

# Salesforce Reports, Dashboards, and Security Review Document

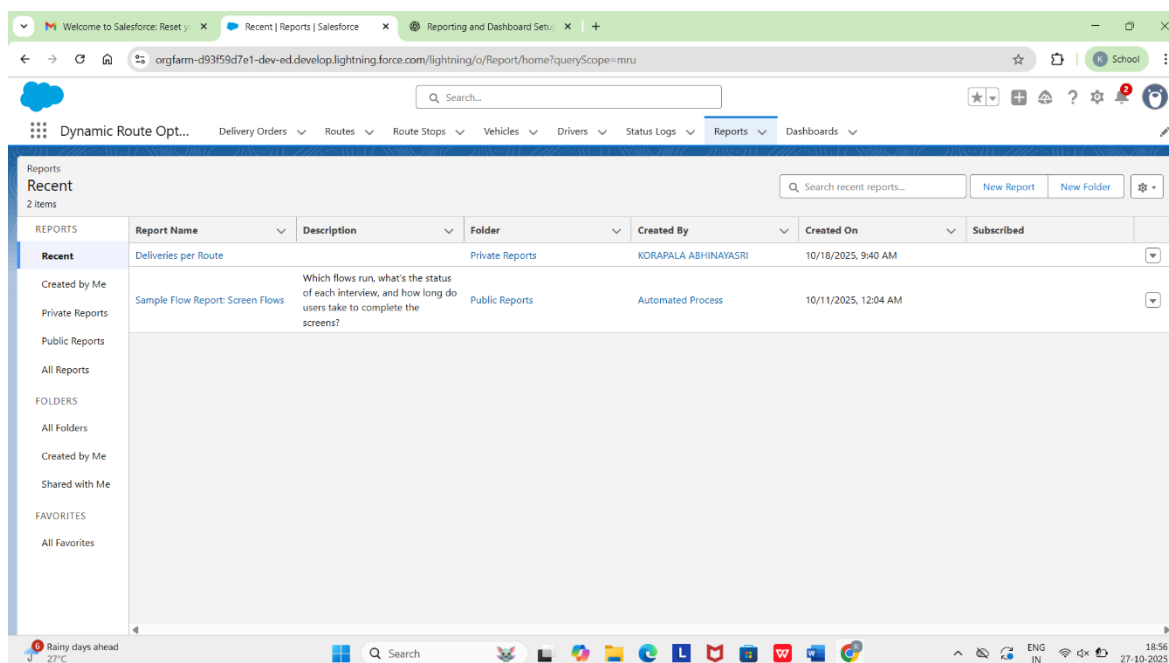
## 1. Reports (Tabular, Summary, Matrix, Joined)

