

## Phase 9 — Reporting, Dashboards & Security

### Review (Implemented Reports)

**Objective:** Create meaningful reports to track leads and travel packages in the Smart TravelConnect CRM.

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#### A. Reports Implemented

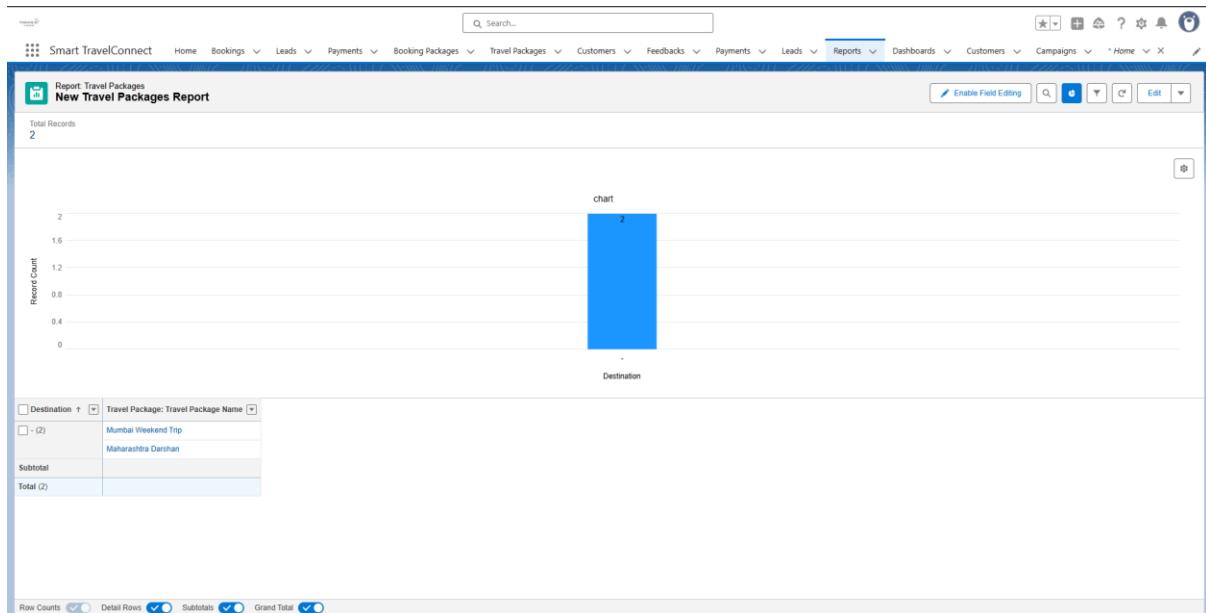
##### 1. New Travel Packages Report

**Purpose:** Track all active travel packages in the system.

**Steps (Click by Click):**

1. Go to **App Launcher** → **Reports** → **New Report**.
2. Select **Report Type:** Travel Packages.
3. Click **Continue**.
4. Apply Filters:
  - **Active = TRUE** (only show active packages).
5. Select Columns to Display:
  - Package Name
  - Destination
  - Price
  - Package Type
  - Start Date / End Date
6. Sort by **Start Date** to view upcoming packages first.
7. Click **Save & Run** → Name: New Travel Packages Report → Folder: Public Reports.
8. Click **Done**.

 Provides an overview of all available packages for easy monitoring.



## 2. New Leads Report

**Purpose:** Track newly captured leads for follow-up and assignment.

**Steps (Click by Click):**

1. Go to **App Launcher** → **Reports** → **New Report**.
2. Select **Report Type:** Leads.
3. Click **Continue**.
4. Apply Filters:
  - **Created Date = This Month** (to show only recent leads).
5. Select Columns to Display:
  - Lead Name
  - Email
  - Phone
  - Source
  - Status
6. Sort by **Created Date** to prioritize recent leads.
7. Click **Save & Run** → Name: New Leads Report → Folder: Public Reports.
8. Click **Done**.

- Helps the sales team track new leads and plan follow-ups efficiently.

