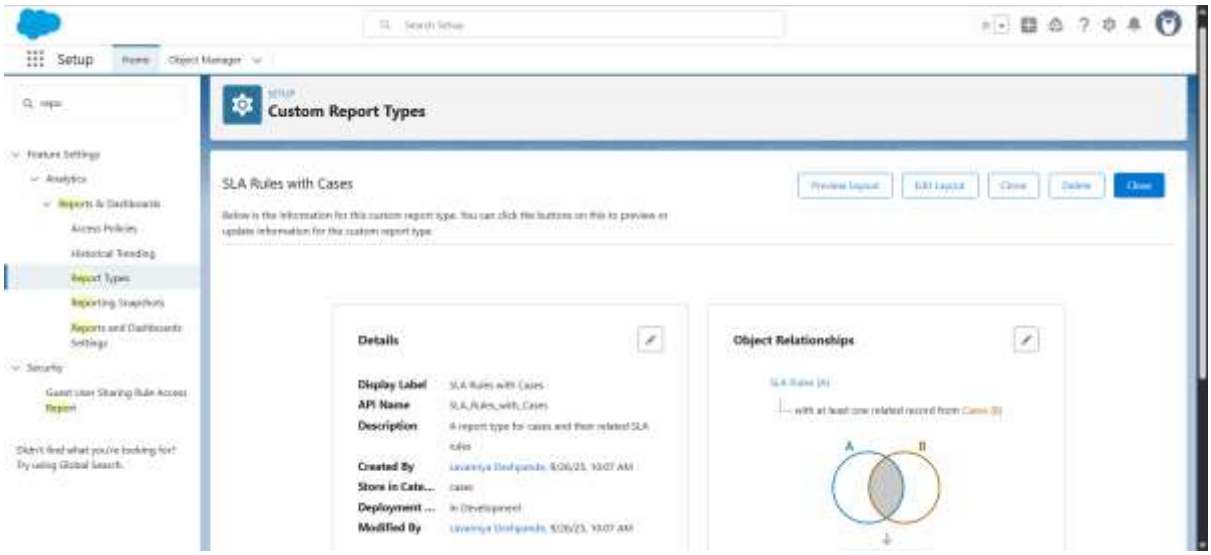
SMART SLA TRACKER: INTELLIGENT CUSTOMER COMPLAINT & ESCALATION MANAGEMENT

Phase 9: Reporting, Dashboards & Security Review

9.1 Reports and Dashboards:

1. Create Custom Report Types

