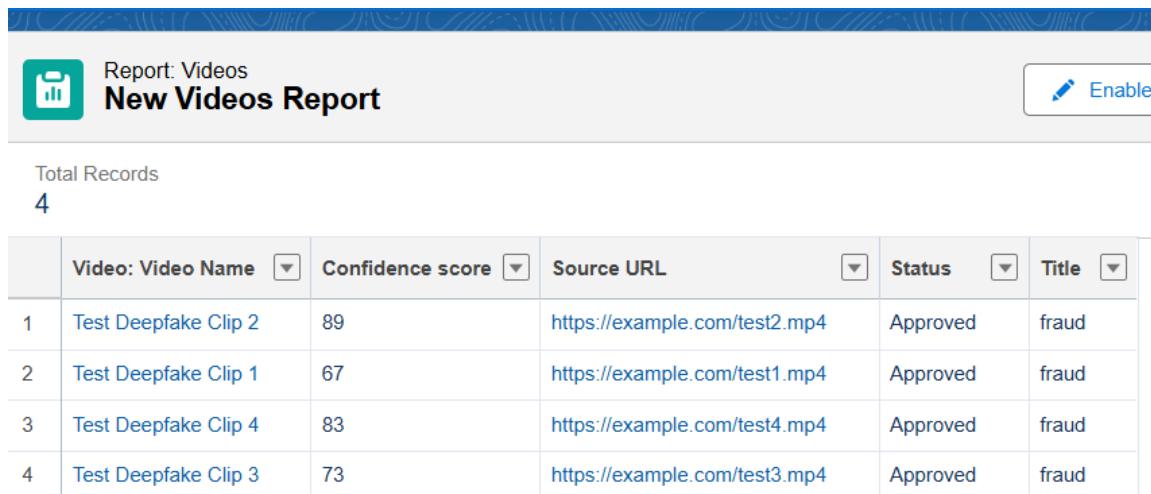

Phase 9: Reporting, Dashboards & Security Review

1. Reports

Salesforce reports let you analyze and present your data. There are **4 main types**:

- **Tabular Report**
 - Simple list of records, like a spreadsheet.
 - Cannot be used as a source for dashboards if row limit > 2000.
- **Summary Report**
 - Groups records by row, allows subtotals.
 - Useful for metrics like “Revenue by Region”.
- **Matrix Report**
 - Groups records by rows and columns.
 - Best for comparing data across multiple dimensions.
- **Joined Report**
 - Combines multiple reports into a single view.
 - Useful to show data from related objects together.



The screenshot shows a Salesforce report titled "Report: Videos" and "New Videos Report". The report displays a table with the following data:

	Video: Video Name	Confidence score	Source URL	Status	Title
1	Test Deepfake Clip 2	89	https://example.com/test2.mp4	Approved	fraud
2	Test Deepfake Clip 1	67	https://example.com/test1.mp4	Approved	fraud
3	Test Deepfake Clip 4	83	https://example.com/test4.mp4	Approved	fraud
4	Test Deepfake Clip 3	73	https://example.com/test3.mp4	Approved	fraud

2. Report Types

- Define which records and fields are available in reports.
- **Standard Report Types:** Pre-built by Salesforce for standard objects.
- **Custom Report Types:** Created for custom objects or specific relationships.
- Allows control over which related objects appear in reports.

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Account History	Standard

3. Dashboards

Visual representation of report data.

- Components: Charts, Tables, Metrics, Gauges.
- Can include data from multiple reports.
- Refresh options: Manual or scheduled.

Deepfake CRM Dashboard

Tracks video uploads, detections, and confidence scores

As of Sep 25, 2025, 2:26 AM · Viewing as shreyansh dubey

New Videos Report

Video: Vi...	Con...	Source URL	St...
Test Deepfake Clip 1	67	https://example.com	Appr
Test Deepfake Clip 2	89	https://example.com	Appr
Test Deepfake Clip 3	73	https://example.com	Appr

View Report (New Videos...) As of Sep 25, 2025, 2:26 AM

4. Dynamic Dashboards

- Display data based on the **logged-in user's access**.
- Eliminates the need to create multiple dashboards for different roles.
- Maximum of 5 dynamic dashboards per org (for Enterprise Edition).

