

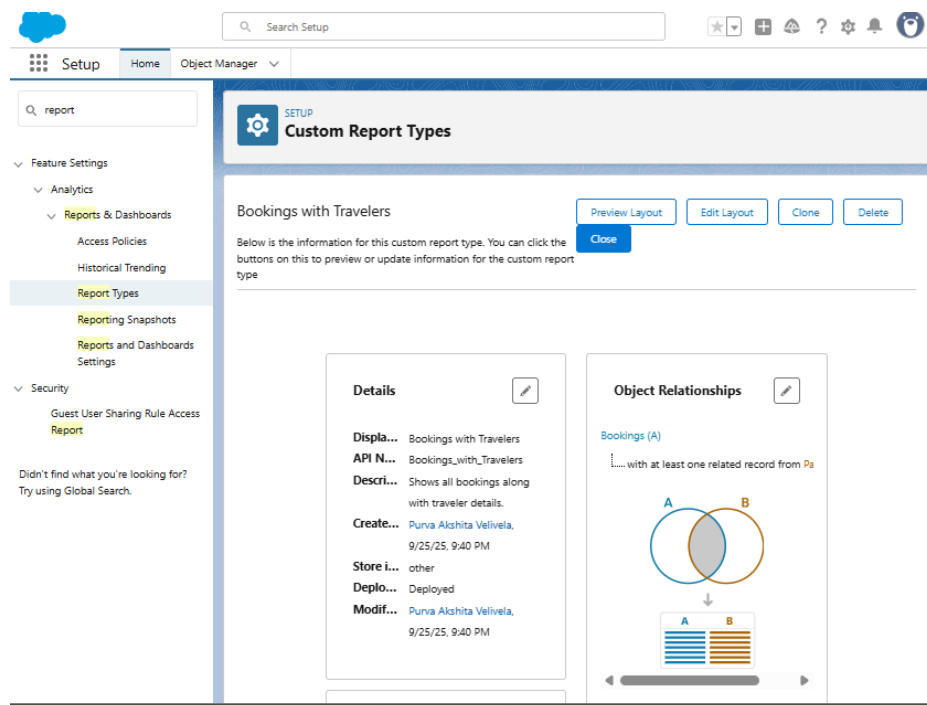
Phase 9: Reporting, Dashboards & Security Review

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.

