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## Phase 9 Summary: Reporting, Dashboards & Security Review

**Project:** Residential Maintenance Request Portal

This phase focused on visualizing your application's data to gain business insights and reviewing key security settings to ensure data is properly protected.

### 1. Custom Report Type: Property Units with Maintenance Requests

- **Purpose:** To create a reusable template that joins the **Property Unit** and **Maintenance Request** objects, allowing for reports that combine data from both.
- **Key Actions:** A new report type was created with Property Units as the primary object. This allows for building reports that can show all properties, including those that may not have any open maintenance requests.

**SETUP**  
**Custom Report Types**

### New Custom Report Type

2 Define Report Records Set

Select related objects to define which records are included in reports using this report type.

**A Property Units**  
Primary Object  
[\(Click to relate another object\)](#)

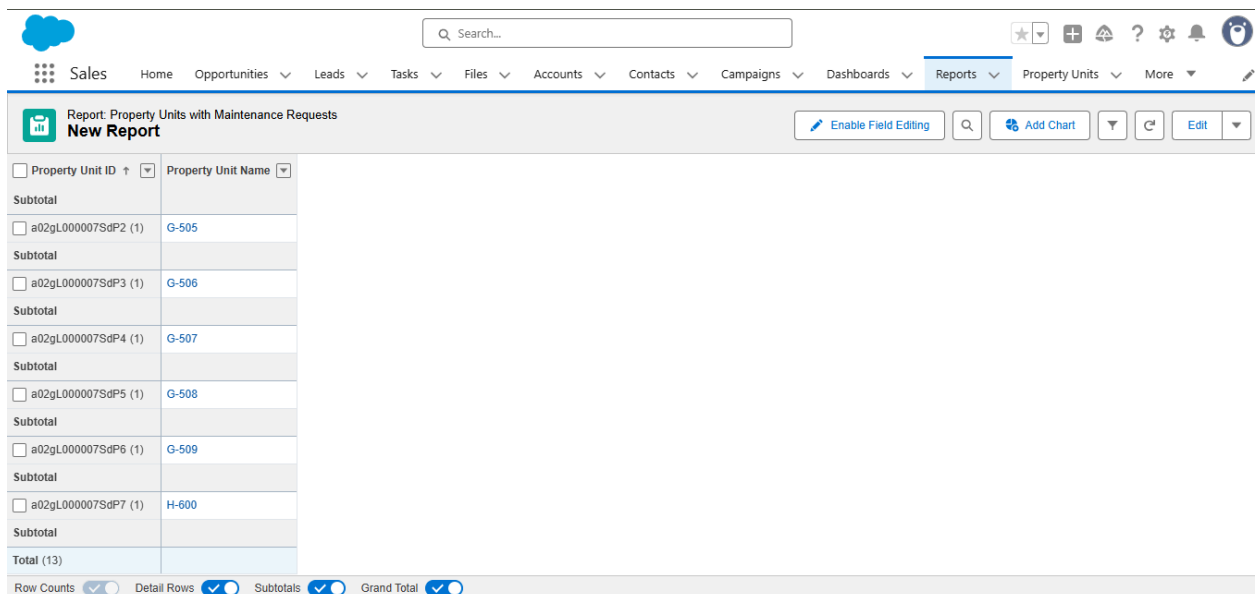
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## 2. Report: Maintenance Requests by Status

- **Purpose:** To analyze and summarize all maintenance requests based on their current operational status.
- **Key Actions:** A new report was built using the custom report type. The data was grouped by the **Status** field to provide a clear summary of how many requests are new, in progress, or completed.



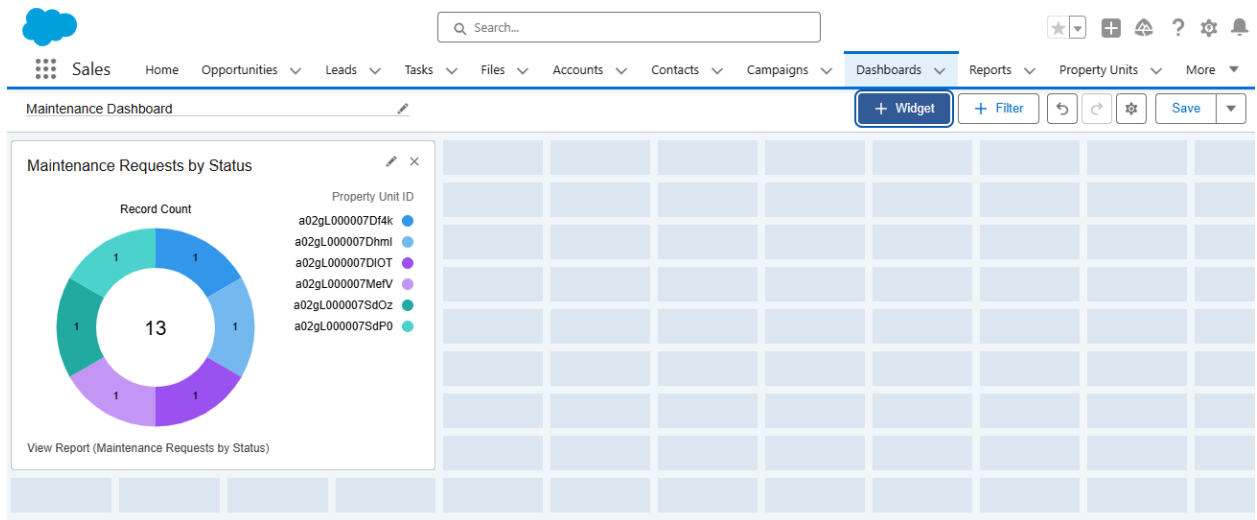
The screenshot shows a CRM interface with a navigation bar at the top containing 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Property Units', and 'More'. A search bar is located in the top right. The main content area displays a report titled 'Report: Property Units with Maintenance Requests' with a 'New Report' button. The report is a table with two columns: 'Property Unit ID' and 'Property Unit Name'. The data is grouped by status, with each group having a 'Subtotal' row. The status values are G-505, G-506, G-507, G-508, G-509, and H-600. The total count is 13. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

Property Unit ID	Property Unit Name
Subtotal	
a02gL000007SdP2 (1)	G-505
Subtotal	
a02gL000007SdP3 (1)	G-506
Subtotal	
a02gL000007SdP4 (1)	G-507
Subtotal	
a02gL000007SdP5 (1)	G-508
Subtotal	
a02gL000007SdP6 (1)	G-509
Subtotal	
a02gL000007SdP7 (1)	H-600
Subtotal	
Total (13)	

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

## 3. Dashboard: Maintenance Dashboard

- **Purpose:** To provide an at-a-glance, visual representation of key business metrics from your reports<sup>5</sup>.
- **Key Actions:** A new dashboard was created. A **Donut Chart** component was added to it, using the Maintenance Requests by Status report as its source, to visually display the breakdown of requests<sup>6</sup>.



#### 4. Security Review: Field Level Security

- **Purpose:** To understand how to control user access to specific fields on an object, ensuring users can only see and edit the data relevant to their role<sup>7</sup>.
- **Key Actions:** The **Field Level Security** settings for the Maintenance Technician profile on the Maintenance Request object were reviewed. This exercise demonstrated how an administrator can make fields visible, read-only, or hidden for a specific group of users<sup>8</sup>.