

Phase 9: Reporting, Dashboards & Security Review.

1. Reports

Purpose: Generate actionable insights from Salesforce data.

Steps:

1. Go to App Launcher → Reports → New Report.
2. Select a report type and format: Tabular, Summary, Matrix, or Joined.
3. Add columns, groupings, and filters as required.
4. Click Run Report, then Save with a descriptive name.

2. Report Types

Purpose: Define which objects and fields are available for reports.

Steps:

1. Go to Setup → Report Types → New Custom Report Type.
2. Select Primary Object (e.g., Orders) and optionally related objects.
3. Configure field layout and relationships.
4. Save and deploy for report creation.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Custom Report Type' and displays a list of 'All Custom Report Types'. The list includes columns for Label, Name, Description, Category, Created Date, and a dropdown menu. The list contains 12 items, sorted by Label, filtered by All custom report types, and updated a few seconds ago. The items are as follows:

Label	Name	Description	Category	Created Date
Orchestration Run Logs Spring '24	flow_orchestration_log_oottb_crt_two_four_eight	Find out which orchestration run logs were created a...	Other Repor...	9/16/2025, 4:25 PM
Orchestration Runs Spring '24	flow_orchestration_run_oottb_crt_two_four_eight	Find out which orchestration runs were created.	Other Repor...	9/16/2025, 4:25 PM
Orchestration Stage Runs Spring '24	flow_orchestration_stage_run_oottb_crt_two_four_eight	Find out which orchestration stage runs were created...	Other Repor...	9/16/2025, 4:25 PM
Orchestration Step Runs Spring '24	flow_orchestration_step_run_oottb_crt_two_four_eight	Find out which orchestration step runs were created ...	Other Repor...	9/16/2025, 4:25 PM
Orchestration Work Items Spring '24	flow_orchestration_work_item_oottb_crt_two_four_eig...	Find out which orchestration work items were create...	Other Repor...	9/16/2025, 4:25 PM
Program Definition Spring '24	Program_Definition_sfdcSESv60	Review your analytics with a program-like structure. S...	Other Repor...	9/16/2025, 4:25 PM
Program Definition Summer '24	Program_Definition_sfdcSESv61	Review your analytics with a program-like structure. S...	Other Repor...	9/16/2025, 4:25 PM
Program Item Progress Spring '24	Program_Task_Progress_sfdcSESv60	Report on tasks like exercises, milestones, and outco...	Other Repor...	9/16/2025, 4:25 PM
Program Item Progress Summer '24	Program_Task_Progress_sfdcSESv61	Report on tasks like exercises, milestones, and outco...	Other Repor...	9/16/2025, 4:25 PM
Program Progress Spring '24	Program_Progress_sfdcSESv60	Report on program progress. Specific progress on mi...	Other Repor...	9/16/2025, 4:25 PM
Program Progress Summer '24	Program_Progress_sfdcSESv61	Report on program progress. Specific progress on mi...	Other Repor...	9/16/2025, 4:25 PM
Screen Flows	screen_flows_prebuilt_crt	Find out which flows get executed and how long user...	Other Repor...	9/16/2025, 4:25 PM

3. Dashboards

Purpose: Visualize key metrics using charts and tables.

Steps:

1. Go to App Launcher → Dashboards → New Dashboard.
2. Add components using saved reports (e.g., bar charts, tables).
3. Configure display properties (filters, legends, colors).
4. Save and share with appropriate users.

4. Dynamic Dashboards

Purpose: Show personalized data based on the logged-in user.

Steps:

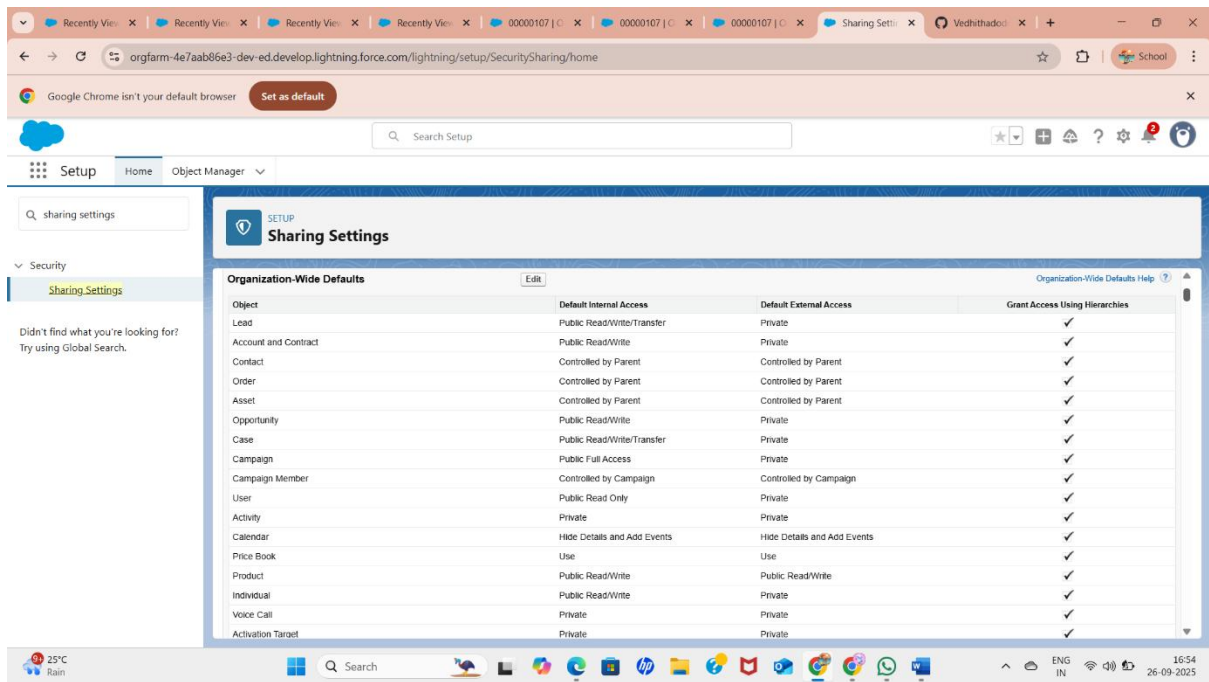
1. Create a new dashboard and enable Dynamic Dashboard option.
2. Set Running User = Logged-in User.
3. Add components and filters similar to a standard dashboard.
4. Save and optionally schedule automatic refresh.

