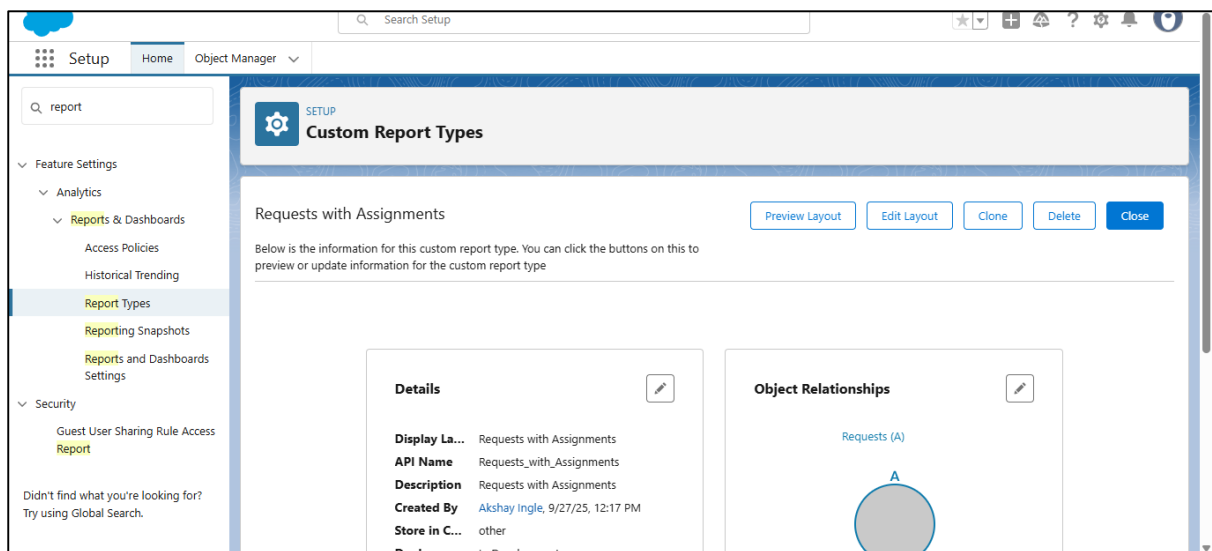


## Phase 9 — Reporting, Dashboards & Security Review

**Relevant:** Reports types, Dashboards (including dynamic), Sharing & Field-level security, Login IP ranges, Audit Trail.

### A — Custom Report Type (for Requests + Assignments)

1. Setup → Quick Find → **Report Types** → New Custom Report Type.
  - Primary Object: Request\_\_c.
  - Give it a name: Requests with Assignments.
  - Click Save.



### B — Create Key Reports (Tabular & Summary)

#### 1. Summary Report

1. App Launcher → Reports → New Report → select Requests with Assignments.
2. Group Rows by **Location\_\_c**.
3. Columns: Requester Name, Priority, Status, Assigned Volunteer.
4. Filter: Status ≠ Fulfilled.
5. Save as **Open Requests by Location**.

Recently Viewed | Requests | Report Builder | Salesforce | Data Loader | Salesforce | Bulk Data Load Jobs | Salesforce | Salesforce Data Loader

https://orgfarm-91c4d4c090-dev-ed.develop.lightning.force.com/one.app#eyJjb21wb25lbnREZWY0IjYkZXBvcnRzOnJlcG9ydEJ1aWxkZXllCjhdHRya...

ReliefConnect Home Requests Assignments Volunteers Resources Locations Reports Dashboards

REPORT New Requests with Assignments Report Requests with Assignments Add Chart Save & Run Save Close Run

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

	Requester Name	Priority	Assigned Volunteer: Volunteer Name	Status
1	Vivek	High	Akshay	Fulfilled
2	Raj	High	Akshay	Fulfilled
3	Amar	Medium	Akshay	Fulfilled
4	Sita	High	Akshay	Assigned
5	Arya	High	-	Submitted
6	Pranav	High	Akshay	Fulfilled
7	Akshay Ingle	High	-	Submitted
8	Preet	High	Vijay	Submitted
9	User	High	Test Volunteer	Assigned
10	Mayur	High	Kartik	Fulfilled

Filters: Add filter... Show Me My requests Created Date Current FQ (Jul 1, 2025 - Sep 30, 2025)

Figure 1 Before Applying filter

Recently Viewed | Requests | Report Builder | Salesforce | Data Loader | Salesforce | Bulk Data Load Jobs | Salesforce | Salesforce Data Loader

https://orgfarm-91c4d4c090-dev-ed.develop.lightning.force.com/one.app#eyJjb21wb25lbnREZWY0IjYkZXBvcnRzOnJlcG9ydEJ1aWxkZXllCjhdHRyaWJ1dG...

