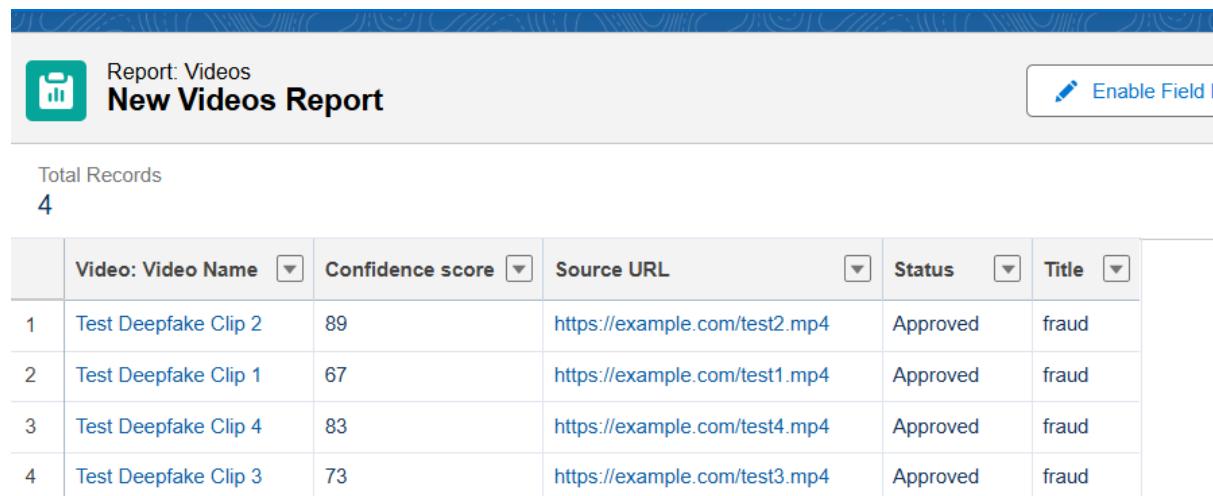

Phase 9: Reporting, Dashboards & Security Review

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	<input type="button" value="▼"/>
Contacts & Accounts	Standard	<input type="button" value="▼"/>
Accounts with Partners	Standard	<input type="button" value="▼"/>
Account with Account Teams	Standard	<input type="button" value="▼"/>
Accounts with Contact Roles	Standard	<input type="button" value="▼"/>
Accounts with Assets	Standard	<input type="button" value="▼"/>
Contacts with Assets	Standard	<input type="button" value="▼"/>
Account History	Standard	<input type="button" value="▼"/>

3. Dashboards

Visual representation of report data.

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

The screenshot shows a dashboard titled "Deepfake CRM Dashboard" with a subtitle "Tracks video uploads, detections, and confidence scores". It indicates the time as "As of Sep 25, 2025, 2:26 AM" and the user as "Viewing as shreyansh dubey". A modal window titled "New Videos Report" displays a table with three rows of data:

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

At the bottom of the modal, there is a link "View Report (New Videos...)" and the timestamp "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 blue header bar contains the title 'Sharing Settings'. Below it, a main section is titled 'Sharing Settings' with a 'Help for this Page' link. A note states: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.' A dropdown menu 'Manage sharing settings for:' is set to 'Video'. A button 'Disable External Sharing Model' is visible. The 'Default Sharing Settings' section has a sub-section 'Organization-Wide Defaults' with an 'Edit' button and a 'Grant Access Using Hierarchies' checkbox checked. A table shows settings for the 'Video' object: 'Default Internal Access' is 'Public Read/Write' and 'Default External Access' is 'Private'. The 'Other Settings' section includes options for 'Manager Groups', 'Secure guest user record access' (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 'SETUP' tab. At the top, there's a 'Session Timeout' section with a dropdown set to '1 hour' and two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). Below this is a 'Session Settings' section containing several checked checkboxes: 'Lock sessions to the IP address from which they originated', 'Lock sessions to the domain in which they were first used', 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked).

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	Help
Action	IP Start Address	IP End Address	Description		
Edit Del	0.0.0.0	255.255.255.255			

9. 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 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).

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/25/2025, 2:41:31 AM PDT	dubeysreyansh20640@agentforce.com		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	dubeysreyansh20640@agentforce.com		Created profile shreyansh: Cloned from profile Standard User	Manage Users	
9/25/2025, 2:34:11 AM PDT	dubeysreyansh20640@agentforce.com		Created new role Manager	Manage Users	
9/25/2025, 2:33:56 AM PDT	dubeysreyansh20640@agentforce.com		Created new role Assistant Manager1	Manage Users	
9/25/2025, 2:33:32 AM PDT	dubeysreyansh20640@agentforce.com		Created new role Director	Manage Users	
9/25/2025, 2:16:16 AM PDT	dubeysreyansh20640@agentforce.com		Added value Approved to Status picklist with color Assigned dynamically on Videos	Custom Objects	
9/25/2025, 2:09:08 AM PDT	dubeysreyansh20640@agentforce.com		Created custom object tab: VirLpns	Custom Tabs	

Tip for Phase 9 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.