

Phase 9: Reporting, Dashboard and Security Review

Project: Customer Support Ticket Management System

1.Reports

Reports were created to provide meaningful insights into customer support operations, ticket status, priority distribution, and agent performance. These reports help support managers and administrators monitor system efficiency and take informed decisions.

- **New Support Tickets Report**

- Object: Support_Ticket__c

- Fields:

1. Support Ticket Name

2. Customer

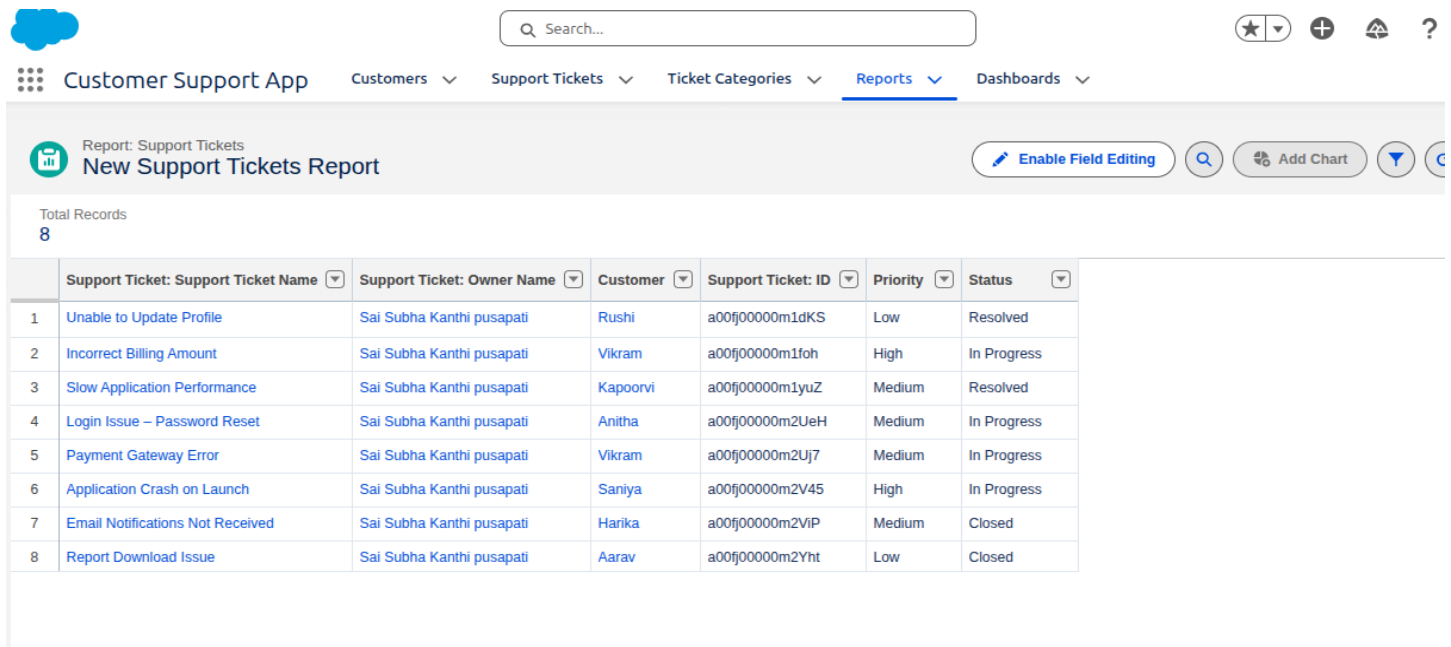
3. Ticket Category

4. Priority

5. Status

6. Owner

- Purpose: To view all support tickets in the system along with their current status and ownership.



The screenshot displays the Salesforce Customer Support App interface. At the top, there is a navigation bar with the app name and several tabs: Customers, Support Tickets, Ticket Categories, Reports (selected), and Dashboards. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area shows the 'Report: Support Tickets' header and the 'New Support Tickets Report' title. A button labeled 'Enable Field Editing' is visible. Below the header, a table displays the report data. The table has 7 columns: Support Ticket: Support Ticket Name, Support Ticket: Owner Name, Customer, Support Ticket: ID, Priority, and Status. The table contains 8 rows of data, each representing a support ticket. The first row shows a ticket titled 'Unable to Update Profile' with status 'Resolved'. The second row shows a ticket titled 'Incorrect Billing Amount' with status 'In Progress'. The third row shows a ticket titled 'Slow Application Performance' with status 'Resolved'. The fourth row shows a ticket titled 'Login Issue – Password Reset' with status 'In Progress'. The fifth row shows a ticket titled 'Payment Gateway Error' with status 'In Progress'. The sixth row shows a ticket titled 'Application Crash on Launch' with status 'In Progress'. The seventh row shows a ticket titled 'Email Notifications Not Received' with status 'Closed'. The eighth row shows a ticket titled 'Report Download Issue' with status 'Closed'.