5. Sharing Settings

Purpose: Control record-level access for users.

Steps:

1. Go to Setup → Sharing Settings.
2. Define Org-Wide Defaults (OWD) for objects.
3. Create sharing rules and configure role hierarchy.
4. Test access for different users to confirm restrictions.



6. Field Level Security

Purpose: Control visibility of individual fields per profile.

Steps:

1. Go to Setup → Object Manager → [Object] → Fields & Relationships.
2. Click a field → Set Field-Level Security.
3. Select profiles that can view/edit the field.
4. Save and confirm in page layouts.

7. Session Settings

Purpose: Configure session management and security policies.

Steps:

1. Go to Setup → Security → Session Settings.
2. Set session timeout, IP restrictions, and login policies.
3. Enable “Lock sessions to IP addresses” if required.
4. Save settings and test user sessions.

8. Login IP Ranges

Purpose: Restrict login access to specific IP ranges for security.

Steps:

1. Go to Setup → Profiles → Login IP Ranges.
2. Define start and end IP addresses allowed.
3. Assign profile and save.
4. Test logins from allowed and blocked IPs.

9. Audit Trail

Purpose: Monitor configuration changes and track admin activity.

Steps:

1. Go to Setup → Security → View Setup Audit Trail.
2. Review changes in the past 6 months (e.g., users, objects, fields).
3. Download CSV report for record-keeping.
4. Use logs to monitor unauthorized changes.

The screenshot shows the Salesforce Setup Audit Trail page. The left sidebar contains the Setup menu with various options like Login Access Policies, Named Credentials, Network Access, Password Policies, Platform Encryption, Private Connect, Remote Site Settings, Session Management, Session Settings, Sharing Settings, Trusted URL and Browser Policy Violations, Trusted URLs, Trusted URLs for Redirects, and View Setup Audit Trail (which is selected). The main content area displays the 'View Setup Audit Trail' page with a table of the last 20 entries. The table has columns for Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The entries show various configuration changes made by a user with ID 229x1a2806659@agentforce.com.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
9/26/2025, 4:01:07 AM PDT	229x1a2806659@agentforce.com		Changed ProductAPI Apex Class code	Apex Class	
9/26/2025, 4:01:02 AM PDT	229x1a2806659@agentforce.com		Created ProductAPI Apex Class code	Apex Class	
9/26/2025, 3:44:32 AM PDT	229x1a2806659@agentforce.com		Changed Enable Email To Salesforce from off to on	Email To Salesforce	
9/26/2025, 2:50:52 AM PDT	229x1a2806659@agentforce.com		Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Supplier_API) for Supplier_API	Named Credentials	
9/26/2025, 2:50:52 AM PDT	229x1a2806659@agentforce.com		Created a new parameter: Uri (Parameter Type: Uri, Parameter Value: https://example.com/api) for Supplier_API	Named Credentials	
9/26/2025, 2:50:52 AM PDT	229x1a2806659@agentforce.com		Created a new named credential: Supplier_API	Named Credentials	
9/26/2025, 2:49:47 AM PDT	229x1a2806659@agentforce.com		Created a new parameter: Custom (Parameter Type: Authentication Protocol Variant, Parameter Value: NoAuthentication) for Supplier_API	External Credentials	
9/26/2025, 2:49:47 AM PDT	229x1a2806659@agentforce.com		Created a new external credential: Supplier_API	External Credentials	
9/26/2025, 1:45:14 AM PDT	229x1a2806659@agentforce.com		Deactivated flow with Name "Low Stock Alert" and Unique Name "Low_Stock_Alerit"	Flows	
9/26/2025, 1:45:14 AM PDT	229x1a2806659@agentforce.com		Deactivated flow with Name "Low Stock Alert" and Unique Name "Low_Stock_Alerit"	Flows	