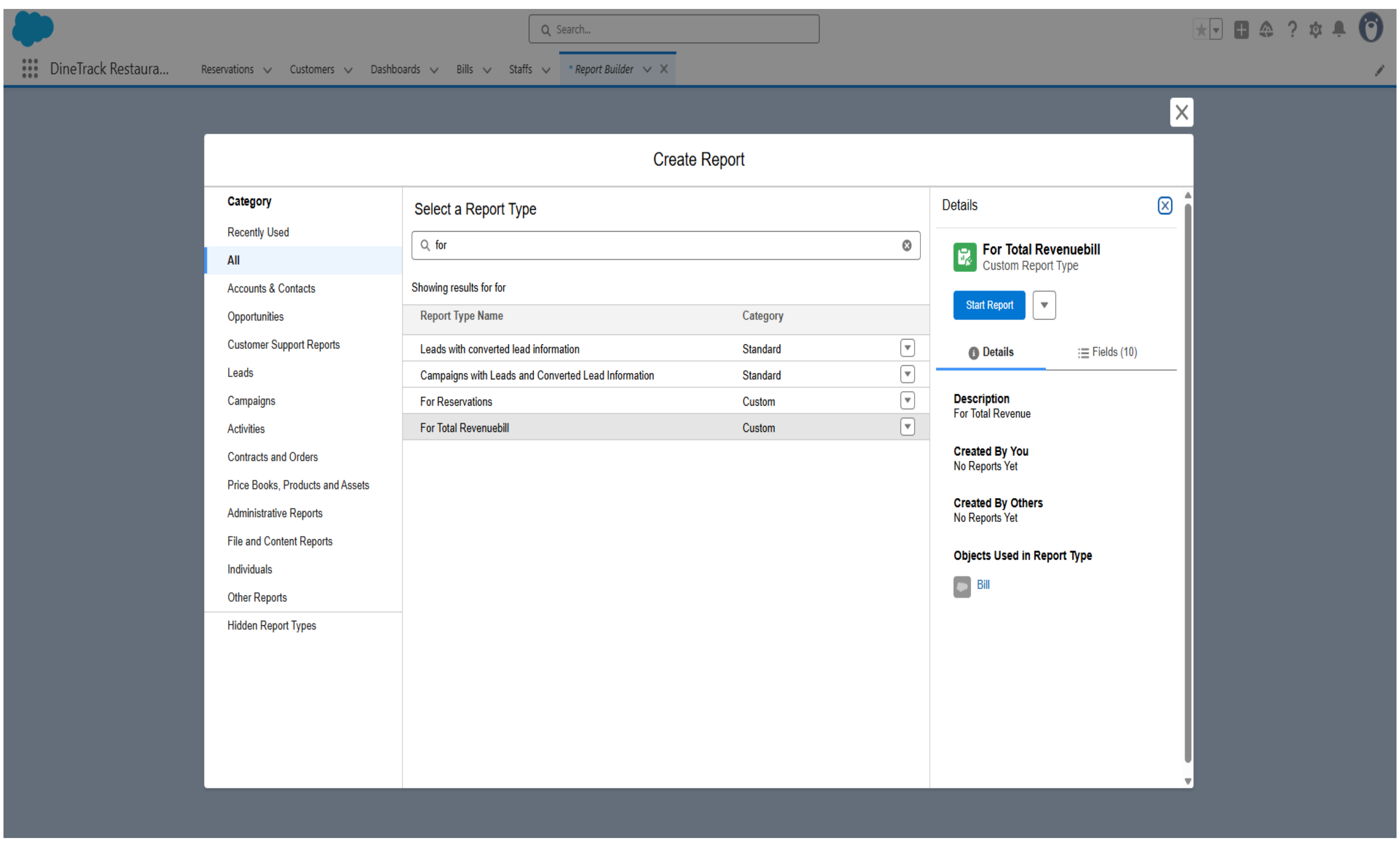
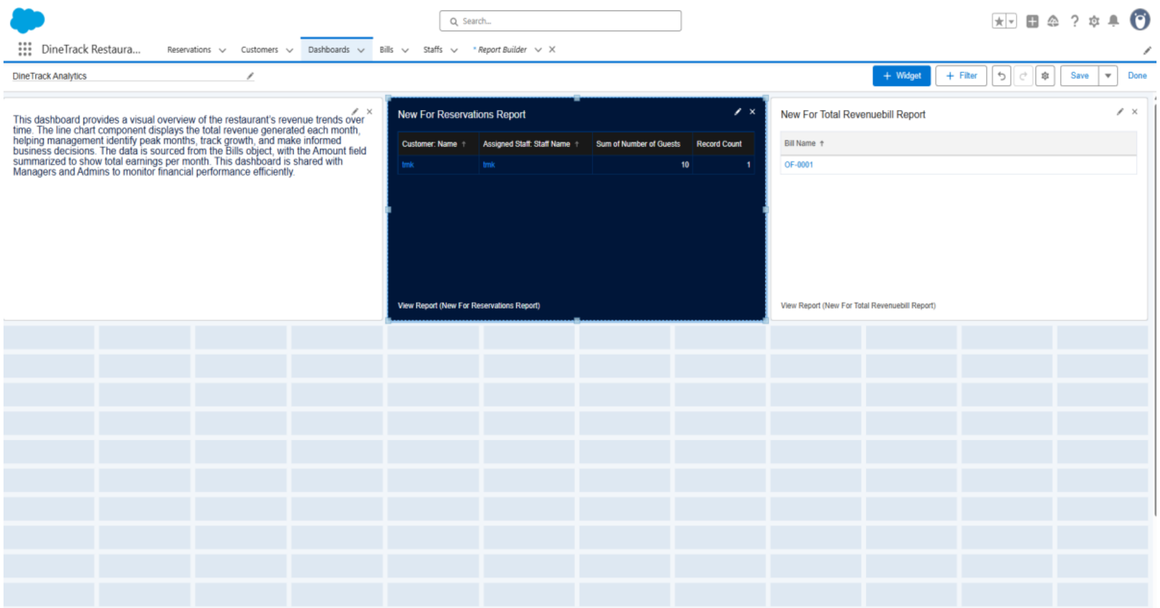
1️⃣ Steps to Create Custom Report Types

