Phase 9: Reporting, Dashboards & Security

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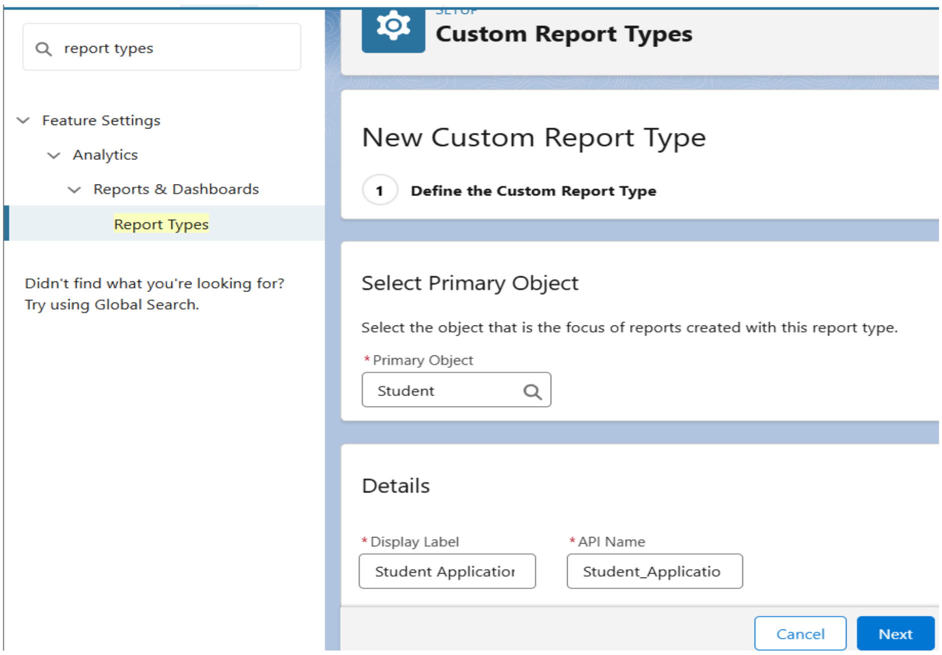
1. Report Types

Steps to Create Report Type:

1. Setup → **Report Types** → New Custom Report Type
2. **Primary Object:** Student, Complaint, or Appointment (depending on the report focus)
3. **Report Type Label:** e.g., *Student Applications Report*, *Complaint Report Type*, or *Appointments Report Type*
4. **Description:** Optional
5. **Store in Category:** Select "Other Reports" or "Complaints"/"Students"/"Appointments"
6. **Deployment Status:** Deployed
7. Click **Save**



Project Note:

- Custom report types ensure only relevant objects and fields appear in reports.

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2. Reports

Tabular Report

Steps:

1. Setup → **Reports** → New Report

2. Select Object (e.g., Complaint, Student, Appointment)
3. Choose **Tabular report type**
4. Add fields: e.g., Complaint Number, Customer Name, Status, Priority, Resolution
5. Filter data if needed (e.g., only Open Complaints)
6. Save report → Name: *All Complaints Tabular*
7. Run → displays all complaints in a simple list

Previewing a limited number of records. Run the report to see everything.

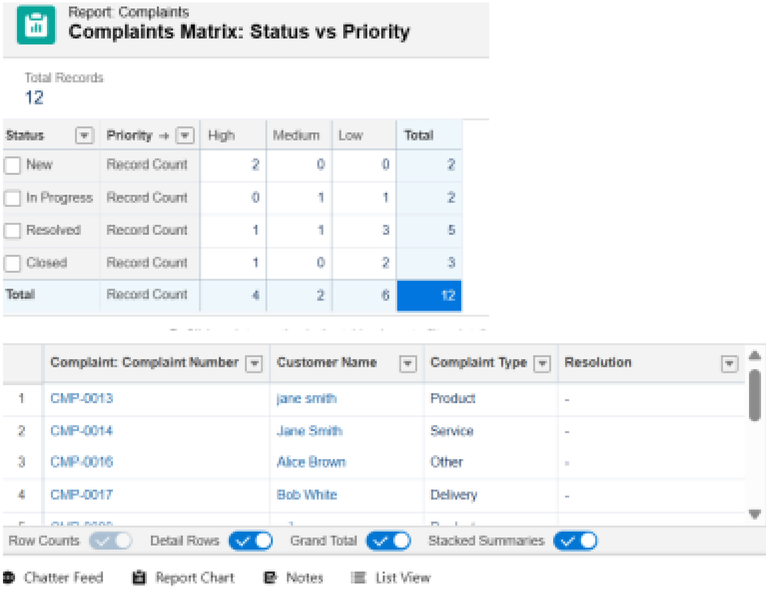
	Complaint: Complaint Number	Customer Name	Complaint Type	Status	Priority	Resolution
1	CMP-0005	somu momu	Product	Resolved	Medium	-
2	CMP-0004	roxa prety	Product	Closed	High	closed
3	CMP-0009	rvikumar	Product	Resolved	High	-
4	CMP-0019	Tom Harris	Service	Resolved	Low	-
5	CMP-0021	Emily Scott	Delivery	Closed	Low	the product is delivered
6	CMP-0015	Mark Lee Mark Lee	Service	Resolved	Low	-
7	CMP-0013	jane smith	Product	New	High	-
8	CMP-0017	Bob White	Delivery	In Progress	Low	-
9	CMP-0018	Sarah Khan	Service	Resolved	Low	-
10	CMP-0020	David Clark	Other	Closed	Low	closed its account related
11	CMP-0014	Jane Smith	Service	New	High	-
12	CMP-0016	Alice Brown	Other	In Progress	Medium	-

