

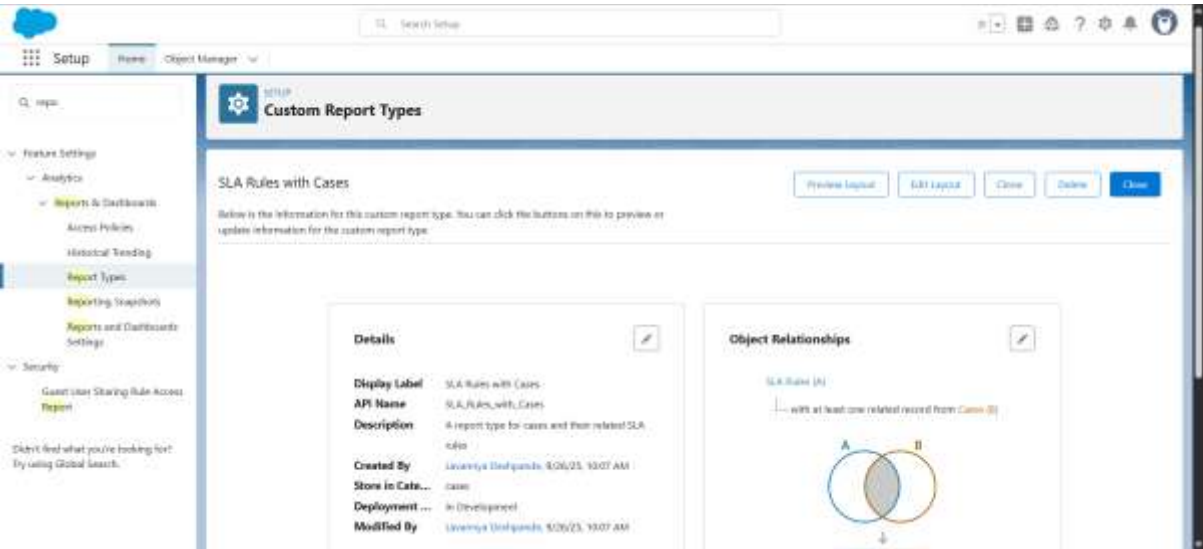
SMART SLA TRACKER: INTELLIGENT CUSTOMER COMPLAINT & ESCALATION MANAGEMENT

Phase 9: Reporting, Dashboards & Security Review

9.1 Reports and Dashboards:

1. Create Custom Report Types

Setup > Report Types > New Custom Report Type

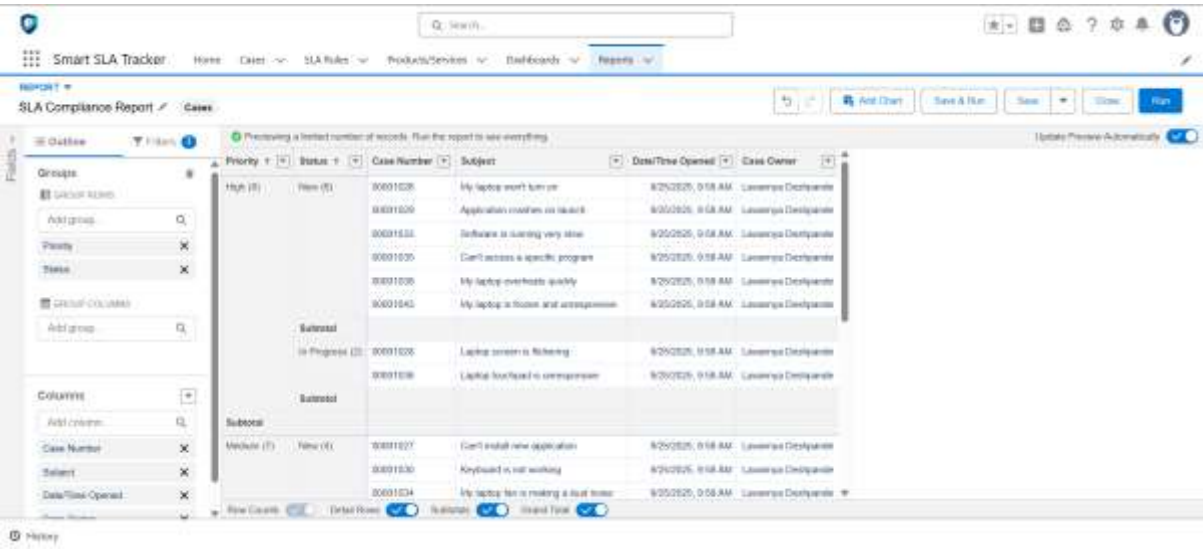


9.2 Create Reports:

Reports tab > New Report > Cases with SLA Rules

SLA Compliance Report

1.1 add columns and group



1.2 Add filters

The screenshot shows the 'Smart SLA Tracker' interface. The top navigation bar includes 'Home', 'Cases', 'SLA Rules', 'Products/Services', 'Dashboards', and 'Reports'. The 'Reports' tab is active, displaying the 'SLA Compliance Report' for 'Cases'. A sidebar on the left contains a 'Filters' section with options to 'Add Filter', 'Clear All', 'Clear State', 'Clear Time', 'Clear User', 'Clear Status', 'Clear Case Number', 'Clear Case Owner', 'Clear Case Type', 'Clear Case Status', and 'Clear Case Priority'. The main table displays a list of cases with columns: Case Number, Status, Subject, Priority, Date/Time Opened, and Case Owner. The table is filtered to show only 'New' cases. The 'Status' column is set to 'New' and the 'Priority' column is set to 'High'. The table shows 15 cases, with the first 10 visible. The 'Date/Time Opened' column is set to '9/25/2025, 9:58 AM'. The 'Case Owner' column is set to 'Laravnya Deshpande'. The table is sorted by 'Date/Time Opened' in descending order. The 'Status' column is set to 'New' and the 'Priority' column is set to 'High'. The table shows 15 cases, with the first 10 visible. The 'Date/Time Opened' column is set to '9/25/2025, 9:58 AM'. The 'Case Owner' column is set to 'Laravnya Deshpande'.

