Phase 9: Reporting, Dashboards & Security Review

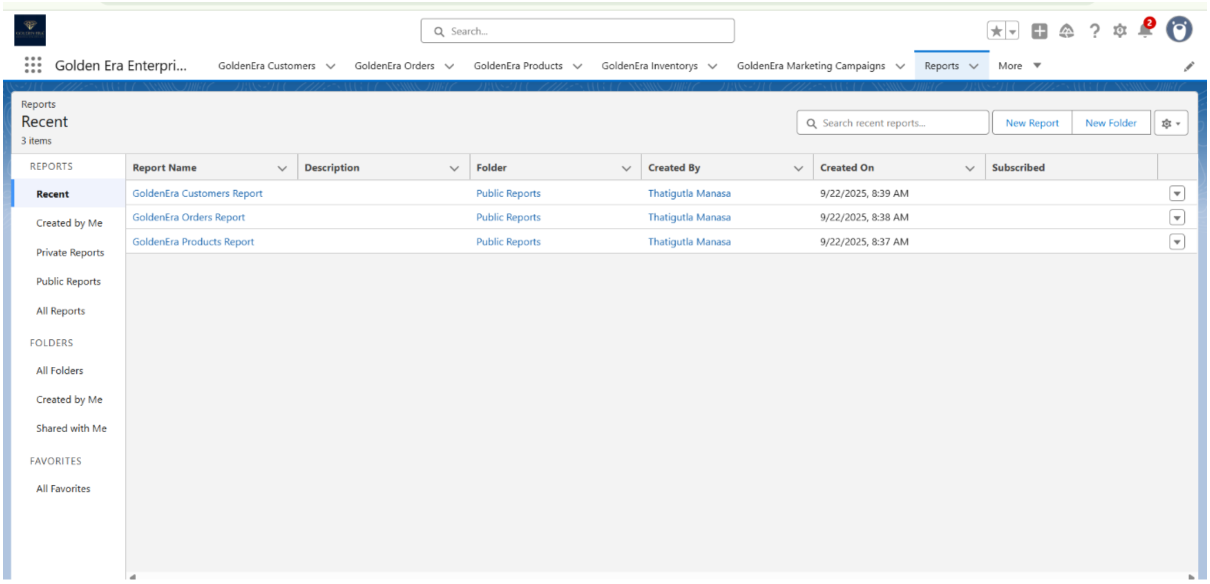
Step 1:Reporting

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:

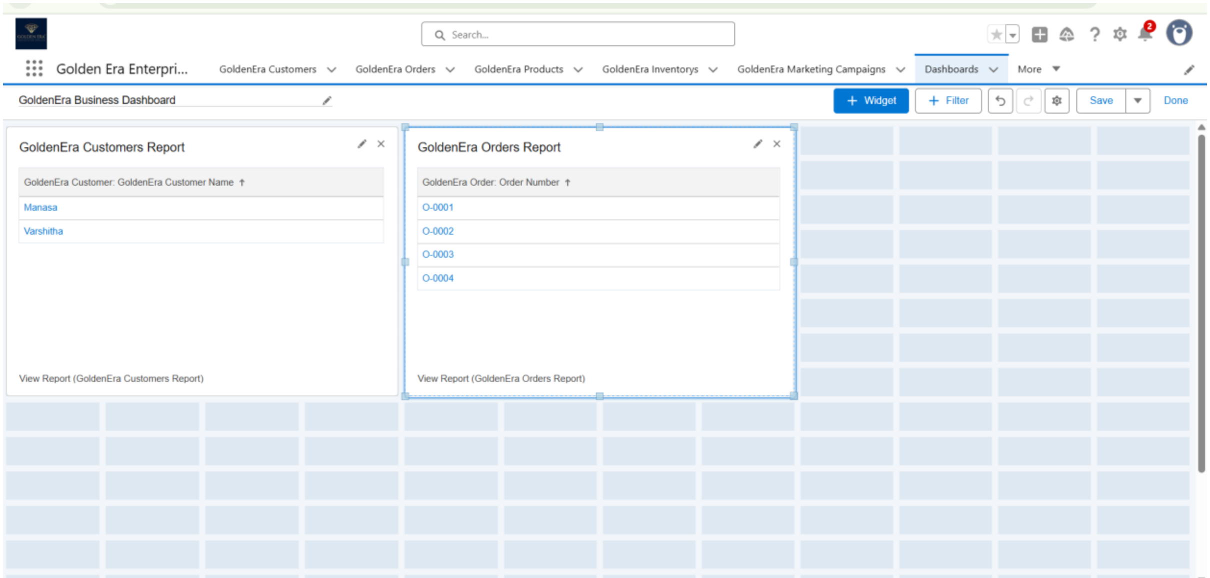
- Charts (Bar, Pie, Line)
- Gauges (show progress toward a target)
- Metrics (single numbers, e.g., total orders this month)
- Tables (report data in a grid)