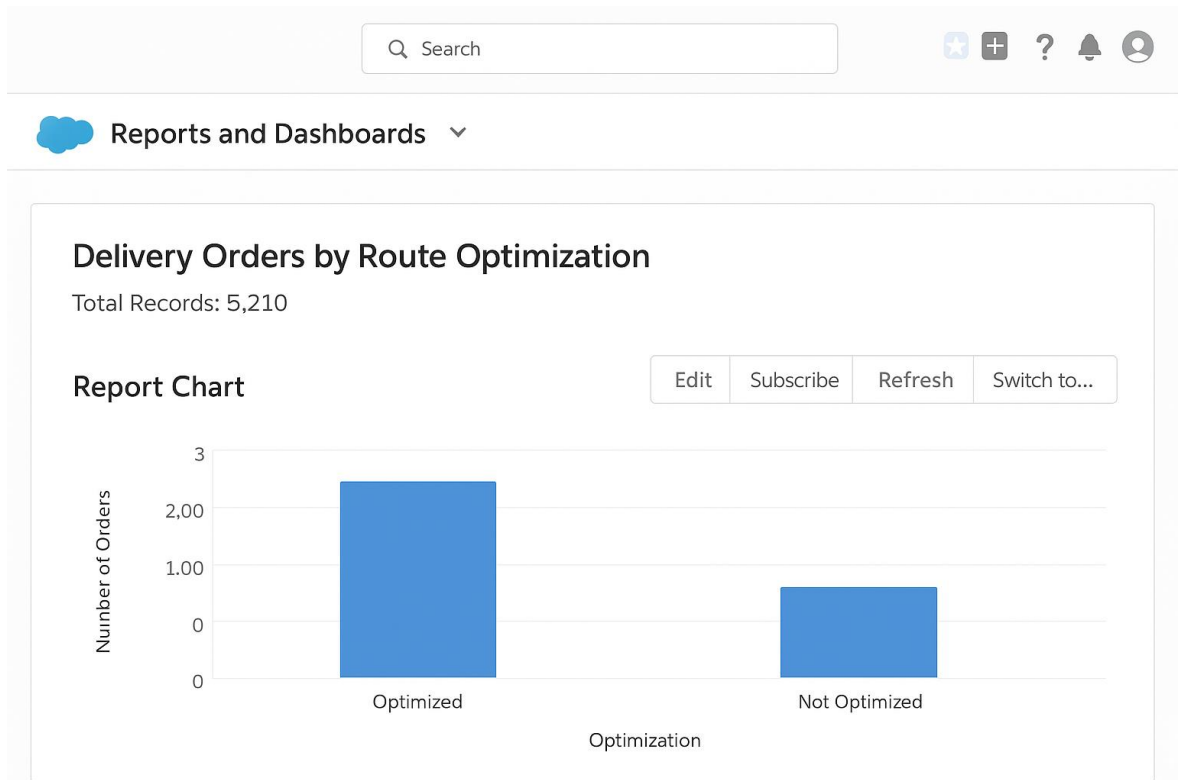
In this stage, we review and validate the various types of reports configured in the system:  
\*\*Tabular, Summary, Matrix, and Joined\*\*.

- \*\*Tabular reports\*\* provide flat lists—useful for delivery orders lists and data exports.
- \*\*Summary reports\*\* allow grouping and subtotals (e.g., grouping DeliveryOrders by city or driver).
- \*\*Matrix reports\*\* enable two-dimensional grouping (e.g., number of stops by vehicle by time window).
- \*\*Joined reports\*\* let you combine multiple report types into one (e.g., combining Route, Vehicle, and DeliveryOrder data).

\*\*During this phase we:\*\*

- Ensure each report type aligns with business metrics (e.g., on-time vs delayed orders).
- Confirm filters, groupings, and charts display correctly for end-users.
- Optimize for performance and ensure correct fields/objects are included.
- Document and classify reports by use-case (Dispatcher, Manager, Executive).





## 2. Report Types

Report Types in Salesforce define which objects and fields are available for reporting.

**\*\*During this phase we:\*\***

- Review existing report types and ensure they include custom objects (DeliveryOrder, RouteStop, Vehicle, etc.).
- Create or modify custom report types to support new use-cases (e.g., “Delivery Orders with Route Stops and Vehicle Assignment”).
- Test each report type for correct object relationships and field availability.
- Document naming conventions and maintain a registry of report types.

orgfarm-d93f59d7e1-dev-ed.develop.lightning.force.com/lightning/r/Report/00Og5000000BayDEAS/edit?queryScope=userFolders

Dynamic Route Opt... Delivery Orders Routes Route Stops Vehicles Drivers Status Logs Reports Dashboards

REPORT Sample Flow Report: Screen Flows Screen Flows Save & Run Save Close Run

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

Filters

Add filter...

Show Me All flow interview logs

Created Date Last 7 Days (Oct 21, 2025 - Oct 27, 2025)

No results found

Flow API Name	Interview Status	Sum of Element Duration in Minutes	Average Element Duration in Minutes	Record Count
No records returned in preview. Try running the report or editing report filters.				
• Set the Created Date filter to All Time.				
• Edit other filters in the filter panel.				

