Phase 9: Reporting, Dashboards & Security Review
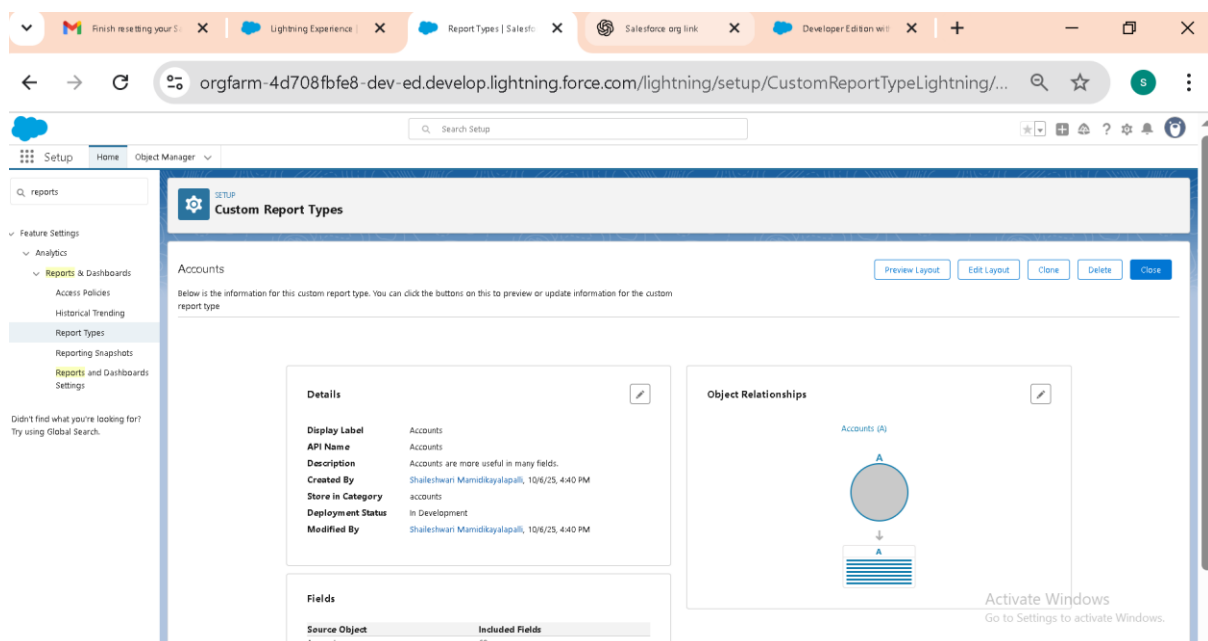
1. Reports

Reports allow users to view, filter, and analyze Salesforce data. There are four main types:

- **Tabular Reports:** Simple lists of records, similar to a spreadsheet.
- **Summary Reports:** Group records by a field and show subtotals.
- **Matrix Reports:** Group records by both rows and columns for cross-analysis.
- **Joined Reports:** Combine multiple report blocks with different report types in a single report.

2. Report Types

Report Types define which objects and fields are available for reporting.

- **Standard Report Types:** Automatically provided for standard objects.
- **Custom Report Types:** Created by users to report on specific object relationships.
-

3. Dashboards

Dashboards provide visual representations of report data using charts, tables, and metrics. Components are added based on source reports to give insights at a glance.
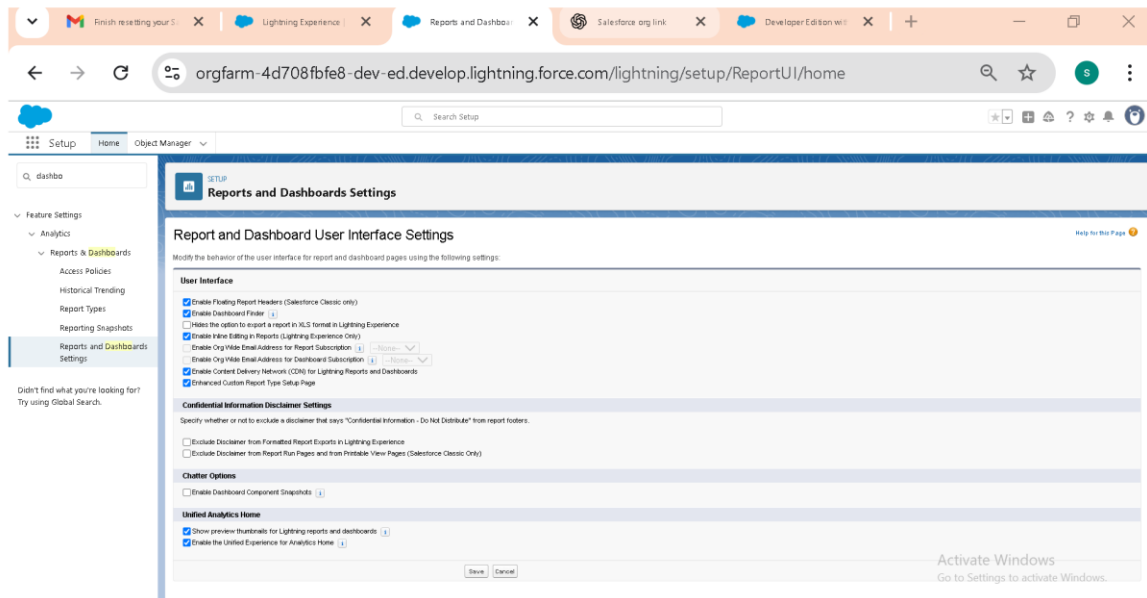

4. Dynamic Dashboards

Dynamic Dashboards allow the data to be displayed based on the logged-in user. Unlike standard dashboards, which display data as a fixed user, dynamic dashboards provide personalized views for different users.

