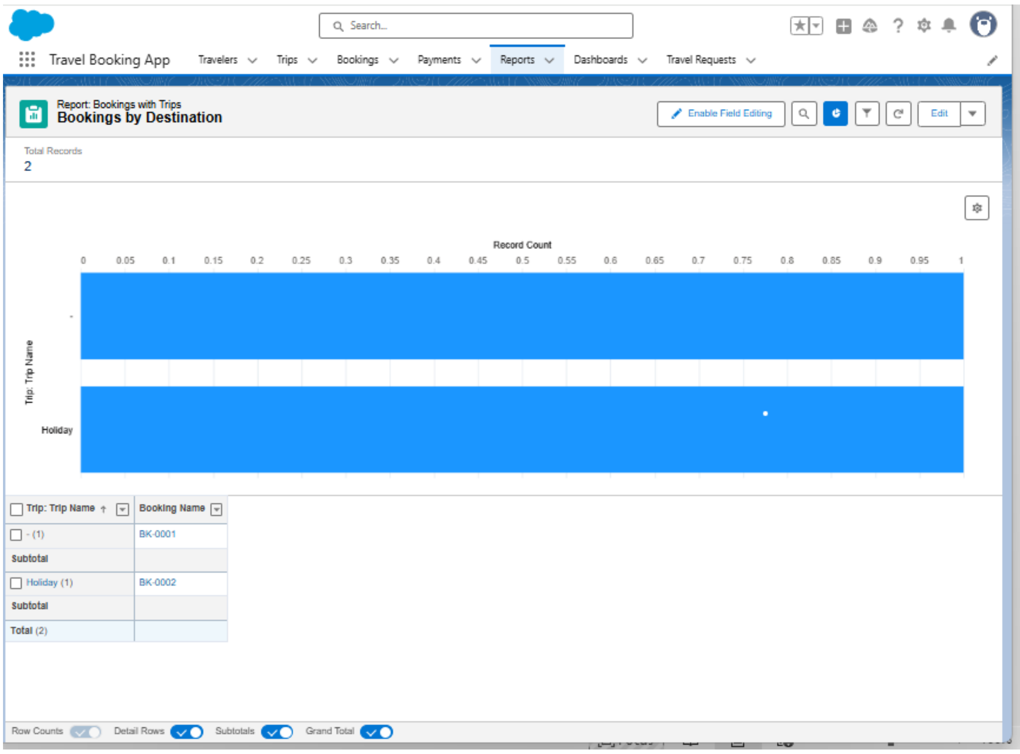
Phase 9: Reporting, Dashboards & Security Review

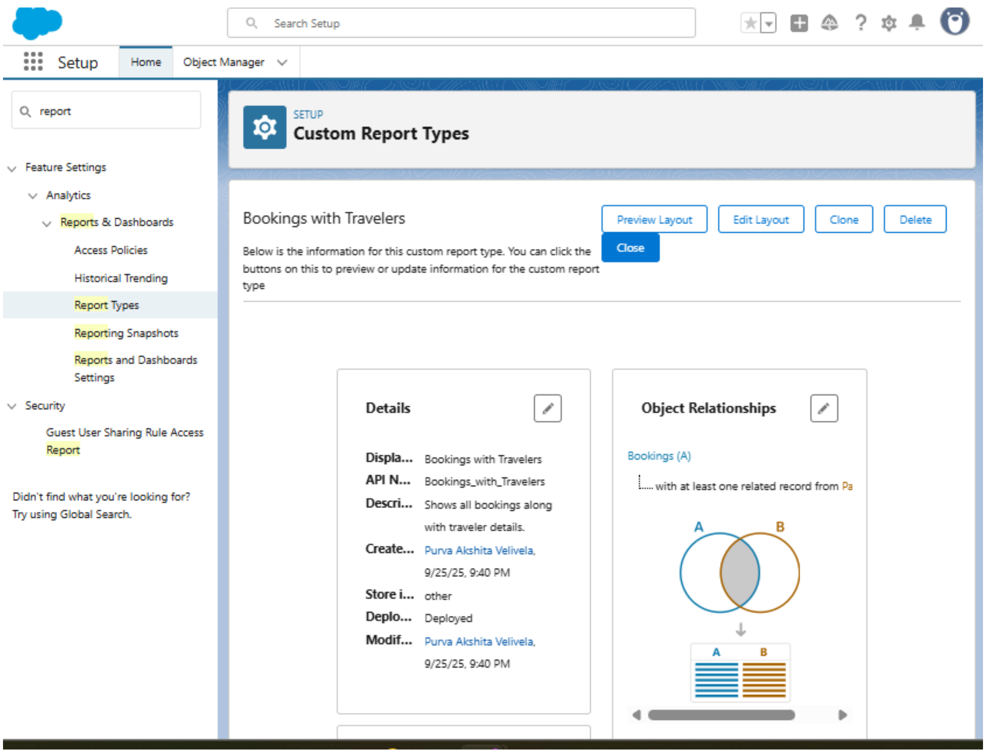
1. Reports (Tabular, Summary, Matrix):

