

Phase 9: Reporting, Dashboards & Security Review

PROJECT TITLE:-

Expense On a Page: An expense approval & insight system.

Industry: Finance / Corporate Expense Management.

Target User: Employees, Managers, and Finance Teams.

REPORTS:-

Salesforce have Report as a tool which can be used to analyse data.

The necessary reports for the given project we have made them earlier in order to used them in the home page the given reports are-

1. Creating reports-

- Creating a report with Pending Approvals of all Expense (For Managers):

Report Object: Expense.

Filter: Show Me- All expenses

Submission Date- All Time

Status- equals Pending Approval

Columns: Status

Report Name: Expense-Pending Approval

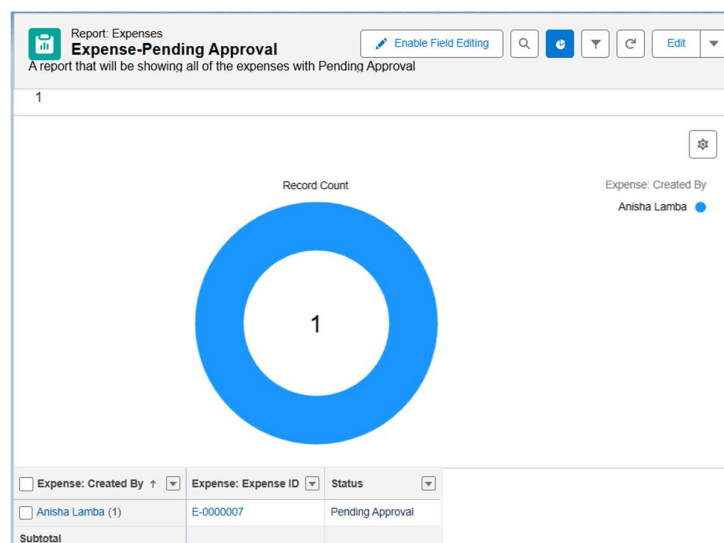
Report Unique Name: ExpensePending_Approval

Report Description: A report that will be showing all of the expenses with Pending Approval

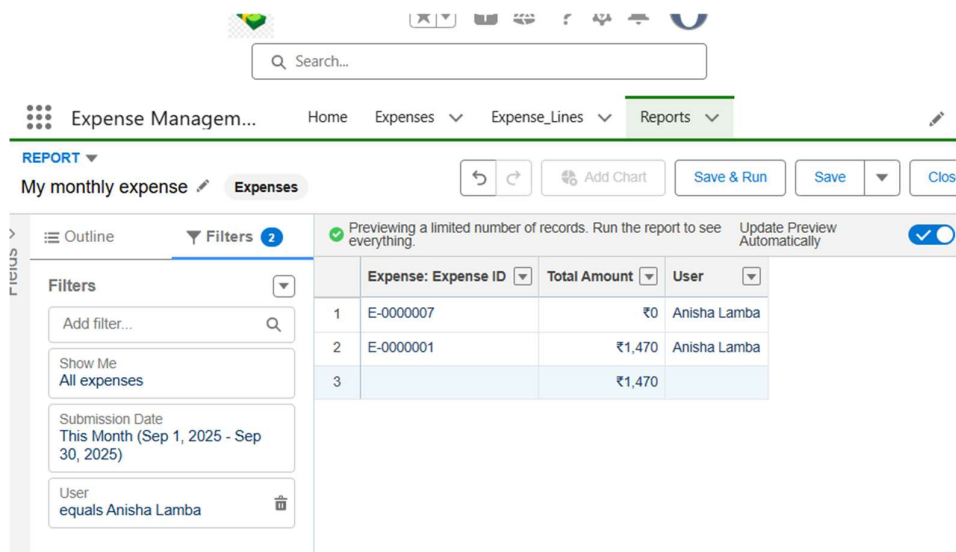
Folder: New Folder

Folder Name- Finance Folder

Folder Unique Name- FinanceFolder



- Creating a report for the employee monthly spending (For Employee):
Report Object: Expense.
Filter: Show Me- All expenses
 Submission Date- This Month
 User- equals kharbanda
Columns: Adding Total Amount
Report Name: My monthly expense
Report Unique Name: My_monthly_expense
Report Description: A report that will be showing all of the expenses of the current month
Folder: Finance Folder