Matrix Report

Steps:

1. Setup → Reports → New Report
2. Select Object → Complaint
3. Choose **Matrix report type**
4. Group rows by **Status**, columns by **Priority**
5. Add fields: Complaint Number, Customer Name, Resolution, Complaint Type
6. Save report → Name: *Complaints Matrix Report*

7. Run → displays complaints cross-tabulated by Status and Priority



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3. Dashboards

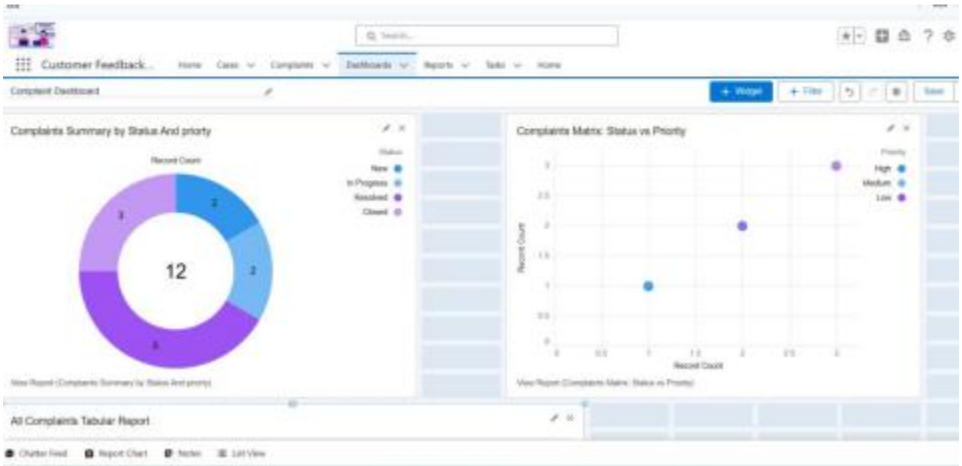
Create Dashboard

Steps:

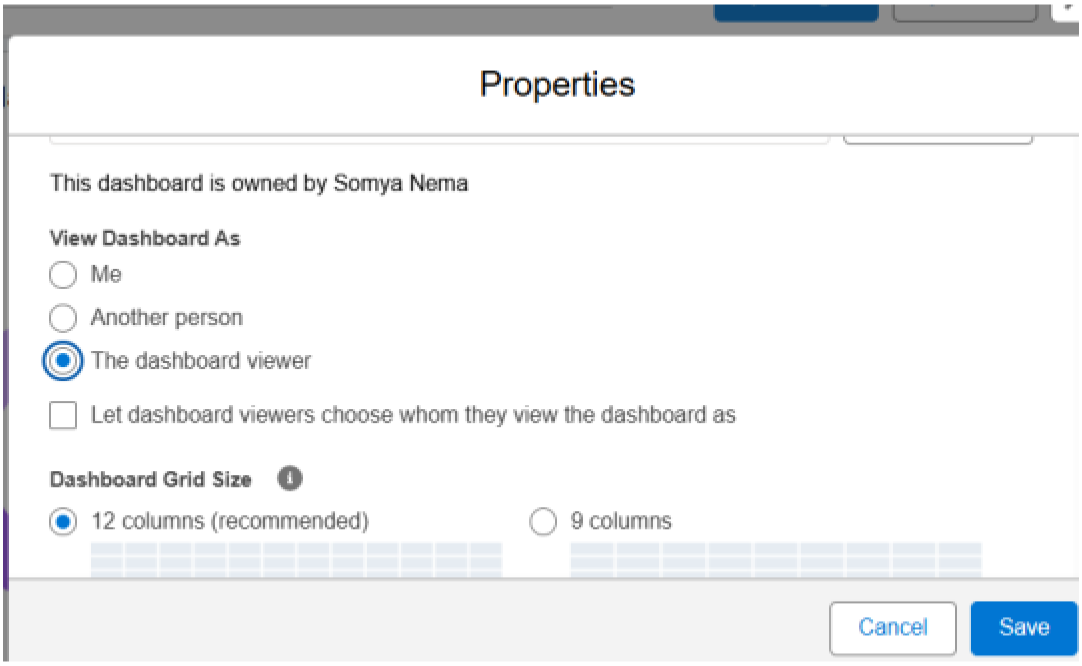
1. Setup → App Launcher → Dashboards → New Dashboard
2. **Name:** Complaint Dashboard (or Student/Appointment Dashboard)
3. Select folder → Private or Shared
4. Click **Create**

