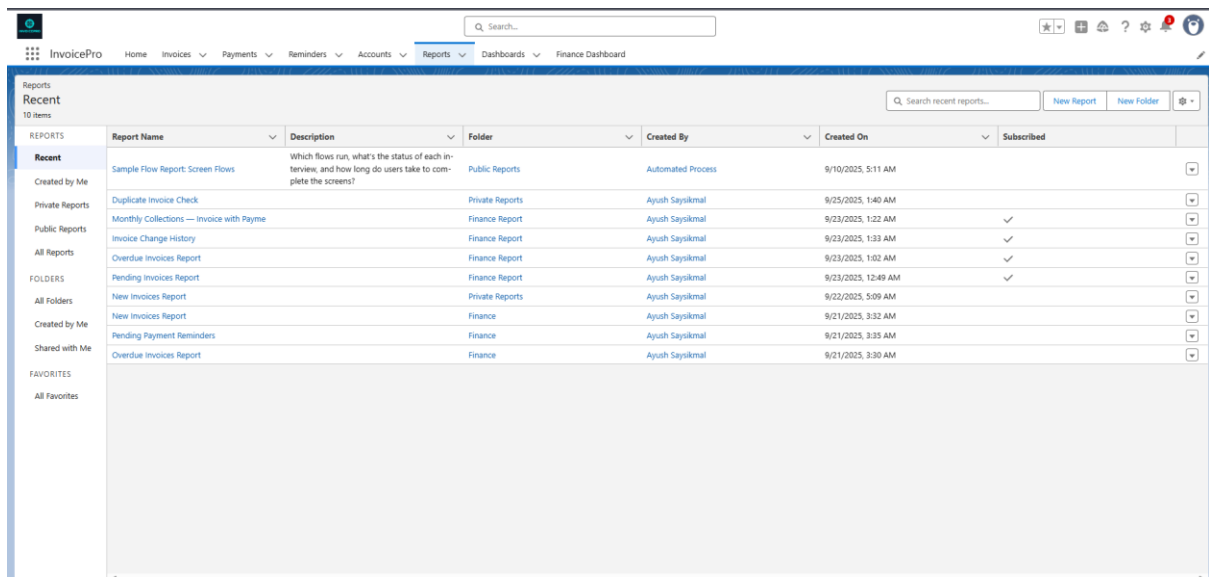


Phase 9: Reporting, Dashboards & Security Review

1. Reports And Report Types

- **Setup → Reports → New Report**
 - **Pending Invoices Report**
 - **Overdue Invoices Report**
 - **Monthly Collections Report**
 - **Invoice Change History**

