

Phase 9: Reporting, Dashboards & Security Review

1. Reports

◆ Use Case:

To track and analyze loan data effectively, multiple Salesforce reports were created based on the **Loan Application__c** and **EMI_Detail__c** objects.

Reports Created:

Type	Report Name	Description
Tabular Report	<i>All Loan Applications</i>	Displays a simple list of all loan records.
Summary Report	<i>Loan Applications by Type</i>	Groups loans by type (Home, Car, Personal).
Matrix Report	<i>Loan Status vs Loan Officer</i>	Shows approvals by each officer.
Joined Report	<i>Loan vs EMI Details</i>	Combines loan data with EMI information.

2. Report Types

◆ Use Case:

Created a **custom Report Type** linking *Loan Application__c* with *EMI_Detail__c* to build combined reports.

Primary Object: Loan Application__c

Related Object: EMI_Detail__c (Lookup relationship)

☑ 3. Dashboards

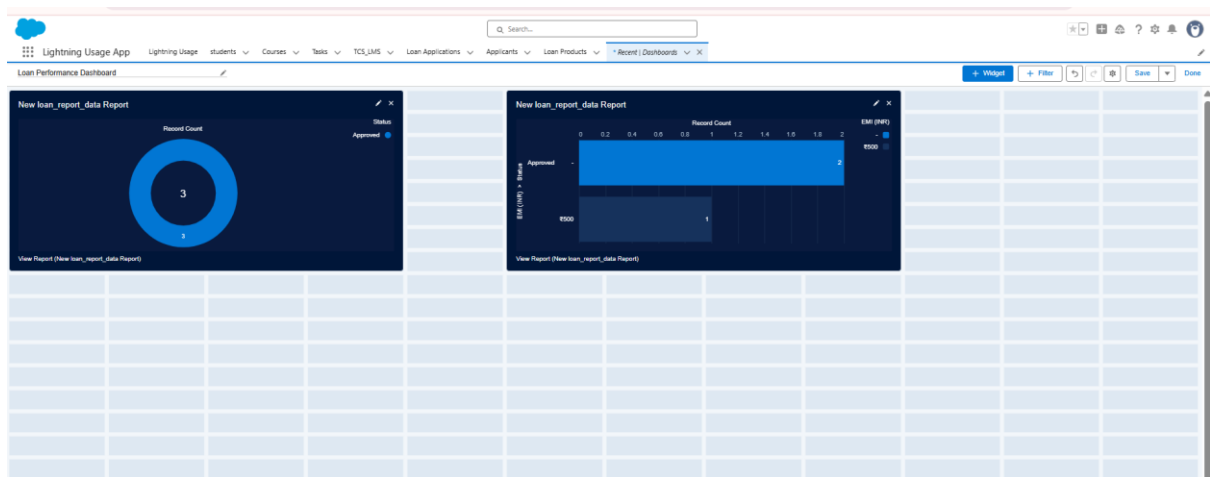
◆ Use Case:

Dashboards were designed for management to monitor key loan metrics in real time.

Dashboard Name: Loan Performance Dashboard

Components included:

- Total Loans by Type (Pie Chart)
- Loan Status Summary (Bar Chart)
- Average Loan Amount (Gauge)
- Pending Approvals (List)



Applicant: Ravi

Details

Owner: [komal kumar](#)

Applicant Name: Ravi
 First Name: Ravi
 Last Name: Kumar
 Full Name: Ravi Kumar
 Contact Phone: 06309897937
 Email: ravi.kumar@example.com
 Date of Birth: 21/11/2007
 Annual Income (INR): ₹5,00,000.00
 Address: Binnagar, 3-29
 Active Loan Count: 1
 Created By: [komal kumar](#), 06/11/2025, 1:47 pm
 Last Modified By: [komal kumar](#), 06/11/2025, 4:16 pm

EMI Calculator

Loan Amount (₹): 5,00,000
 Interest Rate (INR): 10
 Tenure (Months): 60
 Calculate EMI
 Your Monthly EMI: ₹ 10623.52

Activity

Filters: All time • All activities • All types
 Refresh • Expand All • View All

Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.

REPORT: New loan_report_data Report

Previewing a limited number of records. Run the report to see everything.

Fields:

- GROUP ROWS: Status, EMI (INR), Loan Type
- GROUP COLUMNS: Applicant Name, Application Number, Applicant ID, Contact Phone, Loan Amount (INR)

Columns:

- Status
- EMI (INR)
- Loan Type
- Applicant Name
- Application Number
- Applicant ID
- Contact Phone
- Loan Amount (INR)

Status	EMI (INR)	Loan Type	Applicant Name	Application Number	Applicant ID	Contact Phone	Loan Amount (INR)
Approved (3)		Home (2)	Ravi	LA-00002	a19Qy00000gk53	06309897937	₹20,00,000.00
			Ravi	LA-00003	a19Qy00000gk53	06309897937	₹20,00,000.00
		Subtotal					
		Subtotal					
		₹500 (1)	Home (1)	Ravi	LA-00001	a19Qy00000gk53	₹20,00,000.00
		Subtotal					
		Subtotal					
		Total (3)					

8. Organization-Wide Defaults (OWD)

Use Case:

Defined OWD to set the baseline access for records.

- Loan Application → Private
- EMI Details → Controlled by Parent
- Contact → Public Read/Write

Sharing Rules

◆ Use Case:

Added Sharing Rules to allow Managers to view all loan records created by Loan Officers.

Rule Type: Based on Record Owner.

10. Sharing Settings

◆ Use Case:

Verified and adjusted overall Sharing Settings to ensure sensitive loan data is restricted appropriately.