

# Phase 9: Reporting, Dashboards & Security Review – Customer Complaint CRM

## Purpose:

To provide insights into complaints, visualize CRM data through dashboards, and ensure proper security and access control for users.

## 1) Create Reports

### What I did:

I created reports to display complaints grouped by **Status** and **Priority** to track complaints effectively.

### How I did it (Step-by-Step):

#### Report 1: Complaints by Status

1. Go to **Reports** → **New Report**.
2. Select **Report Type**: Complaints → Click **Continue**.
3. Drag the **Status** field into the "Group Rows" area.
4. Add fields to display:
  - Complaint Number
  - Customer Name
  - Assigned To
  - Priority
  - Complaint Date
5. Apply filters if needed (optional): e.g., Status ≠ Closed.
6. Click **Save & Run** → Name: Complaints\_By\_Status.

The screenshot shows the Salesforce Lightning Reports interface. The report is titled 'Complaint\_Summary\_Report' and is grouped by 'Status'. The table displays 10 records, categorized into 'New (3)', 'In Progress (7)', and 'Total (10)'. The columns include Complaint ID, Resolution Date, Complaint Owner Name, Priority, Assigned To, Complaint Date, and Complaint Name.

Status	Complaint ID	Resolution Date	Complaint Owner Name	Priority	Assigned To	Complaint Date	Complaint Name
New (3)	a01tg.00000P90Ks	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	Medium	-	9/27/2025	CMP-0019
	a01tg.00000P90Kn	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	Urgent	-	9/27/2025	CMP-0014
	a01tg.00000P90Kl	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	Medium	-	9/26/2025	CMP-0012
In Progress (7)	a01tg.00000P90DQ	10/7/2025	Nulu Subrahmanya Venkata Lakshmi	High	John Agent	9/30/2025	CMP-0001
	a01tg.00000P90Kn	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	Urgent	-	9/26/2025	CMP-0018
	a01tg.00000P90Kq	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	High	-	9/26/2025	CMP-0017
	a01tg.00000P90Kp	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	High	-	9/26/2025	CMP-0016
	a01tg.00000P90Ku	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	Medium	-	9/23/2025	CMP-0015
	a01tg.00000P90Km	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	High	-	9/24/2025	CMP-0013
	a01tg.00000P90Kk	10/8/2025	Nulu Subrahmanya Venkata Lakshmi	High	-	9/25/2025	CMP-0011
Total (10)							

## Report 2: Complaints by Priority

1. Go to **Reports** → **New Report** → **Complaints** → Click **Continue**.
2. Drag **Priority** into the "**Group Rows**" area.
3. Add fields to display: Complaint Number, Customer Name, Status, Assigned To.
4. Click **Save & Run** → Name: `Complaints_By_Priority`.

### Result:

Two reports are created:

- One grouped by Status
- One grouped by Priority

These reports provide insights into complaint distribution for management and agents.

Report: Complaints  
complaints report group by priority

Total Records: 10

Priority	Status	Resolution Date	Complaint Label	Complaint Description	Complaint Date	Assigned To	Complaint ID	Complaint Name
Medium (3)	New	10/8/2025	-	Warranty claim	9/27/2025	-	a01gl00000P8CKs	CMP-0019
	In Progress	10/8/2025	-	Late response from support	9/23/2025	-	a01gl00000P8CKo	CMP-0015
	New	10/8/2025	-	Wrong item received	9/26/2025	-	a01gl00000P8CKI	CMP-0012
Subtotal								
High (5)	In Progress	10/7/2025	-	unable to use the account	9/30/2025	John Agent	a01gl00000P8CKG	CMP-0001
	In Progress	10/8/2025	-	Account login issue	9/25/2025	-	a01gl00000P8CKq	CMP-0017
	In Progress	10/8/2025	-	Product not as described	9/20/2025	-	a01gl00000P8CKp	CMP-0016
	In Progress	10/8/2025	-	Damaged product on arrival	9/24/2025	-	a01gl00000P8CKm	CMP-0013
	In Progress	10/8/2025	-	Delay in product delivery	9/25/2025	-	a01gl00000P8CKk	CMP-0011
Subtotal								
Urgent (2)	In Progress	10/8/2025	-	Billing error	9/26/2025	-	a01gl00000P8CKr	CMP-0018
	New	10/8/2025	-	Refund not processed	9/27/2025	-	a01gl00000P8CKn	CMP-0014
Subtotal								

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

## 2) Create Dashboard

### What I did:

I built a dashboard to provide visual summaries of complaints.

### How I did it (Step-by-Step):

1. Go to **Dashboards** → **New Dashboard**.
2. Name it: `Complaint_Management_Dashboard`.
3. Choose the folder: Private or App folder → Click **Create**.

