

Phase 9: Reporting, Dashboards & Security Review – Solar Energy Management System

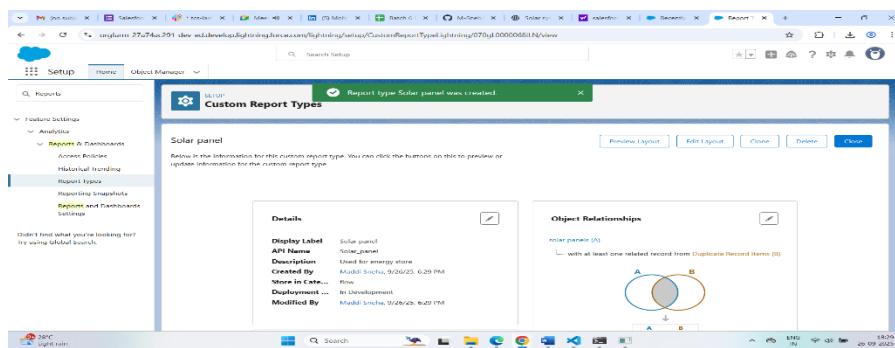
Goal:

To provide **business insights through reports & dashboards** and ensure the system is **secure and compliant** with proper data protection.

1. Reports

Reports help track performance, financials, and maintenance.

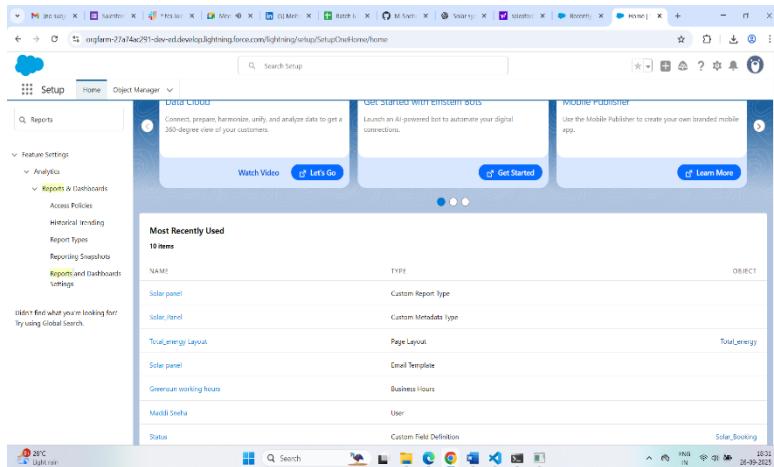
- **Examples in Solar Energy System:**
 - **Energy Generated per Month** (per customer, per panel, per region).
 - **Revenue Reports** (per customer, per solar installation).
 - **Maintenance Reports** (panels serviced, pending service requests).
- **Steps in Salesforce:**
 - Go to **Reports** → **New Report** → Choose Report Type (Customer, Installation, Energy Usage).
 - Add filters (e.g., Date, Customer Name).
 - Add grouping (e.g., Energy by Month).
 - Save & Run Report.



2. Report Types

- **Standard Report Types:** Available automatically (e.g., Accounts, Contacts).

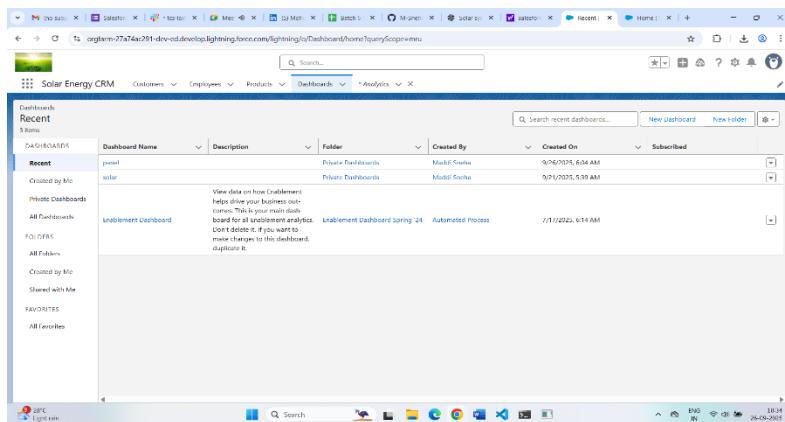
- **Custom Report Types:** Needed for linking multiple objects.
- **Example in this project:**
 - Create a **Custom Report Type** that links **Customer + Installation + Energy Usage**.
 - This lets you see **which customer produced how much energy** from their solar installation.



3. Dashboards

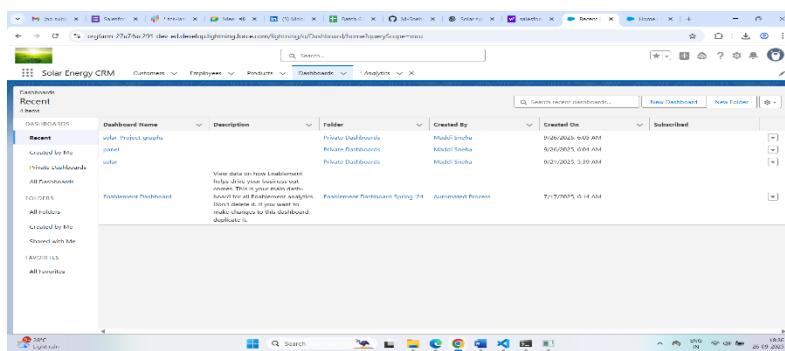
Dashboards provide a **visual summary** of reports.

