

## Phase 9: Reporting, Dashboards & Security Review

### Travel and Tourism Management System (TTMS)

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#### Objective

Phase 9 focuses on enabling stakeholders of TTMS to access insightful reports, visualize key metrics via dashboards, and ensure data security through comprehensive sharing and auditing mechanisms.

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#### 1. Report Types and Creation

##### Purpose:

Define reusable report structures combining key objects like Booking, Customer, Tour Package for comprehensive reporting.

##### Steps:

1. Setup → Report Types → New Custom Report Type.
2. Primary Object: Booking\_\_c
3. Report Type Label: Booking Details Report
4. Report Type Name (API): Booking\_Details\_Report
5. Description: Report showing booking info with customer and destination details
6. Category: Tourism Reports
7. Deployment Status: Deployed
8. Add Related Objects:
  - Booking\_\_c (related via Booking\_\_c)
  - Payment\_\_c (related through Booking\_\_c)

Details

Display Label

Booking Details Report

API Name

Booking\_Details\_Report

Description

Report showing booking info with customer and destination details

Created By

Anshika Sahu, 9/24/25, 6:43 PM

Store in Cate...

opportunities

Deployment ...

Deployed

Modified By

Anshika Sahu, 9/24/25, 11:01 PM

Fields

Source Object	Included Fields
Bookings	28
Payments	0

Object Relationships

Bookings (A)

with at least one related record from Payments (B)

## 2. Reports

### Purpose:

Create detailed and grouped reports to understand booking patterns, customer preferences, and package popularity.

### Steps:

1. Reports → New Report.
2. Select Booking Overview Report.
3. Configure columns:
  - Booking Name: Booking\_\_c.Name
  - Customer: Customer\_\_c.Name
  - Tour Package Name: TourPackage\_\_c.Name
  - Booking Date: Booking\_\_c.Booking\_Date\_\_c
  - Status: Booking\_\_c.Status\_\_c
4. Add filters:
  - Booking Date range
  - Package Type
  - Customer Region
5. Save & Run report.

### Reports Types:

- Tabular for simple lists.
  - Summary for grouped metrics by customer or package.
  - Matrix for cross-dimensional analytics.
  - Joined reports to compare data from related objects.
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### 3. Dashboards

**Purpose:**

Visualize key metrics for decision making like booking volumes, revenue, and package popularity.

**Steps:**

1. Dashboards → New Dashboard.
2. Name: Booking Performance Dashboard
3. Folder: Tourism Reports
4. Add components:
  - Pie Chart: Booking count per Tour Package
  - Bar Chart: Monthly bookings
  - Gauge: Booking Capacity utilization
5. Link each component to relevant report.
6. Save and run dashboard.

**Tip:**

Use Dynamic Dashboards to show data relative to user roles.

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### 4. Sharing Settings

**Purpose:**

Ensure proper data visibility controls across users and roles in Salesforce.

**Steps:**

1. Setup → Sharing Settings.
2. Setup Organization-Wide Defaults:
  - Booking\_\_c: Private
  - Customer\_\_c: Controlled by Parent (Booking)
  - TourPackage\_\_c: Public Read-Only
3. Define Sharing Rules:
  - Grant Managers access to their teams' bookings.

4. Use Role Hierarchy and Permission Sets for finer control.
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## 5. Field Level Security

### Purpose:

Protect sensitive fields from unauthorized access.

### Steps:

1. Setup → Profiles → (select profile).
  2. Field-Level Security → Edit.
  3. Restrict exposure to fields like:
    - Booking\_\_c.Payment\_Details\_\_c
    - Customer\_\_c.Contact\_Number\_\_c
    - TourPackage\_\_c.Cost\_\_c
  4. Save changes.
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## 6. Session Settings and Login IP Ranges

### Purpose:

Enhance org security by controlling login locations and session timeouts.

### Steps:

1. Setup → Session Settings.
  2. Configure session timeout durations.
  3. Set Login IP Ranges for profiles or org-wide.
  4. Implement Login Access Policies for sensitive user accounts.
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## 7. Audit Trail

### Purpose:

Maintain historical records of configuration and data model changes for compliance and troubleshooting.

### Steps:

1. Setup → View Setup Audit Trail.
  2. Review changes to objects, fields, profiles, sharing, and user permissions.
  3. Export audit logs periodically for governance.
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## **Summary**

By implementing these reporting, dashboard, and security controls effectively, TTMS will provide actionable insights, protect sensitive data, and comply with organizational policies. This phase ensures scalable, secure, and data-driven decision-making capabilities for all stakeholders.

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If you want, I can provide sample report filters, dashboard component setups, or security configuration screenshots for your specific org setup.