Setup > Report Types > New Custom Report Type

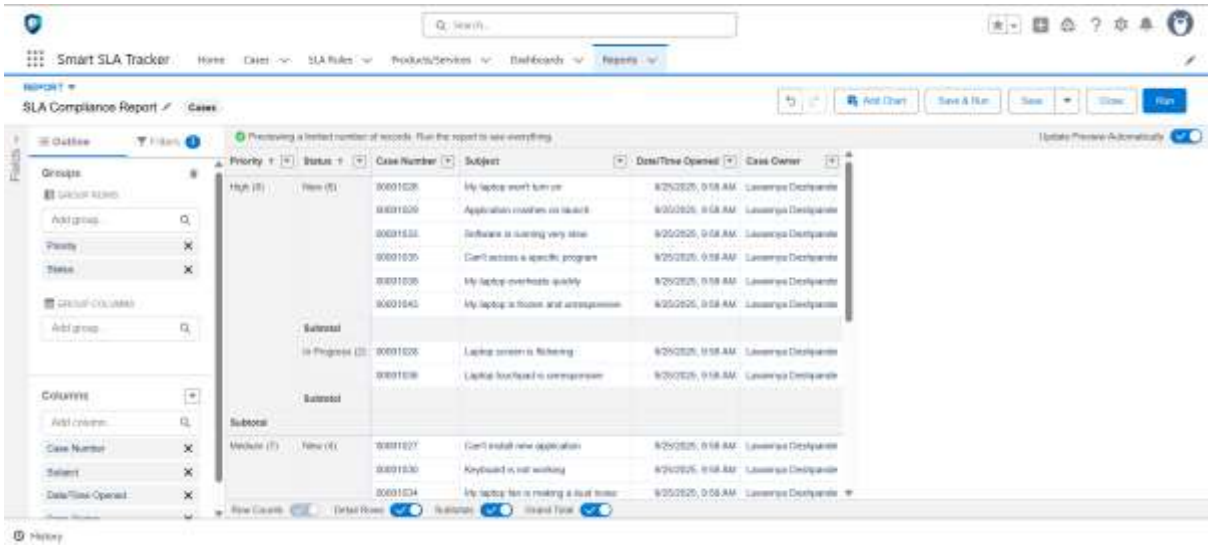


9.2 Create Reports:

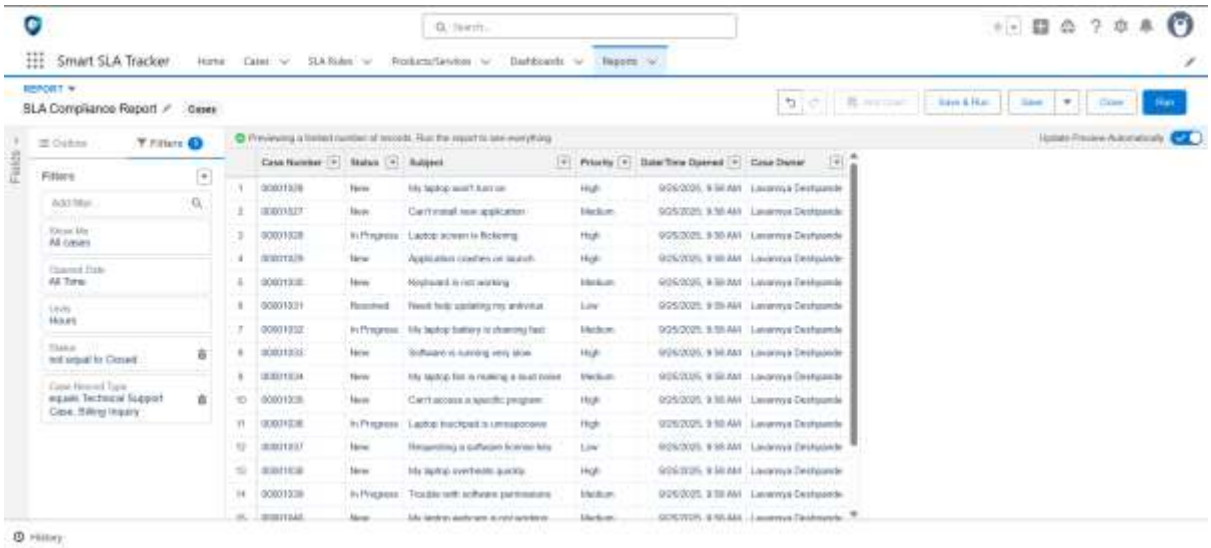
Reports tab > New Report > Cases with SLA Rules