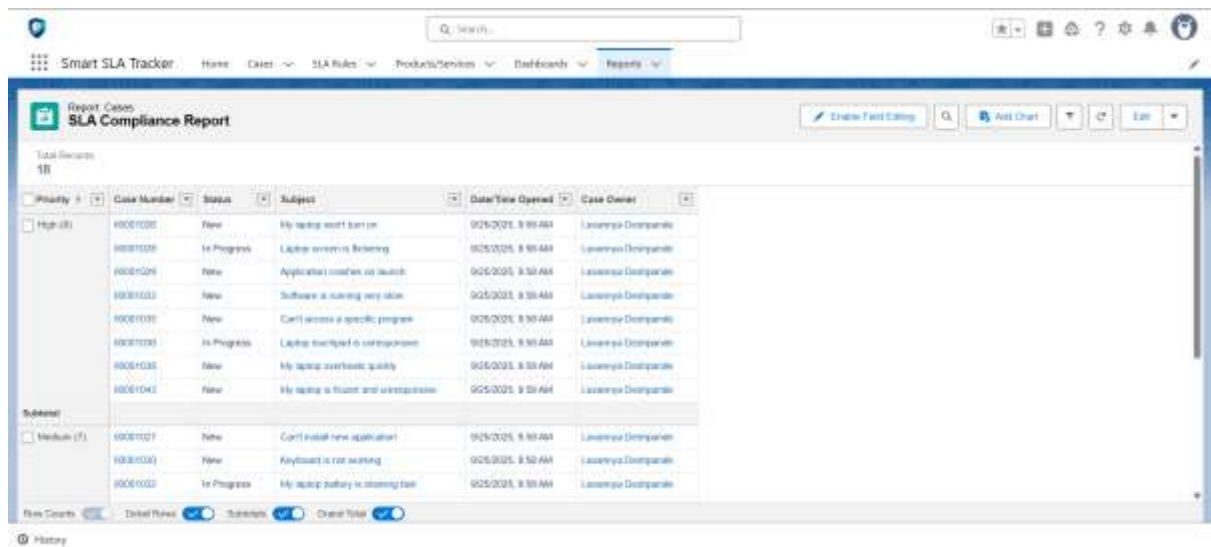
Case Number	Status	Subject	Priority	Date/Time Opened	Case Owner
00001028	New	My laptop won't turn on	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001027	New	Can't install new application	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001026	In Progress	Laptop screen is flickering	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001025	New	Application crashes on launch	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001024	New	Keyboard is not working	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001023	Resolved	Need help installing my antivirus	Low	9/25/2025, 9:58 AM	Laravnya Deshpande
00001022	In Progress	My laptop battery is draining fast	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001021	New	Software is running very slow	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001020	New	My laptop fan is making a loud noise	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001019	New	Can't access a specific program	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001018	In Progress	Laptop trackpad is unresponsive	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001017	New	Resolving a software license key	Low	9/25/2025, 9:58 AM	Laravnya Deshpande
00001016	New	My laptop overheats quickly	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001015	In Progress	Trouble with software permissions	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001014	New	My laptop software is not working	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande

