

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

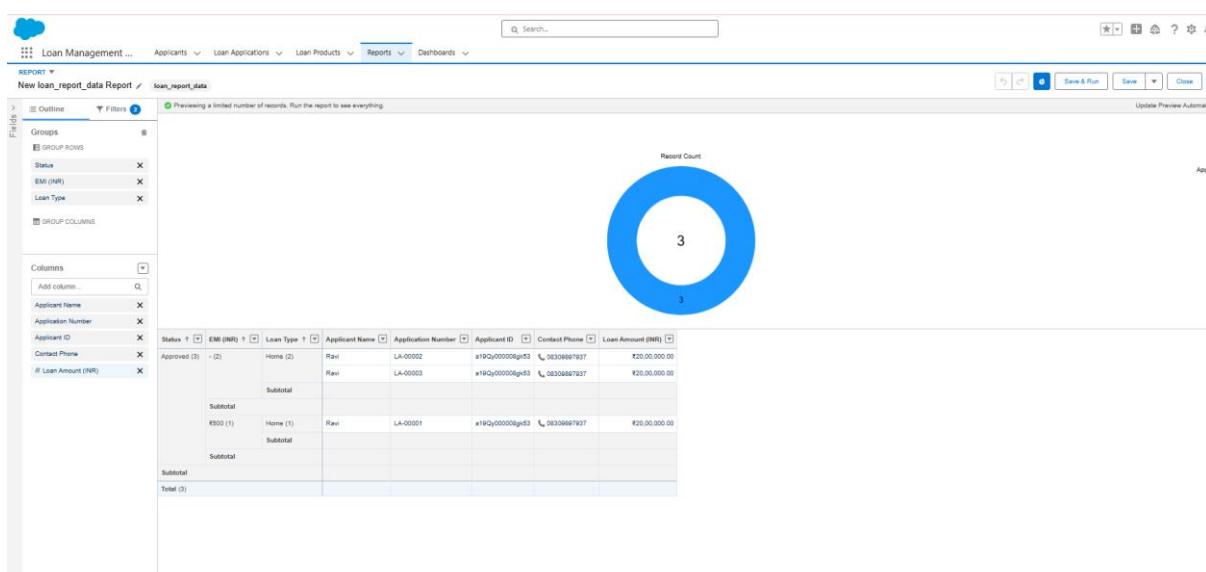
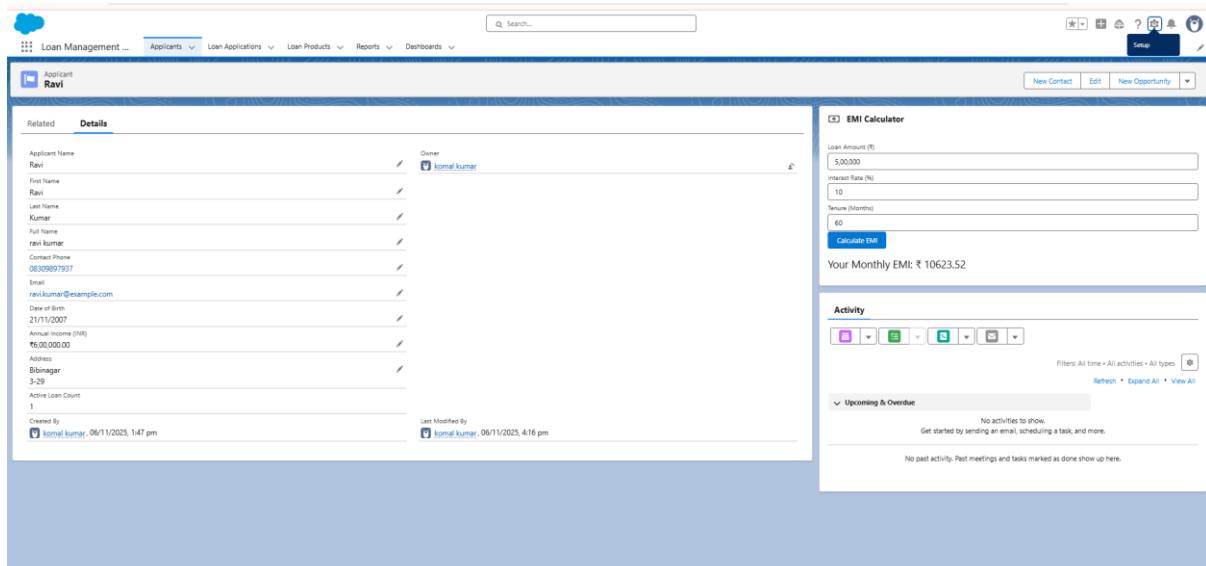
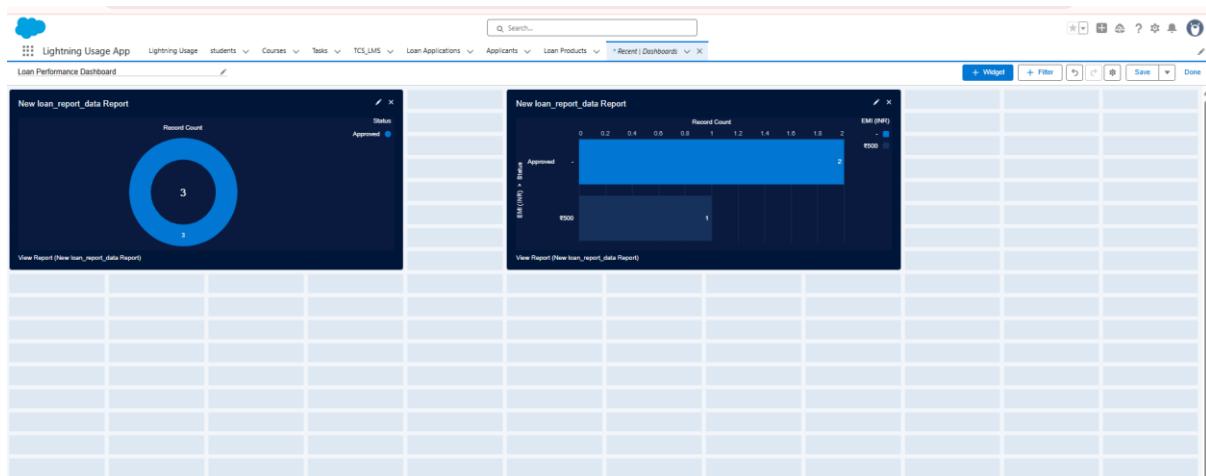
❖ Use Case:

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)



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.