1. Go to Setup → Custom Report Types
2. Click New Custom Report Type
3. Fill details:
   - Primary Object: Choose your custom object (e.g., Customers)
   - Report Type Label: As needed (e.g., Customers with Reservations)
   - Report Type Name: auto-filled
   - Description: Optional
   - Store in Category: Choose category (e.g., Other Reports)
4. Click Next
5. Define Relationships (optional): Example: Customers → Reservations (each Customer can have multiple Reservations)
6. Save



2 Create Dashboard

1. App Launcher → Dashboards → New Dashboard
2. Name: As needed (e.g., Monthly Revenue Trends)
3. Folder: Managers/Admin (shared)
4. Click Create



3 Add Component (Line Chart)

1. In dashboard builder, click + Component
2. Select the relevant report (e.g., Total Revenue Report)
3. Component Type: Line Chart
4. X-axis (Horizontal): Choose Date field → Group by Month
5. Y-axis (Vertical): Choose numeric field → Summarize → Sum
6. Optional: Add filter for year if needed
7. Click Add, then Resize or move the component if needed

4 Finalize Dashboard

1. Click Save → Done
2. Click Refresh to load live data
3. Optional: Schedule automatic refresh (daily/weekly)

5️⃣ Field-Level Security (FLS) for Sensitive Fields

1. Setup → Object Manager → Select Object (e.g., Bill) → Fields & Relationships
2. Select the sensitive field (e.g., Billing Amount, Payment Info)
3. Click Set Field-Level Security (button at top)
4. In the list of profiles, uncheck visibility for Staff profile
5. Keep Managers/Admin profiles checked
6. Save