1.3 Save and Run

The screenshot shows the 'Smart SLA Tracker' interface. The top navigation bar includes 'Home', 'Cases', 'SLA Rules', 'Products/Services', 'Dashboards', and 'Reports'. The 'Reports' tab is active, displaying the 'SLA Compliance Report' for 'Cases'. A sidebar on the left contains a 'Filters' section with options to 'Add Filter', 'Clear All', 'Clear State', 'Clear Time', 'Clear User', 'Clear Status', 'Clear Case Number', 'Clear Case Owner', 'Clear Case Type', 'Clear Case Status', and 'Clear Case Priority'. The main table displays a list of cases with columns: Case Number, Status, Subject, Priority, Date/Time Opened, and Case Owner. The table is filtered to show only 'New' cases. The 'Status' column is set to 'New' and the 'Priority' column is set to 'High'. The table shows 15 cases, with the first 10 visible. The 'Date/Time Opened' column is set to '9/25/2025, 9:58 AM'. The 'Case Owner' column is set to 'Laravnya Deshpande'. The table is sorted by 'Date/Time Opened' in descending order. The 'Status' column is set to 'New' and the 'Priority' column is set to 'High'. The table shows 15 cases, with the first 10 visible. The 'Date/Time Opened' column is set to '9/25/2025, 9:58 AM'. The 'Case Owner' column is set to 'Laravnya Deshpande'.

Case Number	Status	Subject	Priority	Date/Time Opened	Case Owner
00001028	New	My laptop won't turn on	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001027	New	Can't install new application	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001026	In Progress	Laptop screen is flickering	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001025	New	Application crashes on launch	High	9/25/2025, 9:58 AM	Laravnya Deshpande
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00001021	New	Software is running very slow	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001020	New	My laptop fan is making a loud noise	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001019	New	Can't access a specific program	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001018	In Progress	Laptop trackpad is unresponsive	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001017	New	Resolving a software license key	Low	9/25/2025, 9:58 AM	Laravnya Deshpande
00001016	New	My laptop overheats quickly	High	9/25/2025, 9:58 AM	Laravnya Deshpande
00001015	In Progress	Trouble with software permissions	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande
00001014	New	My laptop software is not working	Medium	9/25/2025, 9:58 AM	Laravnya Deshpande