1. Reports → New Report
2. Choose Report Type:
    - Bookings with Travelers → to see which traveler booked which car
    - Cars → for car availability
    - Travelers → for traveler list
3. Select Format:
    - Tabular → simple list
    - Summary → group by Car, Traveler, or Booking Status
    - Matrix → group by rows & columns (optional, only if needed)
4. Drag fields you want to display → Click Run
5. Save with a name → Example: Bookings by Traveler



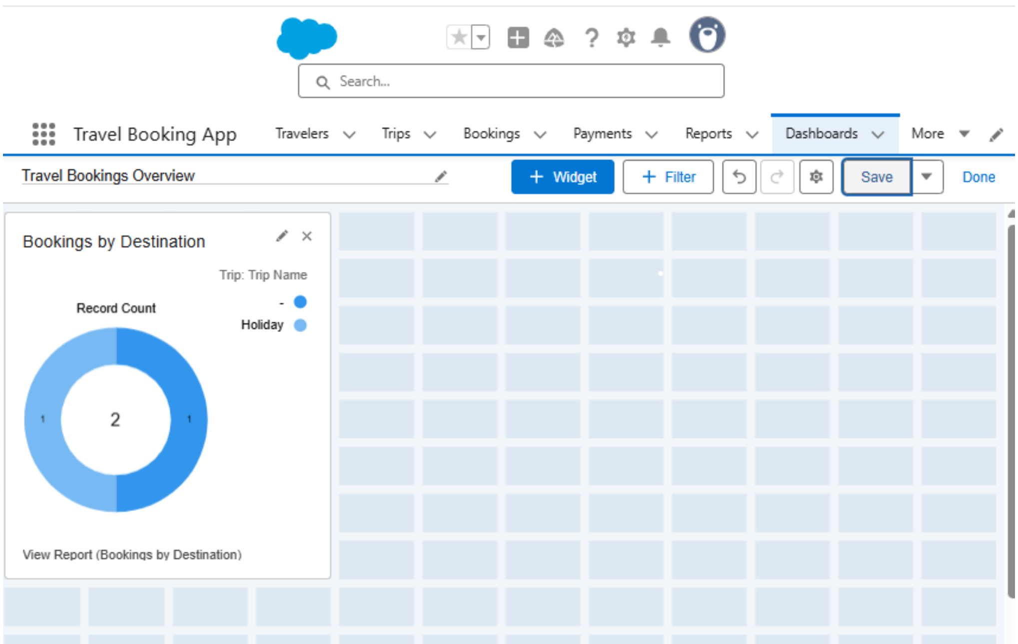
2. Report Types:

1. Setup → Quick Find → Report Types → New Custom Report Type
2. Primary Object → Booking
3. Related Object → Traveler (optional)
4. Give Name → Save
5. Now this report type is available when creating new reports.

