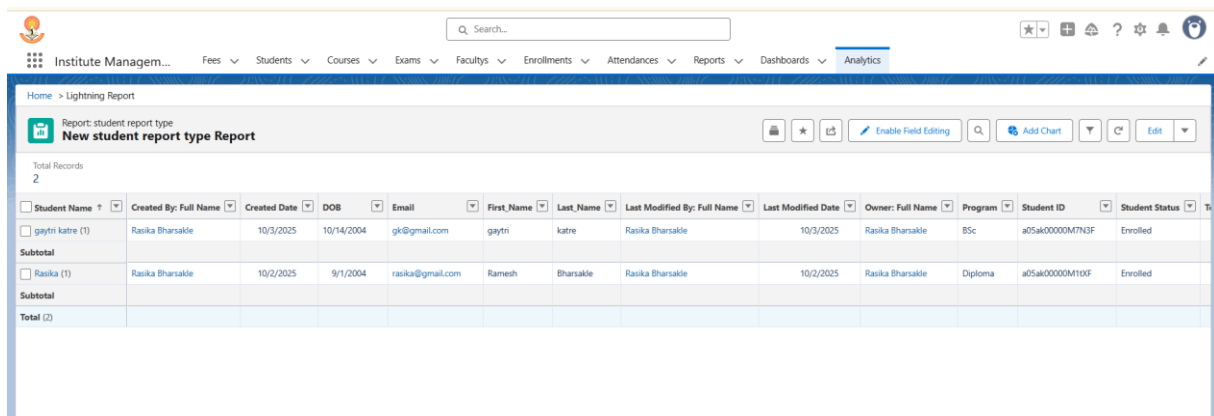


PHASE 9: REPORTING, DASHBOARDS & SECURITY REVIEW

Goal: Provide real-time insights into students, fees, and Attendance while ensuring the application is secure and compliant with Salesforce's best practices.

1. Reports

- Example Reports created:
 - *Registrations by Event* — summary report grouped by Event name.



Home > Lightning Report

Report: student report type
New student report type Report

Total Records: 2

<input type="checkbox"/> Student Name	<input type="checkbox"/> Created By: Full Name	<input type="checkbox"/> Created Date	<input type="checkbox"/> DOB	<input type="checkbox"/> Email	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Last Modified By: Full Name	<input type="checkbox"/> Last Modified Date	<input type="checkbox"/> Owner: Full Name	<input type="checkbox"/> Program	<input type="checkbox"/> Student ID	<input type="checkbox"/> Student Status
<input type="checkbox"/> gayatri katre (1)	Rasika Bharsakle	10/3/2025	10/14/2004	gk@gmail.com	gayatri	katre	Rasika Bharsakle	10/3/2025	Rasika Bharsakle	BSc	a05ak00000M7N3F	Enrolled
Subtotal												
<input type="checkbox"/> Rasika (1)	Rasika Bharsakle	10/2/2025	9/1/2004	rasika@gmail.com	Ramesh	Bharsakle	Rasika Bharsakle	10/2/2025	Rasika Bharsakle	Diploma	a05ak00000M10XF	Enrolled
Subtotal												
Total (2)												

2. Report Types

- A **custom report type** was created linking **Student** with **Fee** and **Attendance**.
- This enabled reporting across all three objects.
- Custom report types ensure only relevant fields are available for reporting, improving clarity for end users.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New student report type Report		Private Reports	Rasika Bharsakle	10/3/2025, 4:34 AM	
Created by Me	New Fees collection report Report		Private Reports	Rasika Bharsakle	10/3/2025, 4:37 AM	
Private Reports	New Attendance Results Report Report		Private Reports	Rasika Bharsakle	10/3/2025, 4:36 AM	
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/19/2025, 1:17 AM	

3. Dashboards

- Dashboards were created to provide a **visual summary of Institute management KPIs**.
- Components used:
 - **Bar Chart**
 - **Pie Chart**
 - **Metric**
- A **Admin & Faculty Dashboard** was created to give a high-level view of event performance.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Admin Dashboard		Private Dashboards	Rasika Bharsakle	10/3/2025, 4:38 AM	
Created by Me	Faculty Dashboard		Private Dashboards	Rasika Bharsakle	10/3/2025, 4:41 AM	

4. Security

- Set Field level Security:

SETUP > OBJECT MANAGER

Fee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fee Custom Field

Fees Amount

Back to Fee

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Fees Amount	Object Name	Fee
Field Name	Fees_Amount	Data Type	Currency
API Name	Fees_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rasika Bharsake, 9/29/2025, 5:43 AM	Modified By	Rasika Bharsake, 9/29/2025, 5:43 AM

General Options

Required

☐

Default Value

Currency Options

Length

18

Decimal Places

0

- View Setup Audit Trail:

Q Search Setup


[View Setup Audit Trail](#)

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).

Date	User	Source Namespace Prefix	Action	Section	Delegate User ?
10/3/2025, 4:09:04 AM PDT	rasika@permit.com		Fee matching rule, fee duplicate rule matching rule, activating by Rasika Bharsakle	Matching Rule	
10/3/2025, 4:06:59 AM PDT	rasika@permit.com		For matching rule fee duplicate rule matching rule, added matching criteria where matching method is Exact, the field is Student and match blank fields is "Does Not Match If Null"	Matching Rule	
10/3/2025, 4:06:59 AM PDT	rasika@permit.com		For matching rule fee duplicate rule matching rule, matching engine set to Exact Match Engine.	Matching Rule	
10/3/2025, 4:06:59 AM PDT	rasika@permit.com		For matching rule fee duplicate rule matching rule, added matching criteria where matching method is Exact, the field is Name and match blank fields is "Does Not Match If Null"	Matching Rule	
10/3/2025, 4:06:59 AM PDT	rasika@permit.com		For matching rule fee duplicate rule matching rule, matching engine set to Exact Match Engine.	Matching Rule	
10/3/2025, 4:06:59 AM PDT	rasika@permit.com		Created new Fee matching rule fee duplicate rule matching rule	Matching Rule	
10/3/2025, 4:06:46 AM PDT	rasika@permit.com		Created new 01lak00006gCR7 duplicate rule "fee duplicate rule" Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
10/3/2025, 4:07:02 AM PDT	rasika@permit.com		Student matching rule, Student Duplicate Rule matching rule, activating by Rasika Bharsakle	Matching Rule	
10/3/2025, 4:06:27 AM PDT	rasika@permit.com		For matching rule Student Duplicate Rule matching rule, added matching criteria where matching method is Exact, the field is Name and match blank fields is "Match When Both Blank"	Matching Rule	
10/3/2025, 4:06:26 AM PDT	rasika@permit.com		For matching rule Student Duplicate Rule matching rule, added matching criteria where matching method is Exact, the field is Email and match blank fields is "Match When Both Blank"	Matching Rule	

➤ Role:



Search Setup

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer


Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

 SETUP

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- Prof Ram Meghe Institute of Technology
 - Add Role
 - Principle
 - Add Role
 - HOD
 - Add Role
 - Faculty
 - Add Role
 - Student
 - Add Role