Add Widgets

1. Click **+ → Component**
2. Select report: *Complaints Summary by Status*
3. Choose chart type: Bar / Pie / Donut
4. Configure axes → X-axis: Status, Y-axis: Count of complaints
5. Click **Add** → chart appears on dashboard
6. Click **+ → Component** again
7. Select report: *All Complaints Tabular*
8. Choose **Table**
9. Click **Add** → detailed complaint list appears



Dynamic Dashboard



1. Click **Dashboard Settings → View Dashboard As → The dashboard viewer**
2. Save & Run → dashboard updates dynamically based on user viewing it
3. Verify by logging in as different roles (Admin, Consultant, Support Agent)

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4. Sharing Settings

Organization-Wide Defaults (OWD)

Steps:

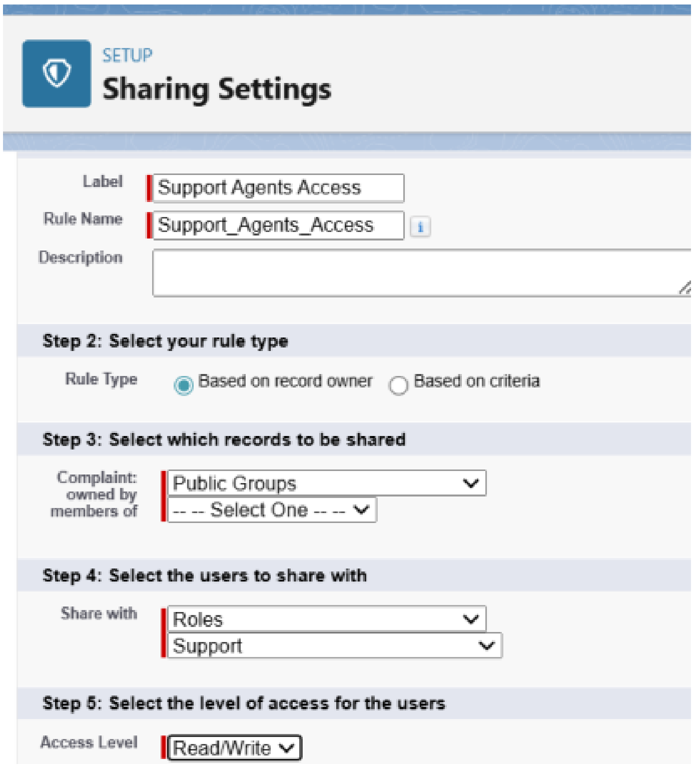
1. Setup → **Sharing Settings → Complaint Object**
2. **Internal Access:** Private (only owners can see)
3. **External Access:** Private (customers see only their complaints)

4. Click **Save**

Create Complaint Sharing Rule

Steps:

1. Setup → **Sharing Settings → Complaint Sharing Rules → New**
2. **Rule Name:** Support Agents Access
3. **Rule Type:** Based on record owner
4. **Records:** Owned by members of → Role / Public Group: Support Agents
5. **Share With:** Role / Public Group: Support Agents
6. **Access Level:** Read/Write
7. Save → all complaints owned by users are now visible/editable to support agents



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5. Field-Level Security (FLS)

Set FLS for Resolution Field

Steps:

1. Setup → Object Manager → Complaint → Fields & Relationships → Resolution → Set Field-Level Security
2. Select Permission Sets or Profiles:
   - Admin Login Access → **Read + Edit**

    - Experience Profile Manager → **Read Only**
    - Leave others unchecked
3. Click **Save** → field access is now role-based

Project Note:

- Ensures sensitive fields like Resolution are only editable by authorized users (Admins or assigned staff).
- Supports role-based visibility for Consultants, Students, and Support Agents.

✅ This setup ensures your CRM for the institution has:

- **Customizable reports** for complaints, students, and appointments.
- **Dynamic dashboards** for role-specific views.
- **Security and sharing** according to roles, OWD, and field-level access.