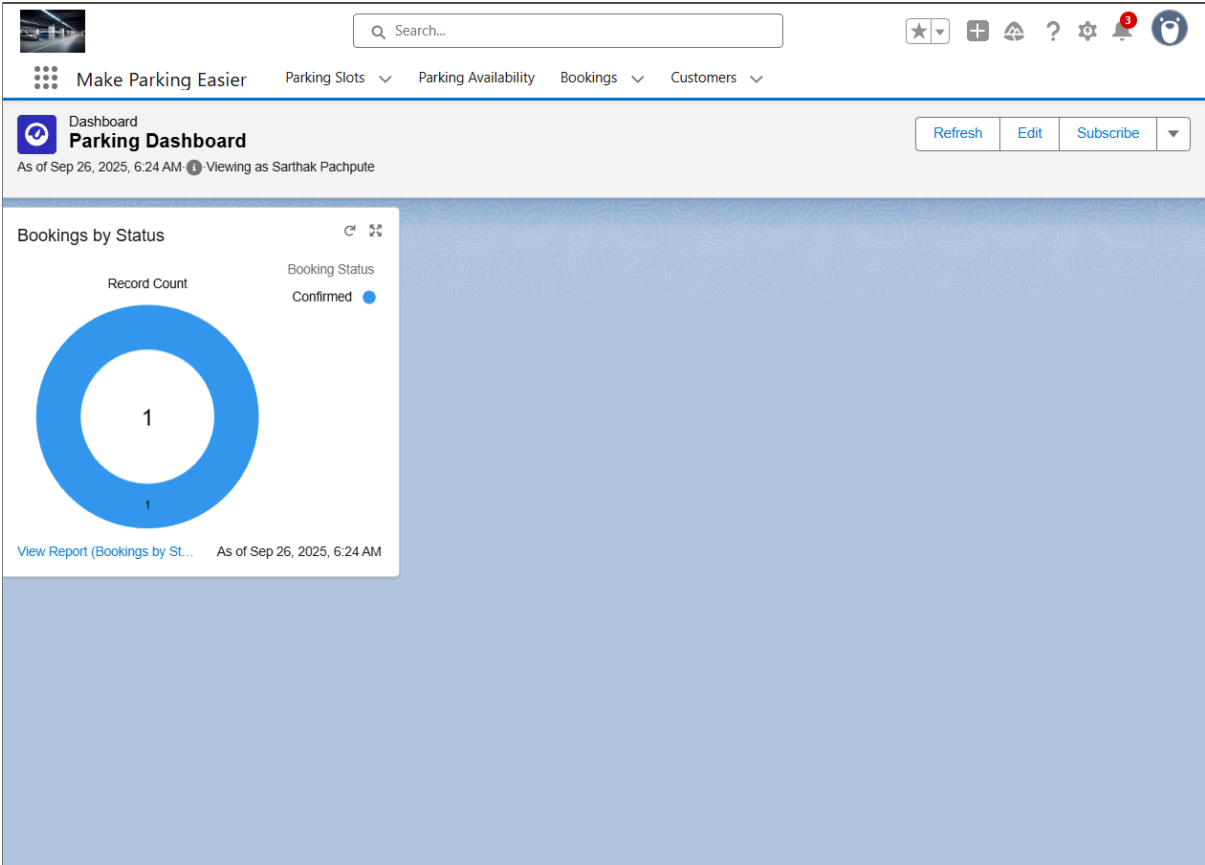# Phase 9: Reporting, Dashboards & Security Review

Objective The objective of this phase is to leverage Salesforce's powerful analytics platform to transform the application's raw data into meaningful business insights. This involves creating custom reports to analyze trends and a dashboard to provide a high-level, visual overview of key metrics, ensuring that administrators can easily monitor the application's performance and data security.

Key Activities & Screenshots

- **Custom Report:** A custom report named "Bookings by Status" was created to analyze the distribution of bookings. The report groups all Booking records by the "Booking Status" field, providing a clear view of how many bookings are confirmed, completed, or cancelled.

- **Dashboard Creation:** A new dashboard, "Parking Dashboard", was built to serve as the central analytics hub. The "Bookings by Status" report was added to this dashboard as a visual Pie Chart component, offering an at-a-glance understanding of the booking lifecycle.

- **Security Review:** A review of security settings was conducted. Key measures, such as setting the Organization-Wide Defaults for the Booking object to "Private" and configuring field-level security on profiles, were confirmed to be in place. This ensures data is only visible to the appropriate users, especially in the customer portal.

Outcome The application is now equipped with business intelligence capabilities. Administrators can instantly track key performance indicators through the dashboard and perform detailed analysis using the custom report. The security review confirms that the application's data is well-protected, completing the requirements for a production-ready application.

Q Search...

Parking Slots   Parking Availability   Bookings   Customers

Dashboard
Parking Dashboard
As of Sep 26, 2025, 6:24 AM · ⓘ · Viewing as Sarthak Pachpute

Refresh   Edit   Subscribe

Bookings by Status

Record Count   Booking Status
                                Confirmed ⬤

1

1

View Report (Bookings by St...   As of Sep 26, 2025, 6:24 AM

Report: Bookings
Bookings by Status

✏ Enable Field Editing   🔍   ✨ Add Chart   ▼   ↻   Edit ▾

Total Records
1

☐ Booking Status ↑ ▼	Booking: Booking ID ▼
☐ Confirmed (1)	BK-0001
Subtotal	
Total (1)	

Row Counts 🔘   Detail Rows 🔘   Subtotals 🔘   Grand Total 🔘

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sharing s

Security
Sharing Settings

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SETUP
Sharing Settings

Service Appointment Attendee	Private	Private	✔
Service Contract	Private	Private	✔
Service Resource	Public Read/Write	Private	✔
Service Territory	Public Read/Write	Private	✔
Shift	Private	Private	✔
Shipment	Private	Private	✔
Shipping Carrier	Public Read Only	Private	✔
Shipping Carrier Method	Public Read Only	Private	✔
Shipping Configuration Set	Public Read Only	Private	✔
Streaming Channel	Public Read/Write	Private	✔
Tableau Host Mapping	Public Read Only	Private	✔
User Presence	Public Read Only	Private	✔
User Provisioning Request	Private	Private	✔
Waitlist	Private	Private	✔
Web Cart Document	Private	Private	✔
Work Order	Private	Private	✔
Work Plan	Private	Private	✔
Work Plan Template	Private	Private	✔
Work Step Template	Private	Private	✔
Work Type	Private	Private	✔
Work Type Group	Public Read/Write	Private	✔
Booking	Public Read/Write	Private	✔
Customer	Public Read/Write	Private	✔
Parking Slot	Public Read/Write	Private	✔