Expense: Expense ID	Total Amount	User
1 E-0000007	₹0	Anisha Lamba
2 E-0000001	₹1,470	Anisha Lamba
3	₹1,470	

REPORT TYPES:-

Report Types in salesforce are used in salesforce like a blueprint to tell *how the objects are related to each other and from what object to pull the data from.*

Making a Report Types-

Define the Custom Report Type:

Primary Object: Object

Display Label: Expense with Lines

API Name: Expense_with_lines

Description: This report type shows Expense records and their related Expense Line records for expense tracking.

Store in Category: Other Reports

Set Availability: Deployment

Select the object that is the focus of reports created with this report type.

* Primary Object
Expenses

Details

* Display Label
Expense with Lines

* API Name
Expense_with_Lines

* Description
This report type shows Expense records and their related Expense Line records for expense tracking.
Note: Description will be visible to users who create reports.

* Store in Category
Other Reports

Set Availability

An in-development report type is visible only to users with the Manage Custom Report Types permission. A deployed report type is available to all users.

State
☐ In Development
☒ Deployed

Define Report Records Set:
Related Object: Expense_Lines

Details

Display ... Expense with Lines

API Name Expense_with_Lines

Descripti... This report type shows Expense records and their related Expense Line records for expense tracking.

Created By Anisha Lamba, 9/25/25, 1:23 PM

Store in ... other

Deploy... Deployed

Modifie... Anisha Lamba, 9/25/25, 1:23 PM

Object Relationships

Expenses (A)

... with at least one related record from Expense_Lin

Fields

Source Object	Included Fields
Expenses	14
Expense_Lines	11

Final Report:

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 Expenses

Primary Object

B Expense_Lines

Expense_Lines

A to B Relationship:

☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

(Click to relate another object)

Previous

Cancel

Save

Making a new report to test the report type:

Report Type: Expense with Lines

Adding Columns: Expense ID, Expense Detail, Status, Total Amount, Expense_Line ID, Category, Amount.

Adding Groups: Category

Report Name: Expense with Lines Report

Report Unique Name: Expense_with_Lines_Report

Report Description: Showing the Expense record with Expense_Line record.

Folder: Finance Folder

✔ Previewing a limited number of records. Run the report to see everything.						
Category ↑ ▾	Expense ID ▾	Expense Detail ▾	Status ▾	Total Amount ▾	Expense_Line ID ▾	Amount ▾
Travel (2)	E-0000001	new	Submitted	₹1,470	EL-00000001	₹600
	E-0000006	Process Builder	Submitted	₹500	EL-00000003	₹300
Subtotal				₹1,970		₹900
Meals (1)	E-0000006	Process Builder	Submitted	₹500	EL-00000004	₹200
Subtotal				₹500		₹200
Lodging (1)	E-0000001	new	Submitted	₹1,470	EL-00000002	₹870
Subtotal				₹1,470		₹870
Office (1)	E-0000010	Meal Claim	Draft	₹250	EL-00000005	₹250
Subtotal				₹250		₹250
Total (5)				₹2,220		₹2,220

DASHBOARD

It is used for making a visual representation of the reports.

