

LoanEase: Salesforce Loan Management CRM

Phase 9: Reporting, Dashboards & Security Review

Reports Created

- Loan Overview Report (Joined Report)
 - Purpose: Consolidates Loans, EMIs, and Payments in a single report for comprehensive tracking.
 - Report Type: Joined Report
 - Blocks Used:
 - Loans Block: Loan Number, Loan Type, Status, Loan Amount
 - EMIs Block: EMI Name, EMI Due Date, EMI Amount, Status
 - Payments Block: Payment Name, Amount Paid, Status, Payment Date, Payment Mode

Report Types | Salesforce | Package Usage | Salesforce | NamaVenkatKarthik/Loan | Hey hi i am doing sales | Loan Overview Report | Salesforce Project Loan E

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Joined Report
Loan Overview Report

Q Add Chart Filter Copy Edit

Loans Loans block 1				EMIs EMIs block 1				Payments Payments block 1				
Loan: Loan Nu...	Loan Type	Status	Loan Amount	EMI: EMI Name	EMI Due Date	EMI Amount	Status	Payme...	A...	Status	Pay...	Payme...
1 LN001-Priya Rao	-	Approved	₹100,000	EMI001	5/1/2025	₹9,000	Overdue	PMT001	₹9,000	Success	5/3/2025	Online
LN002-Arun Singh	-	Pending	₹888,000	EMI002	6/1/2025	₹9,000	Overdue	PMT002	₹9,000	Success	6/3/2025	Bank Transfer
3 LN006-Kiran Patel	Education Loan	Closed	₹800,000	Priya Car EMI 1	10/1/2025	₹6,375	Due	Kiran EMI 1 Pay	₹16,500	Success	7/2/2021	Bank Transfer
4 LN004-Priya Singh	Car Loan	Pending	₹298,000	Aman Home EMI 1	9/9/2025	₹8,100	Paid	Aman EMI 1 Pay	₹8,100	Success	9/14/2025	Online
5 LN003-Aman Verma	Home Loan	Approved	₹500,000	Kiran Edu- EMI 1	2/1/2021	₹16,500	Paid	Ravi EMI 1 Pay	₹7,100	Success	8/12/2025	Cash
6 LN005-Ravi Shah	Personal Loan	Approved	₹150,000	Ravi PL- EMI 1	8/12/2025	₹7,100	Paid	Aman EMI 2 PY	₹7,100	Failed	-	-
7 LN007	Personal Loan	Approved	₹100,000	Aman Home EMI 2	10/10/2025	₹8,100	Due					
8 LN008	Personal Loan	Pending	₹500,000	EMI001	2/1/2025	₹8,333	Due					
9 LN009	Personal Loan	Approved	₹250,000	EMI002	3/1/2025	₹8,333	Due					
10 LN007	Personal Loan	Approved	₹100,000	EMI001	4/1/2025	₹11,696	Due					
11 LN008	Personal Loan	Pending	₹500,000	EMI001	5/15/2025	₹20,833	Due					
12 LN009	Personal Loan	Approved	₹250,000									