Row Counts Detail Rows Subtotals Grand Total

Lenovo Vantage

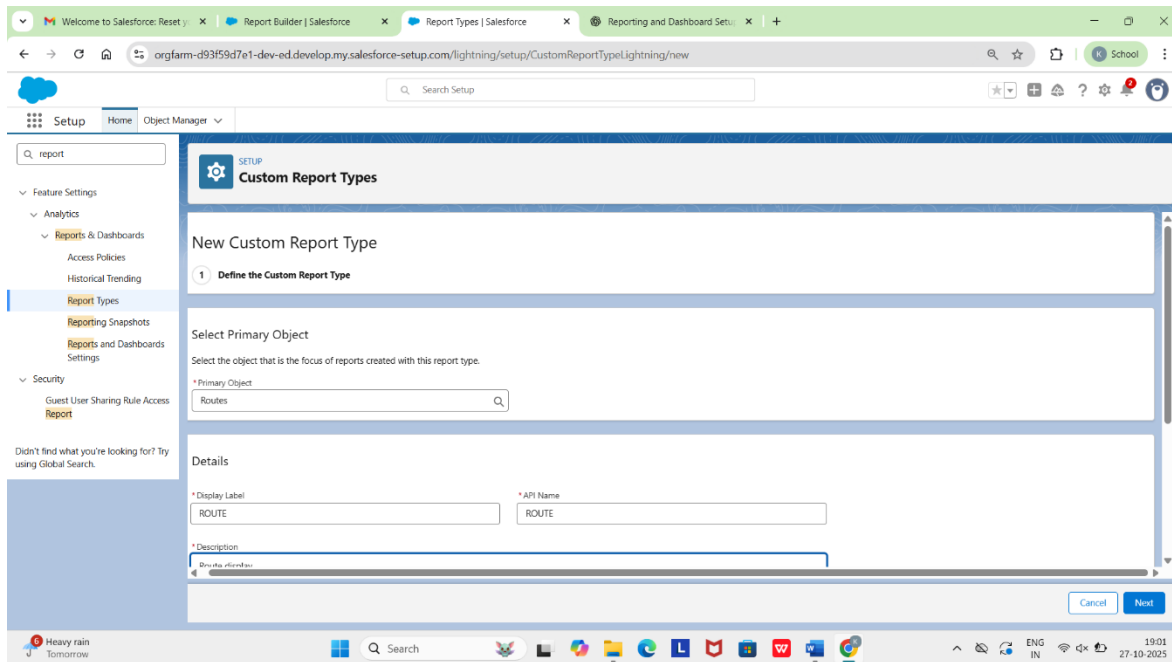
Parts replacement outside of warranty can be costly. Upgrade your warranty to avoid unexpected and costly repairs.