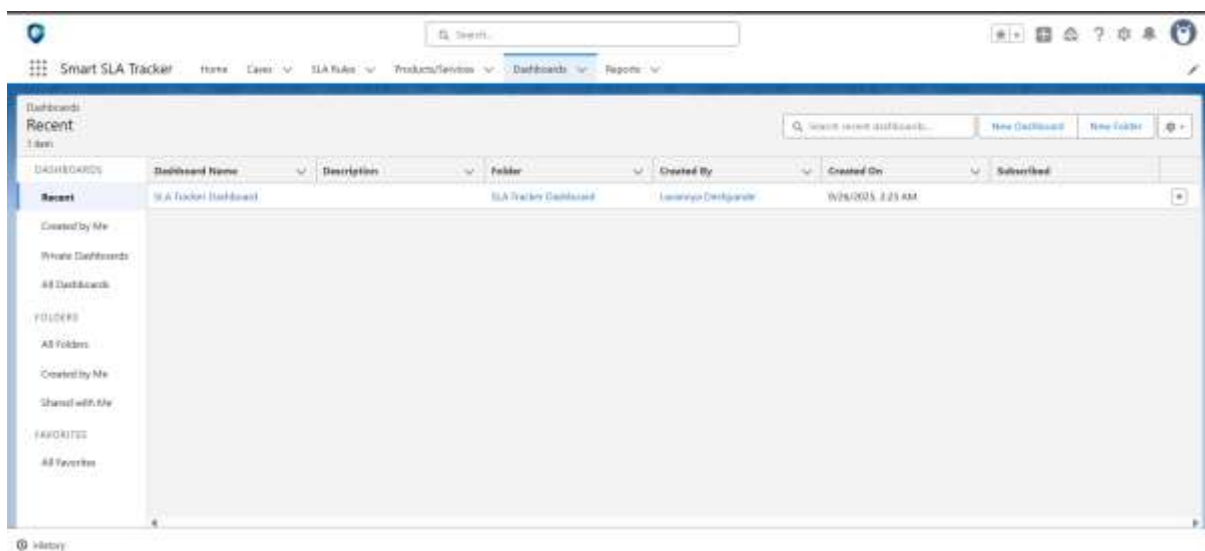
- SLA Compliance Report:



Priority	Case Number	Status	Subject	Date/Time Opened	Case Owner
High (8)	10001000	New	My laptop won't turn on	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001001	In Progress	Laptop screen is flickering	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001002	New	Application crashes on launch	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001003	New	Software is slowing my PC	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001004	New	Can't access a specific program	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001005	In Progress	Laptop keyboard is unresponsive	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001006	New	My laptop overheats quickly	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001007	New	My laptop is frozen and unresponsive	9/25/2025, 9:50 AM	Lusanya Desiparadi
Subtotal	8				
Medium (7)	10001008	New	Can't install new application	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001009	New	Keyboard is not working	9/25/2025, 9:50 AM	Lusanya Desiparadi
	10001010	In Progress	My laptop battery is draining fast	9/25/2025, 9:50 AM	Lusanya Desiparadi
New Records	0				

