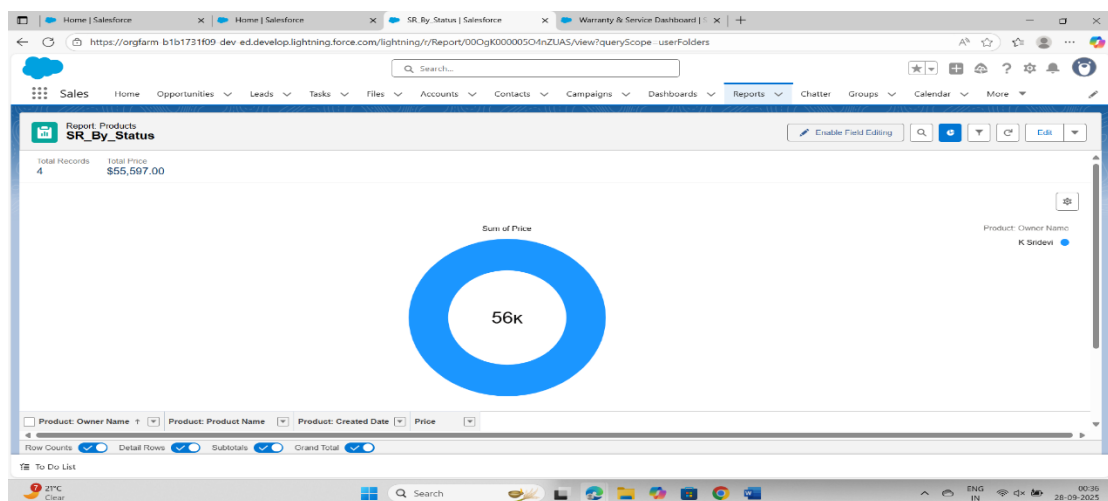


## Phase 9 — Reporting, Dashboards & Security Review

### 1) Create Report 1 — *Service Requests by Status*

1. App Launcher → Reports → New Report.
2. In the New Report modal type Service Requests and select the Service Request report type → Start Report.
3. In the report builder:
  - Remove unnecessary columns; add columns: Name, Status, Product, Created Date, Owner.
  - Drag Status into the Group Rows area (left).
  - Add filter: Created Date = All Time (or last 90 days for demo).
  - Add chart: click the chart icon → choose Pie → slice by Status.
4. Save → Report Name: SR\_By\_Status → Folder: Public Reports → Save & Run.

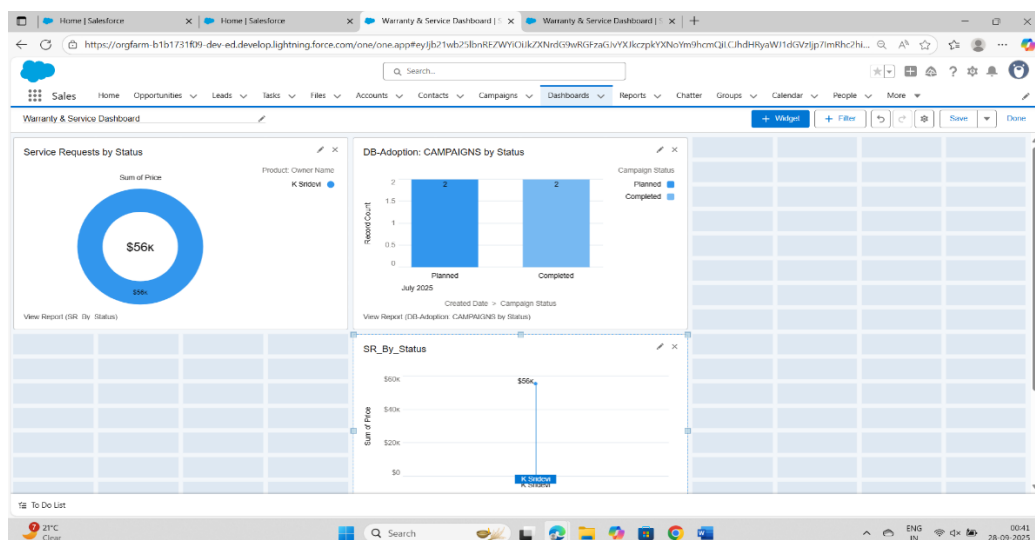


### 2) Create Report 2 — *Warranties Expiring Soon*

1. App Launcher → Reports → **New Report** → search **Warranties** (or your Warranty object) → **Start Report**.
2. In builder:
  - Columns: Name, Product, End Date, Start Date, Warranty Term.
  - Filter: End Date → set filter to Next 30 Days (or <= NEXT 30 DAYS).
  - Optionally group by Product.
  - Add a **Bar** chart showing count by Product or by Days to Expiry.
3. Save → Report Name: Warranties\_ExpiringSoon → Folder: Public Reports → Save & Run.