Learn More

Rainy days ahead 27°C

Search

18:57 27-10-2025



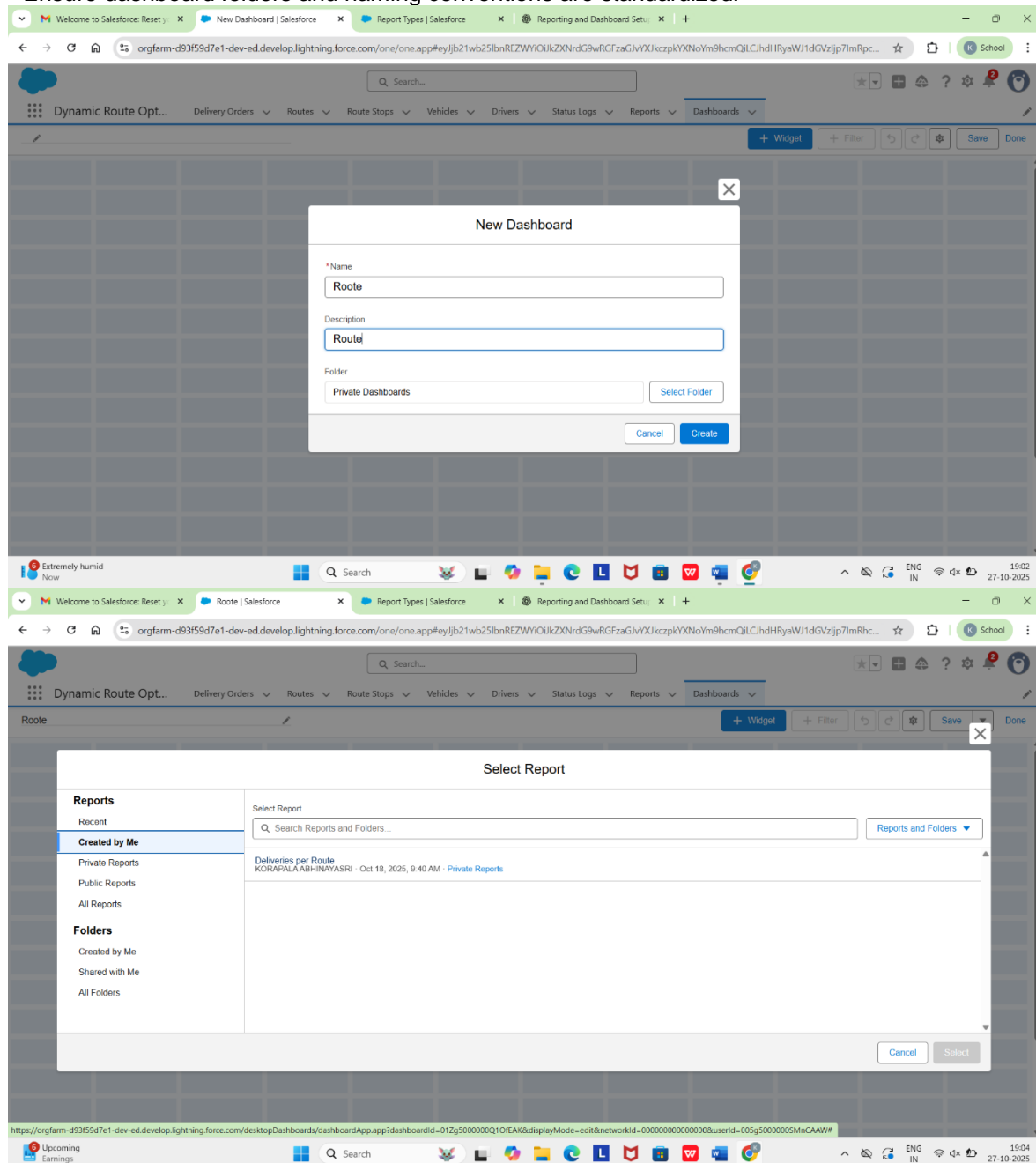
### 3. Dashboards

Dashboards visualize key performance indicators.

**\*\*During this phase:\*\***

- Consolidate dashboard components (charts, gauges, tables) for routing performance metrics.
- Validate that components reflect accurate data.

- Check layout, color themes, and responsiveness.
- Ensure dashboard folders and naming conventions are standardized.



## 4. Dynamic Dashboards

Dynamic dashboards allow personalized views for users (drivers, dispatchers, managers).

**\*\*During this phase:\*\***

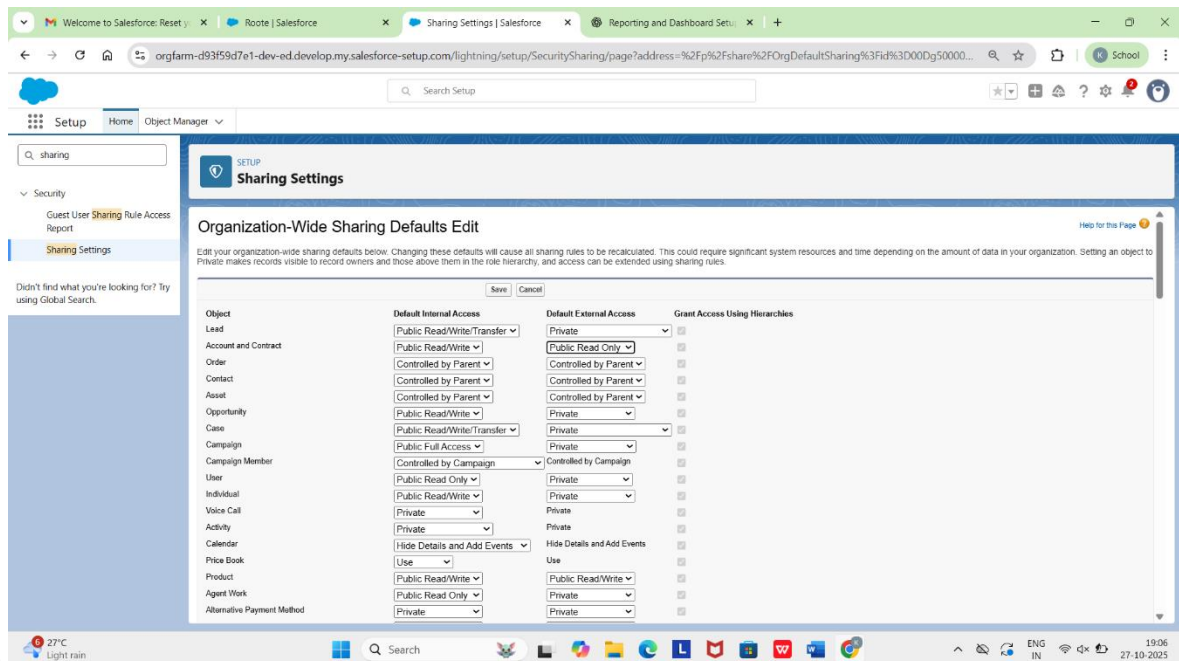
- Identify dashboards that should be dynamic and set “Run as Logged-in User”.
- Verify user permissions and sharing settings.
- Review limits (e.g., Developer Edition supports 3 dynamic dashboards).
- Test across profiles to ensure correct data filtering.