	Support Ticket: Support Ticket Name	Support Ticket: Owner Name	Customer	Support Ticket: ID	Priority	Status
1	Unable to Update Profile	Sai Subha Kanthi pusapati	Rushi	a00fj00000m1dKS	Low	Resolved
2	Incorrect Billing Amount	Sai Subha Kanthi pusapati	Vikram	a00fj00000m1foh	High	In Progress
3	Slow Application Performance	Sai Subha Kanthi pusapati	Kapoorvi	a00fj00000m1yuZ	Medium	Resolved
4	Login Issue – Password Reset	Sai Subha Kanthi pusapati	Anitha	a00fj00000m2UeH	Medium	In Progress
5	Payment Gateway Error	Sai Subha Kanthi pusapati	Vikram	a00fj00000m2Uj7	Medium	In Progress
6	Application Crash on Launch	Sai Subha Kanthi pusapati	Saniya	a00fj00000m2V45	High	In Progress
7	Email Notifications Not Received	Sai Subha Kanthi pusapati	Harika	a00fj00000m2ViP	Medium	Closed
8	Report Download Issue	Sai Subha Kanthi pusapati	Aarav	a00fj00000m2Yht	Low	Closed

- **Ticket Status Report**

- Object: Support_Ticket__c

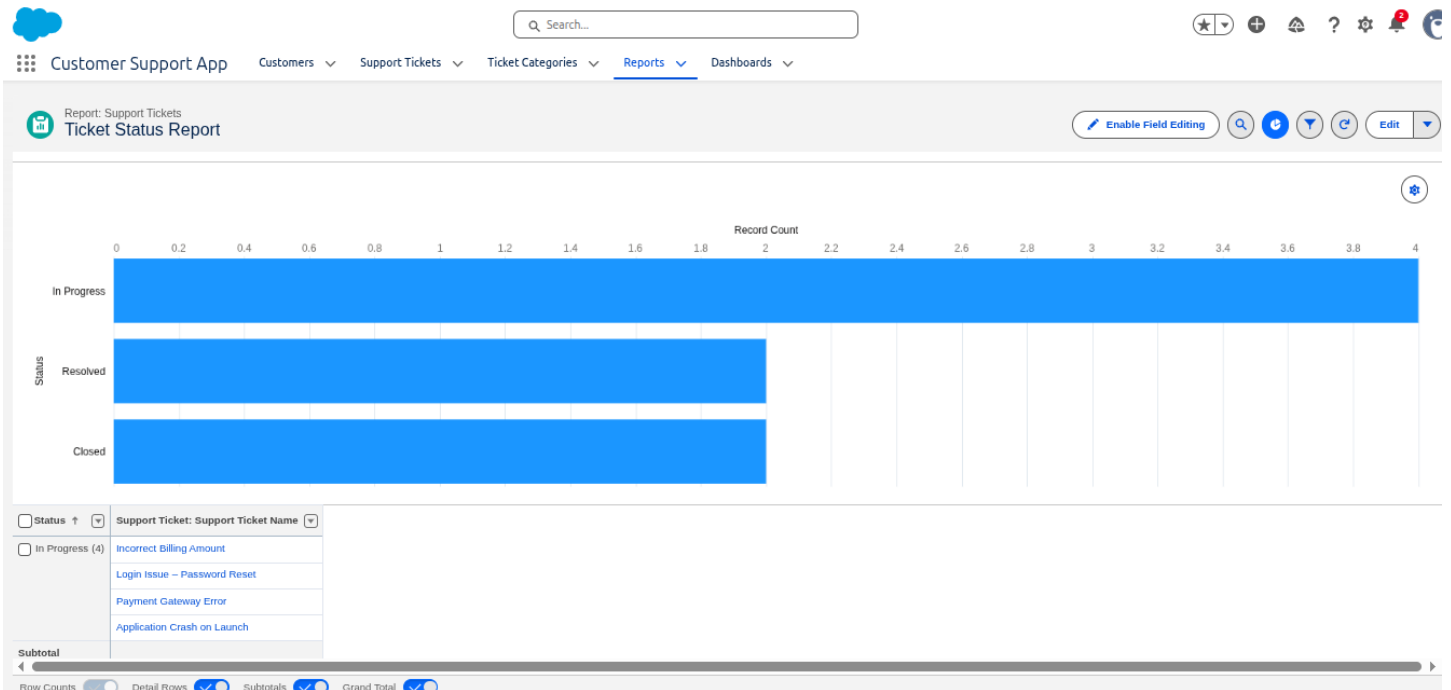
- Fields:

1. Support Ticket Name

2. Customer

3. Status

- Grouped by: Status (New, In Progress, Resolved, Closed)
- Purpose: To monitor the ticket lifecycle and track how many tickets are pending, resolved, or closed.