#### 4) Build Dashboard

1. App Launcher → Dashboards → **New Dashboard** → Name: Warranty & Service Dashboard → Folder: Private Reports (or Public).
2. Add components:
  - Component 1: Source SR\_By\_Status → Display: **Pie** → Title: Service Requests by Status.
  - Component 2: Source Warranties\_ExpiringSoon → Display: **Bar/Column** → Title: Warranties Expiring (30d).
  - Component 3: Create a report Open SR Trend (Summary by Created Date) and add as Line chart.
3. Arrange components and **Save**.
4. (Optional) Dashboard Properties → **View Dashboard As** → choose **The person viewing the dashboard** to enable dynamic dashboard.



#### 5) Sharing & Security Review (quick checklist + steps)

Complete and capture each of these:

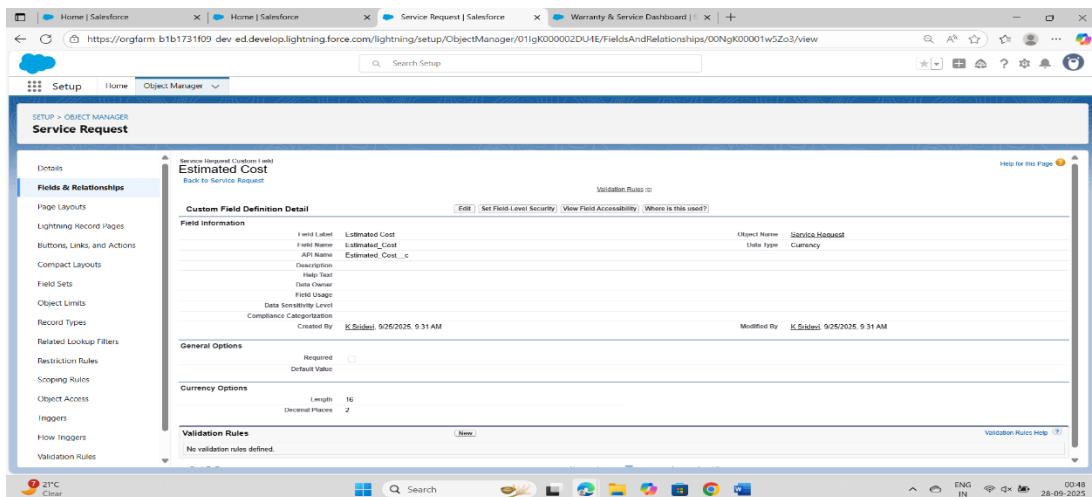
##### A — Organization-Wide Defaults (OWD)

- Setup → Quick Find → **Sharing Settings**.
- Ensure Service Requests = **Private** (or as project requires).
- Note any other object settings (Accounts = Public Read/Write, Contacts = Controlled by Parent).

User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	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	✓
Customer	Public Read/Write	Private	✓
Equipment Maintenance Item	Controlled by Parent	Controlled by Parent	
Invoice	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Product	Public Read/Write	Private	✓
Service Request	Public Read/Write	Private	✓
Student	Controlled by Parent	Controlled by Parent	
Subscription	Public Read/Write	Private	✓
Vehicle	Public Read/Write	Private	✓
Warranty	Public Read/Write	Private	✓

## B — Field Level Security (FLS)

- Setup → Object Manager → Service\_Request\_\_c → Fields & Relationships → click Estimated\_Cost\_\_c (or field to hide).
- Click **Set Field-Level Security** → uncheck **Visible** for PS\_Service\_Agent profile → Save.



**Screenshot:** Field Level Security page. File: Phase9\_FLS\_EstimatedCost.png

## C — Profiles & Permission Sets

- Setup → Profiles → open PS\_Service\_Agent, PS\_Manager → confirm Tab Settings, Object Permissions.

