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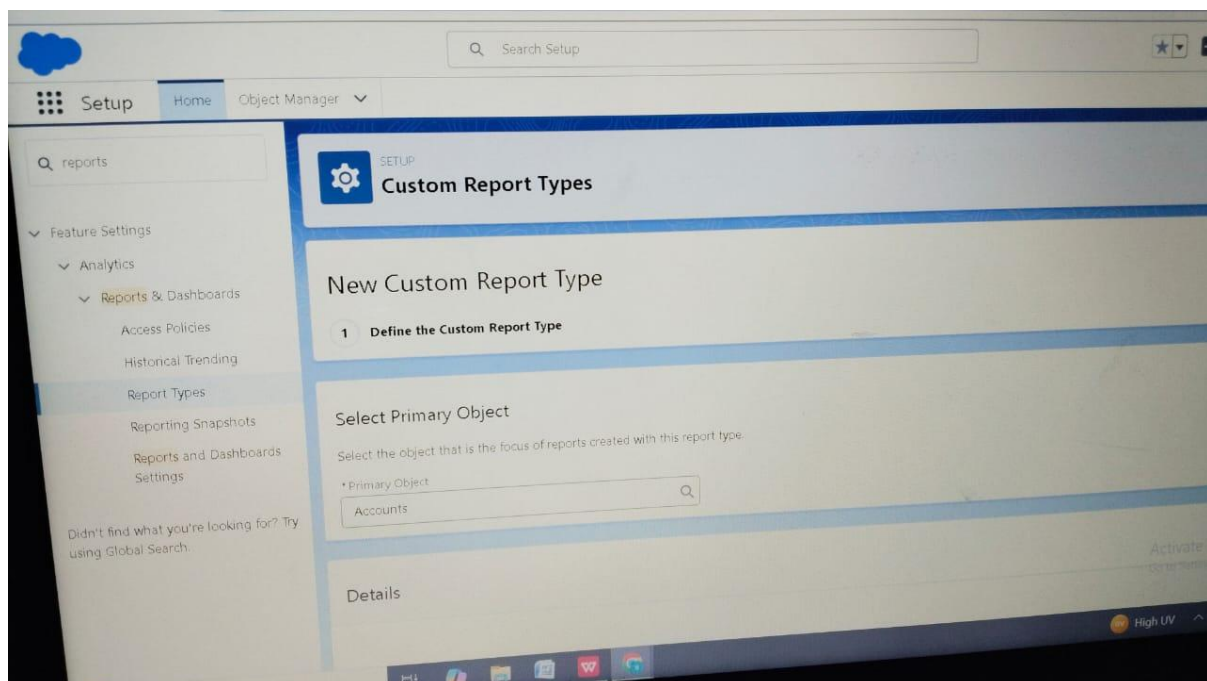
1. Reports

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.
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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.
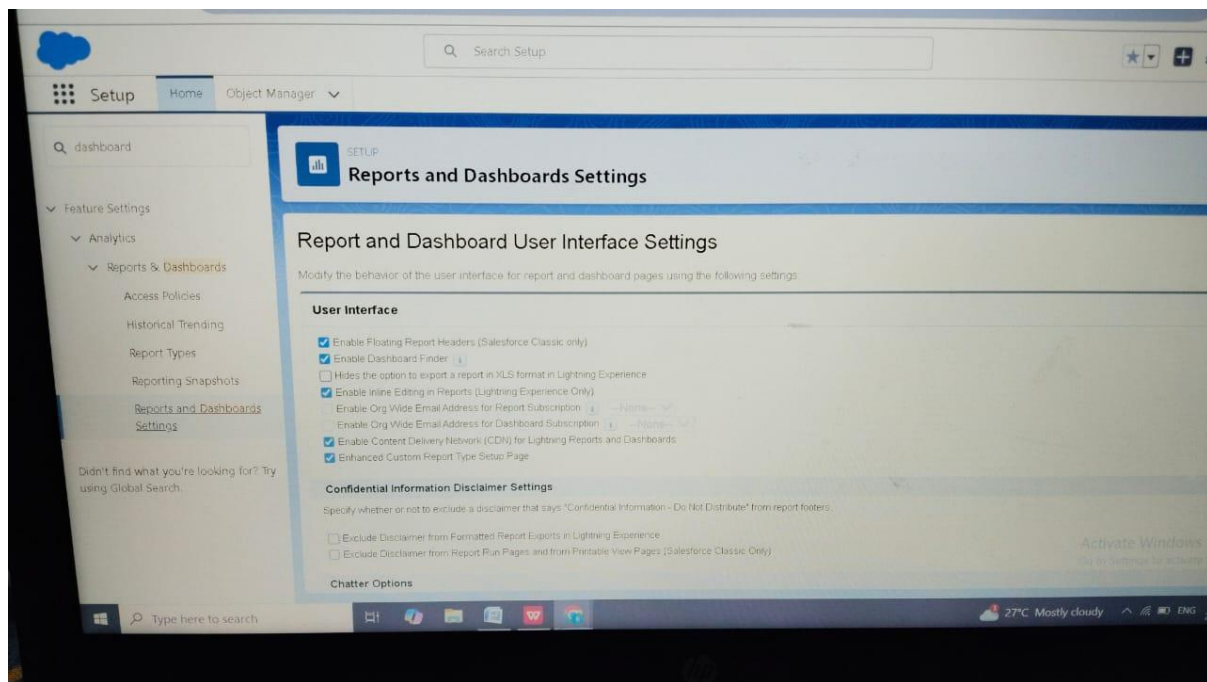
4. Dynamic Dashboards