- **Examples in Solar Energy System:**
 - **Customer Dashboard:**
 - Total monthly energy produced.
 - Cost savings (compared to traditional electricity bills).
 - **Manager Dashboard:**
 - Total energy generated across all customers.
 - Revenue growth.
 - Top-performing panels or regions.
- **Steps in Salesforce:**
 - Go to **Dashboards** → **New Dashboard** → Add Components.
 - Choose chart types (Bar Chart, Pie Chart, Gauge).
 - Add source reports → Save & View Dashboard.



4. Dynamic Dashboards

- Allows users to see data based on **their access/role**.
- Example in this project:
 - A **Field Agent** only sees dashboards for **their assigned customers**.
 - A **Manager** sees data across the entire company.
- **Steps:**
 - While creating Dashboard → Choose “**Run as Logged-In User**” option.



5. Sharing Settings

- Control who can see what data.
- Example in this project:
 - Solar Installations → Public Read (everyone can view).
 - Billing/Revenue Records → Private (only Finance and Manager can view).
- **Steps:**

- o Setup → Sharing Settings → Adjust Object-Level Sharing → Save.

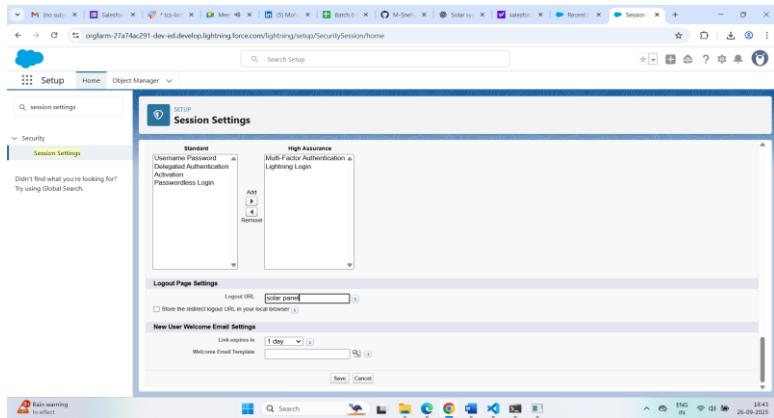
6. Field Level Security (FLS)

- Control who can see/edit specific fields.
- **Example in this project:**
 - o Hide **Customer ID Proof** and **Payment Details** from Field Agents.
 - o Allow only Finance/Manager roles to see billing information.
- **Steps:**
 - o Setup → Object Manager → Fields & Relationships → Field Level Security → Select Profiles → Save.

7. Session Settings

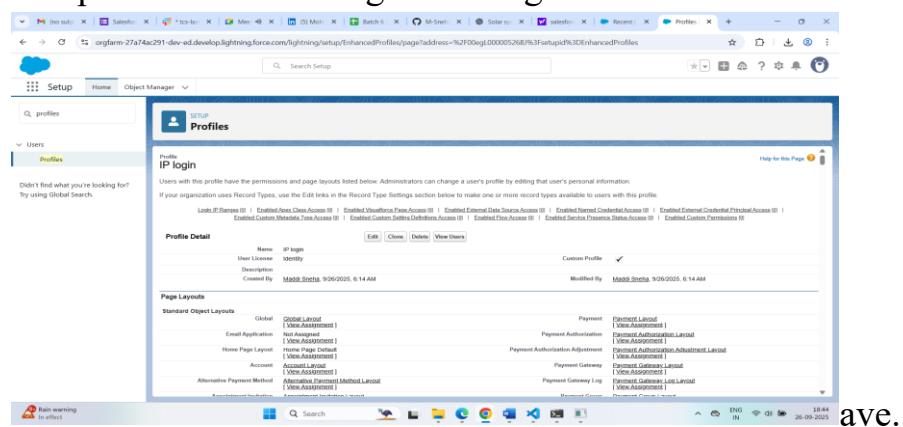
- Add extra security for system logins.

- **Example in this project:**
 - Set session timeout to 30 minutes of inactivity.
- **Steps:**
 - Setup → Session Settings → Adjust Timeout → Save.



