

Phase 9 – Reporting, Dashboards & Security Review

Objective:

To provide analytical insights into events, tickets, and vendors, and to enforce security standards in Salesforce for data integrity and controlled access.

1. Reports

Definition:

Reports are organized representations of Salesforce data, used to analyze trends, performance, and outcomes. Salesforce provides different report formats:

- **Tabular:** Simple list of records
- **Summary:** Grouped records with subtotals
- **Matrix:** Grouped by rows and columns
- **Joined:** Multiple related reports combined

Steps Completed:

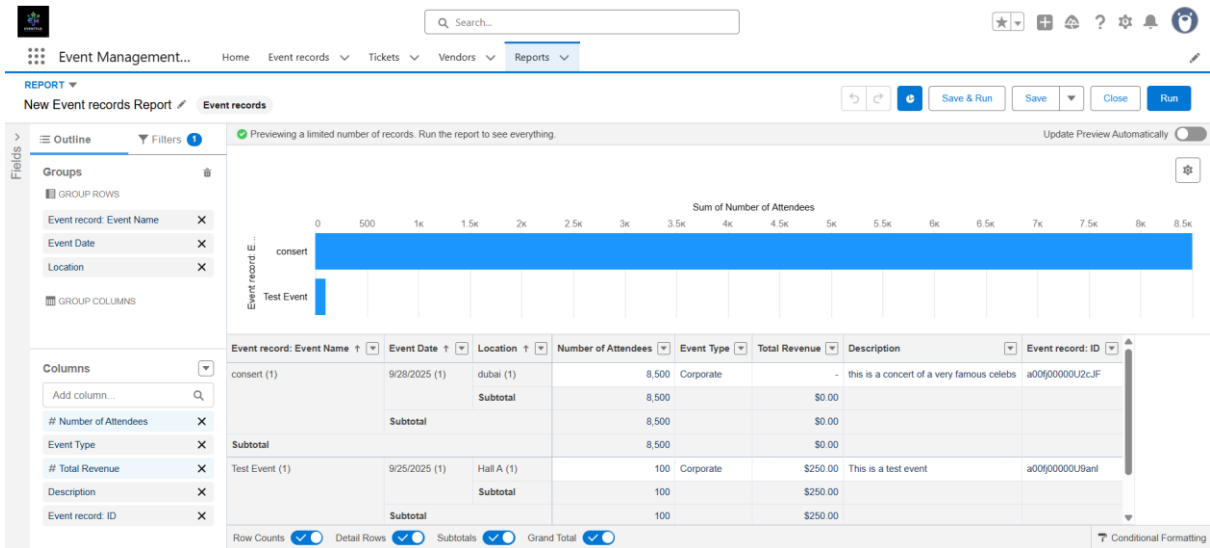
1. Created **Event Records Report**
 - Report Type: Event Records
 - Selected fields: Event Name, Date, Type, Location, Number of Tickets
 - Filters applied: Event Status = Active
2. Created **Ticket Report**
 - Report Type: Event Records with Tickets
 - Selected fields: Ticket Name, Status, Price, Attendee Email, Event Name
 - Filters applied: Ticket Status = Booked

Notes:

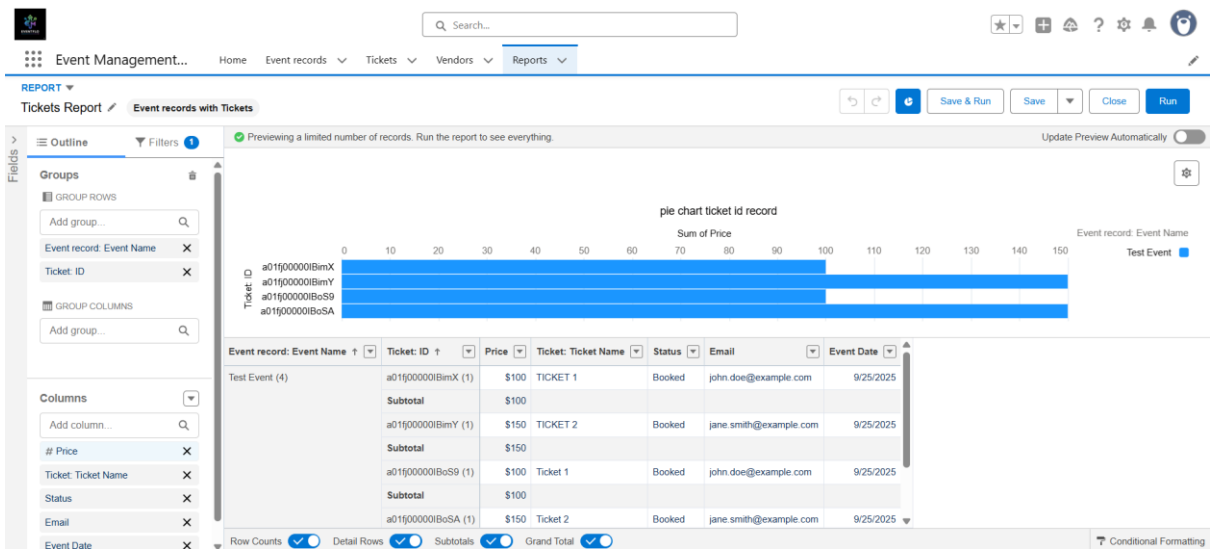
- Reports are saved and shared with appropriate profiles for visibility.
- Reports can be exported for offline analysis if needed.

Screenshot:

#Event Records Report layout



- Ticket Report layout:



Vendor Report layout:

Event Management... Home Event records Tickets Vendors Reports

REPORT Vendor Report Vendors with Event record

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Vendor: Vendor Name

Vendor: Vendor Name	Vendor: ID	Contact Number	Event record: Event Name	Vendor: Owner Name	Rating	Email	Service Provided
abc (1)	a02f0000006CdN7 (1)	942515293 (1)	Test Event	md shaqb	5	md.shaq@gmail.com	book a hall
Subtotal					5		
Subtotal					5		
test_vendor (1)	a02f0000006CdN7 (1)	8223605454 (1)	consert	md shaqb	5	ms.shaq@gmail.com	test_fild
Subtotal					5		
Subtotal					5		

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

2. Dashboards

Definition:

Dashboards are visual displays of report data, showing key metrics and trends using charts, tables, and gauges.

Steps Completed:

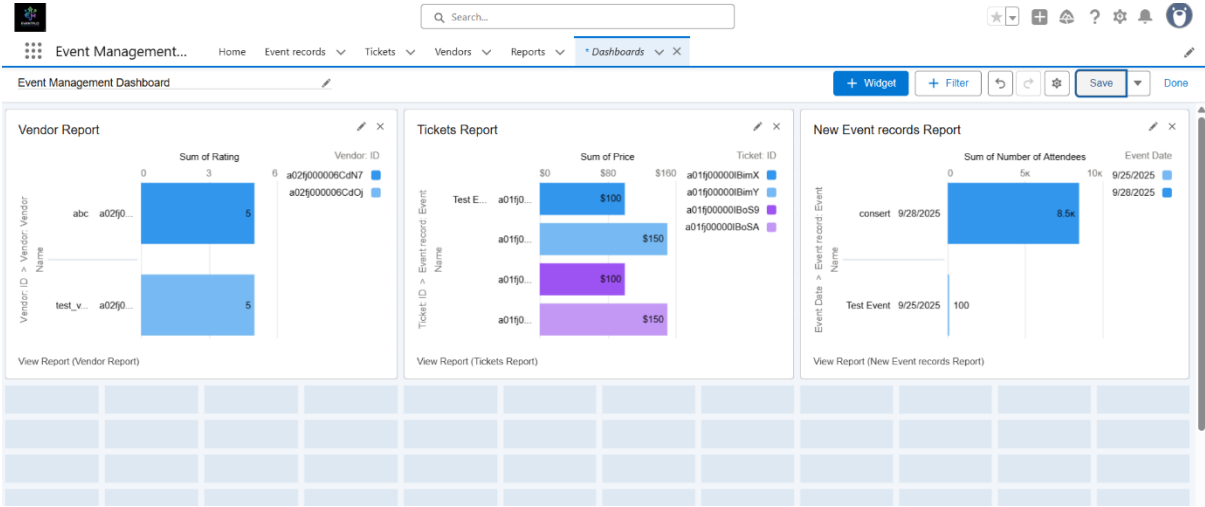
1. Created **Event Management Dashboard**
 - Components included:
 - Total Events (Metric)
 - Total Tickets Booked (Metric)
 - Revenue per Event (Chart)
 - Linked components to respective reports
2. Configured layout for visibility and readability

Notes:

- Dashboard helps management quickly monitor performance and attendance.