SLA Compliance Report

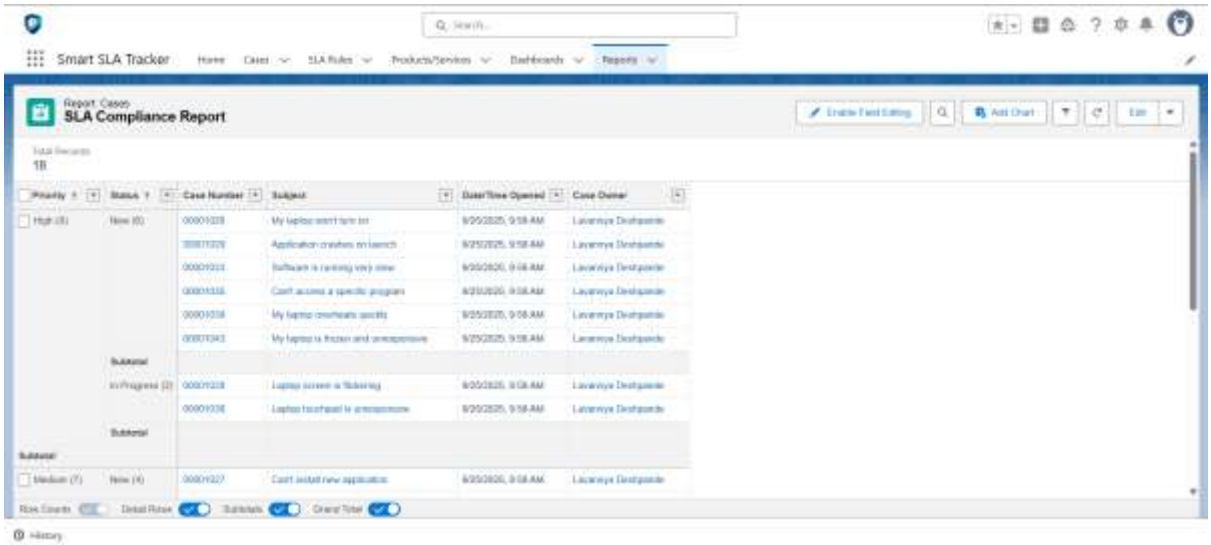
1.1 add columns and group



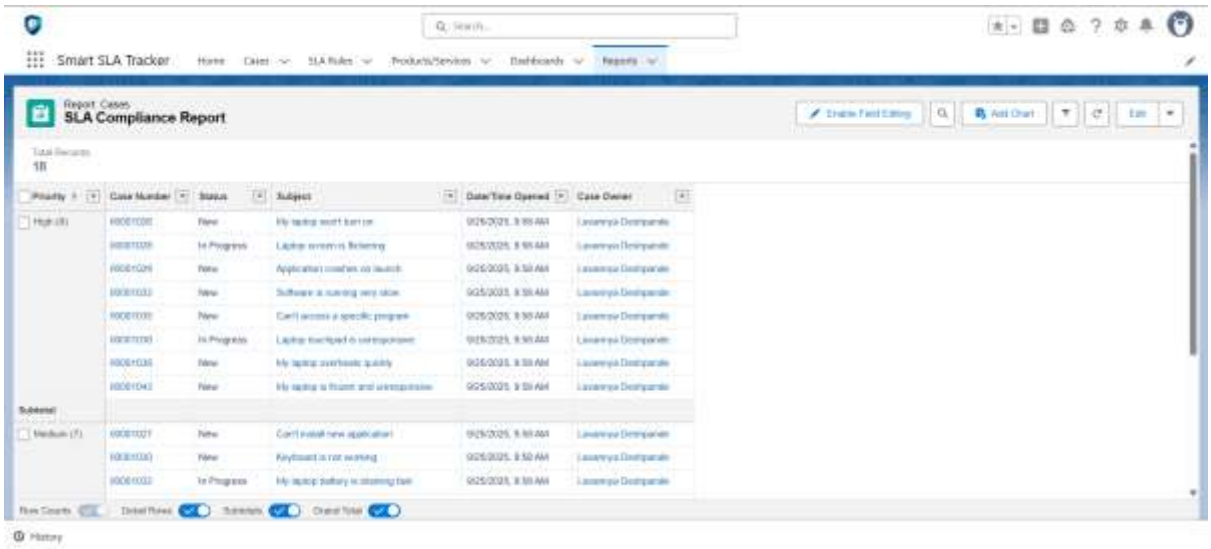
1.2 Add filters



