

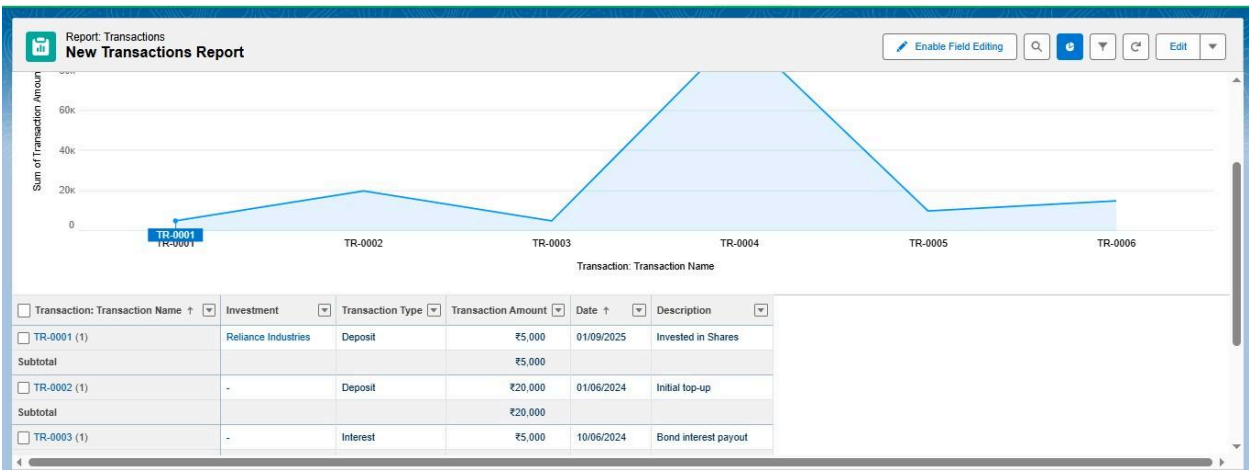
Phase 9: Reporting, Dashboards & Security Review – Documentation

Objective

To provide actionable insights on investments and portfolios using Salesforce reporting and dashboards, and to ensure that data is secure through access controls and audit mechanisms.

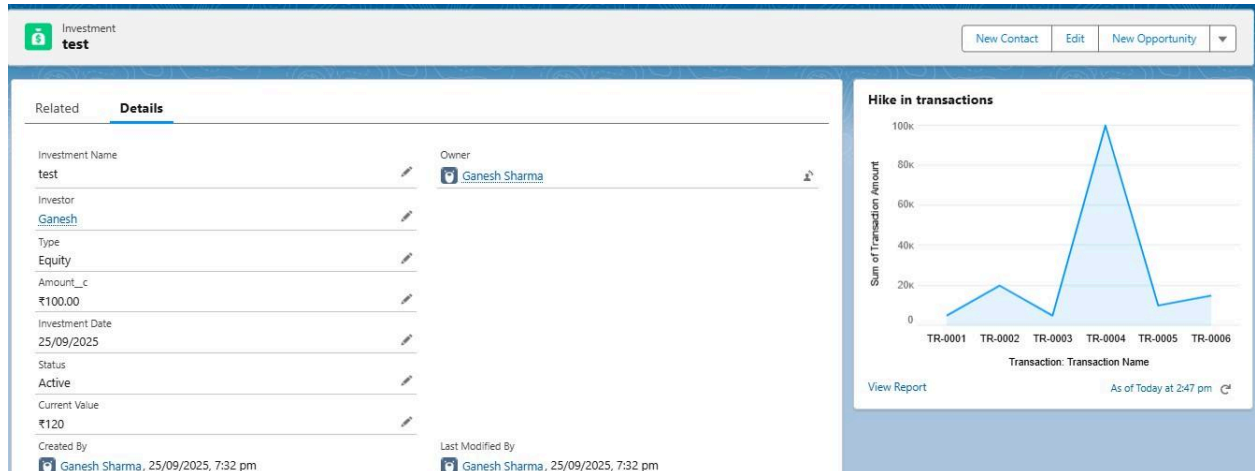
1. Reports

- **Recent Transactions (Tabular Report):** Displays a detailed list of all transactions with fields like Investment, Date, Amount, and Type.



2. Report Types

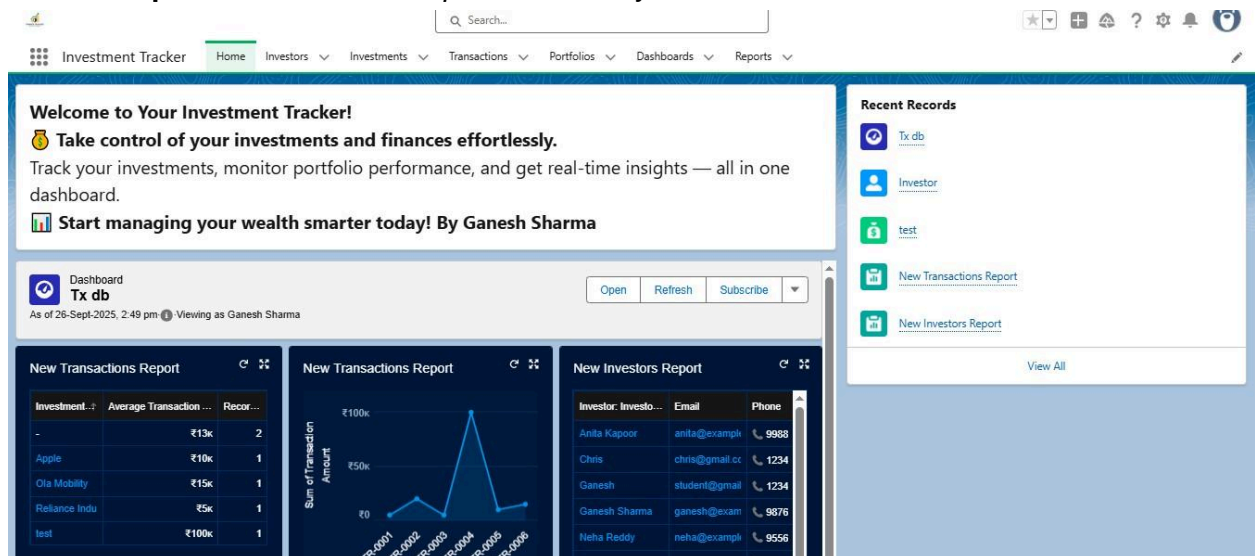
- Created a **Custom Report Type: Investments with Transactions**, to analyze investments along with their related transactions in record pages.



3. Dashboards

Line Chart : Transaction distribution by type showing the transaction times (1x to 115x)

Table Component: Shows the *Top 5 Investors by Total Invested*.



4 - Dynamic Dashboard:

Configured to run as the logged-in user → Investors only see their own data, Admin sees all.