ReliefConnect Home Requests Assignments Volunteers Resources Locations Reports Dashboards

REPORT New Requests with Assignments Report Requests with Assignments Add Chart Save & Run Save Close Run

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

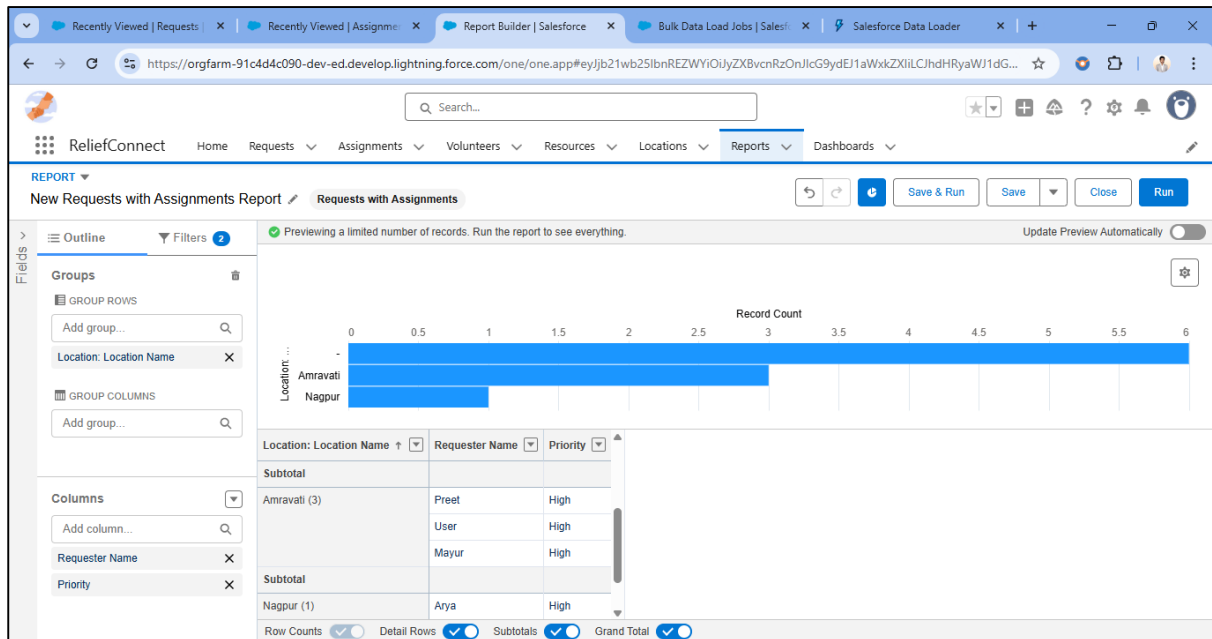
	Requester Name	Priority	Assigned Volunteer: Volunteer Name	Status
1	Sita	High	Akshay	Assigned
2	Arya	High	-	Submitted
3	Akshay Ingle	High	-	Submitted
4	Preet	High	Vijay	Submitted
5	User	High	Test Volunteer	Assigned

Filters: Add filter... Show Me My requests Created Date Current FQ (Jul 1, 2025 - Sep 30, 2025) Status not equal to Fulfilled