8. Login IP Ranges

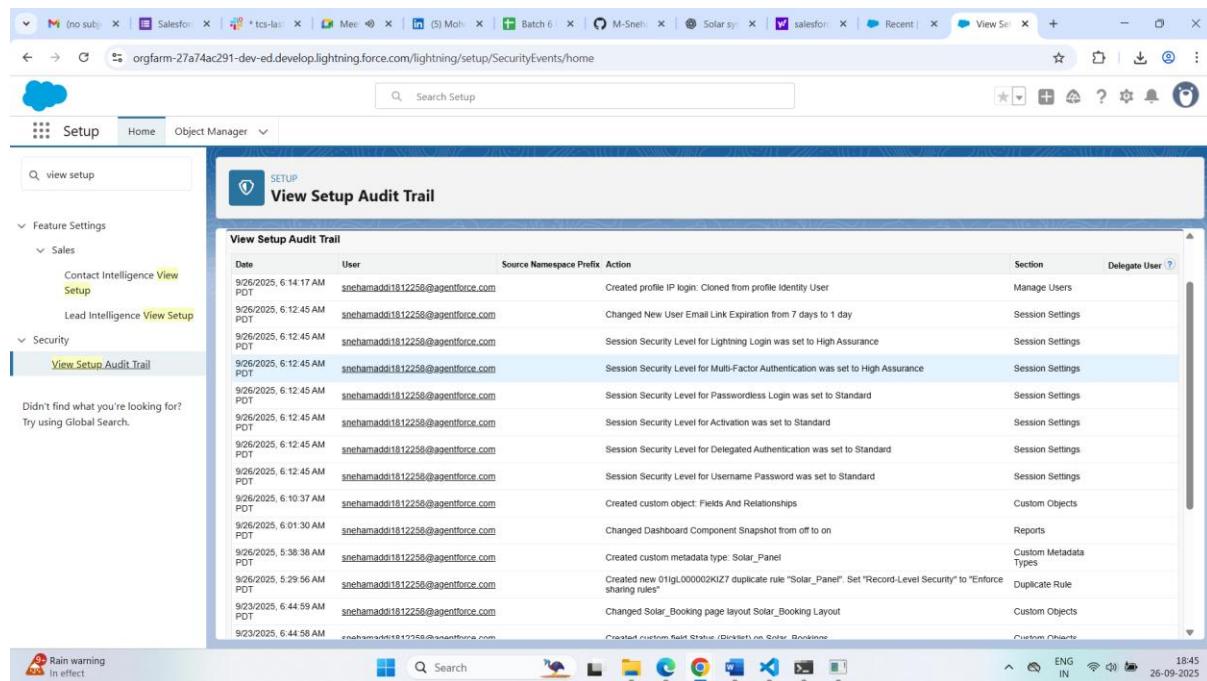
- Restrict access to Salesforce only from approved locations.
- **Example in this project:**
 - Agents can only log in from **office network or registered IPs**.
- **Steps:**
 - Setup → Profiles → Login IP Ranges → Enter allowed IPs → S



9. Audit Trail

- Tracks **who made what changes** in the system.
- **Example in this project:**

- If billing data is modified, the Audit Trail will show **which user changed it and when.**
- Steps:
 - Setup → View Setup Audit Trail → Download logs if needed.



The screenshot shows a browser window with multiple tabs open, including Salesforce, M-Sneha, Solar sys, and salesforce. The main content is the 'View Setup Audit Trail' page. The left sidebar shows 'Feature Settings' and 'View Setup Audit Trail' is selected. The main area displays a table of audit logs with columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table lists various actions performed on 9/26/2025, such as creating a profile, changing user email link expiration, setting session security levels, and creating custom objects. A 'Rain warning' icon is visible in the bottom left corner of the browser.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 6:14:17 AM PDT	snehamaddi1812258@agentforce.com		Created profile IP login: Cloned from profile Identity User	Manage Users	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Changed New User Email Link Expiration from 7 days to 1 day	Session Settings	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Session Security Level for Lightning Login was set to High Assurance	Session Settings	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Session Security Level for Multi-Factor Authentication was set to High Assurance	Session Settings	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Session Security Level for Passwordless Login was set to Standard	Session Settings	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Session Security Level for Activation was set to Standard	Session Settings	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Session Security Level for Delegated Authentication was set to Standard	Session Settings	
9/26/2025, 6:12:45 AM PDT	snehamaddi1812258@agentforce.com		Session Security Level for Username Password was set to Standard	Session Settings	
9/26/2025, 6:10:37 AM PDT	snehamaddi1812258@agentforce.com		Created custom object: Fields And Relationships	Custom Objects	
9/26/2025, 6:01:30 AM PDT	snehamaddi1812258@agentforce.com		Changed Dashboard Component Snapshot from off to on	Reports	
9/26/2025, 5:38:38 AM PDT	snehamaddi1812258@agentforce.com		Created custom metadata type: Solar_Panel	Custom Metadata Types	
9/26/2025, 5:29:56 AM PDT	snehamaddi1812258@agentforce.com		Created new 01igl000002KUZ7 duplicate rule "Solar_Panel". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
9/26/2025, 6:44:59 AM PDT	snehamaddi1812258@agentforce.com		Changed Solar_Booking page layout Solar_Booking Layout	Custom Objects	
9/23/2025, 6:44:58 AM	snehamaddi1812258@agentforce.com		Created custom field Status (Disabled) on Solar_Booking	Custom Objects	