Making a new Dashboard:

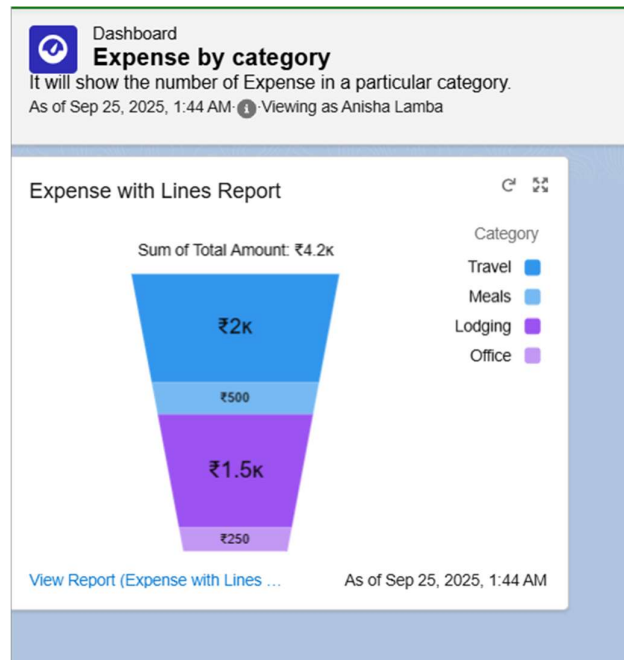
Name: Expense by category

Description: It will show the number of Expense in a particular category.

Folder: Test dashboard Folder

Widget: Chart or Table*Report:* Expense with Lines Report

Display As: Funnel Chart



DYNAMIC DASHBOARD:-

Making THE DASHBOARD A Dynamic one so that it runs as current logged in user

Properties

* Name

Expense by category

Description

It will show the number of Expense in a particular category.

Folder

Test Dashboard folder [Select Folder](#)

This dashboard is owned by Anisha Lamba

View Dashboard As

☐ Me

☐ Another person

☒ The dashboard viewer

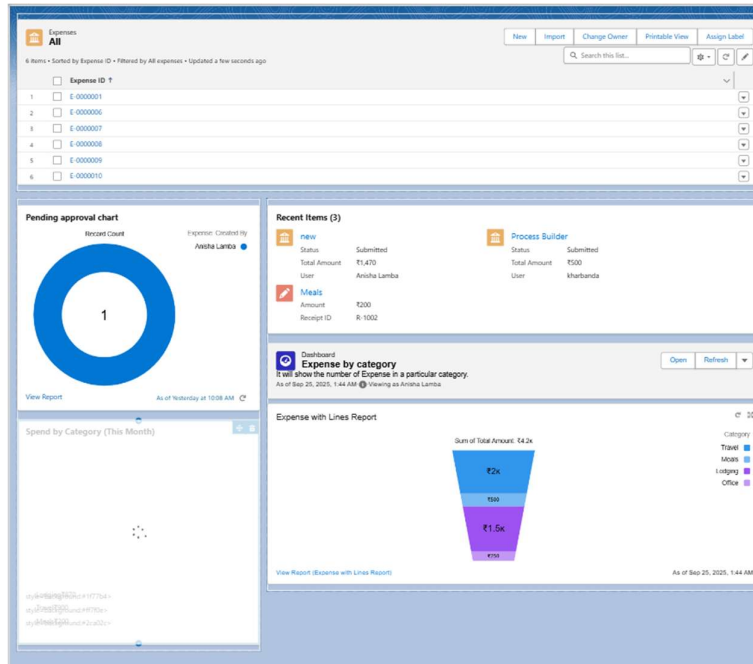
☐ Let dashboard viewers choose whom they view the dashboard as

Dashboard Grid Size ⓘ

☒ 12 columns (recommended) ☐ 9 columns

[Cancel](#) [Save](#)

Adding the Dashboard to the Home Page:



SHARING SETTING:-

It gives the Org-Wide default + Sharing rules.

Expense	Private	Private	<input checked="" type="checkbox"/>
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Making the sharing rule for the following Expense Object.