## Add Chart 1: Complaints by Status

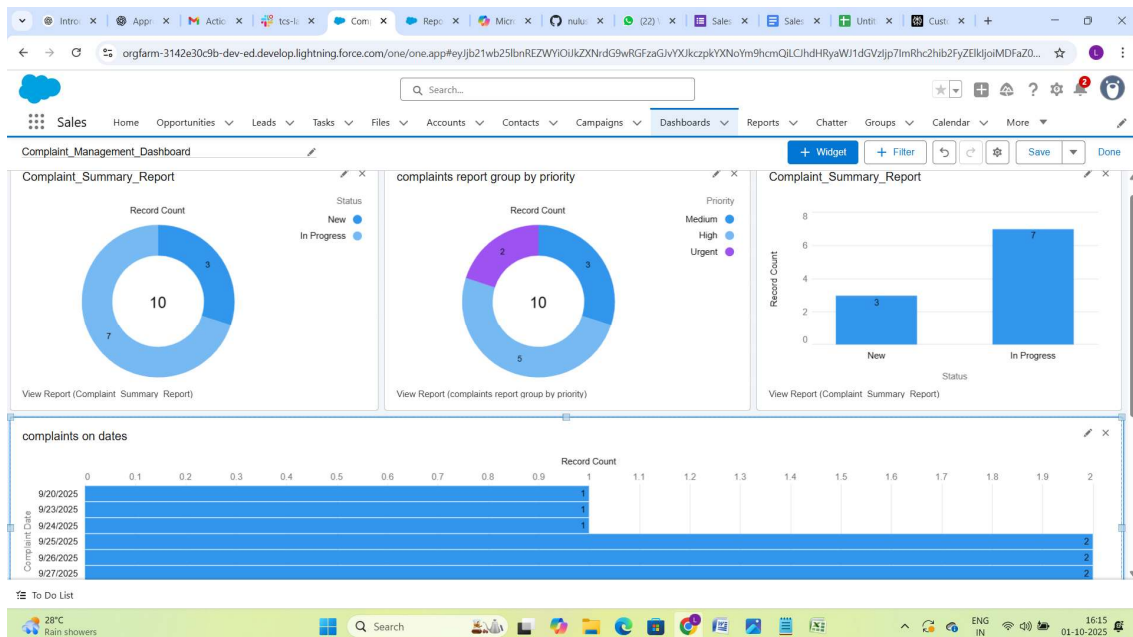
1. Click + **Component** → **Select Report: Complaints\_By\_Status**.
2. Choose **Chart Type: Bar Chart** or **Donut Chart**.
3. Configure:
  - Y-Axis: Count of Records
  - X-Axis / Grouping: Status
  - Title: Complaints by Status
4. Click **Add** → Position on dashboard canvas.

## Add Chart 2: Complaints by Priority

1. Click + **Component** → **Select Report: Complaints\_By\_Priority**.
2. Choose **Chart Type: Bar, Pie, or Donut**.
3. Configure:
  - Y-Axis: Count of Records
  - X-Axis / Grouping: Priority
  - Title: Complaints by Priority
4. Click **Add** → Position on dashboard.
5. Click **Save** → **Run Dashboard**.
6. Verify charts display correctly:
  - Bar chart shows complaints grouped by Status
  - Pie/Bar chart shows complaints grouped by Priority

### Result:

The dashboard provides a visual summary of complaints by Status and Priority for quick decision-making.



### 3) Configure Sharing Settings & Security

**What I did:**

I ensured CRM data is accessed only by authorized users based on roles and profiles.

**How I did it (Step-by-Step):**

- 1. **Organization-Wide Defaults (OWD):**
  - Go to **Setup** → **Sharing Settings**
  - Set **Customer** and **Complaint** objects to **Private**
  - Only owners and users above in role hierarchy can access records
- 2. **Profiles & Field-Level Security:**
  - Go to **Setup** → **Object Manager** → **Complaint** → **Fields & Relationships** → **Field-Level Security**
  - Ensure sensitive fields (e.g., Resolution Notes) are visible only to agents or managers
- 3. **Role Hierarchy:**
  - Define roles:
    - **Manager:** can see all complaints under their team
    - **Agent:** can see only complaints assigned to them

**Result:**

Access to CRM data is restricted according to user roles and profiles, maintaining data confidentiality.

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#### Summary Table — Phase 9 Required Steps

Feature	Purpose	Implementation
Reports	Show complaints grouped by Status or Priority	Create <code>Complaints_By_Status</code> and <code>Complaints_By_Priority</code> reports
Dashboards	Visual summary of CRM data	Add charts based on the reports to <code>Complaint_Management_Dashboard</code>
Sharing Settings & Field Security	Restrict access to authorized users	Set OWD = Private, configure profiles and roles, secure sensitive fields

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**Conclusion:**

Phase 9 ensures that your CRM has **useful reports and dashboards** for decision-making and **data security** is properly enforced, without including optional enterprise-level security features.

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