

# Phase 9 – Reporting, Dashboards & Security Review (Event Management App)

## Objective:

Monitor business data and secure access for the Event Management app.



### 1. Reports:

Created **Bookings by Event** report.

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Event Management...

Reports

Booking...

Test Boo...

Gaming ...

Event wi...

Event M...

More

Report: Bookings

**Bookings by Event**

Field Editing Enabled

🔍

Add Chart

⌵

↺

Edit

⌵

Total Records

1

Total Daily Rate

\$5,000.00

Total Total Amount

\$15,000.00

	Booking: Booking Name	Event	Customer	Daily Rate	Total Amount	Status
1	Test Booking 001	-	-	\$5,000.00	\$15,000.00	Confirmed
2				\$5,000.00	\$15,000.00	

### 2. Dashboards:

- Added **Bar chart** for Total Bookings by Event.

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Event Management...

Dashboards

Booking...

Test Boo...

Gaming ...

Event M...

Event M...

More

Dashboard

**Event Management**

Refresh

Edit

Subscribe

⌵

As of Sep 25, 2025, 3:45 AM

Viewing as Kattamuri Aswini Sudha

Status

equals Confirmed

⌵

Bookings by Event

🔍

⌵

Booking: Booking Name	Event	Customer	Daily Rate	Total Amount
Test Booking 001	-	-	\$5.00k	\$15.00k

View Report (Bookings by Event)

As of Sep 25, 2025, 3:45 AM

### 3. Sharing Settings:

- Set **Bookings object** to Private.
- Set **Events object** to Public.

**Setup**
Home
Object Manager

Security

Guest User
Sharing Rule Access Report

**Sharing Settings**

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

**Sharing Settings**

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Booking

[Disable External Sharing Model](#)

**Default Sharing Settings**

**Organization-Wide Defaults** [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Booking	Private	Private	<input checked="" type="checkbox"/>

**Other Settings** [Other Settings Help](#)

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Manage sharing settings for: Event

[Disable External Sharing Model](#)

**Default Sharing Settings**

**Organization-Wide Defaults** [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Event	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

**Other Settings** [Other Settings Help](#)

Manager Groups ☐ [i](#)  
Secure guest user record access ☒ [i](#)  
Require permission to view record names in lookup fields ☐ [i](#)

#### 4. Field-Level Security (Optional):

- Can hide sensitive fields (e.g., Customer ID Proof) from users with the Agent profile.

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#### 5. Agent Users:

- Agent profile created and assigned to users.
- Restricted access to only their own bookings via sharing settings.

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**Status:** Phase 9 in progress — Reports, basic dashboard, and sharing/security settings configured; advanced dashboard components limited by org edition.