1.3 Save and Run

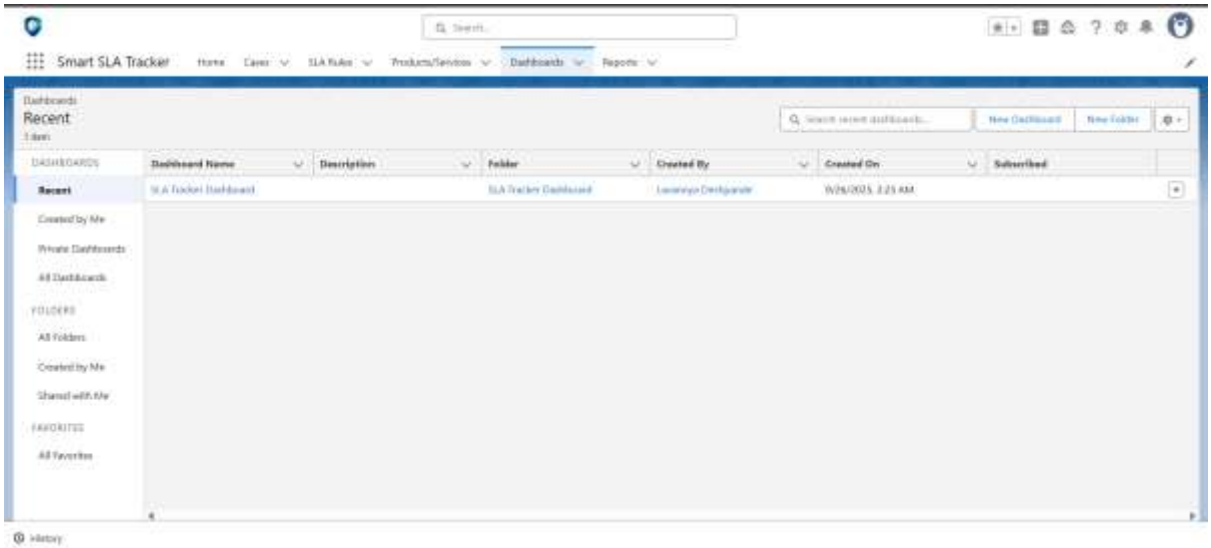


- SLA Compliance Report:



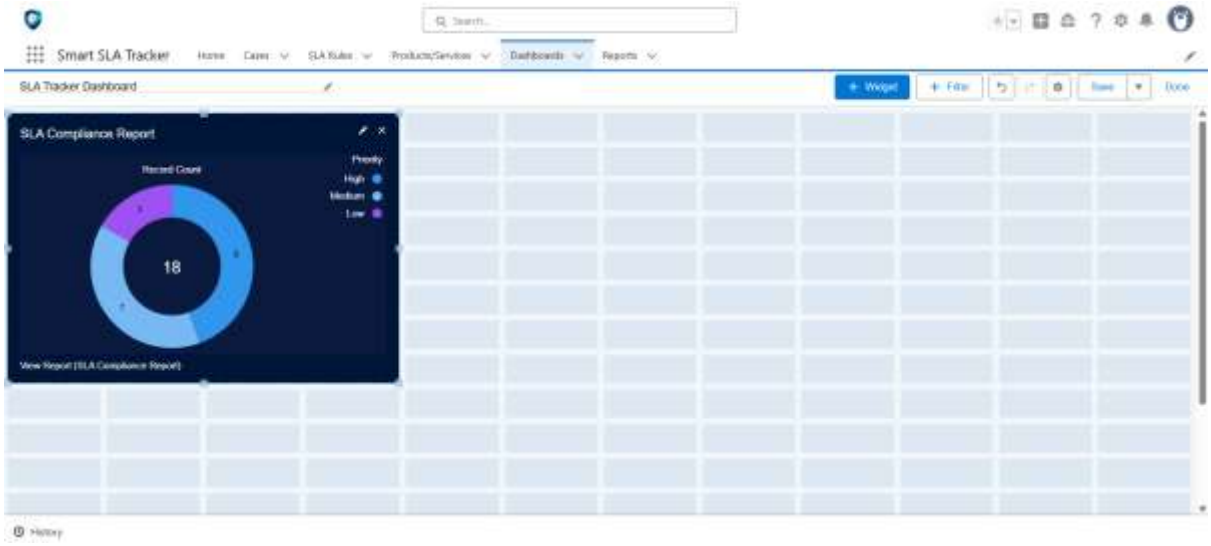
9.3 Create a Dashboard:

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

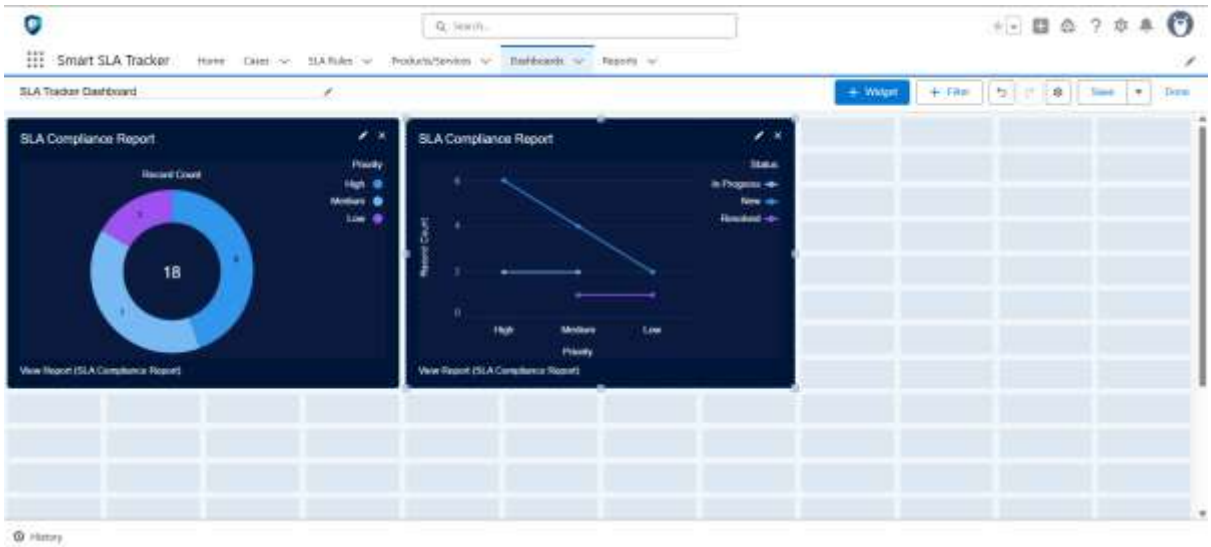


2. Add report do dashboard based on different factors

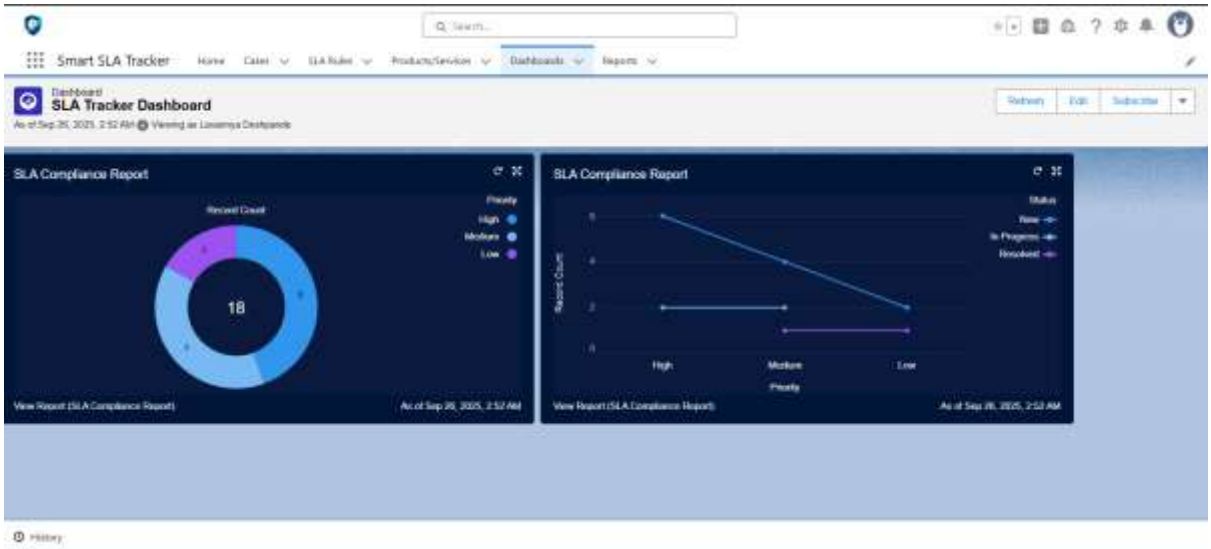
1. case priority:



2. case Status + priority:



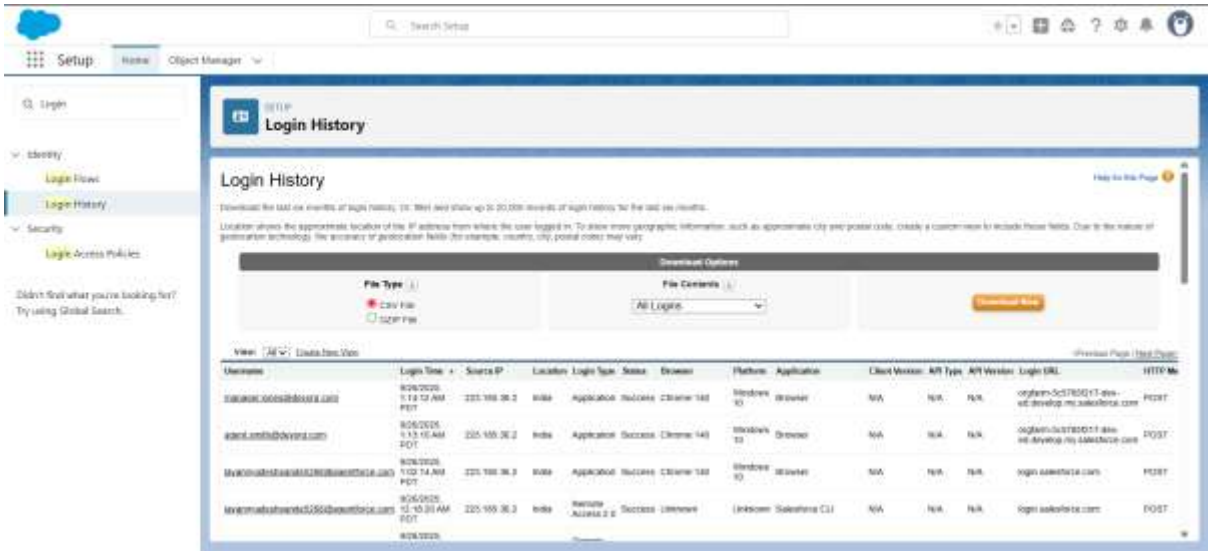
Final Dashboard :



9.4 Security Review:

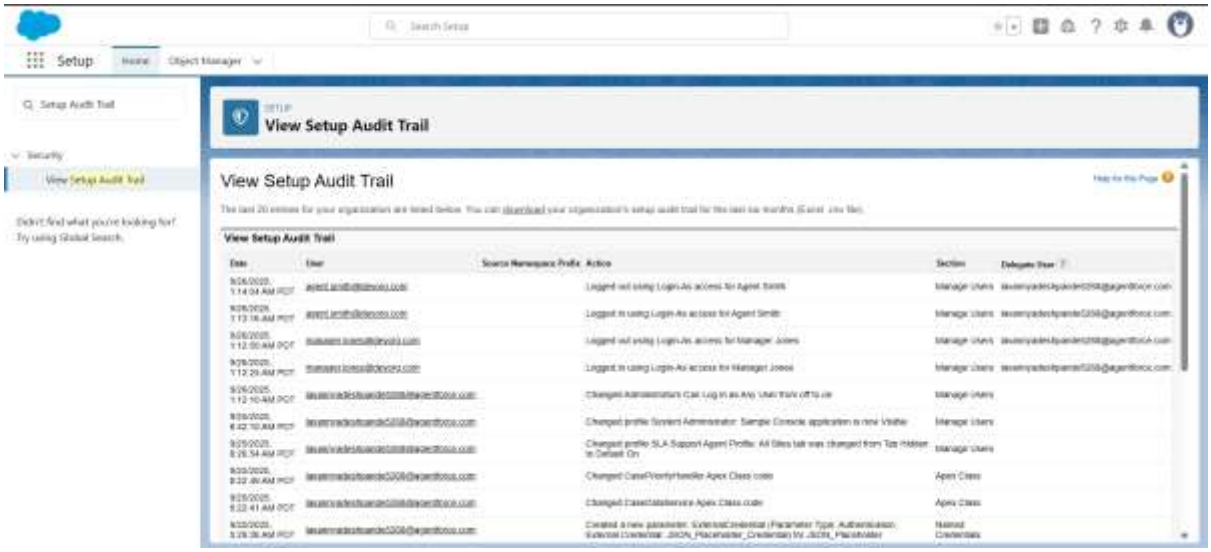
1. Verify Login History:

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



2. Use the Setup Audit Trail:

Setup > Setup Audit Trail.



*We can see the Login History and Setup audit Trail