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## Phase 9: Reporting, Dashboards & Security Review

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### 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.

Report: Videos					
New Videos Report					
Total Records					
4					
	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.

The screenshot shows the 'Create Report' interface. On the left is a 'Category' sidebar with a scrollable list: 'Recently Used', 'All' (highlighted), 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', and 'Price Books'. The main area is titled 'Select a Report Type' and contains a search bar 'Search Report Types...'. Below the search bar is a table with two columns: 'Report Type Name' and 'Category'. The table lists several report types, all categorized as 'Standard', each with a dropdown arrow on the right.


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

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## 3. Dashboards

Visual representation of report data.

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

Dashboard

## 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	<a href="https://example.com">https://example.com</a>	Appri
Test Deepfake Clip 2	89	<a href="https://example.com">https://example.com</a>	Appri
Test Deepfake Clip 3	73	<a href="https://example.com">https://example.com</a>	Appri

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

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#### 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
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## 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 Salesforce 'Sharing Settings' page. At the top, there's a 'SETUP' link and a 'Sharing Settings' header. Below this, a sub-header 'Sharing Settings' is followed by a help link 'Help for this Page'. A paragraph explains that the page displays organization's sharing settings and provides a link to 'Background Jobs'. A dropdown menu 'Manage sharing settings for:' is set to 'Video'. Below this is a button 'Disable External Sharing Model'. The main section is 'Default Sharing Settings', which includes a table for 'Organization-Wide Defaults' and a section for 'Other Settings'.

**Organization-Wide Defaults**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Video	Public Read/Write	Private	<input checked="" type="checkbox"/>

**Other Settings**

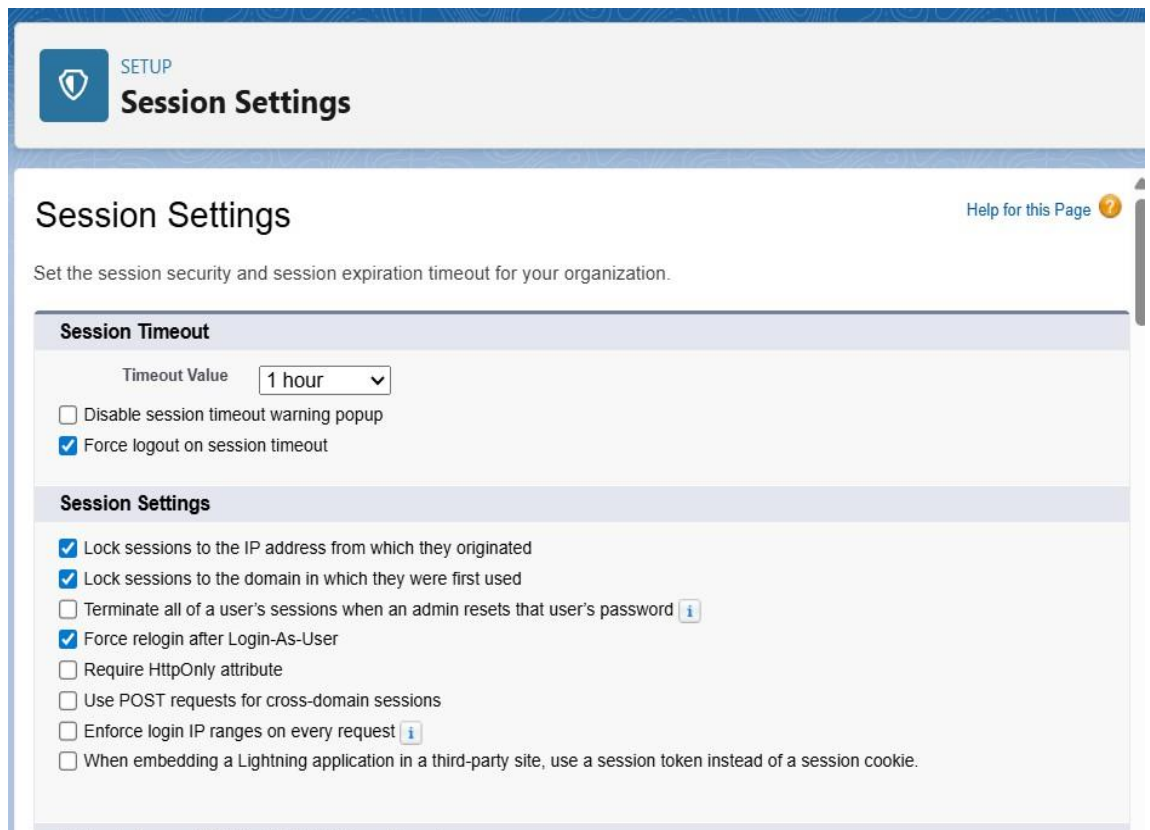
- Manager Groups ☐
- Secure guest user record access ☒
- Require permission to view record names in lookup fields ☐

## 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.



**Session Settings**

Set the session security and session expiration timeout for your organization.

**Session Timeout**

Timeout Value: 1 hour

☐ Disable session timeout warning popup

☒ Force logout on session timeout

**Session Settings**

☒ 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

☒ Force relogin after Login-As-User

☐ Require HttpOnly attribute

☐ Use POST requests for cross-domain sessions

☐ Enforce login IP ranges on every request

☐ 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
Action	IP Start Address	IP End Address	Description
<a href="#">Edit</a>   <a href="#">Del</a>	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.

 **SETUP**

**View Setup Audit Trail**

**View Setup Audit Trail** [Help for this Page](#)

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 ?
9/25/2025, 2:41:31 AM PDT			Added Login Ip Range to Custom: Sales Profile from 0.0.0.0 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 Assistant 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.