View Dashboard As

- Me
- Another person
- The dashboard viewer
-

5. Sharing Settings

Control who can view and edit records:

- **Organization-Wide Defaults (OWD):** Base level of access.
- **Role Hierarchy:** Users higher in hierarchy inherit access of lower roles.
- **Sharing Rules:** Automatic exceptions to OWD.
- **Manual Sharing:** Individual record access.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The top navigation bar includes 'SETUP' and the 'Sharing Settings' page title. A sidebar on the right provides 'Help for this Page'. The main content area displays sharing settings for the 'Video' object. A dropdown menu 'Manage sharing settings for:' is set to 'Video'. A button 'Disable External Sharing Model' is visible. The 'Default Sharing Settings' section shows 'Organization-Wide Defaults' for 'Video' object, where 'Default Internal Access' is 'Public Read/Write' and 'Default External Access' is 'Private'. A checkbox 'Grant Access Using Hierarchies' is checked. The 'Other Settings' section includes options for 'Manager Groups', 'Secure guest user record access' (which is checked), and 'Require permission to view record names in lookup fields'.

6. Field Level Security (FLS)

- Controls who can view or edit fields in objects.
- Configured via Profiles or Permission Sets.
- Essential to protect sensitive information like salaries or personal data.

7. Session Settings

- Control user session behavior:
 - Session timeout duration.
 - Force logout on browser close.
 - High-security session settings for sensitive orgs.

The screenshot shows the 'Session Settings' page under the 'Session Timeout' section. It includes a dropdown for 'Timeout Value' set to '1 hour', a checkbox for 'Disable session timeout warning popup' (unchecked), and a checked checkbox for 'Force logout on session timeout'. Below this is the 'Session Settings' section with several checkboxes:

- ✓ Lock sessions to the IP address from which they originated
- ✓ Lock sessions to the domain in which they were first used
- ☐ Terminate all of a user's sessions when an admin resets that user's password i
- ✓ Force relogin after Login-As-User
- ☐ Require HttpOnly attribute
- ☐ Use POST requests for cross-domain sessions
- ☐ Enforce login IP ranges on every request i
- ☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

8. Login IP Ranges

- Restrict login access by IP addresses per profile.
- Useful to secure org access from trusted networks only.

Login IP Ranges				New	Login IP Ranges Help <small>i</small>
Action	IP Start Address	IP End Address	Description		
Edit Del	0.0.0.0	255.255.255.255			

G. Audit Trail

- Tracks **changes in setup and configuration**.
- Maintains history of admin actions for up to **180 days**.
- Helps in troubleshooting or compliance audits.

The screenshot shows the 'View Setup Audit Trail' page in the Salesforce Setup section. The page title is 'View Setup Audit Trail'. A message at the top says, '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).'. Below this is a table with the following data:

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 2:41:31 AM PDT			Added Login Ip Range to Custom: Sales Profile from 0.0.0 to 255.255.255.255	Manage Users	
9/25/2025, 2:40:03 AM PDT			Created profile shreyansh: Cloned from profile Standard User	Manage Users	
9/25/2025, 2:34:11 AM PDT			Created new role Manager	Manage Users	
9/25/2025, 2:33:56 AM PDT			Created new role Assisstant Manager1	Manage Users	
9/25/2025, 2:33:32 AM PDT			Created new role Director	Manage Users	
9/25/2025, 2:16:16 AM PDT			Added value Approved to Status picklist with color Assigned dynamically on Videos	Custom Objects	
9/25/2025, 2:09:08 AM			Created custom object tab: Videos	Custom Tabs	

Tip for Phase G Implementation:

- Create a **summary report**, then use it in a **dashboard**.
- Test **dynamic dashboards** for different user roles.
- Check **field-level security** to ensure sensitive data is hidden.
- Review **audit trail** regularly to monitor org changes.