## 5. Sharing Settings

Sharing settings control record visibility across users.

**\*\*During this phase:\*\***

- Review OWD for custom objects (DeliveryOrder\_\_c, Route\_\_c, etc.).
- Validate Sharing Rules, Manual Sharing, and Apex Sharing.
- Ensure role hierarchy aligns with business needs.
- Test visibility for roles (driver, manager, operations head).

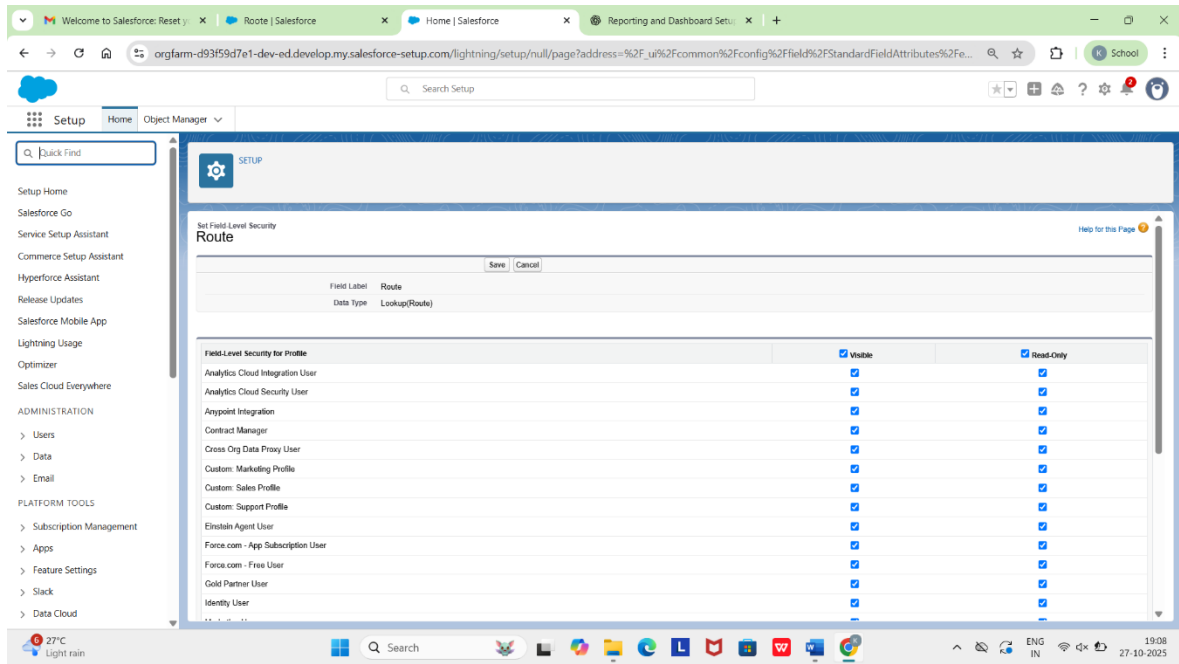


## 6. Field-Level Security

Defines who can view/edit specific fields.

**\*\*During this phase:\*\***

- Hide or restrict sensitive fields (driver contact, vehicle timings).
- Validate mandatory fields are visible and required for relevant users.
- Review and adjust profiles/permission sets.
- Ensure compliance with data policies.