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.
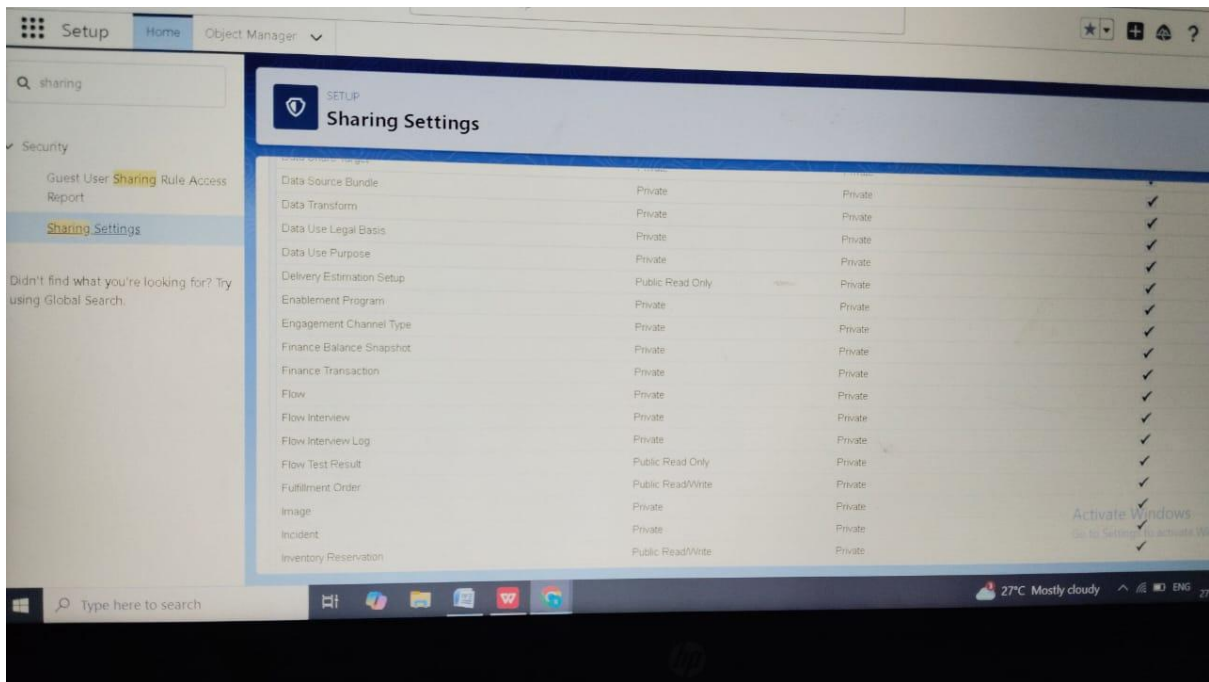
6. Field-Level Security

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.

Q Search Setup

Q view setup

✓ Feature Settings
  ✓ Sales
     Contact Intelligence View Setup
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  ✓ Security
     View Setup Audit Trail

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SETUP
View Setup Audit Trail

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View Setup Audit Trail

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).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/27/2025, 1:01:02 AM PDT	salesforce.com, inc		Max number of streaming topics		
9/26/2025, 9:24:20 AM PDT	shaileshwari4039426@agentforce.com		Set new password for user Shaileshwari Mamidikayalapalli	Manage Users	
9/26/2025, 5:57:17 AM PDT	shaileshwari4039426@agentforce.com		Set new password for user Shaileshwari Mamidikayalapalli	Manage Users	
9/26/2025, 12:33:05 AM PDT	shaileshwari4039426@agentforce.com		Deactivated flow with Name "Patient__c" and Unique Name "Patient_c"	Flows	
9/26/2025, 12:33:05 AM PDT	shaileshwari4039426@agentforce.com		Deleted flow version #1 "Patient__c" for flow with Unique Name "Patient_c"	Flows	
9/26/2025, 12:33:04 AM PDT	shaileshwari4039426@agentforce.com		Created flow version #1 "Patient__c" for flow with Unique Name "Patient_c"	Flows	
9/26/2025, 12:33:04 AM PDT	shaileshwari4039426@agentforce.com		Deactivated flow with Name "Patient__c" and Unique Name "Patient_c"	Flows	
9/26/2025, 12:32:36 AM PDT	shaileshwari4039426@agentforce.com		Deleted flow version #1 "Patient__c" for flow with Unique Name "Patient_c"	Flows	
9/26/2025, 12:32:36 AM PDT	shaileshwari4039426@agentforce.com		Created flow version #1 "Patient__c" for flow with Unique Name "Patient_c"	Flows	
9/26/2025, 12:32:35 AM PDT	shaileshwari4039426@agentforce.com		Created flow with Name "Patient__c" and Unique Name "Patient_c"	Flows	
9/26/2025, 12:31:46 AM PDT	shaileshwari4039426@agentforce.com		Set new password for user Shaileshwari Mamidikayalapalli	Manage Users	
9/25/2025, 11:10:36 PM PDT	shaileshwari4039426@agentforce.com				

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