

## 1 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

The screenshot displays the DineTrack Restaurant Management System interface. The top navigation bar includes a search bar and various menu items: Reservations, Customers, Dashboards, Bills, Staffs, and Report Builder. The 'Report Builder' menu is currently selected, and a 'Create Report' dialog box is open.

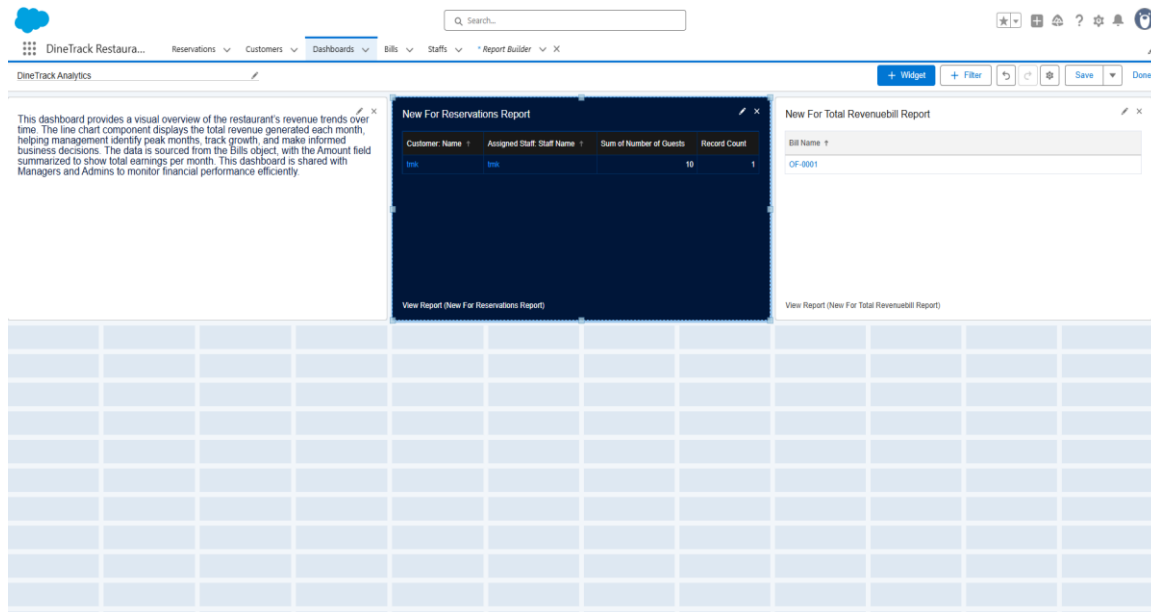
The 'Create Report' dialog box is divided into three main sections:

- Category:** A list of categories on the left, with 'All' selected. Other categories include Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, Individuals, Other Reports, and Hidden Report Types.
- Select a Report Type:** A table showing results for the selected category. The table has two columns: 'Report Type Name' and 'Category'. The results are as follows:

Report Type Name	Category
Leads with converted lead information	Standard
Campaigns with Leads and Converted Lead Information	Standard
For Reservations	Custom
For Total Revenuebill	Custom
- Details:** A section on the right showing details for the selected report type, 'For Total Revenuebill'. It includes a 'Start Report' button, a 'Details' tab, and a list of fields (10). The details section also shows the description 'For Total Revenue', the creator 'Created By You' (No Reports Yet), and the objects used in the report type (Bill).

## 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)

## 5 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

 SETUP

Set Field-Level Security

Amount

Help for this Page

Save Cancel

Field Label	Amount
Data Type	Currency(16, 2)

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Manager Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>