

Phase 9: Reporting, Dashboards & Security Review

1. Reports

Reports generate insights from Salesforce data using filters and groupings.

2. Report Types

Define which objects and fields are available for reporting.

3. Dashboards

Dashboards visualize key metrics using charts and tables.

4. Dynamic Dashboards

Display personalized data based on the logged-in user.

5. Security Settings

Includes sharing rules, field-level security, session settings, IP restrictions, and audit trails.