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

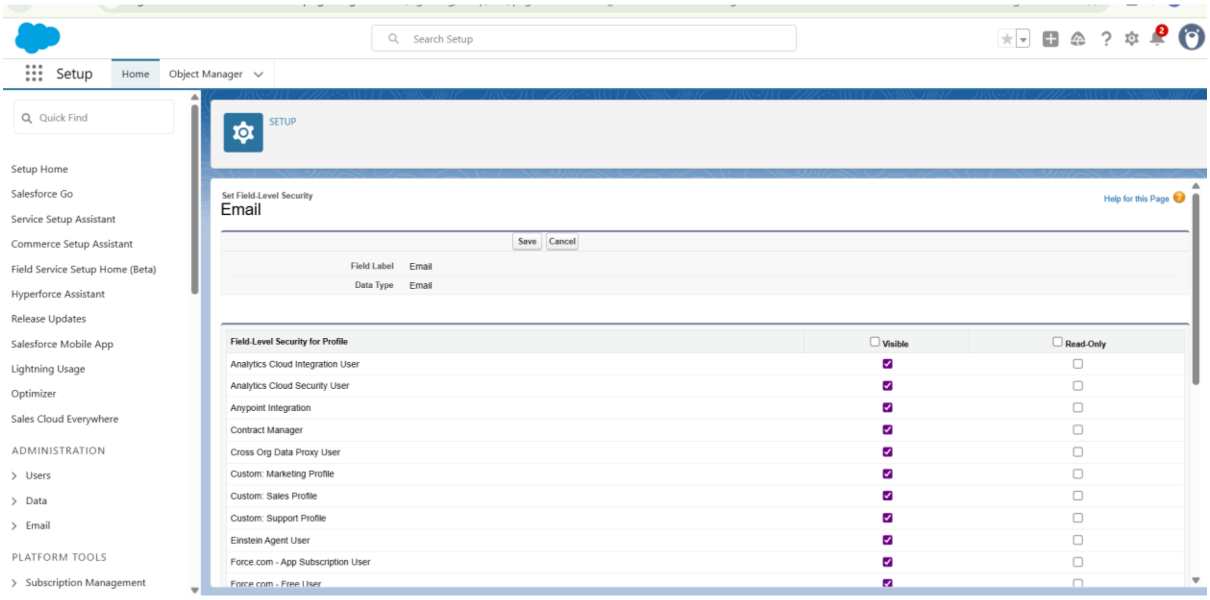
Steps:

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.