Figure 2 After Applying filter

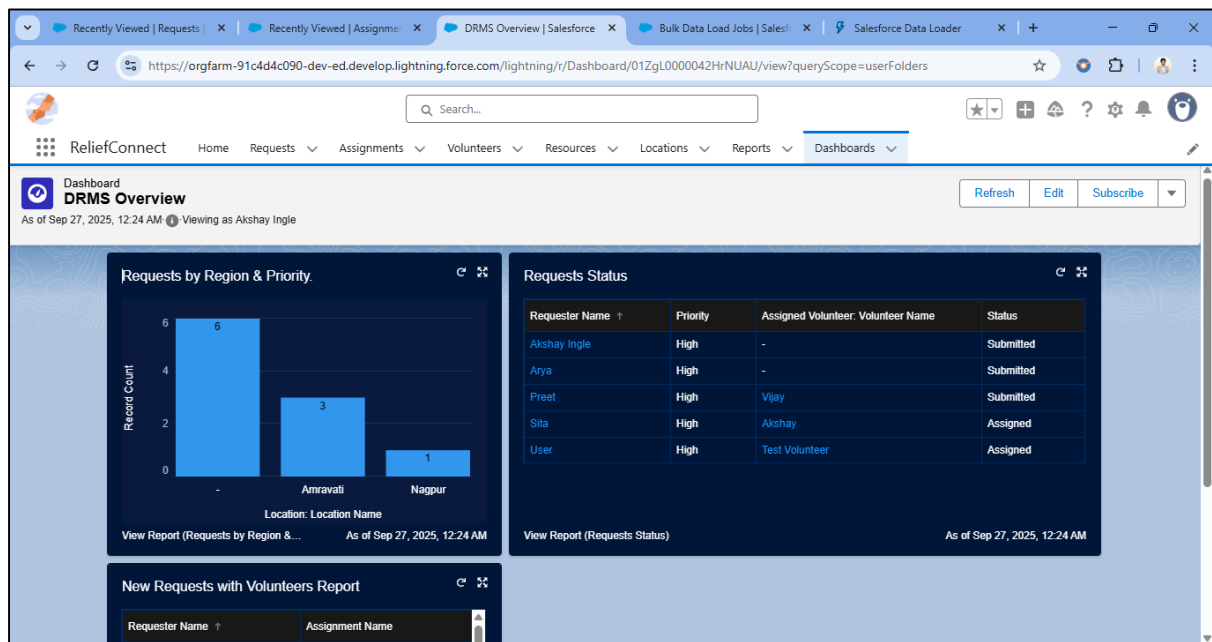
## 2. Matrix Report

1. App Launcher → Reports → New Report → select Requests with Assignments.
2. Rows = Region / Columns = Priority.
3. Aggregate = Count of Requests.
4. Save as **Requests by Region & Priority**.



## C — Dashboards & Dynamic Dashboards

1. App Launcher → Dashboards → New Dashboard → Name: DRMS Overview.
2. Add Components:
  - **Bar Chart:** Open Requests by Location.
  - **Table:** Assignments by Volunteer.
3. Enable **Dynamic Dashboard:** View dashboard as Logged-in User (if org allows).
4. Save & Run.



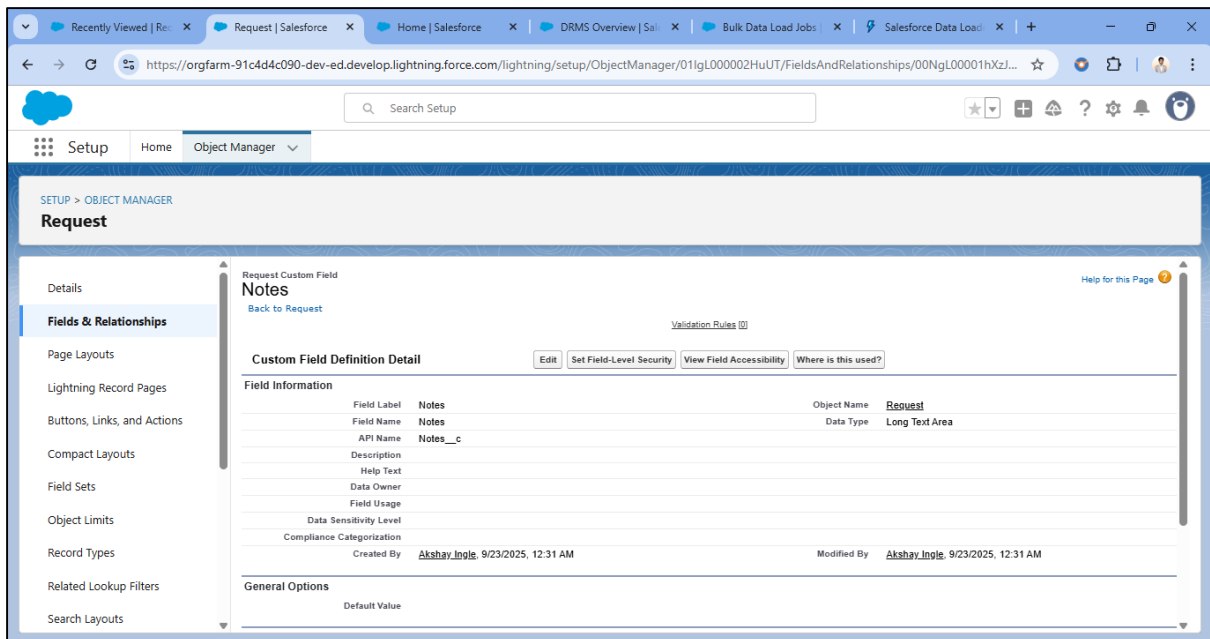
## D — Sharing Settings & Field Level Security