## 7. Session Settings

Controls login session security.

**\*\*During this phase:\*\***

- Verify session timeout (e.g., 30 minutes for mobile users).

- Check IP restrictions for sensitive profiles.
- Confirm MFA and session-based permissions.
- Document exceptions and compensating controls.

## 8. Login IP Ranges

Defines trusted IP ranges for login.

**\*\*During this phase:\*\***

- Review profiles with locked IP ranges.
- Validate restrictions for admin and operations profiles.
- Recommend VPN/secure network access.
- Document exceptions and monitor login anomalies.

The screenshot displays the Salesforce Setup Audit Trail page. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'View Setup Audit Trail' and includes a search bar and a 'Help for this Page' link. Below the title, a message states: 'The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).' The table below lists the audit trail entries.

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
10/26/2025, 7:32:49 AM PDT	229y1a3924462@agentforce.com		Requested an export	Data Export	
10/19/2025, 8:50:14 AM PDT	229y1a3924462@agentforce.com		Remote Proxy Insert DeliveryAPI: https://api.deliveryoptimizer.com	Security Controls	
10/19/2025, 8:46:11 AM PDT	229y1a3924462@agentforce.com		Added Change Data Capture entity Route__c to channel ChangeEvents	Change Data Capture	
10/19/2025, 8:46:11 AM PDT	229y1a3924462@agentforce.com		Added Change Data Capture entity Delivery_Order__c to channel ChangeEvents	Change Data Capture	
10/19/2025, 8:46:10 AM PDT	229y1a3924462@agentforce.com		Added Change Data Capture entity Route_Shop__c to channel ChangeEvents	Change Data Capture	
10/19/2025, 7:13:03 AM PDT	229y1a3924462@agentforce.com		Created Lightning Page: Delivery Order Record Page	Lightning Pages	
10/19/2025, 2:24:28 AM PDT	229y1a3924462@agentforce.com		Changed DeliveryUpdateService Apex Class code	Apex Class	
10/19/2025, 2:24:28 AM PDT	229y1a3924462@agentforce.com		Created DeliveryNotificationService Apex Class code	Apex Class	
10/19/2025, 2:24:10 AM PDT	229y1a3924462@agentforce.com		Created DeliveryUpdateService Apex Class code	Apex Class	
10/19/2025, 2:22:07 AM PDT	229y1a3924462@agentforce.com		Created DeliveryNotificationService Apex Class code	Apex Class	
10/19/2025, 2:19:05 AM PDT	229y1a3924462@agentforce.com		Changed DailyDeliveryScheduler Apex Class code	Apex Class	
10/19/2025, 2:18:45 AM PDT	229y1a3924462@agentforce.com		Created DailyDeliveryScheduler Apex Class code	Apex Class	
10/19/2025, 2:17:40 AM PDT	229y1a3924462@agentforce.com		Changed DriverAssignmentQueueable Apex Class code	Apex Class	
10/19/2025, 2:17:20 AM PDT	229y1a3924462@agentforce.com		Created DriverAssignmentQueueable Apex Class code	Apex Class	
10/19/2025, 2:16:36 AM PDT	229y1a3924462@agentforce.com		Changed DeliveryOrderBatch Apex Class code	Apex Class	
10/19/2025, 2:16:14 AM PDT	229y1a3924462@agentforce.com		Created DeliveryOrderBatch Apex Class code	Apex Class	
10/19/2025, 1:49:04 AM PDT	229y1a3924462@agentforce.com		Changed Delivery Order Trigger code: DeliveryOrderTrigger	Apex Trigger	
10/19/2025, 1:47:26 AM PDT	229y1a3924462@agentforce.com		Changed RouteService Apex Class code	Apex Class	
10/19/2025, 1:16:56 AM PDT	229y1a3924462@agentforce.com		Created Route Trigger code: RouteTrigger	Apex Trigger	
10/19/2025, 1:13:47 AM PDT	229y1a3924462@agentforce.com		Created Delivery Order Trigger code: DeliveryOrderTrigger	Apex Trigger	

## 9. Audit Trail

Tracks metadata and data changes.