Fulfillment Orders	Tab Hidden	Site.com	Default On
Allocation Based Actions	Tab Hidden	Stores	Tab Hidden
Groups	Default On	Streaming Channels	Tab Hidden
Home	Tab Hidden	Subscriptions	Tab Hidden
Home	Default On	Tasks	Default On
Ideas	Default On	Territory Account Product Message Scores	Tab Hidden
Idea Themes	Tab Hidden	Territory Account Scores	Tab Hidden
Identity Documents	Tab Hidden	Today	Default On
Identity Resolutions	Default On	Unstructured Data	Default On
Images	Tab Hidden	User Provisioning Requests	Tab Hidden
Individuals	Tab Hidden	Voice Calls	Tab Hidden
Territory Count Assessments	Tab Hidden	Waitlists	Default Off
Territory Count Plan Items	Tab Hidden	Web Store Inventory Sources	Tab Hidden
Territory Product Batch Items	Tab Hidden	Work Type Groups	Tab Hidden
Territory Item Reservations	Tab Hidden	Work Types	Tab Hidden
Inventory Operations	Tab Hidden		
Create Default Data	Tab Hidden	Service Requests	Default On
Customers	Default On	Students	Default On
Equipment Maintenance Items	Tab Hidden	Subscriptions	Default On
Invoices	Default On	Vehicles	Tab Hidden
Mentors	Default On	Warranties	Default On
Products	Default On		

- Setup → Permission Sets → create PS\_ExportReports (if needed) → assign to Manager.

## D — Session Settings & Login IP Ranges

- Setup → Session Settings → note timeout, secure settings.
- Profiles → Login IP Ranges (optional): set ranges for Manager if required (Profile → Login IP Ranges).

## E — View Setup Audit Trail

- Setup → Quick Find → **View Setup Audit Trail** → export last 6 months (if needed) → include in documentation.

The screenshot displays the Salesforce Setup Audit Trail interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'View Setup Audit Trail' and includes a sub-header '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)'. Below this is a table with the following columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists various setup changes, including creating and modifying rules, custom objects, and credentials.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/27/2025, 11:08:12 AM PDT	sidelkurtanoo11559@apexforce.com		For duplicate rule Serial Number rule match, changed matching rules.	Duplicate Rule	
9/27/2025, 11:08:12 AM PDT	sidelkurtanoo11559@apexforce.com		Created new 01hg000002DUyP duplicate rule "Serial Number rule match". Set "Record Level Security" to "Enforce sharing rules".	Duplicate Rule	
9/27/2025, 11:06:28 AM PDT	sidelkurtanoo11559@apexforce.com		For matching rule Serial Number rule match, added matching criteria where matching method is Exact, the field is Serial_Number and match block field is "Does Not Match & Fail".	Matching Rule	
9/27/2025, 11:06:28 AM PDT	sidelkurtanoo11559@apexforce.com		For matching rule Serial Number rule match, matching engine set to Exact Match Engine.	Matching Rule	
9/27/2025, 11:06:28 AM PDT	sidelkurtanoo11559@apexforce.com		Created new Product matching rule Serial Number rule match.	Matching Rule	
9/27/2025, 7:52:52 AM PDT	sidelkurtanoo11559@apexforce.com		Created custom field Message (Text) on Service_Request__Events	Custom Objects	
9/27/2025, 7:45:16 AM PDT	sidelkurtanoo11559@apexforce.com		Created custom object: Service_Request__Event	Custom Objects	
9/27/2025, 7:10:26 AM PDT	sidelkurtanoo11559@apexforce.com		Remote Proxy Insert SampleAPI: https://sampleholder.typecode.com	Security Controls	
9/27/2025, 7:09:11 AM PDT	sidelkurtanoo11559@apexforce.com		Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: NoAuthCredential) for SampleAPI	Named Credentials	
9/27/2025, 7:09:11 AM PDT	sidelkurtanoo11559@apexforce.com		Created a new parameter: UH (Parameter Type: UH, Parameter Value: https://sampleholder.typecode.com) for SampleAPI	Named Credentials	
9/27/2025, 7:09:11 AM PDT	sidelkurtanoo11559@apexforce.com		Created a new named credential: SampleAPI	Named Credentials	
9/27/2025, 7:08:12 AM PDT	sidelkurtanoo11559@apexforce.com		Created a new parameter: Custom (Parameter Type: Authentication Protocol Variant, Parameter Value: NoAuthentication) for NoAuthCredential	External Credentials	
9/27/2025, 7:08:12 AM PDT	sidelkurtanoo11559@apexforce.com		Created a new external credential: NoAuthCredential	External Credentials	
9/27/2025, 2:35:48 AM PDT	sidelkurtanoo11559@apexforce.com		Changed Lightning Page: Warranty & Service Tracker UtilityBar	Lightning Pages	