Label: Expense Rule

Rule Name: Expense_Rule

Rule Type: Based on Record Owner

Expense Owner: All Internal User

Share with: Manager

Access Level: Read/ Write

Step 1: Rule Name ! Required Information

Label: Expense Rule
Rule Name: Expense_Rule
Description:

Step 2: Select your rule type

Rule Type: ☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Expense owned by members of: Public Groups All Internal Users

Step 4: Select the users to share with

Share with: Roles

Step 5: Select the level of access for the users

Access Level: Read/Write

FIELD LEVEL SECURITY:-

The field level security of every field made in the project was set while making the field for example.

1. Expense__c -> Total_Amount__c

Custom: Support Profile	<input type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input type="checkbox"/>	<input type="checkbox"/>
Expense Admin Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Expense User Profile	<input checked="" 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"/>
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"/>
New	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TCS profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

2. Expense__c -> Submission_Date__c

Custom: Support Profile	<input type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input type="checkbox"/>	<input type="checkbox"/>
Expense Admin Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Expense User Profile	<input checked="" 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"/>
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"/>
New	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TCS profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Expense_Line__c -> Category__c

Visible to all as the field is required.

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

SESSION SETTING:-

Controls login timeout, forced logout, session security.

Timeout Value: 2 hours

locking session to IP Address

Require HttpOnly attribute

Session Timeout

Timeout Value

2 hours

☐ Disable session timeout warning popup

☒ Force logout on session timeout

Session Settings

☒ Lock sessions to the IP address from which they originated

☒ Lock sessions to the domain in which they were first used

☐ Terminate all of a user's sessions when an admin resets that user's password

i

☒ Force relogin after Login-As-User

☒ Require HttpOnly attribute

☐ Use POST requests for cross-domain sessions

☐ Enforce login IP ranges on every request

i

☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

LOGIN IP RANGES:-

1. For Expense Admin Profile:

Login IP Range : 49.36.0.0 – 49.37.0.0

Login IP Ranges			
		New	Login IP Ranges Help ?
Action	IP Start Address	IP End Address	Description
Edit Del	49.36.0.0	49.37.0.0	

For Expense User Profile:

Login IP Range : 49.36.0.0 – 49.37.0.0

Login IP Ranges			
		New	Login IP Ranges Help ?
Action	IP Start Address	IP End Address	Description
Edit Del	49.36.0.0	49.37.0.0	

AUDIT TRAIL:-

Viewing the Audit Trail-

View Setup Audit Trail

[Help for this Page](#) ?

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).

View Setup Audit Trail					
Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
9/25/2025, 4:50:13 AM PDT	cse22_anishalamba474@agentforce.com		Added Login Ip Range to Expense User Profile. from 49.36.0.0 to 49.37.0.0	Manage Users	
9/25/2025, 4:45:41 AM PDT	cse22_anishalamba474@agentforce.com		Added Login Ip Range to Expense Admin Profile from 49.36.0.0 to 49.37.0.0	Manage Users	
9/25/2025, 4:42:33 AM PDT	cse22_anishalamba474@agentforce.com		Change Lock Session IP from off to on	Session Settings	
9/25/2025, 4:42:33 AM PDT	cse22_anishalamba474@agentforce.com		Changed Require HttpOnly attribute from off to on	Session Settings	
9/25/2025, 4:19:57 AM PDT	cse22_anishalamba474@agentforce.com		The custom field option Required for Total Amount on object Expenses has changed from off to on	Custom Objects	
9/25/2025, 4:19:57 AM PDT	cse22_anishalamba474@agentforce.com		Changed permission set 00egK000003tx2YQAQ: field-level security for Expense: Total Amount was changed from Read/Write to No Access	Manage Users	
9/25/2025, 4:19:56 AM PDT	cse22_anishalamba474@agentforce.com		Changed permission set 00ex00000018ozq_128_09_04_12_10: field-level security for Expense: Total Amount was changed from Read/Write to No Access	Manage Users	
9/25/2025, 4:19:56 AM	cse22_anishalamba474@agentforce.com		Changed permission set 00ex0000001GUIZ_128_09_04_12_11: field-level security for Expense: Total Amount was changed from Read/Write to No Access	Manage Users	