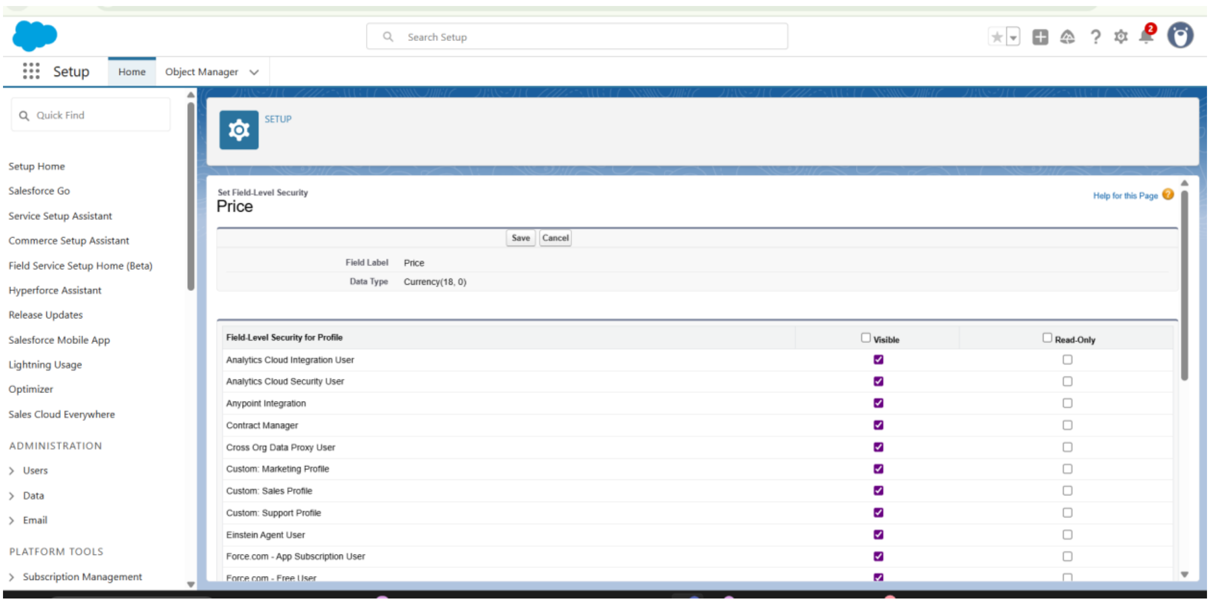
GoldenEra Customer

- **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).



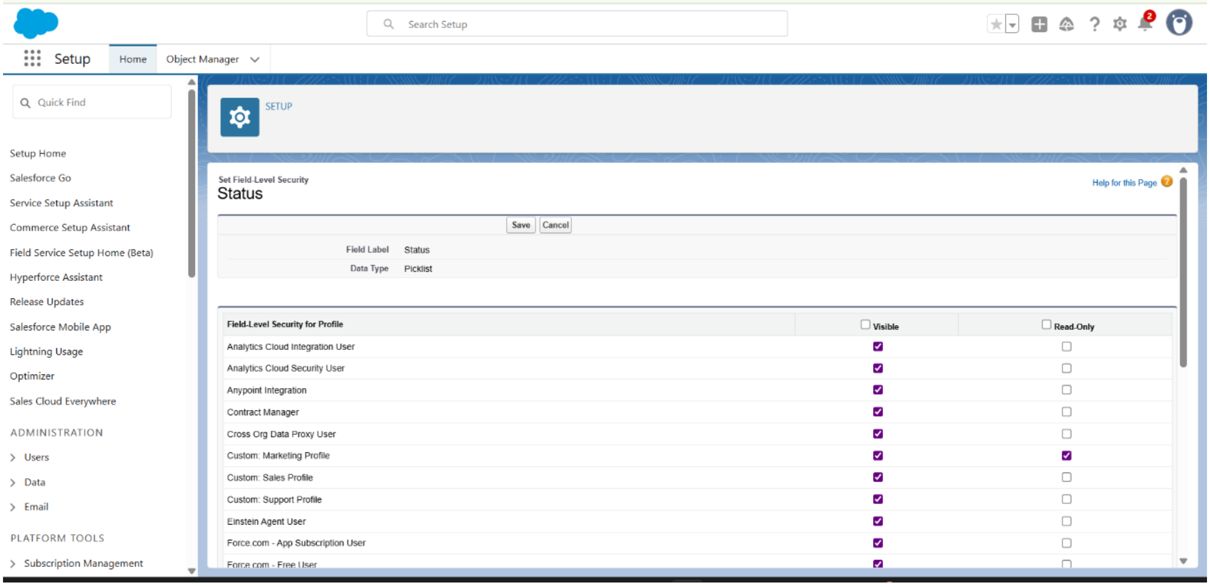
GoldenEra Product

- **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).



GoldenEra Order

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



GoldenEra Inventory

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