Title: Integrated Customer Sales and Support System

Phase 9: Reports, Dashboards & Security

1. Accounts Report

Purpose:
To list all Accounts with key details such as Industry, Owner, and Contact info.

Steps:

1. Go to **App Launcher → Reports → New Report**
2. **Category:** Accounts & Contacts
3. **Report Type:** Accounts
4. Click **Continue** → opens Report Builder

Select Fields:

- Account Name
- Owner
- Phone
- Website
- Industry
- Created Date

Filters:

- Optional – no filters applied

Format:

- Tabular (Table) – kept as table for this project

Run & Save:

- Click **Run** → preview table
- Click **Save & Run**
    - **Report Name:** Project Accounts Report
    - **Folder:** Public Reports (or Private Reports if Public not available)

Report: Accounts

Project Accounts Report

List of all accounts for project

Total Records

8

	Account Owner	Account Name	Last Modified Date	Phone	Industry	Created Date
1	Ramya Sree Pappireddy	Test Premier Customer	9/21/2025	-	-	9/21/2025
2	Ramya Sree Pappireddy	Acme Corporation	9/23/2025	-	Manufacturing	9/23/2025
3	Ramya Sree Pappireddy	ABC Corp	9/25/2025	-	-	9/25/2025
4	Ramya Sree Pappireddy	XYZ Ltd	9/25/2025	-	-	9/25/2025
5	Ramya Sree Pappireddy	PQR Industies	9/25/2025	-	-	9/25/2025
6	Ramya Sree Pappireddy	ABC Corp	9/25/2025	987654321	Technology	9/25/2025
7	Ramya Sree Pappireddy	XYZ Ltd	9/25/2025	(912) 345-6789	Finance	9/25/2025
8	Ramya Sree Pappireddy	PQR Industries	9/25/2025	99887766	Healthcare	9/25/2025

2. Contacts Report

Purpose:

To list all Contacts along with their associated Accounts and key details.

Steps:

1. Go to **Reports → New Report**
2. **Category:** Accounts & Contacts
3. **Report Type:** Contacts & Accounts
4. Click **Continue** → opens Report Builder

Select Fields:

- Contact Name
- Account Name
- Email
- Phone
- Title / Role
- Created Date

Filters:

- Optional – no filters applied

Format:

- Tabular

Run & Save:

- Click **Run** → preview table
- Click **Save & Run**
    - **Report Name:** Project Contacts Report
    - **Folder:** Public Reports

Report: Contacts & Accounts
Project Contacts Report

Total Records
5

	Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City	Phone	Email	Account Owner
1	-	Ravi	Kumar	-	Acme Corporation	Nabikot,Kadapa,Andhra pradesh	Kadapa	09493426562	ramyasreepappireddy2005@gmail.com	Ramya Sree Pappireddy
2	Mr.	KEVIN	JOE	-	Acme Corporation	-	-	-	-	Ramya Sree Pappireddy
3	-	john	doe	-	XYZ Ltd	-	-	-	john@example.com	Ramya Sree Pappireddy
4	-	Alice	Smith	-	PQR Industies	-	-	-	alice@example.com	Ramya Sree Pappireddy
5	-	Ravi	Reddy	-	-	-	-	-	ravi@example.com	-

3. Cases Report

Purpose:
To list all Cases with key details including Status, Priority, and Owner.

Steps:

1. Go to **Reports** → **New Report**
2. **Category:** Customer Support Reports
3. **Report Type:** Cases (or Cases with Accounts)
4. Click **Continue** → opens Report Builder

Select Fields:

- Case Number
- Subject
- Status
- Priority
- Account Name
- Contact Name
- Created Date
- Owner

Filters:

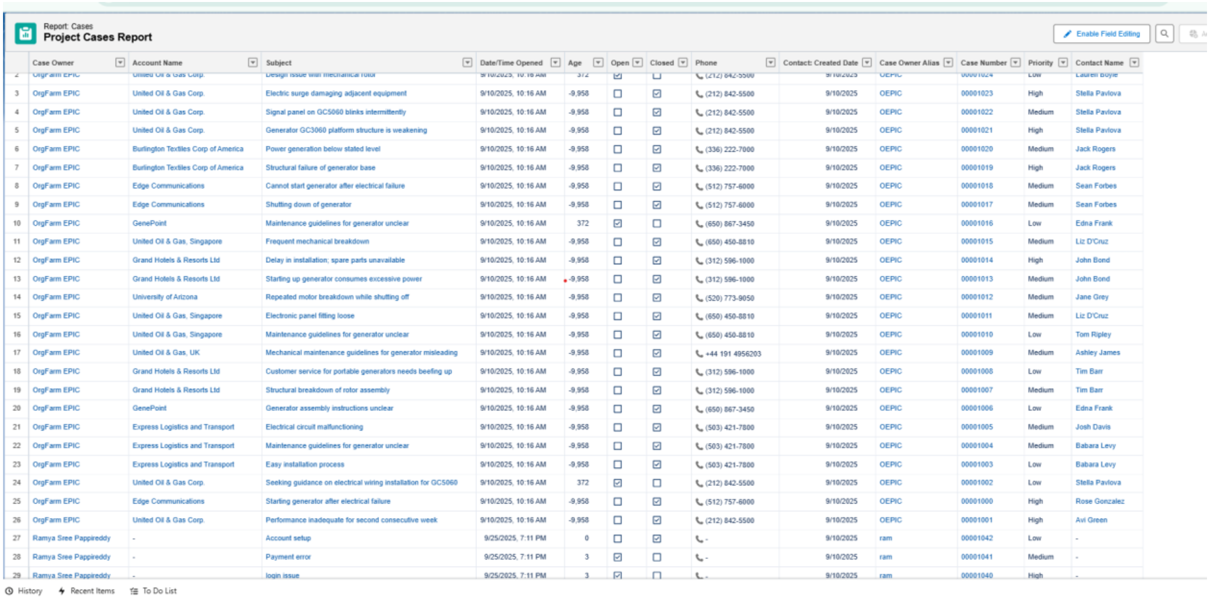
- Optional – no filters applied

Format:

- Tabular

Run & Save:

- Click **Run** → preview table
- Click **Save & Run**
    - **Report Name:** Project Cases Report
    - **Folder:** Public Reports