utilityComponent

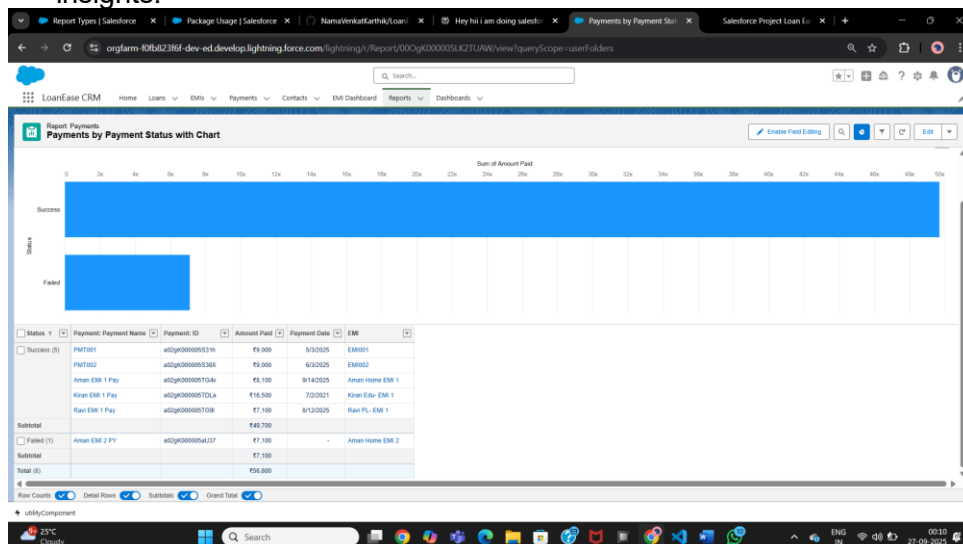
25°C
Light rain

Search

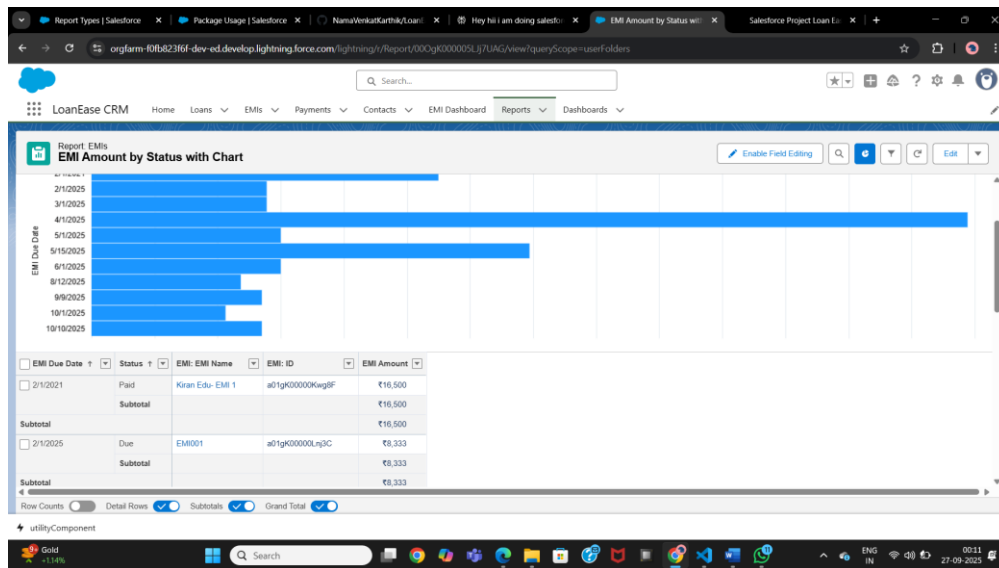
Chrome | Edge | File Explorer | Mail | Calendar | Teams | OneDrive | Outlook | WhatsApp | Signal | Telegram | Messenger | Zoom | Slack | Discord | Spotify | Netflix | Amazon Prime Video | Hulu | HBO Max | Disney+ | Apple TV+ | YouTube | YouTube Music | Google Play Store | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | 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Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play Movies & TV | Google Play Books | Google Play Music | Google Play Newsstand | Google Play Games | Google Play 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Other Reports

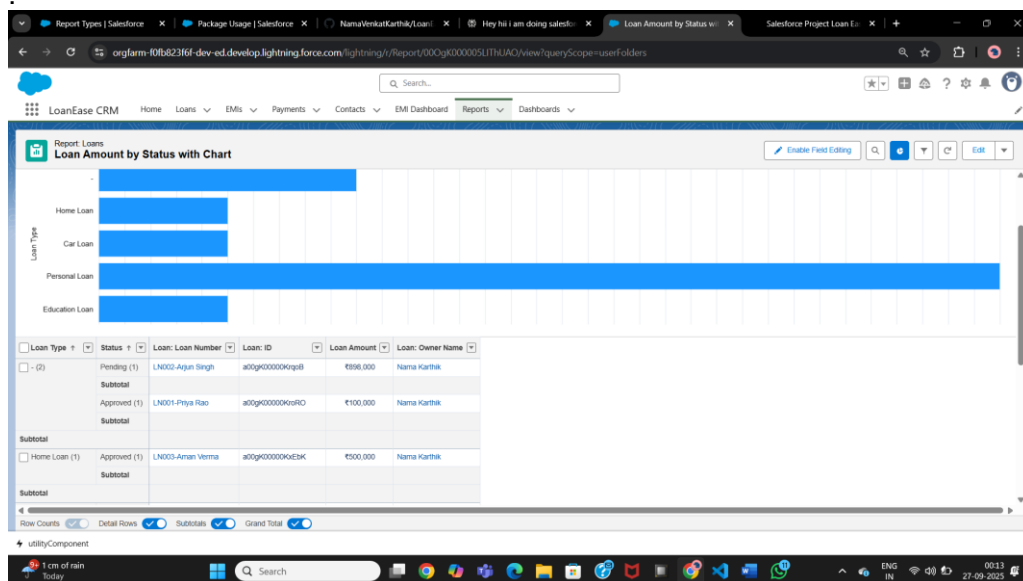
- Payments by Payment Status with Chart – Visualizes payment statuses for quick insights.