9.3 Create a Dashboard:

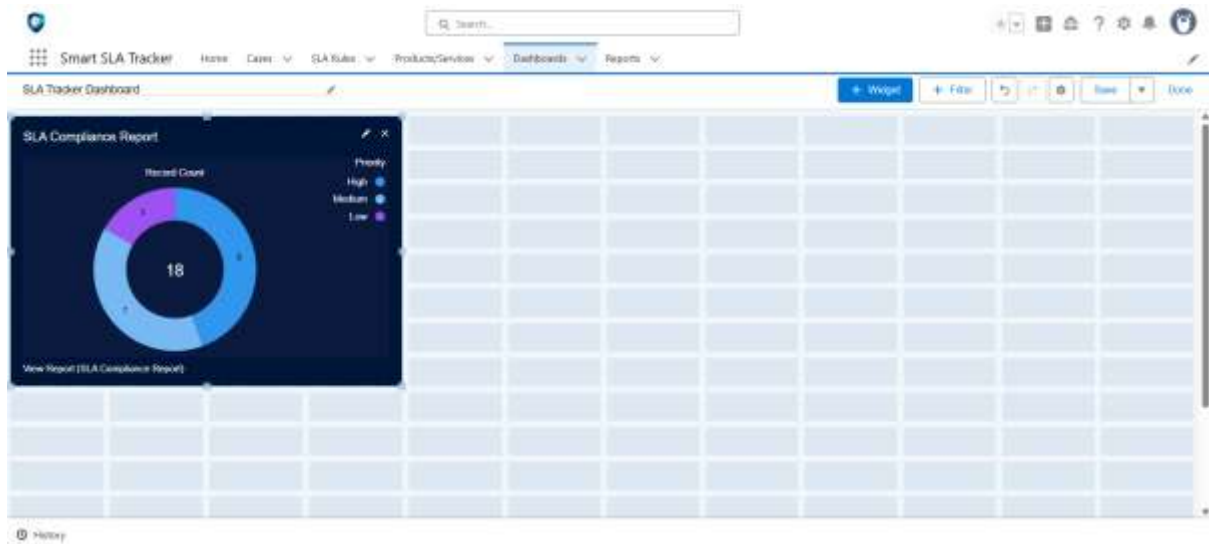
Add Dashboard to nav bar > New Dashboard > SLA Tracker Dashboard



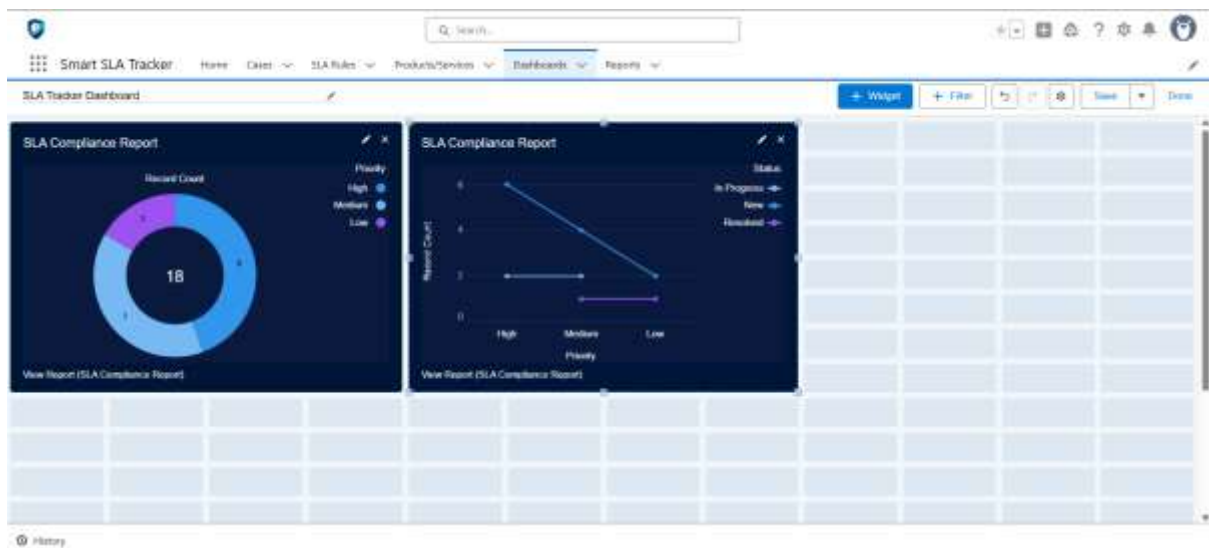
Dashboard Name	Description	Folder	Created By	Created On	Subscribed
SLA Tracker Dashboard	SLA Tracker Dashboard	SLA Tracker Dashboard	Lusanya Desiparadi	9/26/2025, 2:25 AM	