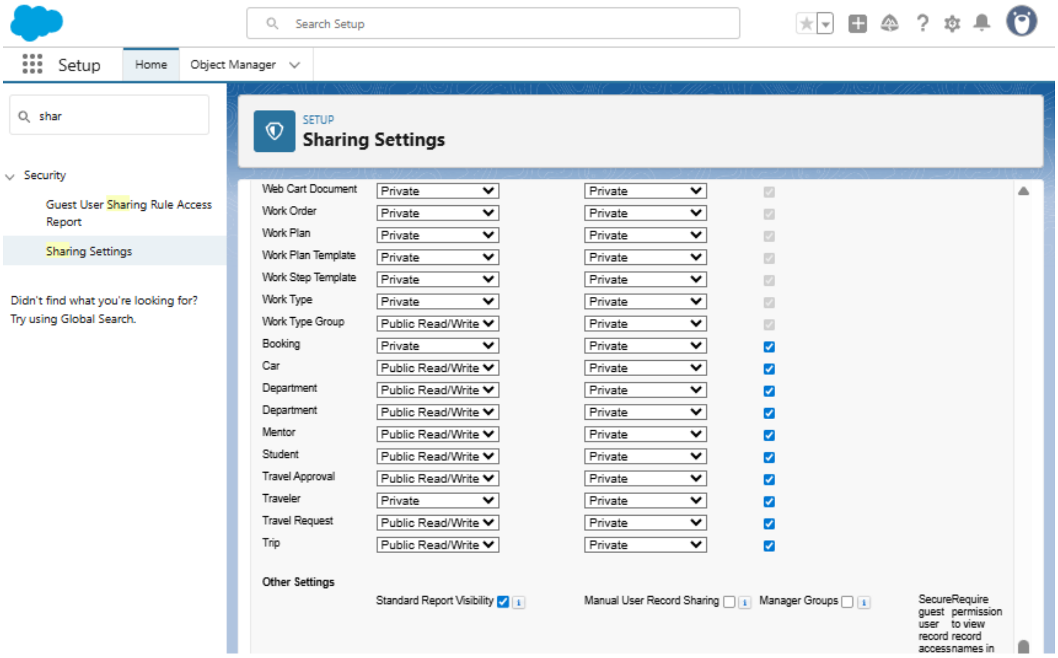


3. Dashboards:

1. Dashboards → New Dashboard
2. Enter Name → Folder → Create
3. Click + Component → Choose a report you created
4. Select Chart Type → e.g., Bar, Pie, Gauge
5. Repeat to add multiple components (optional)
6. Save → View Dashboard

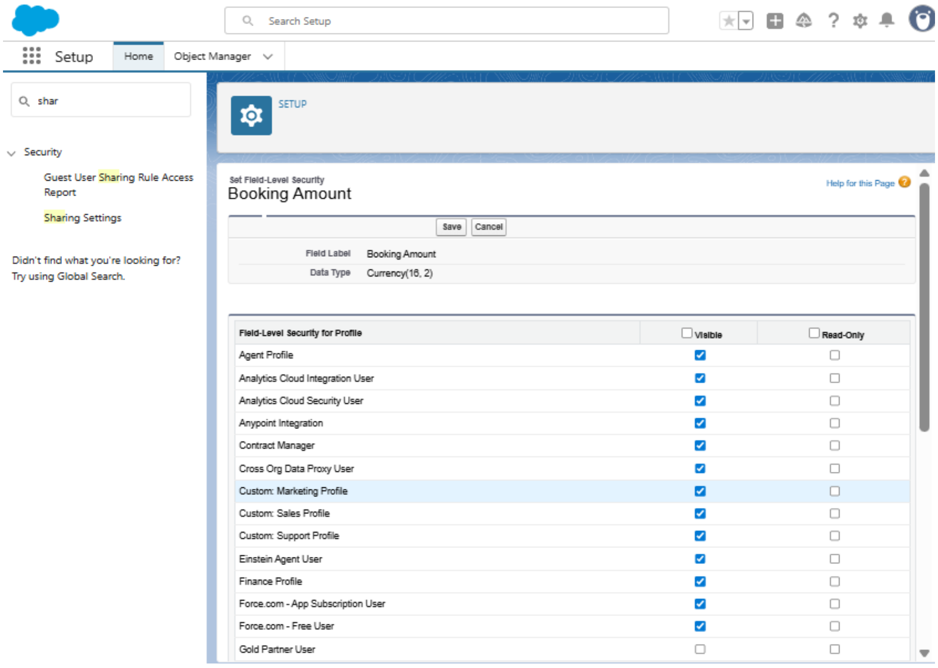


4. **Sharing Settings:**
    1. Setup → Quick Find → Sharing Settings
    2. Objects → Booking / Traveler / Car
    3. Set Default Internal Access → e.g., Private or Read/Write
    4. Set Default External Access (if community users exist) → e.g., Read Only
    5. Save



