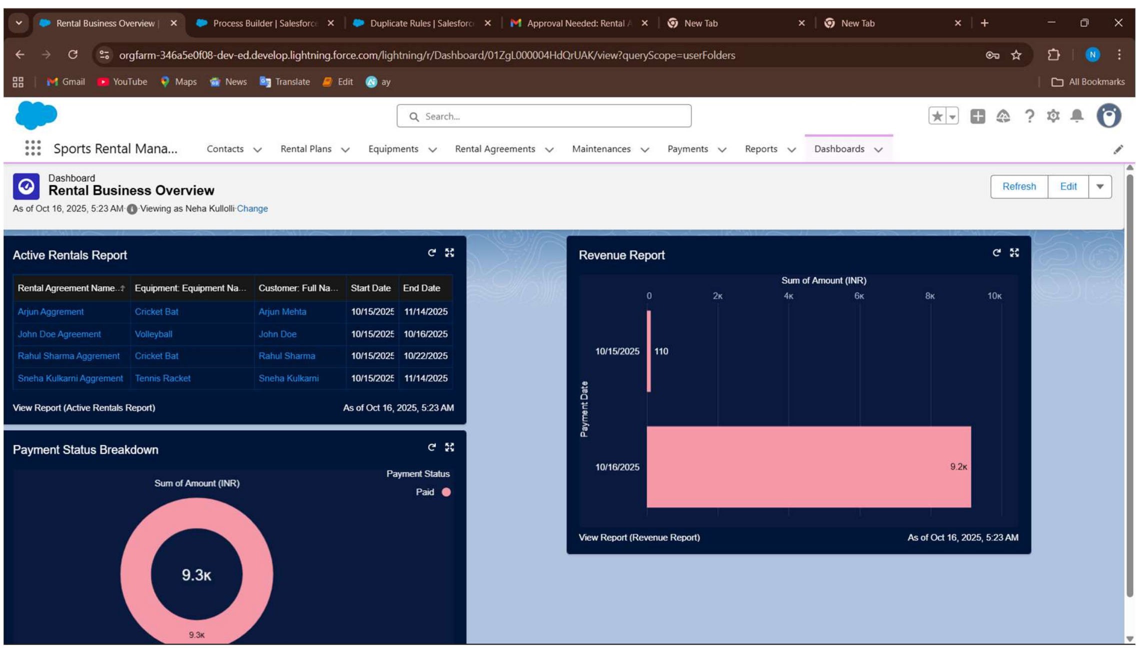
Type	Source Report	Purpose
Pie Chart	Rentals by Status	Show Active vs Completed
Bar Chart	Rentals by Instrument	Identify top rented items
Metric	Payments Summary	Display Total Revenue
Gauge	Active vs Overdue Rentals	Show Customer Satisfaction Ratio

5. Click **Add Component**, choose visualization, select source report, and click **Add**.
6. Click **Save → Done**.

Dynamic Dashboard (Per User View):

1. In Dashboard Properties ⚙️ (top-right) → check **View Dashboard As** → **The viewer**.
2. Save → this makes it **dynamic** (each user sees their own data). ✅





📍 4. SHARING SETTINGS

Goal:

Define default record-level visibility.

Procedure:

1. Setup → Quick Find → **Sharing Settings**.
2. Scroll to **Organization-Wide Defaults** → Click **Edit**.
3. Set internal access:

Object	**Default Access**
Instrument	Public Read/Write
Rental Agreement	Private
Payment	Private
Maintenance Record	Public Read Only
Rental Plan	Public Read Only

4. Click **Save**.

Role Hierarchy

1. Setup → **Roles** → Set Up Roles.
2. Create hierarchy:
   Store Owner > Manager > Technician > Support.
3. Assign users to roles accordingly. ✅

📍 5. FIELD-LEVEL SECURITY

Goal:

Restrict sensitive fields (e.g., Total Amount, Discount).

Procedure:

1. Setup → Object Manager → Rental_Agreement__c.
2. Click **Fields & Relationships**.
3. Select Total_Amount__c.
4. Click **Set Field-Level Security**.
5. For all profiles:
   - ✅ Visible
   - ❌ Editable (Read-Only checked)
6. Repeat for Discount_Percentage__c.
7. Click **Save** ✅