2. Add report do dashboard based on different factors

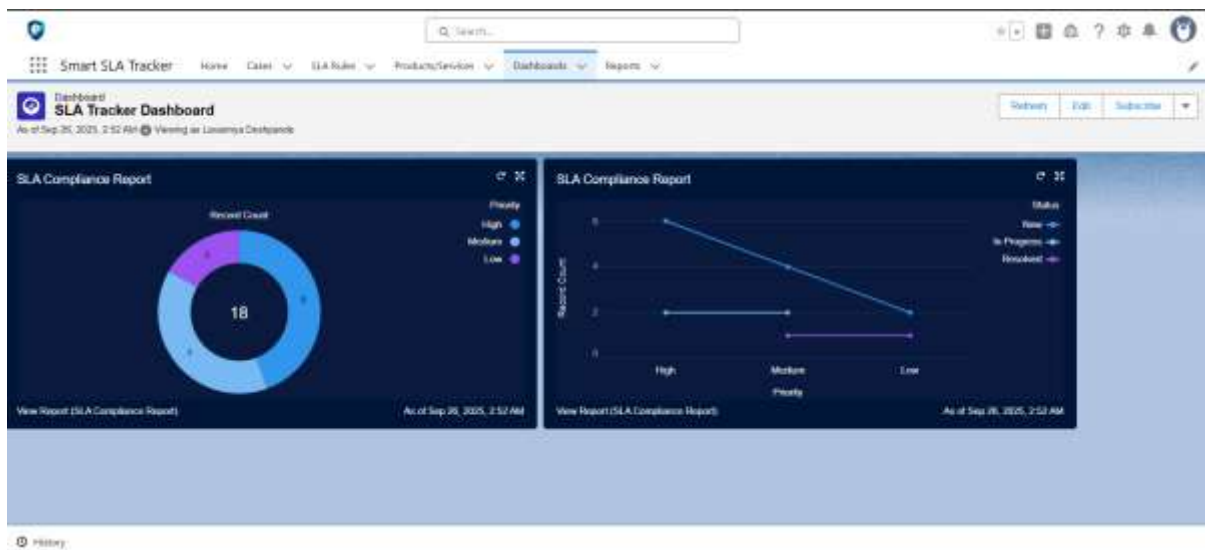
1. case priority:



2. case Status + priority:



Final Dashboard :



9.4 Security Review:

1. Verify Login History:

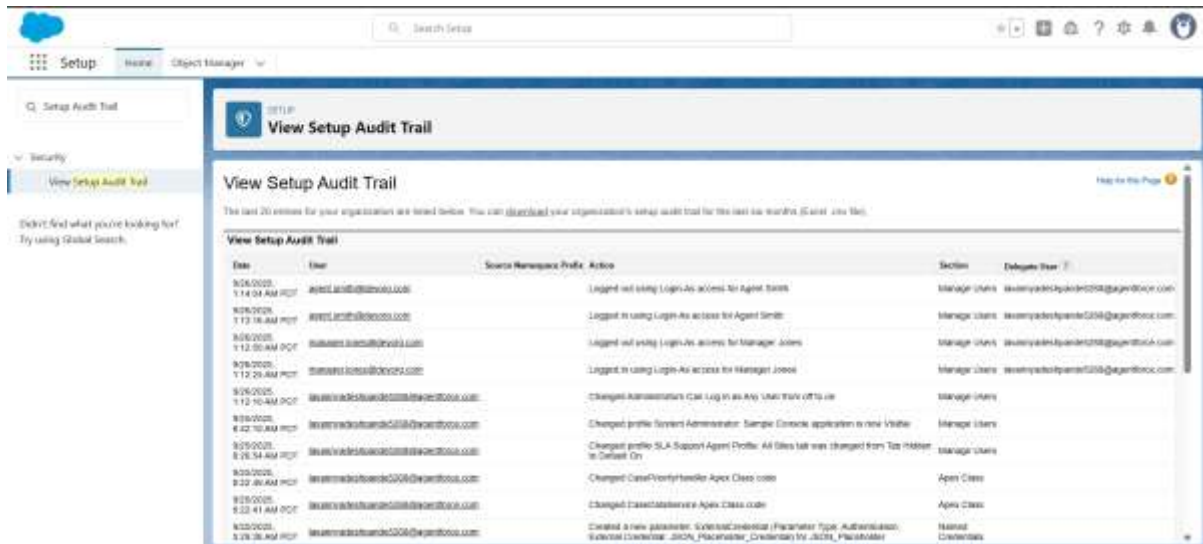
Setup > Login History > verify test users (SLA Support Agent and SLA Support Manager) have successfully logged in