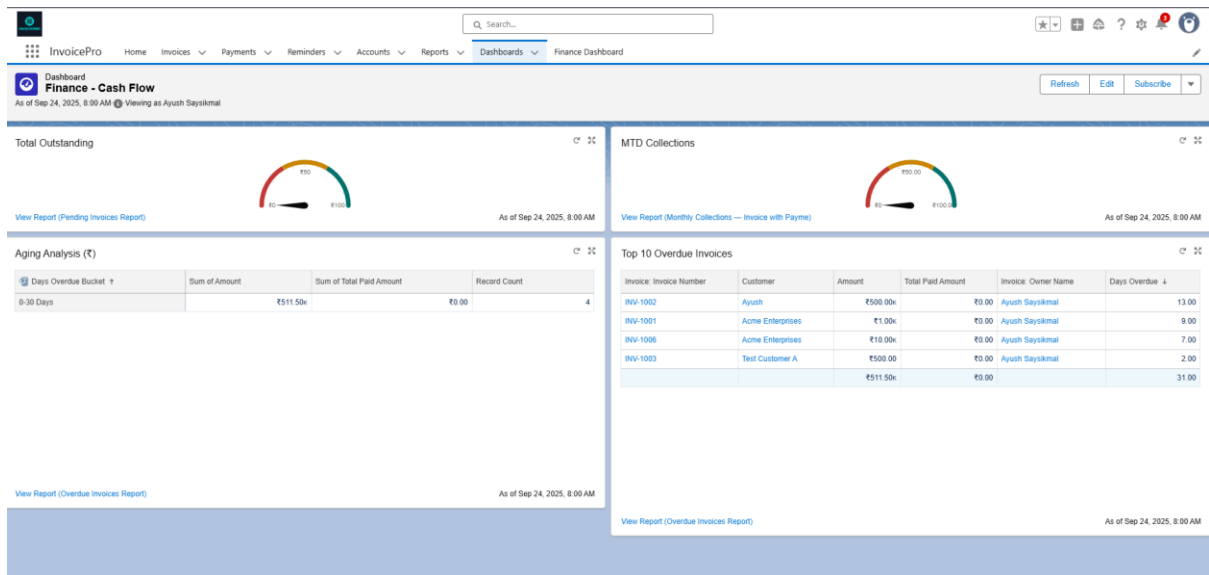


The screenshot shows the InvoicePro interface with the 'Reports' section selected. The 'Recent' tab is active, displaying a list of 10 reports. The table columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed include 'Sample Flow Report: Screen Flows', 'Duplicate Invoice Check', 'Monthly Collections — Invoice with Payme', 'Invoice Change History', 'Overdue Invoices Report', 'Pending Invoices Report', 'New Invoices Report', 'New Invoices Report', 'Pending Payment Reminders', and 'Overdue Invoices Report'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/10/2025, 5:11 AM	
Created by Me	Duplicate Invoice Check		Private Reports	Ayush Sayiskmal	9/25/2025, 1:40 AM	
Private Reports	Monthly Collections — Invoice with Payme		Finance Report	Ayush Sayiskmal	9/23/2025, 1:22 AM	✓
Public Reports	Invoice Change History		Finance Report	Ayush Sayiskmal	9/23/2025, 1:33 AM	✓
All Reports	Overdue Invoices Report		Finance Report	Ayush Sayiskmal	9/23/2025, 1:02 AM	✓
FOLDERS	Pending Invoices Report		Finance Report	Ayush Sayiskmal	9/23/2025, 12:49 AM	✓
All Folders	New Invoices Report		Private Reports	Ayush Sayiskmal	9/22/2025, 5:09 AM	
Created by Me	New Invoices Report		Finance	Ayush Sayiskmal	9/21/2025, 3:32 AM	
Shared with Me	Pending Payment Reminders		Finance	Ayush Sayiskmal	9/21/2025, 3:35 AM	
FAVORITES	Overdue Invoices Report		Finance	Ayush Sayiskmal	9/21/2025, 3:30 AM	
All Favorites						

2. Dashboards

- **Dashboards → New Dashboard → Name Finance - Cash Flow → Folder Finance Dashboards**
 - **Finance - Cash Flow**
 - **Total Outstanding**
 - **MTD Collections**
 - **Top 10 Overdue Invoices**
 - **Aging Analysis**



3. Sharing Settings

- Setup→ Sharing Settings

Setup Search Setup

Setup Home Object Manager

Q sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

Object	Public Read Only	Private
Delivery Estimation Group	Public Read Only	Private
Enablement Program	Private	Private
Engagement Channel Type	Private	Private
External Managed Account	Private	Private
Finance Balance Snapshot	Private	Private
Finance Transaction	Private	Private
Flow	Private	Private
Flow Interview	Private	Private
Flow Interview Log	Private	Private
Flow Test Result	Public Read Only	Private
Fulfillment Order	Public Read/Write	Private
Image	Private	Private
Incident	Private	Private
Inventory Reservation	Public Read/Write	Private
Invoice	Private	Private
Legal Entity	Private	Private
List Email	Private	Private
Location	Public Read/Write	Private
Location Group	Public Read/Write	Private
Location Shipping Carrier Method	Public Read Only	Private
Macro	Private	Private
Macro Instance	Private	Private

4. Field Level Security

- **Setup → Object Manager → Payment/Invoice → Fields & Relationships → Set Field Level Security**

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS. The main content area is titled 'Set Field Level Security' for the 'Transaction ID' field. It includes a 'Save' button and a 'Cancel' button. Below this is a table showing the field's data type as 'Text(255)'. The 'Field Level Security for Profile' table lists various profiles with checkboxes for 'Visible' and 'Read-Only' permissions.