The screenshot shows the Smart TravelConnect application's Reports section. The left sidebar has categories like Reports, Recent, Private Reports, Public Reports, Folders, Favorites, and Shared with Me. The main area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains three items:

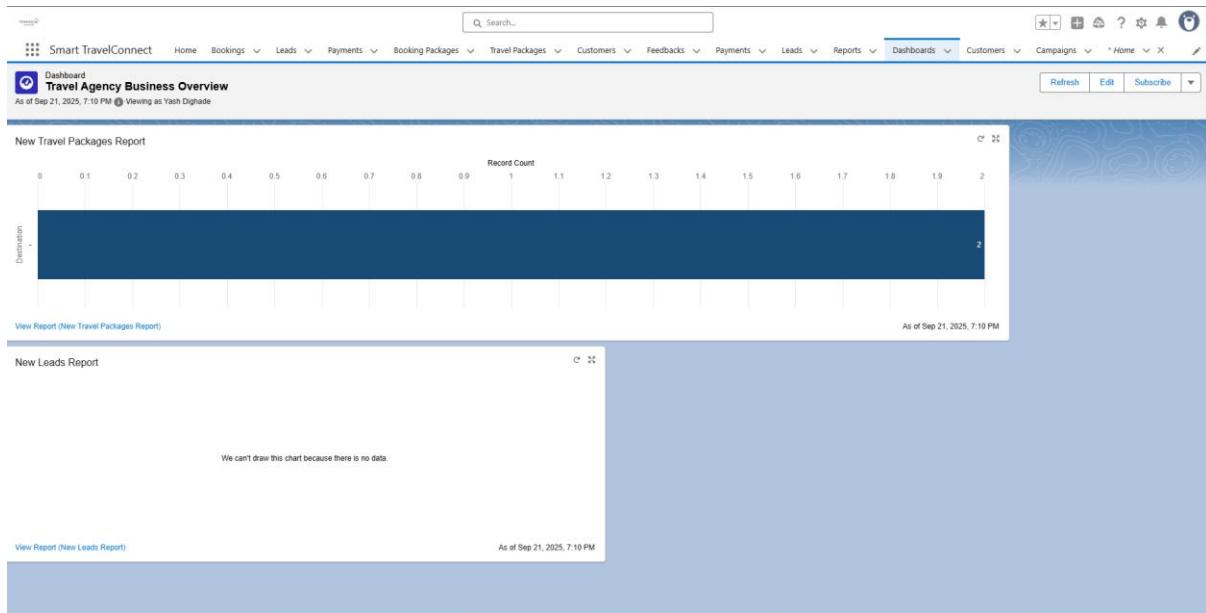
Report Name	Description	Folder	Created By	Created On	Subscribed
New Travel Packages Report		Public Reports	Yash Dighade	9/21/2025, 6:13 AM	
New Leads Report		Public Reports	Yash Dighade	9/21/2025, 6:37 PM	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/18/2025, 3:19 AM	

## B. Dashboards Creation

**Purpose:** Visualize reports for quick business insights.

**Steps (Click by Click):**

1. Go to **App Launcher** → **Dashboards** → **New Dashboard**.
  2. Enter **Name:** Travel Agency Overview → Select Folder → Click **Create**.
  3. Click **+Component** → Select a report → Choose **Chart Type** (Bar, Pie, Heatmap).
  4. Sample Components Added:
    - Travel Agency Business Overview → Key metrics like total leads, bookings, and revenue.
    - Top Destinations Heatmap → Using Packages by Popularity report.
    - Customer Loyalty Tracker → Using Customer Loyalty Points report.
  5. Arrange components → Click **Save** → Click **Done**.
- Dashboards now provide a visual overview for quick decision-making.



## C. Security Review

**Objective:** Ensure data privacy, proper access control, and audit tracking.

**Steps (Click by Click):**

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

- Go to **Setup** → **Security** → **Sharing Settings**.
- Leads: Private
- Bookings: Controlled by Role
- Customers: Private / Controlled by Role → Save.

### 2. Profiles & Permission Sets:

- Assign **object-level** and **field-level access**.
- Example: Sales Agent → Leads, Bookings; Finance → Payments only.

### 3. Record-Level Restrictions:

- Ensure users can only access their own records where required (e.g., leads, bookings).

**Sharing Settings**

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: All Objects

Disable External Sharing Model

**Default Sharing Settings**

**Organization-Wide Defaults**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓

**Other Settings**

Manager Groups:  [Help](#)

Secure guest user record access:  [Help](#)

Require permission to view record names in lookup fields:  [Help](#)

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**Default Sharing Settings**

**Organization-Wide Defaults**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Wallet	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Booking	Controlled by Parent	Controlled by Parent	✓
Booking Package	Controlled by Parent	Controlled by Parent	✓
Campaigns	Public Read/Write	Private	✓
Customer	Public Read/Write	Private	✓
Feedback	Public Read/Write	Private	✓
Invoices	Public Read/Write	Private	✓
Lead	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Payment	Controlled by Parent	Controlled by Parent	✓
Student	Public Read/Write	Private	✓
Travel Package	Public Read/Write	Private	✓

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✓ Data is now secure, and access is restricted as per roles and profiles.