2. Dashboard Components

1. Ticket Status Pie Chart

- a. Displays New vs In Progress vs Resolved vs Closed tickets

2. Priority-wise Ticket Donut Chart

- a. Shows High, Medium, and Low priority tickets

3. Category-wise Ticket Bar Chart

- a. Displays number of tickets per category

4. Agent-wise Ticket Table

- a. Shows ticket count handled by each support agent

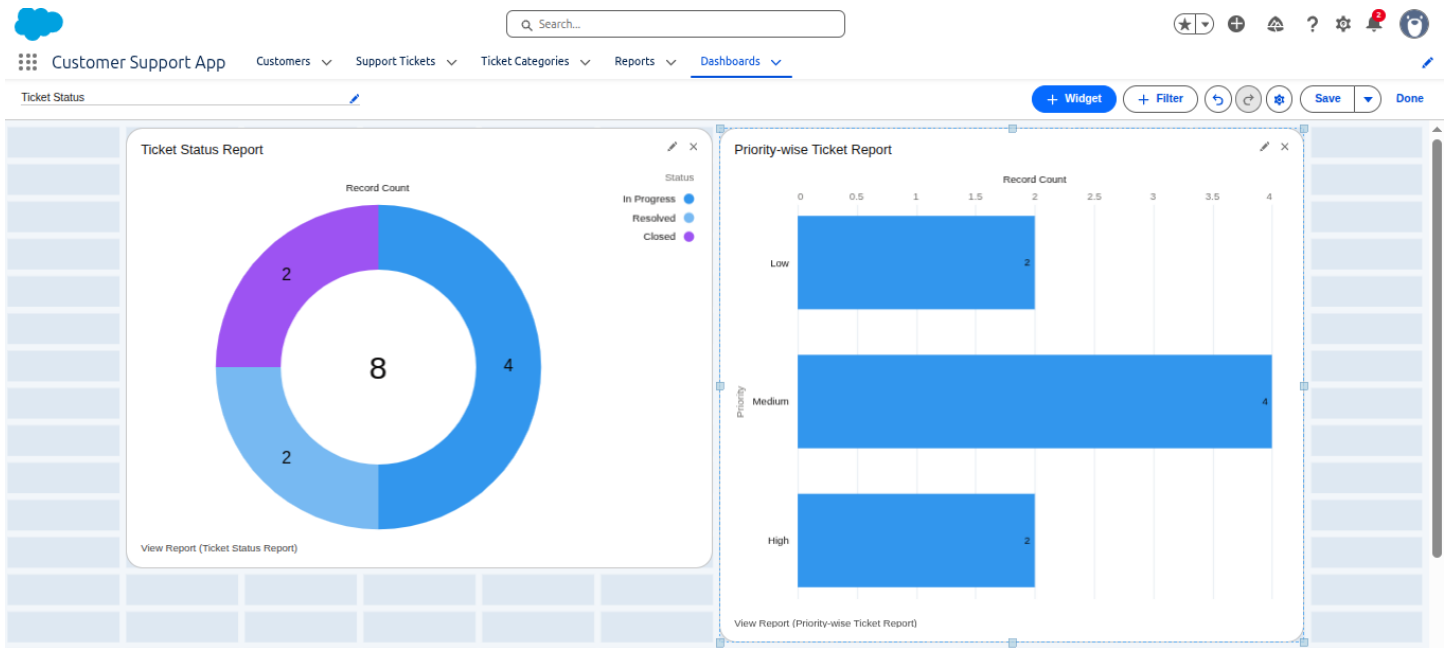
5. Recent Tickets List

- a. Displays recently created support tickets

Benefits of Dashboard

- Provides real-time visibility into support operations
- Helps managers quickly identify bottlenecks

- Enables prioritization of critical tickets
- Improves decision-making and service quality



3. Security Review

3.1 Object-Level Security

- **Admin:** Full access to Customer__c, Support_Ticket__c, and Ticket_Category__c
- **Support Agent:**
 - Create and update Support_Ticket__c (assigned records)
 - Read access to Customer__c
- **Support Manager:**
 - Read and update access to Support_Ticket__c
 - Read access to Customer__c

3.2 Field-Level Security

- Priority and Status fields are editable only by authorized users
- Sensitive customer-related fields are restricted based on profile
- Read-only access is provided where modification is not required