Report: Cases
Project Cases Report

Enable Field Editing

	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed	Phone	Contact: Created Date	Case Owner Alias	Case Number	Priority	Contact Name
2	OrgFarm EPIC	United Oil & Gas Corp.	Design issue with mechanical rotor	9/10/2025, 10:16 AM	372	☑	☐	(212) 842-5500	9/10/2025	OEPIC	00001024	Low	Lauren Boyle
3	OrgFarm EPIC	United Oil & Gas Corp.	Electric surge damaging adjacent equipment	9/10/2025, 10:16 AM	-9,958	☐	☑	(212) 842-5500	9/10/2025	OEPIC	00001023	High	Stella Pavlova
4	OrgFarm EPIC	United Oil & Gas Corp.	Signal panel on GC5060 blinks intermittently	9/10/2025, 10:16 AM	-9,958	☐	☑	(212) 842-5500	9/10/2025	OEPIC	00001022	Medium	Stella Pavlova
5	OrgFarm EPIC	United Oil & Gas Corp.	Generator GC3060 platform structure is weakening	9/10/2025, 10:16 AM	-9,958	☐	☑	(212) 842-5500	9/10/2025	OEPIC	00001021	High	Stella Pavlova
6	OrgFarm EPIC	Burlington Textiles Corp of America	Power generation below stated level	9/10/2025, 10:16 AM	-9,958	☐	☑	(336) 222-7000	9/10/2025	OEPIC	00001020	Medium	Jack Rogers
7	OrgFarm EPIC	Burlington Textiles Corp of America	Structural failure of generator base	9/10/2025, 10:16 AM	-9,958	☐	☑	(336) 222-7000	9/10/2025	OEPIC	00001019	High	Jack Rogers
8	OrgFarm EPIC	Edge Communications	Cannot start generator after electrical failure	9/10/2025, 10:16 AM	-9,958	☐	☑	(512) 757-6000	9/10/2025	OEPIC	00001018	Medium	Sean Forbes
9	OrgFarm EPIC	Edge Communications	Shutting down of generator	9/10/2025, 10:16 AM	-9,958	☐	☑	(512) 757-6000	9/10/2025	OEPIC	00001017	Medium	Sean Forbes
10	OrgFarm EPIC	GenePoint	Maintenance guidelines for generator unclear	9/10/2025, 10:16 AM	372	☑	☐	(650) 867-3450	9/10/2025	OEPIC	00001016	Low	Edna Frank
11	OrgFarm EPIC	United Oil & Gas, Singapore	Frequent mechanical breakdown	9/10/2025, 10:16 AM	-9,958	☐	☑	(650) 450-8810	9/10/2025	OEPIC	00001015	Medium	Liz D'Cruz
12	OrgFarm EPIC	Grand Hotels & Resorts Ltd	Delay in installation; spare parts unavailable	9/10/2025, 10:16 AM	-9,958	☐	☑	(312) 596-1000	9/10/2025	OEPIC	00001014	High	John Bond
13	OrgFarm EPIC	Grand Hotels & Resorts Ltd	Starting up generator consumes excessive power	9/10/2025, 10:16 AM	-9,958	☐	☑	(312) 596-1000	9/10/2025	OEPIC	00001013	Medium	John Bond
14	OrgFarm EPIC	University of Arizona	Repeated motor breakdown while shutting off	9/10/2025, 10:16 AM	-9,958	☐	☑	(520) 773-9050	9/10/2025	OEPIC	00001012	Medium	Jane Grey
15	OrgFarm EPIC	United Oil & Gas, Singapore	Electronic panel fitting loose	9/10/2025, 10:16 AM	-9,958	☐	☑	(650) 450-8810	9/10/2025	OEPIC	00001011	Medium	Liz D'Cruz
16	OrgFarm EPIC	United Oil & Gas, Singapore	Maintenance guidelines for generator unclear	9/10/2025, 10:16 AM	-9,958	☐	☑	(650) 450-8810	9/10/2025	OEPIC	00001010	Low	Tom Ripley
17	OrgFarm EPIC	United Oil & Gas, UK	Mechanical maintenance guidelines for generator misleading	9/10/2025, 10:16 AM	-9,958	☐	☑	+44 191 4956203	9/10/2025	OEPIC	00001009	Medium	Ashley James
18	OrgFarm EPIC	Grand Hotels & Resorts Ltd	Customer service for portable generators needs beefing up	9/10/2025, 10:16 AM	-9,958	☐	☑	(312) 596-1000	9/10/2025	OEPIC	00001008	Low	Tim Barr
19	OrgFarm EPIC	Grand Hotels & Resorts Ltd	Structural breakdown of rotor assembly	9/10/2025, 10:16 AM	-9,958	☐	☑	(312) 596-1000	9/10/2025	OEPIC	00001007	Medium	Tim Barr
20	OrgFarm EPIC	GenePoint	Generator assembly instructions unclear	9/10/2025, 10:16 AM	-9,958	☐	☑	(650) 867-3450	9/10/2025	OEPIC	00001006	Low	Edna Frank
21	OrgFarm EPIC	Express Logistics and Transport	Electrical circuit malfunctioning	9/10/2025, 10:16 AM	-9,958	☐	☑	(503) 421-7800	9/10/2025	OEPIC	00001005	Medium	Josh Davis
22	OrgFarm EPIC	Express Logistics and Transport	Maintenance guidelines for generator unclear	9/10/2025, 10:16 AM	-9,958	☐	☑	(503) 421-7800	9/10/2025	OEPIC	00001004	Medium	Babara Levy
23	OrgFarm EPIC	Express Logistics and Transport	Easy installation process	9/10/2025, 10:16 AM	-9,958	☐	☑	(503) 421-7800	9/10/2025	OEPIC	00001003	Low	Babara Levy
24	OrgFarm EPIC	United Oil & Gas Corp.	Seeking guidance on electrical wiring installation for GC5060	9/10/2025, 10:16 AM	372	☑	☐	(212) 842-5500	9/10/2025	OEPIC	00001002	Low	Stella Pavlova
25	OrgFarm EPIC	Edge Communications	Starting generator after electrical failure	9/10/2025, 10:16 AM	-9,958	☐	☑	(512) 757-6000	9/10/2025	OEPIC	00001000	High	Rose Gonzalez
26	OrgFarm EPIC	United Oil & Gas Corp.	Performance inadequate for second consecutive week	9/10/2025, 10:16 AM	-9,958	☐	☑	(212) 842-5500	9/10/2025	OEPIC	00001001	High	Avi Green
27	Ramya Sree Pappireddy	-	Account setup	9/25/2025, 7:11 PM	0	☐	☑	-	9/10/2025	ram	00001042	Low	-
28	Ramya Sree Pappireddy	-	Payment error	9/25/2025, 7:11 PM	3	☑	☐	-	9/10/2025	ram	00001041	Medium	-
29	Ramya Sree Pappireddy	-	login issue	9/25/2025, 7:11 PM	3	☑	☐	-	9/10/2025	ram	00001040	High	-

History Recent Items To Do List

4. Dashboard

Purpose:
To display all three reports together for a visual overview of project data.