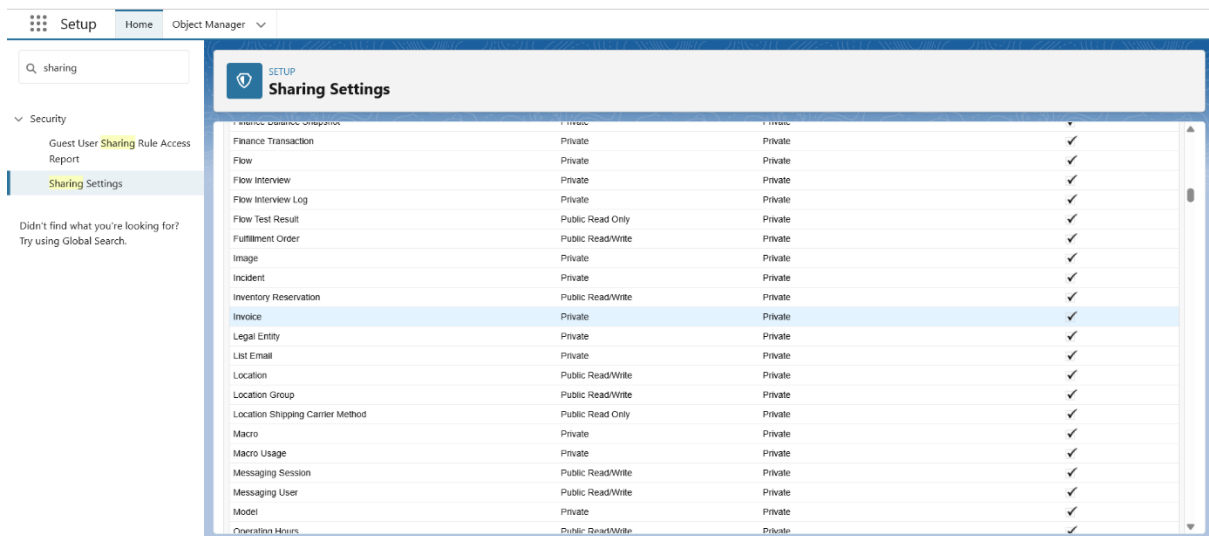
Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input 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"/>

The screenshot shows the Salesforce Setup interface for the 'Amount Paid' field. The left sidebar is identical to the previous screenshot. The main content area is titled 'Set Field Level Security' for the 'Amount Paid' field. It includes a 'Save' button and a 'Cancel' button. Below this is a table showing the field's data type as 'Currency(16, 2)'. The 'Field Level Security for Profile' table lists various profiles with checkboxes for 'Visible' and 'Read-Only' permissions.

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"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<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"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. OWD/Sharing Settings

