

Phase 9: Reporting, Dashboards & Security Review – Replastix Innovation

Reports (Tabular, Summary, Matrix, Joined)

- **Tabular Reports:** Simple lists of records.
- **Summary Reports:** Grouped records with subtotals.
- **Matrix Reports:** Records grouped by rows and columns.
- **Joined Reports:** Combine multiple report types for complex analysis.

Report Types

Define objects and fields available in reports to ensure relevant and accurate data retrieval.

Dashboards

Visualize data using charts, tables, and gauges to provide insights into operations and performance metrics.

Dynamic Dashboards

Dashboards that display data according to the logged-in user, enabling personalized insights.

Sharing Settings

Control record visibility and access across roles, profiles, and users to ensure data security.

Field Level Security

Restrict access to specific fields within objects to protect sensitive data.

Session Settings

Define session timeout, login hours, and other security policies to safeguard user access.

Login IP Ranges

Restrict Salesforce login access to specific IP addresses for enhanced security.

Audit Trail

Track changes made by users for compliance, monitoring, and accountability.

Result of Phase 9

Replastix Innovation has robust reporting, dynamic dashboards, and security controls, enabling informed decision-making while maintaining strong governance and data protection.