- EMI Amount by Status with Chart – Displays EMI totals grouped by status.

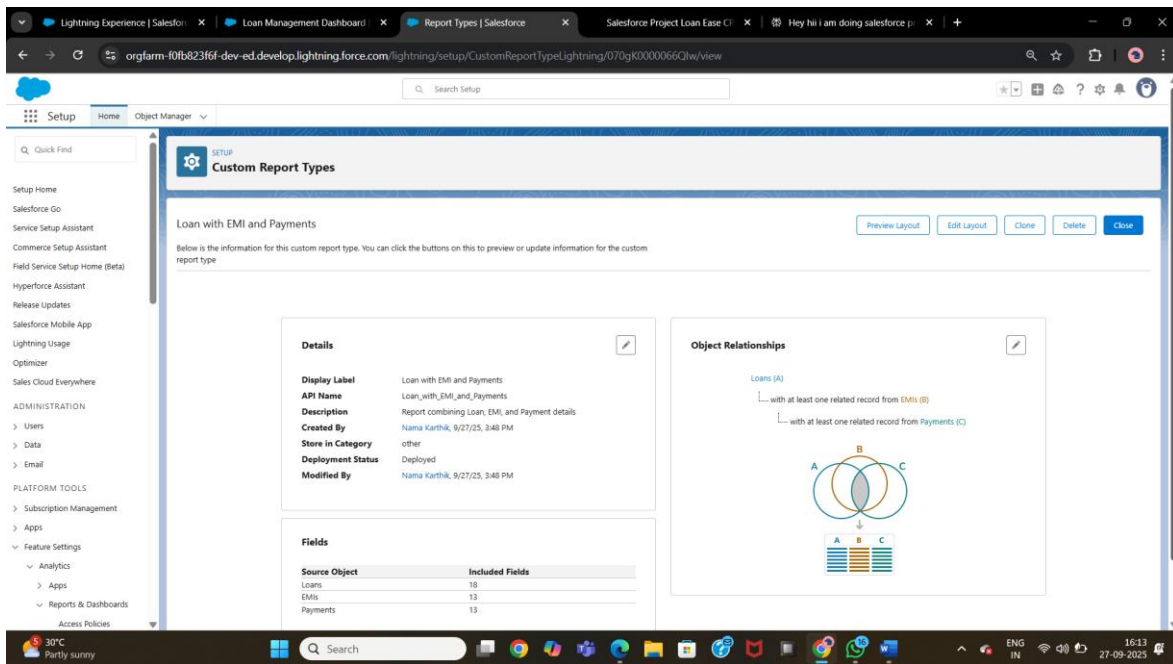


- Loan Amount by Status with Chart – Summarizes loan amounts based on status.



