Phase 9: Reporting, Dashboards & Security Review

Objective: To provide business intelligence and analytics for management, allowing them to track key metrics and understand the health of the loan pipeline.

Key Activities & Outcomes:

1. **Custom Report Creation: A "Loan Pipeline by Status" report was created using the standard Salesforce Report Builder. This report lists all Loan Application records and groups them by the Status field, providing a clear breakdown of how many loans are in each stage of the process.**

2. **Management Dashboard: A "Loan Management Dashboard" was created to provide an at-a-glance, visual overview of the business.**

   o **It features a Donut Chart component.**

   o **This component is sourced from the "Loan Pipeline by Status" report.**

   o **It visually represents the proportion of loans in each stage, making it easy for a manager to assess the pipeline's health instantly.**

3. **Security Review: Basic security was implemented through the use of Profiles (Standard Platform User) to ensure users have appropriate access levels. The final architectural decision to use a self-contained object model successfully bypassed the complex, prohibitive sharing rules in the provided org.**

Supporting Evidence: The Final Management Dashboard

The screenshot below shows the final "Loan Management Dashboard," featuring the donut chart that provides a clear, visual summary of the loan pipeline.