- Components can be updated as reports are refreshed.

Screenshot placeholders:



3. Sharing Settings

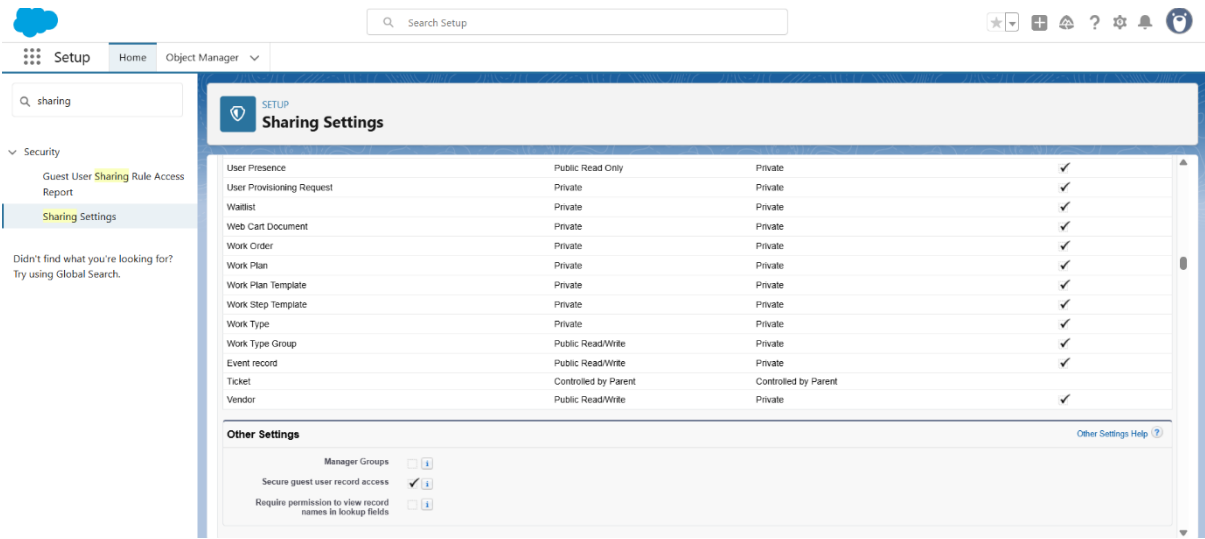
Definition:

Sharing settings determine how records are shared within the organization, controlling access to sensitive information.

Steps Completed:

- Verified Organization-Wide Defaults (OWD) for objects
- Set sharing rules for Event, Ticket, and Vendor records to appropriate profiles
- Ensured only authorized roles can view/edit records

Screenshot:



4. Field-Level Security

Definition:

Field-level security restricts visibility and edit access to specific fields based on profile or permission sets.

Steps Completed:

- Reviewed and adjusted field permissions for key objects
- Ensured sensitive fields (e.g., Attendee Email, Ticket Price) are restricted for some profiles

Screenshot:

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links such as 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, Data, Email), and PLATFORM TOOLS (Subscription Management, Apps). The main content area is titled 'Set Field-Level Security' and shows the 'Price' field configuration. The field is of type 'Currency(18, 0)'. Below this, a table titled 'Field-Level Security for Profile' lists various profiles and their permissions for the Price field.

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

5. Session Settings & Login IP Ranges

Definition:

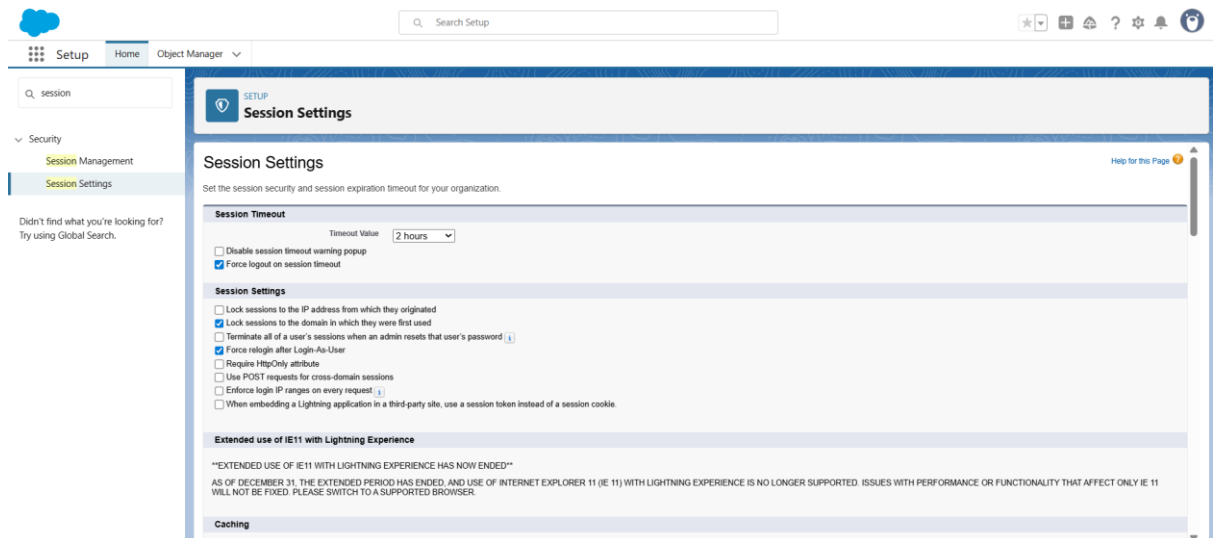
- **Session Settings:** Control session timeout, login security, and session policies.
- **Login IP Ranges:** Restrict login access to specific IP addresses for enhanced security.

Steps Completed:

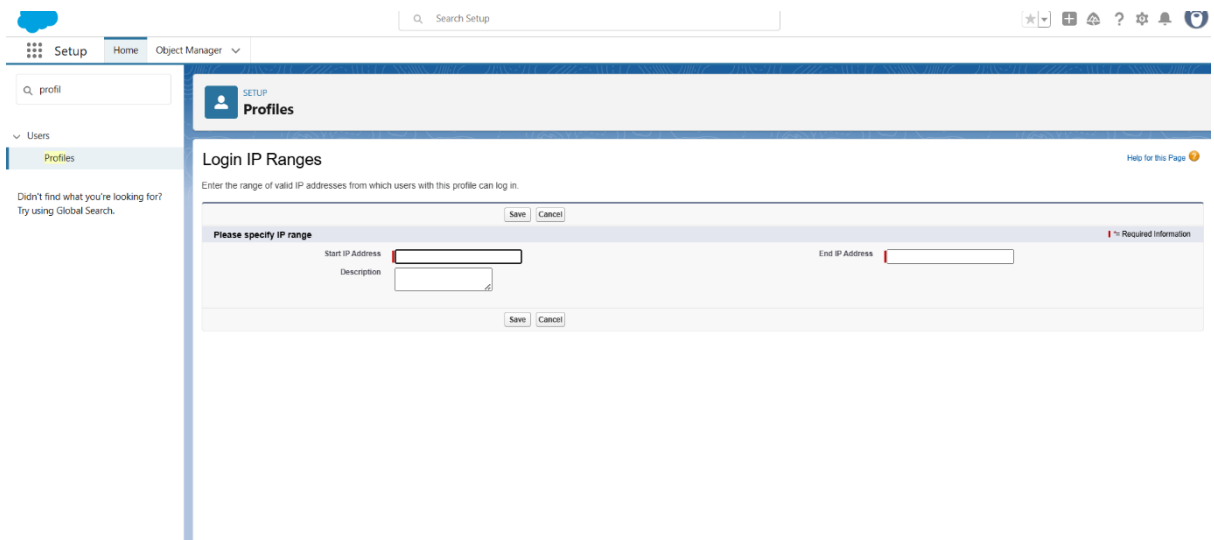
- Configured session timeout and security policies for users
- Added login IP ranges for Event Managers and Admins

Screenshot:

- Session settings



- Login IP range configuration



6. Audit Trail

Definition:

Audit Trail tracks changes made by administrators to setup and configuration, helping in compliance and monitoring.

Steps Completed:

- Enabled audit trail to log metadata changes
- Reviewed changes for Phase 9 activities

Screenshot:

- Audit trail logs