- Setup → Sharing Settings → set Invoice__c OWD = Private

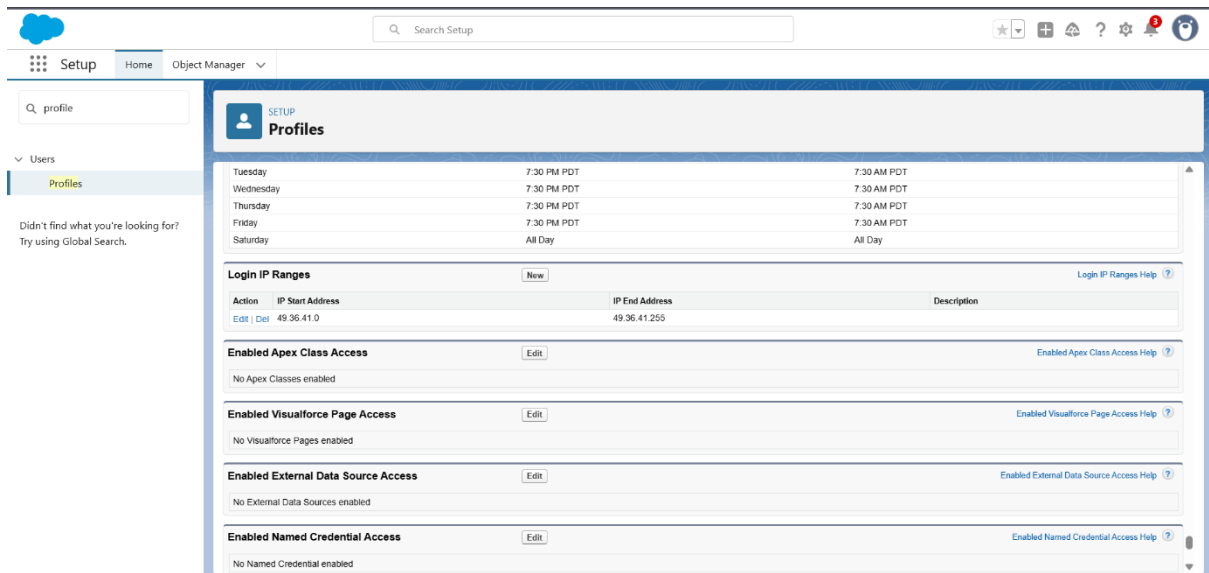


The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar contains a search bar with 'sharing' and a list of categories: Security, Guest User, Sharing Rule Access Report, and Sharing Settings (highlighted). Below the sidebar is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Sharing Settings' and displays a table of object permissions. The 'Invoice' row is highlighted, showing 'Private' for OWD and 'Private' for sharing controls, with a checkmark in the final column.

Object	Private	Private	Private	
Finance Balance Sheet	Private	Private	Private	✓
Finance Transaction	Private	Private	Private	✓
Flow	Private	Private	Private	✓
Flow Interview	Private	Private	Private	✓
Flow Interview Log	Private	Private	Private	✓
Flow Test Result	Public Read Only	Private	Private	✓
Fulfillment Order	Public Read/Write	Private	Private	✓
Image	Private	Private	Private	✓
Incident	Private	Private	Private	✓
Inventory Reservation	Public Read/Write	Private	Private	✓
Invoice	Private	Private	Private	✓
Legal Entity	Private	Private	Private	✓
List Email	Private	Private	Private	✓
Location	Public Read/Write	Private	Private	✓
Location Group	Public Read/Write	Private	Private	✓
Location Shipping Carrier Method	Public Read Only	Private	Private	✓
Macro	Private	Private	Private	✓
Macro Usage	Private	Private	Private	✓
Messaging Session	Public Read/Write	Private	Private	✓
Messaging User	Public Read/Write	Private	Private	✓
Model	Private	Private	Private	✓
Operative Hours	Public Read/Write	Private	Private	✓

6. Login IP Ranges

- Setup → Profiles → Officer Profile



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'profile' and a list of categories: Users and Profiles (highlighted). Below the sidebar is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' and displays a table of login IP ranges. The 'Officer Profile' is selected, showing a login IP range of 49.36.41.0 to 49.36.41.255. Below the table are sections for 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', and 'Enabled Named Credential Access', all of which are currently disabled.

Day	Start Time	End Time
Tuesday	7:30 PM PDT	7:30 AM PDT
Wednesday	7:30 PM PDT	7:30 AM PDT
Thursday	7:30 PM PDT	7:30 AM PDT
Friday	7:30 PM PDT	7:30 AM PDT
Saturday	All Day	All Day

Login IP Ranges [New] [Login IP Ranges Help ?]

Action	IP Start Address	IP End Address	Description
Edit Del	49.36.41.0	49.36.41.255	

Enabled Apex Class Access [Edit] [Enabled Apex Class Access Help ?]
No Apex Classes enabled