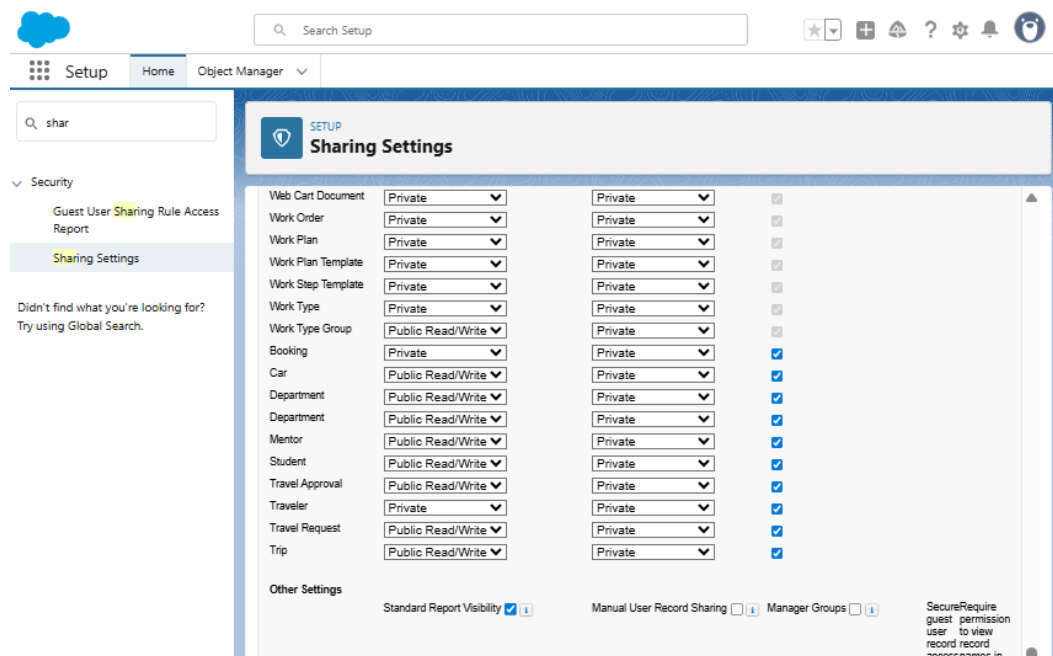


3. Dashboards:

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "shar" and a "Security" section with links to "Guest User Sharing Rule Access Report" and "Sharing Settings". The main content area is titled "Booking Amount" under "Set Field-Level Security". It includes a "Save" button and a table with "Field Label" (Booking Amount) and "Data Type" (Currency(16, 2)). Below this is a table for "Field-Level Security for Profile" with columns for "Visible" and "Read-Only".

Field-Level Security for Profile	Visible	Read-Only
Agent Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finance Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "sessio" and a "Security" section with links to "Session Management" and "Session Settings". The main content area is titled "Session Settings" under "SETUP". It includes a "Help for this Page" link and a description: "Set the session security and session expiration timeout for your organization." Below this are two sections: "Session Timeout" and "Session Settings".

Session Timeout

- Timeout Value: 30 minutes
- ☐ 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.

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

SETUP
Profiles

Login IP Ranges

Help for this Page ?

Enter the range of valid IP addresses from which users with this profile can log in.

Save Cancel

Please specify IP range ! Required Information

Start IP Address 0.0.0.0 End IP Address 255.255.255.255

Description

Save Cancel

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

Setup Home Object Manager

Search Setup

aud

Security

View Setup Audit Trail

Didn't find what you're looking for? Try using Global Search.

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).

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
9/25/2025, 9:55:09 AM PDT	purvaakshita527@agentforce.com		Added Login Ip Range to System Administrator from 0.0.0.0 to 255.255.255.255	Manage Users	
9/25/2025, 9:51:28 AM PDT	purvaakshita527@agentforce.com		Changed Session Timeout Value from 120 to 30 minutes	Session Settings	
9/25/2025, 9:48:27 AM PDT	purvaakshita527@agentforce.com		Finished Organization-Wide Defaults update	Sharing Defaults	
9/25/2025, 9:48:18 AM PDT	purvaakshita527@agentforce.com		Changed default internal access for Booking from Public Read/Write to Private	Sharing Defaults	
9/25/2025, 9:48:09 AM PDT	purvaakshita527@agentforce.com		Changed default internal access for Traveler from Public Read/Write to Private	Sharing Defaults	
9/25/2025, 9:47:57 AM PDT	purvaakshita527@agentforce.com		Started default internal access update for Booking from Public Read/Write to Private	Sharing Defaults	
9/25/2025, 9:47:57 AM PDT	purvaakshita527@agentforce.com		Started default internal access update for Traveler from Public Read/Write to Private	Sharing Defaults	
9/25/2025, 9:47:58 AM PDT	purvaakshita527@agentforce.com		Started Organization-Wide Defaults update	Sharing Defaults	
9/25/2025, 9:21:07 AM PDT	purvaakshita527@agentforce.com		Changed Enable Reports setting for custom object Car from off to on	Custom Objects	
9/25/2025, 9:20:53 AM PDT	purvaakshita527@agentforce.com		Changed Enable Reports setting for custom object Traveler from off to on	Custom Objects	
9/25/2025, 9:20:29 AM PDT	purvaakshita527@agentforce.com		Changed Enable Reports setting for custom object Booking from off to on	Custom Objects	
9/25/2025, 9:08:41 AM PDT	purvaakshita527@agentforce.com		Changed Booking page layout Booking Layout	Custom Objects	
9/25/2025, 9:08:41 AM PDT	purvaakshita527@agentforce.com		Created custom lookup relationship Traveler1 (Traveler) on Bookings	Custom Objects	
9/25/2025,	purvaakshita527@agentforce.com		Changed Booking TriggerHandlerTest Apex	Apex	