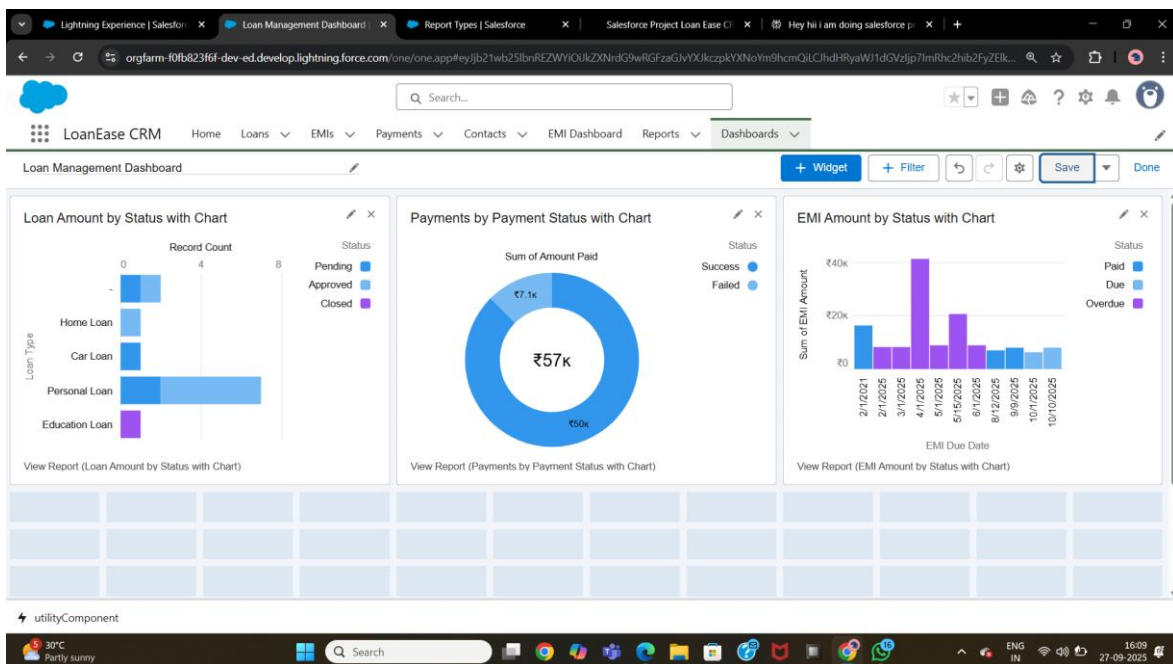
Report Types

- Created **Custom Report Types** for reporting across related objects:
 - Loans with EMIs**
 - Loans with Payments**
 - Joined report combining Loans, EMIs, and Payments**
- These report types allow building reports that pull data from multiple objects in one view.
- Enabled the **System Administrator** profile to access these report types.



