

Phase 9: Reporting, Dashboards & Security Review

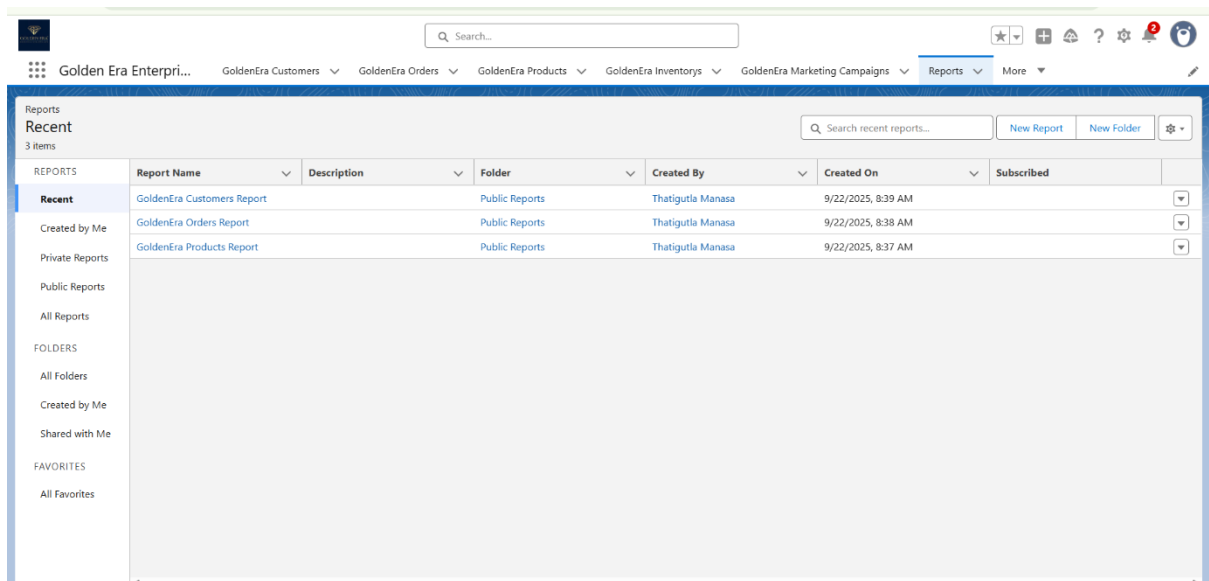
Step 1: Reporting

A **Report** is a **list or summary of records** in Salesforce that helps you analyze data.

- Reports allow you to **filter, sort, group, and summarize** your Salesforce data.
- Example: You can create a report to see **all orders placed this month** or **top-selling pro**

Steps:

- **Go to the App Launcher** → search **Reports** → click **Reports**.
- Click **New Report**.
- **Select the Report Type** (object to report on, e.g., GoldenEra Orders, GoldenEra Customer).
- Click **Continue**.
- **Add Filters**
 - Example: Show Orders where Status = Completed and Date = This Month.
- **Add Columns**
 - Choose which fields to display (like Customer Name, Order Date, Total Amount).
- **Group Data (optional)**
 - Example: Group orders by Product or by Customer.
- **Summarize (optional)**
 - Add totals, averages, or counts.
- Click **Save & Run** → Give report a name → Choose a folder to save.



Step 2: Dashboards

A Dashboard is a visual representation of your reports.

- Shows charts, graphs, metrics, or tables from one or multiple reports.
- Helps managers and teams quickly understand performance and trends.
- Example: A dashboard showing Top-Selling Products, Customer Engagement, and Inventory Levels.

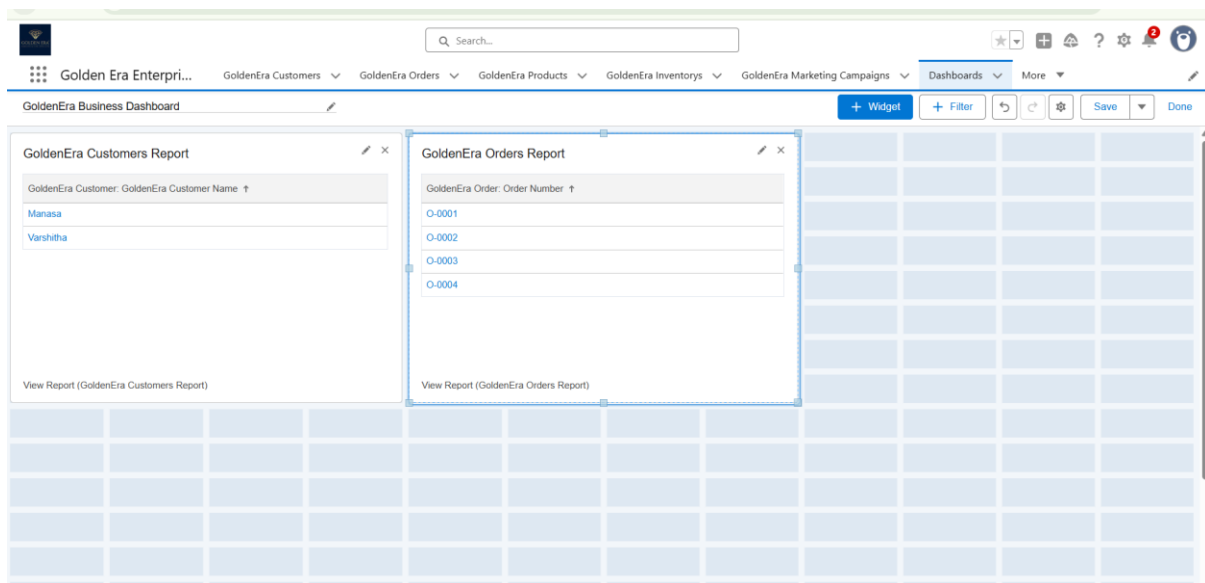
Dashboard Components:

- Charts (Bar, Pie, Line)
- Gauges (show progress toward a target)
- Metrics (single numbers, e.g., total orders this month)
- Tables (report data in a grid)

Steps:

- Go to **App Launcher** → search **Dashboards** → click **Dashboards**.
- Click **New Dashboard**.
- Give it a **Name** and choose a **Folder** to save.
- Click **Create**.
- Click + **Component** to add a chart or metric.
- Select a **Report** you already created.
- Choose **Visualization Type**

- Bar Chart, Pie Chart, Gauge, Metric, Table.
- Configure **Data Display**
 - Select fields, groupings, and filters for the chart.
- Click **Add** → Repeat for other components.
- Click **Save** → **Done**.
- You can **refresh dashboard** to see updated data anytime.



Step 3: Field Level Security

I applied Field Level Security to ensure sensitive fields like Customer Loyalty Status, Product Pricing, and Campaign Budgets are only visible or editable to authorized roles. This prevents data misuse and enforces least-privilege access

How to Set Field Level Security

Steps:

Go to **Setup** → **Object Manager**.

1. Select an object (e.g., **GoldenEra Customer**).
2. Go to **Fields & Relationships** → choose a field (e.g., Loyalty Status).
3. Click **Set Field-Level Security**.
4. For each **Profile**, choose:
 - **Visible** (can see the field).
 - **Read-Only** (cannot edit).
 - **Hidden** (not visible at all).
5. Save.

GoldenEra Customer

- **Email** → Sensitive → visible only to Sales & Service (not Marketing interns).
- **Phone** → Sensitive → same as above.
- **Loyalty Status** → Restrict: only Sales Manager & Marketing should see/update.
- **Total Purchases** → Finance/Admin only (read-only for others).

The screenshot shows the Salesforce Setup interface for configuring field-level security for the 'Email' field. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Set Field-Level Security Email' and includes a 'Save' button and a 'Cancel' button. Below this, there is a table with columns for 'Field Label', 'Data Type', 'Email', and 'Field-Level Security for Profile'. The table lists various profiles and their security settings for the 'Email' field.

Field Label	Data Type	Email	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"/>
			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"/>
			Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

GoldenEra Product

- **Price** → Hide from Inventory users, visible to Sales & Managers.
- **SKU** → Visible to all, make read-only.
- **Stock Quantity** → Editable by Inventory Managers only (read-only for Sales).

The screenshot shows the Salesforce Setup interface for configuring field-level security for the 'Price' field. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Set Field-Level Security Price' and includes a 'Save' button and a 'Cancel' button. Below this, there is a table with columns for 'Field Label', 'Data Type', 'Price', and 'Field-Level Security for Profile'. The table lists various profiles and their security settings for the 'Price' field.

Field Label	Data Type	Price	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"/>
			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"/>
			Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

GoldenEra Order

- **Order Total** → Finance/Admin only (read-only for Sales).
- **Order Status** → Editable by Sales/Service, read-only for Managers.

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 (Subscription Management). The main content area is titled 'Set Field-Level Security Status'. It includes a 'Save' button and a 'Cancel' button. Below these are two tables. The first table has columns 'Field Label', 'Status', and 'Data Type'. The second table, 'Field-Level Security for Profile', has columns 'Field Label', 'Visible', and 'Read-Only'. The 'Visible' column contains checkboxes, and the 'Read-Only' column contains checkboxes. The 'Status' column contains a dropdown menu.

Field Label	Status	Data Type
Analytics Cloud Integration User	Visible	
Analytics Cloud Security User	Visible	
Anypoint Integration	Visible	
Contract Manager	Visible	
Cross Org Data Proxy User	Visible	
Custom: Marketing Profile	Visible	
Custom: Sales Profile	Visible	
Custom: Support Profile	Visible	
Einstein Agent User	Visible	
Force.com - App Subscription User	Visible	
Force.com - Free User	Visible	

GoldenEra Inventory

- **Stock Quantity** → Editable by Inventory only, read-only for Sales.
- **Warehouse Location** (if created) → Inventory Team only.

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 (Subscription Management). The main content area is titled 'Set Field-Level Security Stock Quantity'. It includes a 'Save' button and a 'Cancel' button. Below these are two tables. The first table has columns 'Field Label', 'Stock Quantity', and 'Data Type'. The second table, 'Field-Level Security for Profile', has columns 'Field Label', 'Visible', and 'Read-Only'. The 'Visible' column contains checkboxes, and the 'Read-Only' column contains checkboxes. The 'Stock Quantity' column contains a dropdown menu.

Field Label	Stock Quantity	Data Type
Analytics Cloud Integration User	Visible	
Analytics Cloud Security User	Visible	
Anypoint Integration	Visible	
Contract Manager	Visible	
Cross Org Data Proxy User	Visible	
Custom: Marketing Profile	Visible	
Custom: Sales Profile	Visible	
Custom: Support Profile	Visible	
Einstein Agent User	Visible	
Force.com - App Subscription User	Visible	
Force.com - Free User	Visible	