### 1. Organization-Wide Defaults (OWD)

1. Setup → Quick Find → Sharing Settings.
2. Show OWD for Request\_\_c (should be Private).

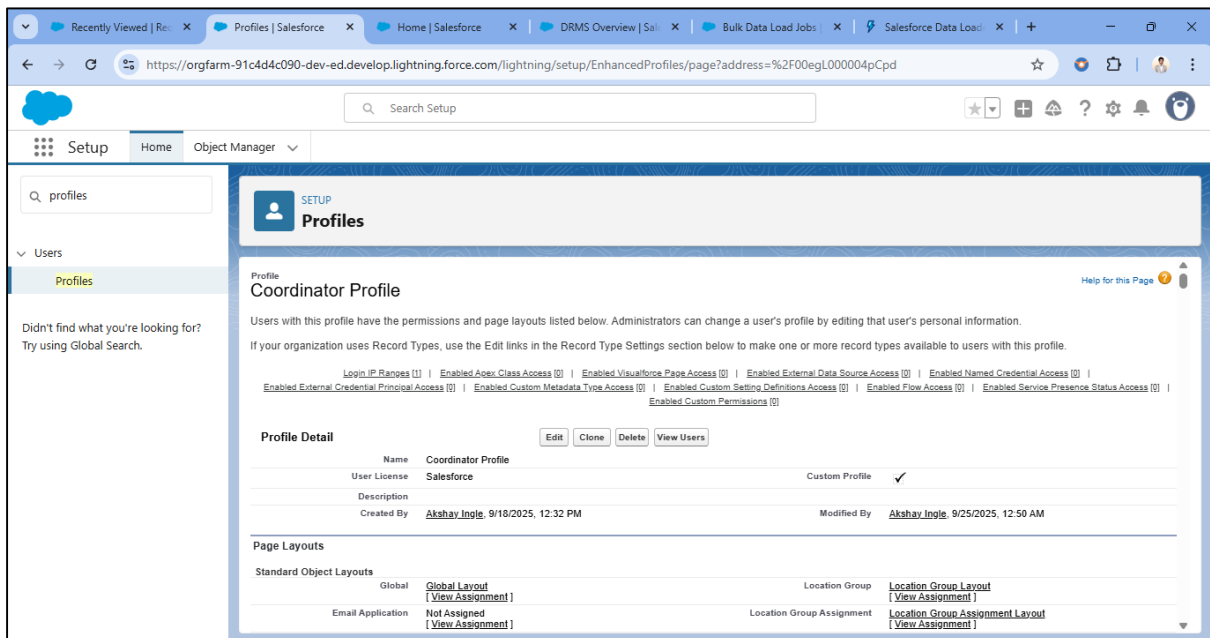
### 2. Field Level Security

1. Setup → Object Manager → Request\_\_c → Fields & Relationships → select a field Notes.
2. Set **Field-Level Security** → hide from Volunteer profile if needed.