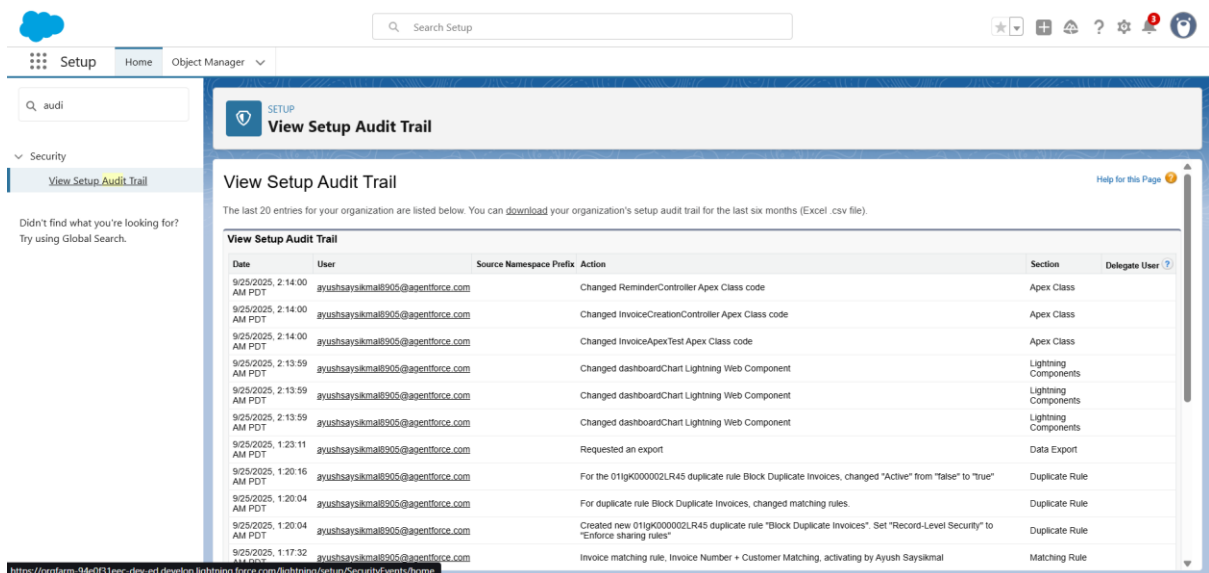
Enabled Visualforce Page Access [Edit] [Enabled Visualforce Page Access Help ?]
No Visualforce Pages enabled

Enabled External Data Source Access [Edit] [Enabled External Data Source Access Help ?]
No External Data Sources enabled

Enabled Named Credential Access [Edit] [Enabled Named Credential Access Help ?]
No Named Credential enabled