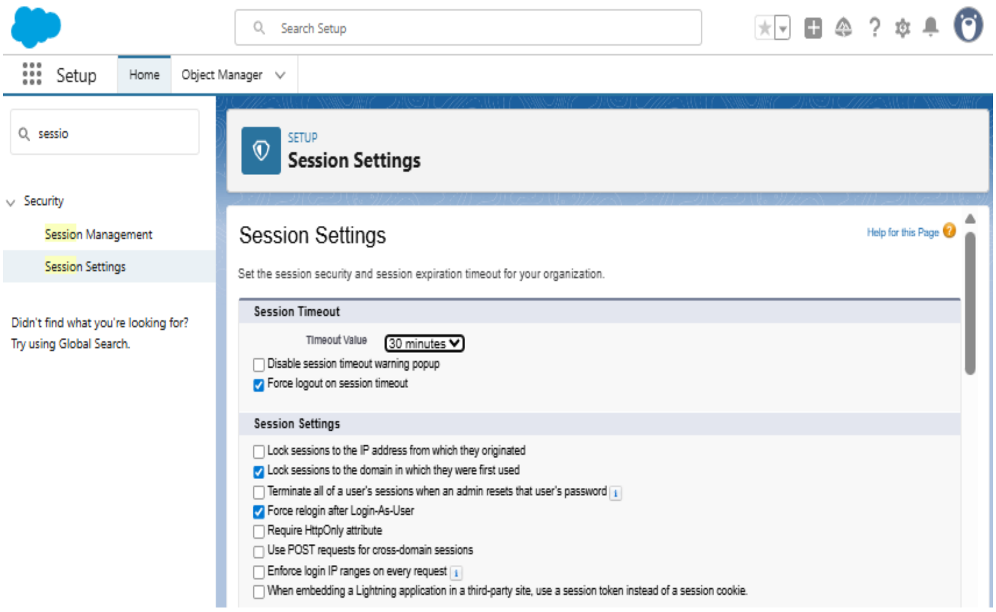
5. **Field Level Security:**

    1. Setup → Object Manager → Booking → Fields & Relationships
    2. Click a field → Set Field-Level Security
    3. Check/uncheck profiles → Save



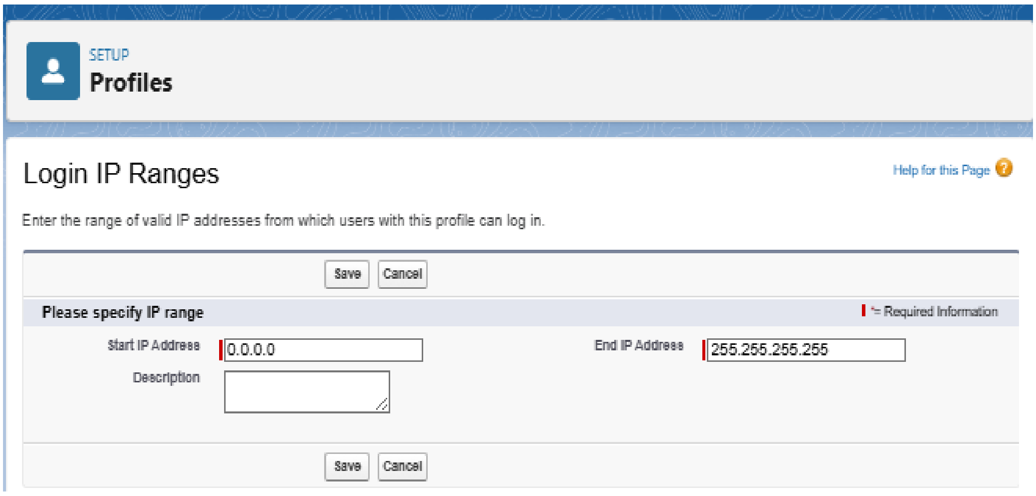
6. Session Settings:

1. Setup → Quick Find → Session Settings
2. Configure timeout → e.g., 30 minutes
3. Check force logout on browser close if needed → Save



7. Login IP Ranges:

1. Setup → Profiles → Select Profile (e.g., System Admin)
2. Scroll → Login IP Ranges → New
3. Enter Start & End IP → Save



8. Audit Trail: To track who made changes in the org

1. Setup → Quick Find → View Setup Audit Trail
2. Check last 6 months of changes → Download if needed