### 3. Profiles & Permission Sets

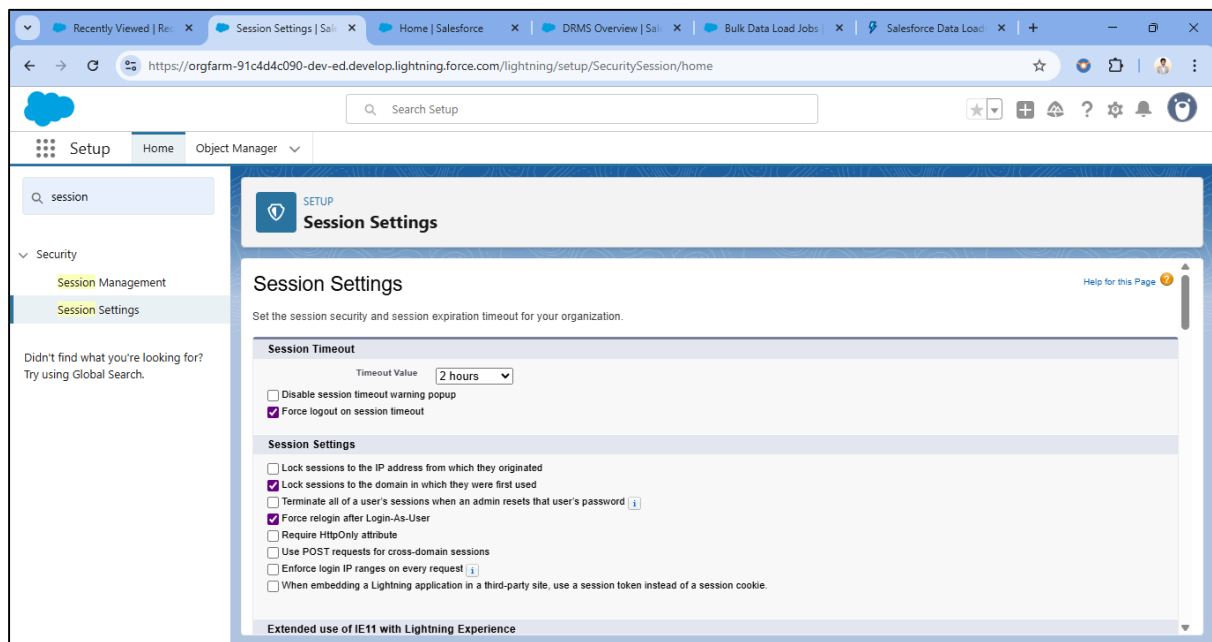
1. Ensure **Coordinator** has Read/Write on Requests.
2. Volunteers have limited access as planned.