**\*\*During this phase:\*\***

- Review 180-day Setup Audit Trail logs.
- Ensure Field History Tracking is enabled on key fields.
- Review privileged changes and validate approvals.
- Establish audit log governance and anomaly reporting.

Welcome to Salesforce: Reset y

Route | Salesforce

View Setup Audit Trail | Salesfor

Reporting and Dashboard Setup

orgfarm-d93f59d7e1-dev-ed.develop.my.salesforce-setup.com/lightning/setup/SecurityEvents/home

Search Setup

Setup Home Object Manager

view set

Feature Settings

Sales

Contact Intelligence View Setup

Lead Intelligence View Setup

Security

View Setup Audit Trail

Didn't find what you're looking for? Try using Global Search.

SETUP

View Setup Audit Trail

Help for this Page

View Setup Audit Trail

The last 20 entries for your organization are listed below. You can download your organization's setup audit trail for the last six months (Excel .csv file).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
10/26/2025, 7:32:49 AM PDT	229y1a3924462@agentforce.com		Requested an export	Data Export	
10/19/2025, 8:50:14 AM PDT	229y1a3924462@agentforce.com		Remote Proxy Insert DeliveryAPI: https://api.deliveryoptimizer.com	Security Controls	
10/19/2025, 8:46:11 AM PDT	229y1a3924462@agentforce.com		Added Change Data Capture entity Route__c to channel ChangeEvents	Change Data Capture	
10/19/2025, 8:46:11 AM PDT	229y1a3924462@agentforce.com		Added Change Data Capture entity Delivery_Order__c to channel ChangeEvents	Change Data Capture	
10/19/2025, 8:46:11 AM PDT	229y1a3924462@agentforce.com		Added Change Data Capture entity Route_Stop__c to channel ChangeEvents	Change Data Capture	
10/19/2025, 7:13:03 AM PDT	229y1a3924462@agentforce.com		Created Lightning Page: Delivery Order Record Page	Lightning Pages	
10/19/2025, 2:24:28 AM PDT	229y1a3924462@agentforce.com		Changed DeliveryUpdateService Apex Class code	Apex Class	
10/19/2025, 2:24:28 AM PDT	229y1a3924462@agentforce.com		Changed DeliveryNotificationService Apex Class code	Apex Class	
10/19/2025, 2:24:10 AM PDT	229y1a3924462@agentforce.com		Created DeliveryUpdateService Apex Class code	Apex Class	
10/19/2025, 2:22:07 AM PDT	229y1a3924462@agentforce.com		Created DeliveryNotificationService Apex Class code	Apex Class	
10/19/2025, 2:19:05 AM PDT	229y1a3924462@agentforce.com		Changed DailyDeliveryScheduler Apex Class code	Apex Class	
10/19/2025, 2:18:45 AM PDT	229y1a3924462@agentforce.com		Created DailyDeliveryScheduler Apex Class code	Apex Class	
10/19/2025, 2:17:40 AM PDT	229y1a3924462@agentforce.com		Changed DriverAssignmentQueueable Apex Class code	Apex Class	
10/19/2025, 2:17:20 AM PDT	229y1a3924462@agentforce.com		Created DriverAssignmentQueueable Apex Class code	Apex Class	
10/19/2025, 2:16:36 AM PDT	229y1a3924462@agentforce.com		Changed DeliveryOrderBatch Apex Class code	Apex Class	
10/19/2025, 2:16:14 AM PDT	229y1a3924462@agentforce.com		Created DeliveryOrderBatch Apex Class code	Apex Class	
10/19/2025, 1:49:04 AM PDT	229y1a3924462@agentforce.com		Changed Delivery Order Trigger code: DeliveryOrderTrigger	Apex Trigger	
10/19/2025, 1:47:26 AM PDT	229y1a3924462@agentforce.com		Changed RouteService Apex Class code	Apex Class	
10/19/2025, 1:16:56 AM PDT	229y1a3924462@agentforce.com		Created Route Trigger code: RouteTrigger	Apex Trigger	
10/19/2025, 1:13:47 AM PDT	229y1a3924462@agentforce.com		Created Delivery Order Trigger code: DeliveryOrderTrigger	Apex Trigger	

27°C

Light rain

Search

ENG IN

19:10

27-10-2025