7. Audit Trail

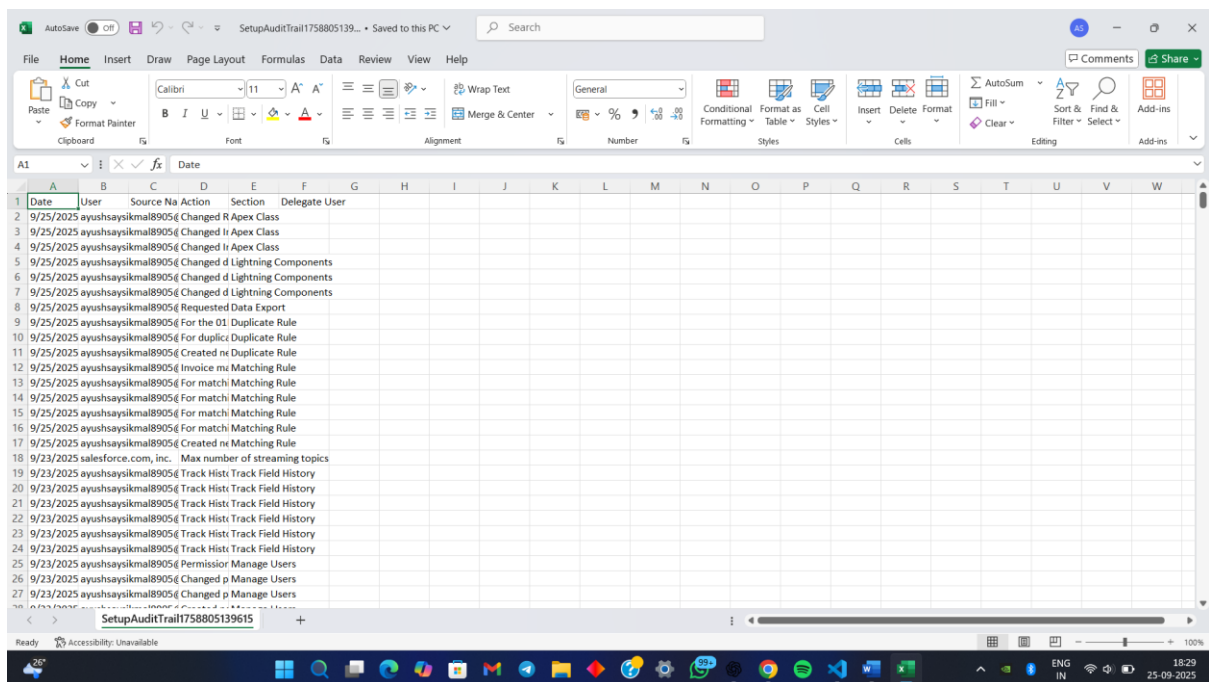
- Setup → View Setup Audit Trail



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
9/25/2025, 2:14:00 AM PDT	ayushsaisikmal8905@agentforce.com		Changed ReminderController Apex Class code	Apex Class	
9/25/2025, 2:14:00 AM PDT	ayushsaisikmal8905@agentforce.com		Changed InvoiceCreationController Apex Class code	Apex Class	
9/25/2025, 2:14:00 AM PDT	ayushsaisikmal8905@agentforce.com		Changed InvoiceApexTest Apex Class code	Apex Class	
9/25/2025, 2:13:59 AM PDT	ayushsaisikmal8905@agentforce.com		Changed dashboardChart Lightning Web Component	Lightning Components	
9/25/2025, 2:13:59 AM PDT	ayushsaisikmal8905@agentforce.com		Changed dashboardChart Lightning Web Component	Lightning Components	
9/25/2025, 2:13:59 AM PDT	ayushsaisikmal8905@agentforce.com		Changed dashboardChart Lightning Web Component	Lightning Components	
9/25/2025, 1:23:11 AM PDT	ayushsaisikmal8905@agentforce.com		Requested an export	Data Export	
9/25/2025, 1:20:16 AM PDT	ayushsaisikmal8905@agentforce.com		For the 011gK000002LR45 duplicate rule Block Duplicate Invoices, changed "Active" from "false" to "true"	Duplicate Rule	
9/25/2025, 1:20:04 AM PDT	ayushsaisikmal8905@agentforce.com		For duplicate rule Block Duplicate Invoices, changed matching rules.	Duplicate Rule	
9/25/2025, 1:20:04 AM PDT	ayushsaisikmal8905@agentforce.com		Created new 011gK000002LR45 duplicate rule "Block Duplicate Invoices". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/25/2025, 1:17:32 AM PDT	ayushsaisikmal8905@agentforce.com		Invoice matching rule, Invoice Number + Customer Matching, activating by Ayush Saisikmal	Matching Rule	



SetupAuditTrail175805139615

Date	User	Source Na	Action	Section	Delegate User
9/25/2025	ayushsaisikmal8905@agentforce.com		Changed R Apex Class	Apex Class	
9/25/2025	ayushsaisikmal8905@agentforce.com		Changed I Apex Class	Apex Class	
9/25/2025	ayushsaisikmal8905@agentforce.com		Changed d Lightning Components	Lightning Components	
9/25/2025	ayushsaisikmal8905@agentforce.com		Changed d Lightning Components	Lightning Components	
9/25/2025	ayushsaisikmal8905@agentforce.com		Changed d Lightning Components	Lightning Components	
9/25/2025	ayushsaisikmal8905@agentforce.com		Requested Data Export	Data Export	
9/25/2025	ayushsaisikmal8905@agentforce.com		For the 01 Duplicate Rule	Duplicate Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		For duplic Duplicate Rule	Duplicate Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		Created ne Duplicate Rule	Duplicate Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		Invoice m Matching Rule	Matching Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		For match Matching Rule	Matching Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		For match Matching Rule	Matching Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		For match Matching Rule	Matching Rule	
9/25/2025	ayushsaisikmal8905@agentforce.com		Created ne Matching Rule	Matching Rule	
9/23/2025	salesforce.com, inc.		Max number of streaming topics		
9/23/2025	ayushsaisikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaisikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaisikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaisikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaisikmal8905@agentforce.com		Track Hist Track Field History		
9/23/2025	ayushsaisikmal8905@agentforce.com		Permissior Manage Users		
9/23/2025	ayushsaisikmal8905@agentforce.com		Changed p Manage Users		
9/23/2025	ayushsaisikmal8905@agentforce.com		Changed p Manage Users		