## *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.

Report: Videos
**New Videos Report**

Enable Field

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.

### Create Report

**Category**

Recently Used

**All**

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books

**Select a Report Type**

🔍 Search Report Types...

| 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.

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 | 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

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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.
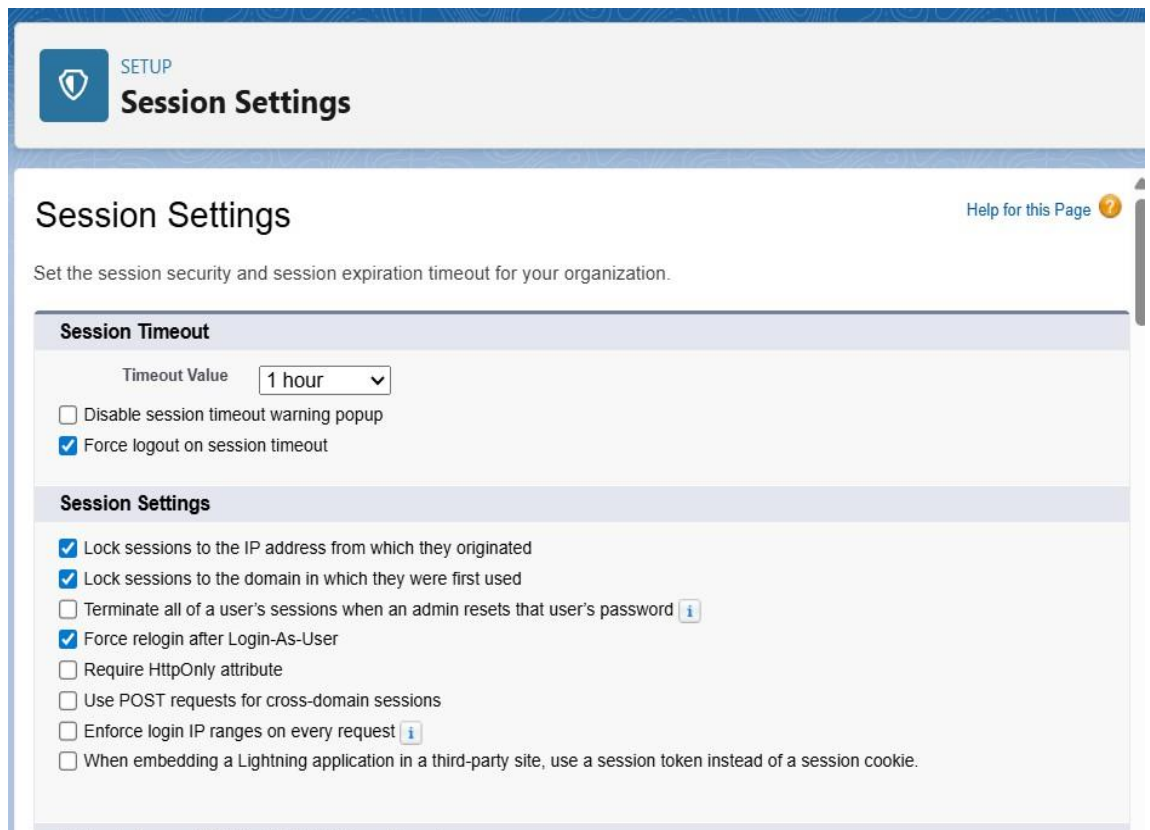
- **Manual Sharing:** Individual record access.



### 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.



## 8. Login IP Ranges

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

### 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.



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🟩 **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.