Steps:

1. Go to **App Launcher → Dashboards → New Dashboard**
2. Enter details:
    - **Dashboard Name:** Project Dashboard
    - **Folder:** Private Dashboards
3. Click **Create** → opens Dashboard Builder

Add Components:

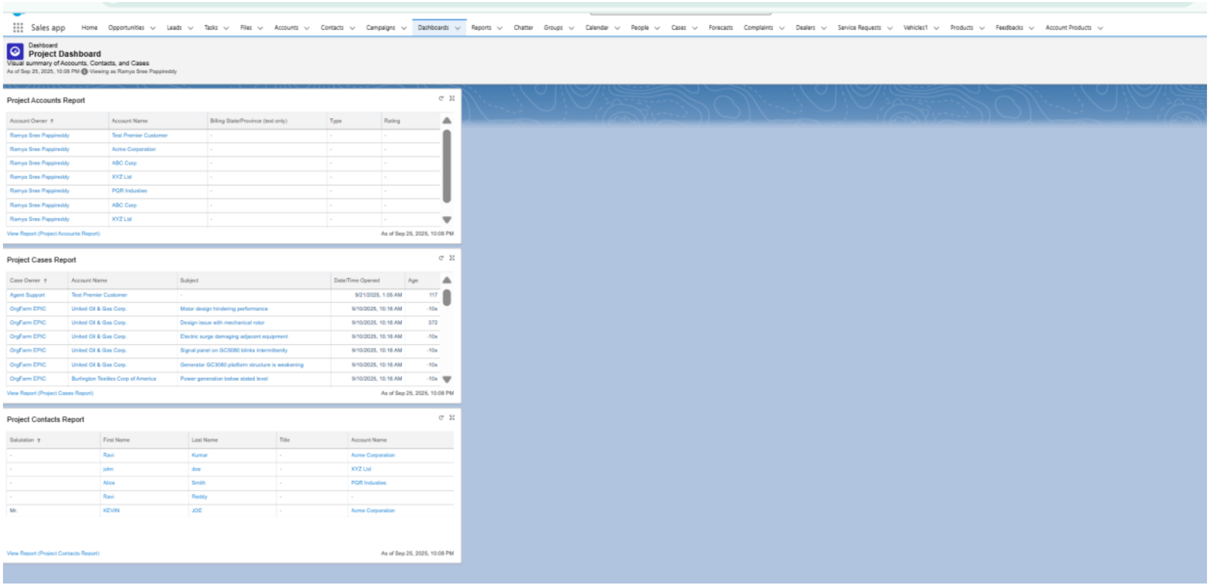
- **Component 1:** Project Accounts Report → Table → Add
- **Component 2:** Project Contacts Report → Table → Add
- **Component 3:** Project Cases Report → Table → Add

Arrange Components:

- Drag tables to arrange neatly
- Ensure each table is clearly labeled

Save & Run:

- Click **Save & Run**



5. Dynamic Dashboards (Optional)

Purpose:

- Show user-specific views of data without creating multiple dashboards.
- Useful in organizations where each user sees only their records.

6. Sharing Settings

Purpose:
Control who can view or edit records, reports, and dashboards.

Note:

- Sharing Settings were **already configured in previous phases** (Phase 3/4) during user and role setup.

- For this phase, we **reviewed the settings**; no new changes were made.

7. Field Level Security (FLS)

Purpose:
Control visibility and edit permissions for fields based on user profiles.

Note:

- FLS was **configured in earlier phases** when creating profiles and assigning field access.
- For this phase, we **reviewed field-level security**; no new changes were made.

8. Session Settings

Purpose:
Configure session security for users (timeout, login IP restrictions).

Note:

- Session Settings were **set up in previous phases**.
- Reviewed existing configuration for this phase; no changes required.

9. Login IP Ranges

Purpose:
Restrict login access to specific IP addresses.

Note:

- Login IP Ranges were **configured in earlier phases** for user profiles.
- Reviewed for Phase 9; no new changes made.