The screenshot shows the 'Login History' page in the 'Setup' section. It displays a table of login events with columns for Username, Login Time, Source IP, Location, Login Type, Status, Browser, Platform, Application, Client Version, API Type, API Version, Login URL, and HTTP Method.

Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL	HTTP Method
slasupport@salesforce.com	8/26/2025 11:12:12 AM PDT	225.155.36.3	India	Application	Success	Chrome 103	Windows 10	Browser	N/A	N/A	N/A	org.springframework.boot.devtools.remote.console	POST
agent.smith@dev.com	8/26/2025 11:15:15 AM PDT	225.155.36.3	India	Application	Success	Chrome 103	Windows 10	Browser	N/A	N/A	N/A	login.salesforce.com	POST
slasupport@salesforce.com	8/26/2025 11:22:14 AM PDT	225.155.36.3	India	Application	Success	Chrome 103	Windows 10	Browser	N/A	N/A	N/A	login.salesforce.com	POST
slasupport@salesforce.com	8/26/2025 11:45:30 AM PDT	225.155.36.3	India	Remote Access	Success	Chrome 103	Windows 10	Salesforce CLI	N/A	N/A	N/A	login.salesforce.com	POST

2. Use the Setup Audit Trail:

Setup > Setup Audit Trail.



The screenshot displays the Salesforce Setup Audit Trail interface. The left sidebar shows the navigation menu with 'Setup' and 'Security' sections. The main content area is titled 'View Setup Audit Trail' and contains a table of recent setup changes. The table has columns for Date, User, Source Namespace Profile, Action, Section, and Delegate User. The table lists 10 recent changes, including login history and profile updates.

Date	User	Source Namespace Profile	Action	Section	Delegate User
8/26/2023 11:14:04 AM PST	agent@acme.com		Logged out using Login-As access for Agent Smith	Manage Users	sean@acme.com
8/26/2023 11:13:18 AM PST	agent@acme.com		Logged in using Login-As access for Agent Smith	Manage Users	sean@acme.com
8/26/2023 11:12:50 AM PST	sean@acme.com		Logged out using Login-As access for Manager Jones	Manage Users	sean@acme.com
8/26/2023 11:12:25 AM PST	sean@acme.com		Logged in using Login-As access for Manager Jones	Manage Users	sean@acme.com
8/26/2023 11:12:10 AM PST	sean@acme.com		Changed Administrator's Can Log in as Any User from off to on	Manage Users	
8/26/2023 8:42:10 AM PST	sean@acme.com		Changed profile System Administrator: Sample Console application is now Visible	Manage Users	
8/26/2023 8:26:54 AM PST	sean@acme.com		Changed profile SLA Support Agent Profile: All files tab was changed from Top Hidden to Default On	Manage Users	
8/26/2023 8:25:40 AM PST	sean@acme.com		Changed CasePriorityHandler Apex Class code	Apex Class	
8/26/2023 8:23:41 AM PST	sean@acme.com		Changed CaseCategory Apex Class code	Apex Class	
8/26/2023 8:23:38 AM PST	sean@acme.com		Created a new password: System Administrator (Parameter Type: Authentication, External Credential: JCHN_MacHolder, Credentials for JCHN_MacHolder)	Named Credentials	

*We can see the Login History and Setup audit Trail