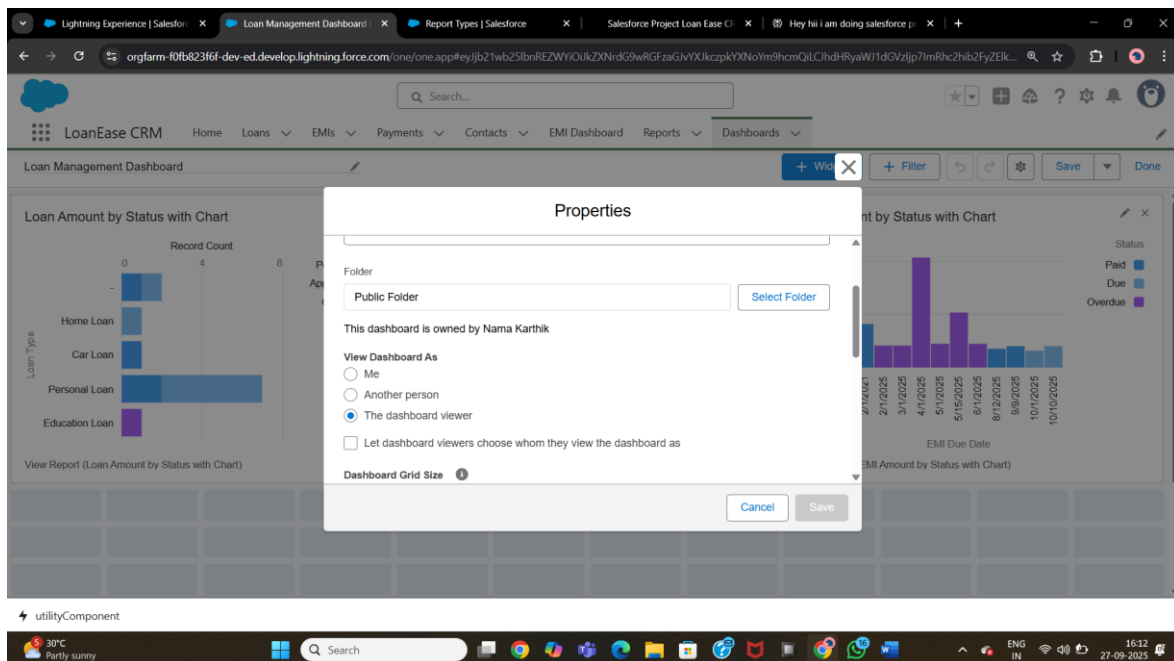
Dashboards

- Created **Dashboards** to visualize key metrics from Loans, EMIs, and Payments.
- Types of dashboards created:
 - Loan Overview Dashboard** – Summary of Loan Amounts by Status.
 - EMI Amount by Status** – Tracks EMIs that are Paid, Due, or Overdue.
 - Payments by Payment Status** – Shows Payments in Success, Failed, or Pending status.
- Used **Charts** (bar, pie, or line) to make dashboards visually informative.
- Linked **Reports** to dashboard components for real-time data updates.
- Created **Loan__c**, **EMI__c**, **Payment__c**, **API_Call_Log__c** objects.



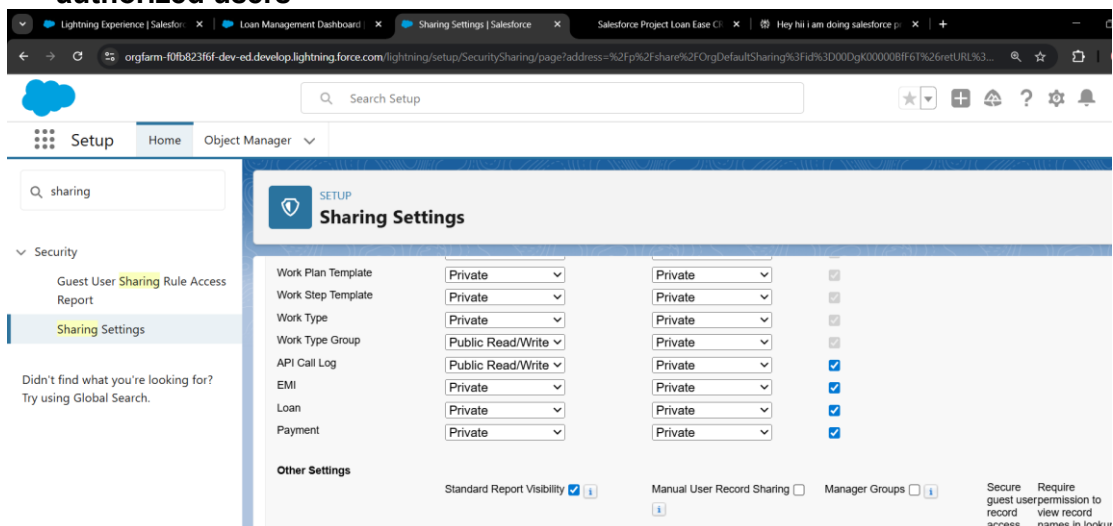
Dynamic Dashboards

- Converted standard dashboards into **Dynamic Dashboards** to display data according to the **viewing user's access**.
- Enabled managers or different roles to see metrics without creating multiple copies of dashboards.
- Dynamic dashboards reflect real-time changes in **Loans, EMIs, and Payments** based on the logged-in user's permissions.
- Ensures **data security** while providing visibility to relevant users.