5. Sharing Settings

Sharing settings control record-level access in Salesforce. Organization-wide defaults define baseline access (Private, Public Read Only, Public Read/Write), while sharing rules allow exceptions to provide access to specific groups.
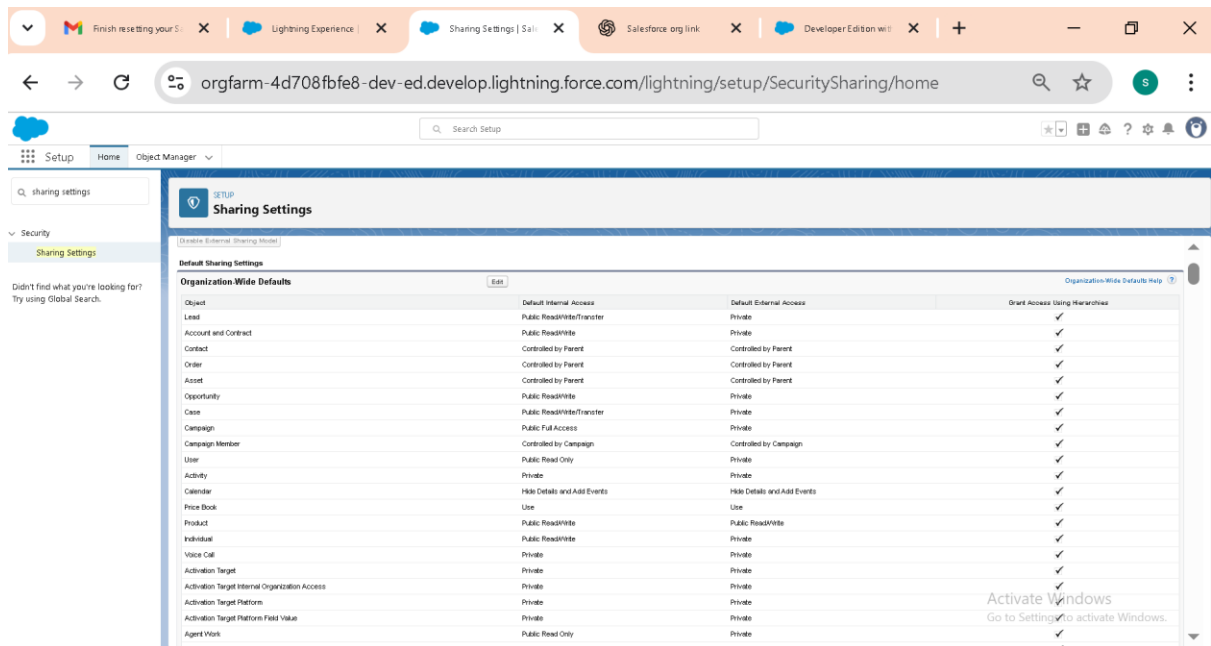
6. Field-Level Security

Field-Level Security defines which fields a user can view or edit. This ensures sensitive information is protected and access is controlled based on profiles or permission sets.

7. Session Settings

Session settings control the behavior of user sessions, including timeout duration, security policies, and login verification requirements.

8. Login IP Ranges

Login IP ranges restrict user access to Salesforce from specified IP addresses, enhancing security by preventing unauthorized network logins.

9. Audit Trail

The Audit Trail tracks changes made in the Salesforce setup, showing what was changed, who made the changes, and when. It helps administrators monitor configuration modifications for security and compliance.

Setup | Home | Object Manager ⌄

Q Search Setup

SETUP
Users

Q view setup

- Feature Settings
  - Sales
    - Contact Intelligence View Setup
    - Lead Intelligence View Setup
  - Security
    - View Setup Audit Trail

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User
Shaileshwari Mamidikayalapalli

User Profile Help for this Page

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User Detail

Edit | Sharing | Change Password | View Summary

Name	Shaileshwari Mamidikayalapalli	Role	
Alias	sha	User License	Salesforce
Email	shaileshwari4039@gmail.com [Verified]	Profile	System Administrator
Username	shaileshwari4039426@agentforce.com	Active	✓
Nickname	User1758605731565640225 ⓘ	Marketing User	☐
Title		Offline User	☐
Company	salesforce	Knowledge User	✓
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	☐
Locale	English (United States)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	ⓘ
Federation ID		High-Contrast Palette on Charts	ⓘ
App Registration: One-Time Password Authenticator	[Connect] ⓘ	Load Lightning Pages While Scrolling	✓ ⓘ
App Registration: Salesforce Authenticator	[Connect] ⓘ	Send Apex Warning Emails	☐
Security Key (U2F or WebAuthn)	[Register] ⓘ	Salesforce CRM Content User	✓
Lightning Login	[Enroll] ⓘ	Receive Salesforce CRM Content Email Alerts	✓
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate] ⓘ	Receive Salesforce CRM Content Alerts as Daily Digest	✓