## E — Session Settings, Login IP Ranges & Audit Trail

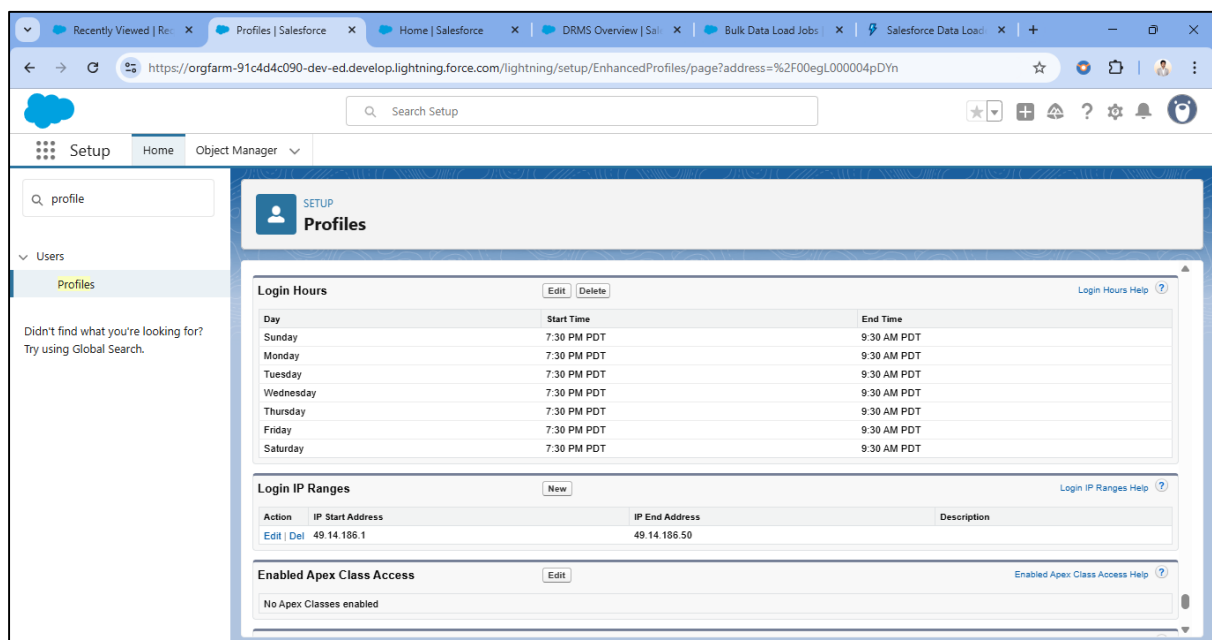
### 1. Session Settings

- Setup → Quick Find → Session Settings.
- Review timeout, secure cookie settings.



### 2. Login IP Ranges

- Profile → open Volunteer Profile → Login IP Ranges.
- Add if needed (demo: note none set if not configured).



### 3. Audit Trail

- Setup → Quick Find → View Setup Audit Trail → Download last 6 months.

The screenshot shows the Salesforce Setup Audit Trail page. The left sidebar contains a navigation menu with 'Setup' selected. The main content area is titled 'View Setup Audit Trail' and displays a table of audit events. The table has columns for Date, User, Action, and Section. The events listed include actions like 'Created new Request matching rule', 'Finished the process to create the Managed App plugin OAuth', and 'Associated a new External Client App OAuth Policies'. A download link for the last six months is visible at the bottom of the table.

Date	User	Action	Section
9/26/2025, 11:19:37 PM PDT	akshayingie627670@agentforce.com	Created new Request matching rule Request_Duplicate_ByPhoneEmail	Matching Rule
9/26/2025, 11:19:37 PM PDT	akshayingie627670@agentforce.com	Created new Request matching rule Request_Duplicate_ByPhoneEmail	Matching Rule
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com	Finished the process to create the Managed App plugin OAuth for the Managed App called MyDemoApp	External Client Application
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com	Associated a new External Client App OAuth Policies called MyDemoApp_oauthPlicy with the External Client App MyDemoApp	External Client Application
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com	Generated the consumer secret for the External Client App called MyDemoApp with a consumer ID of 888gL000000BgS9.	External Client Application
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com	Generated the consumer key for the External Client App called MyDemoApp with a consumer ID of 888gL000000BgS9.	External Client Application
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com	Updated the External Client App Global OAuth Settings MyDemoApp: Changed ValidateOAuth1CallbackUrl from false to true	External Client Application
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com	Associated a new External Client App OAuth Settings called MyDemoApp_oauth with the External Client App MyDemoApp	External Client Application

The screenshot shows an Excel file named 'SetupAuditTrail1758959738703 - Excel (Product Activation Failed)'. The data is organized into columns: Date, User, Source Namespace, Action, Section, and Delegate User. The data rows correspond to the audit events shown in the Salesforce interface.

Date	User	Source Namespace	Action	Section	Delegate User
9/27/2025, 12:53:34 AM PDT	akshayingie627670@agentforce.com		Added Login Ip Range to Volur Manage Users		
9/27/2025, 12:42:47 AM PDT	akshayingie627670@agentforce.com		Changed profile Volunteer Prc Manage Users		
9/26/2025, 11:24:14 PM PDT	akshayingie627670@agentforce.com		Requested an export	Data Export	
9/26/2025, 11:20:48 PM PDT	akshayingie627670@agentforce.com		Request matching rule, Reque Matching Rule		
9/26/2025, 11:20:43 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:20:43 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:20:43 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:20:16 PM PDT	akshayingie627670@agentforce.com		Request matching rule, Reque Matching Rule		
9/26/2025, 11:20:06 PM PDT	akshayingie627670@agentforce.com		Request matching rule, Reque Matching Rule		
9/26/2025, 11:20:01 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:20:01 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:19:37 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:19:37 PM PDT	akshayingie627670@agentforce.com		For matching rule Request_Du Matching Rule		
9/26/2025, 11:19:37 PM PDT	akshayingie627670@agentforce.com		Created new Request matching rule		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Finished the process to create External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Associated a new External Client External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Generated the consumer secret External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Generated the consumer key External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Updated the External Client External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Associated a new External Client External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Started the process to create External Client Application		
9/26/2025, 10:06:36 PM PDT	akshayingie627670@agentforce.com		Created an External Client External Client Application		