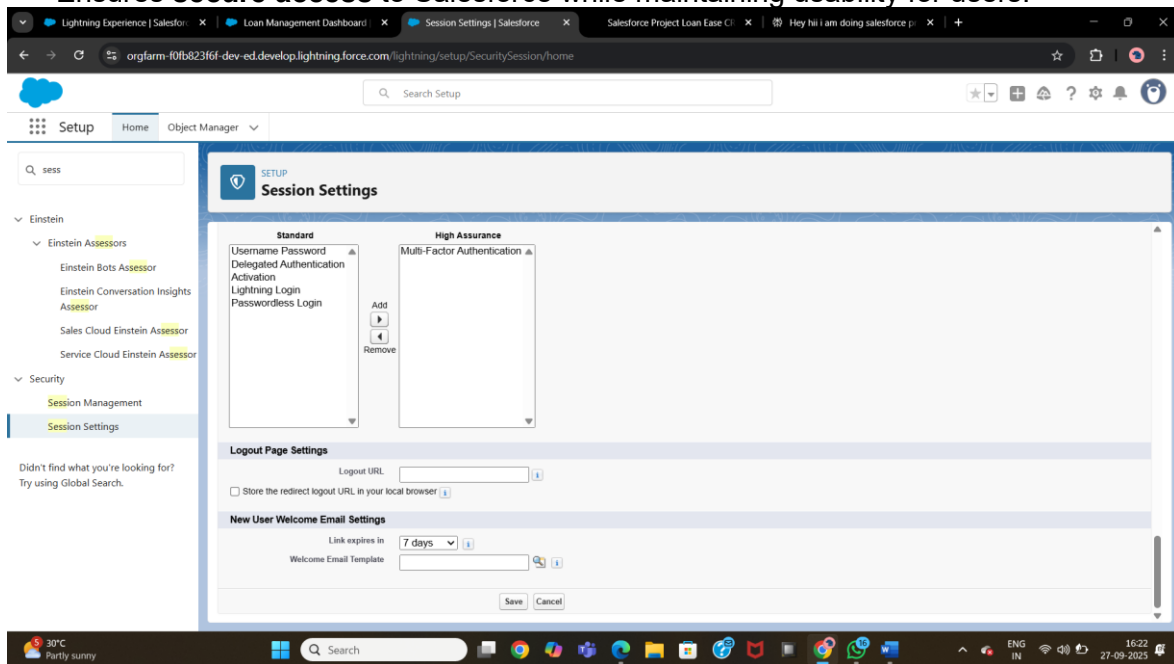
Sharing Settings

- Configured **Organization-Wide Defaults (OWD)** to control access to records:
 - Loan – Private**
 - EMI – Private**
 - Payment – Private**
- Enabled **Grant Access Using Hierarchies** so managers and higher roles can access records of users below them.
- Ensures sensitive financial data like loans and payments are **only visible to authorized users**