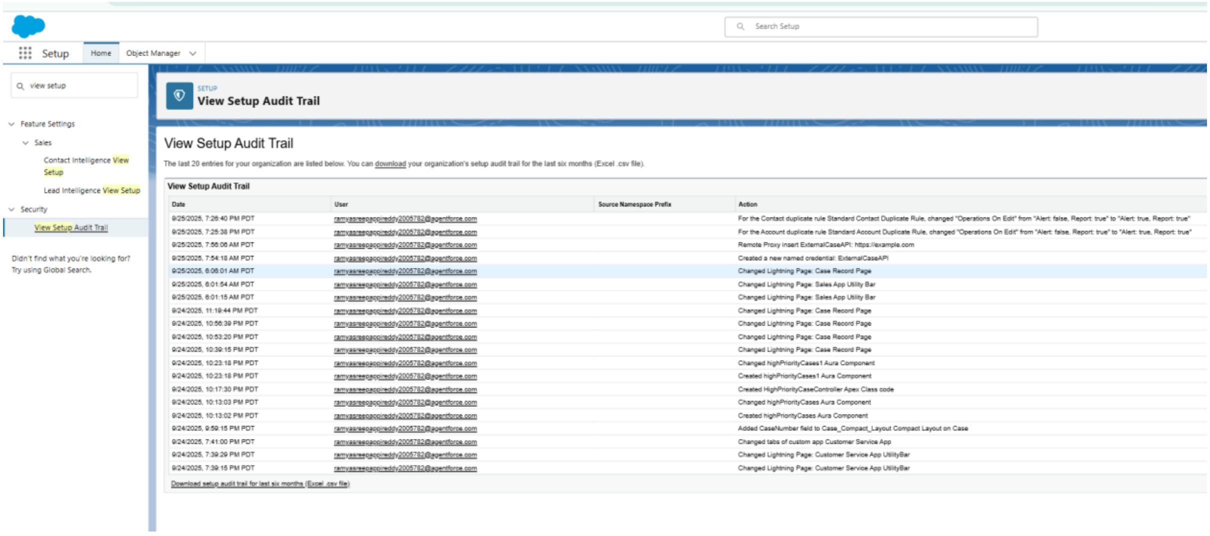
10. Audit Trail

Purpose:

- Track setup changes in Salesforce.
- Shows who made changes and when.

Steps:

- Go to **Setup → View Setup Audit Trail**
- Review recent changes



View Setup Audit Trail

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
9/25/2025, 7:26:40 PM PDT	ramyasreepappireddy2005782@agentforce.com		For the Contact duplicate rule Standard Contact Duplicate Rule, changed "Operations On Edit" from "Alert: false, Report: true" to "Alert: true, Report: true"
9/25/2025, 7:25:38 PM PDT	ramyasreepappireddy2005782@agentforce.com		For the Account duplicate rule Standard Account Duplicate Rule, changed "Operations On Edit" from "Alert: false, Report: true" to "Alert: true, Report: true"
9/25/2025, 7:56:06 AM PDT	ramyasreepappireddy2005782@agentforce.com		Remote Proxy insert ExternalCaseAPI: https://example.com
9/25/2025, 7:54:18 AM PDT	ramyasreepappireddy2005782@agentforce.com		Created a new named credential: ExternalCaseAPI
9/25/2025, 6:06:01 AM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Case Record Page
9/25/2025, 6:01:54 AM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Sales App Utility Bar
9/25/2025, 6:01:15 AM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Sales App Utility Bar
9/24/2025, 11:19:44 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Case Record Page
9/24/2025, 10:56:39 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Case Record Page
9/24/2025, 10:53:20 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Case Record Page
9/24/2025, 10:39:15 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Case Record Page
9/24/2025, 10:23:18 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed highPriorityCases1 Aura Component
9/24/2025, 10:23:18 PM PDT	ramyasreepappireddy2005782@agentforce.com		Created highPriorityCases1 Aura Component
9/24/2025, 10:17:30 PM PDT	ramyasreepappireddy2005782@agentforce.com		Created HighPriorityCaseController Apex Class code
9/24/2025, 10:13:03 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed highPriorityCases Aura Component
9/24/2025, 10:13:02 PM PDT	ramyasreepappireddy2005782@agentforce.com		Created highPriorityCases Aura Component
9/24/2025, 9:59:15 PM PDT	ramyasreepappireddy2005782@agentforce.com		Added CaseNumber field to Case_Compact_Layout Compact Layout on Case
9/24/2025, 7:41:00 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed tabs of custom app Customer Service App
9/24/2025, 7:39:29 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Customer Service App UtilityBar
9/24/2025, 7:39:15 PM PDT	ramyasreepappireddy2005782@agentforce.com		Changed Lightning Page: Customer Service App UtilityBar

Download setup audit trail for last six months (Excel .csv file)