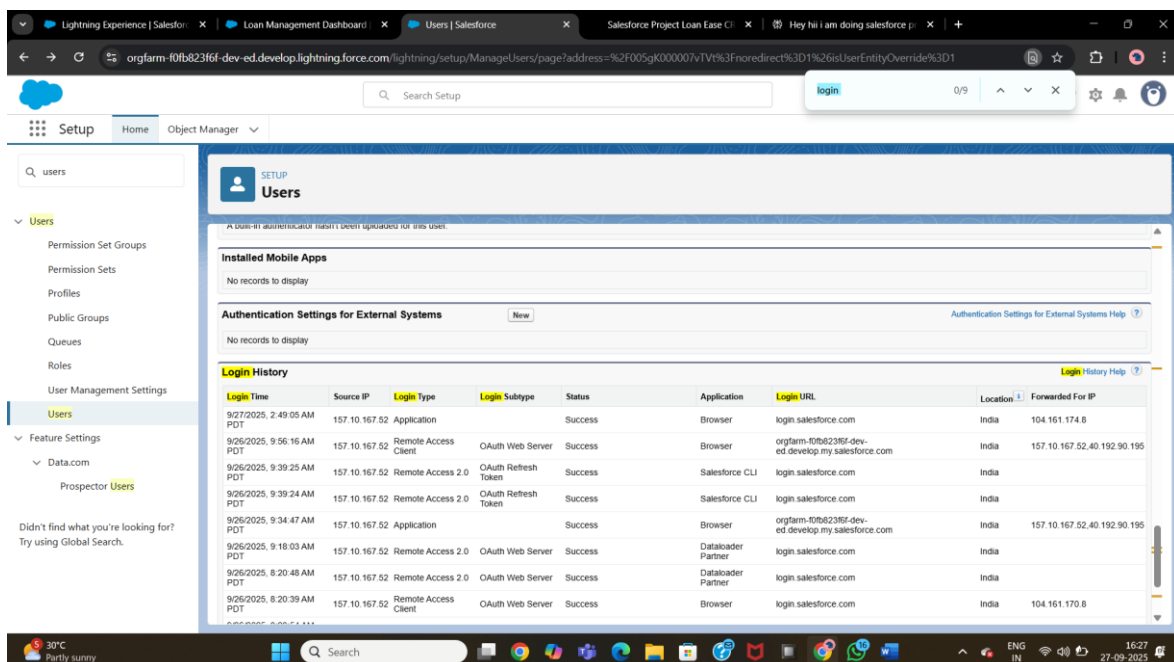
Session Settings

- Default session settings are **maintained** for security and user experience.
- Key points configured or observed:
 - Login Session Timeout:** Default Salesforce timeout applied.
 - Login Access Policies:** Standard policies in place; no custom changes made.
 - Multi-Factor Authentication (MFA):** Not explicitly modified, default high-assurance settings retained.
- **Logout Page Settings:** Default logout URL used.
- Ensures **secure access** to Salesforce while maintaining usability for users.



Login IP Ranges

- No custom IP ranges were set; default Salesforce settings are applied.
- Users can log in from any IP unless restricted by profile-level IP ranges.



Audit Trail

- Setup Audit Trail shows recent changes including:
- Updates to Organization-Wide Defaults (Loan, EMI, Payment objects)
- Changes to Apex classes (LoanManager, LoanRecordDisplayController, PaymentProcessor, OverdueEMIBatch, etc.)
- Records the **Date**, **User**, **Action**, and **Section** for all changes.
- Can download the last six months of audit data as an Excel (.csv) file for record-keeping.

The screenshot displays the Salesforce Setup Audit Trail interface. The browser address bar shows the URL: `orgfarm-10fb823f6f-dev-ed.develop.lightning.force.com/lightning/setup/SecurityEvents/home`. The page title is "View Setup Audit Trail". The left sidebar shows the "Setup" menu with "Security" expanded and "View Setup Audit Trail" selected. The main content area displays a table of audit events.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/27/2025, 3:50:30 AM PDT	karthiknasa3558@agentforce.com		Finished Organization-Wide Defaults update	Sharing Defaults	
9/27/2025, 3:50:25 AM PDT	karthiknasa3558@agentforce.com		Changed default internal access for Loan from Public Read/Write to Private	Sharing Defaults	
9/27/2025, 3:50:24 AM PDT	karthiknasa3558@agentforce.com		Changed default internal access for EMI from Public Read/Write to Private	Sharing Defaults	
9/27/2025, 3:50:21 AM PDT	karthiknasa3558@agentforce.com		Changed default internal access for Payment from Public Read/Write to Private	Sharing Defaults	
9/27/2025, 3:50:10 AM PDT	karthiknasa3558@agentforce.com		Started default internal access update for EMI from Public Read/Write to Private	Sharing Defaults	
9/27/2025, 3:50:10 AM PDT	karthiknasa3558@agentforce.com		Started default internal access update for Payment from Public Read/Write to Private	Sharing Defaults	
9/27/2025, 3:50:10 AM PDT	karthiknasa3558@agentforce.com		Started default internal access update for Loan from Public Read/Write to Private	Sharing Defaults	
9/27/2025, 3:50:09 AM PDT	karthiknasa3558@agentforce.com		Started Organization-Wide Defaults update	Sharing Defaults	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed PaymentProcessorHandler Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed PaymentProcessor Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed PaymentFuture Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed OverdueEMIScheduler Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed OverdueEMIScheduler Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed OverdueEMIBatch Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed OverdueEMIBatch Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanRepaymentScheduler Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanRepaymentBatchTest Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanRepaymentBatch Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanRecordDisplayControllerTest Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanRecordDisplayController Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanRecordDisplayController Apex Class code	Apex Class	
9/26/2025, 10:58:22 AM PDT	karthiknasa3558@agentforce.com		Changed LoanManager Apex Class code	Apex Class	

Download setup audit trail for last six months (.Excel .csv file)