Phase-9 Reporting , Dashboard & Security Review

1. Introduction

This document details the work completed during Phase 9 of the Salon Management App project. The objective of this phase was to build a comprehensive analytics suite for data-driven decision-making and to implement key security controls to protect business and client data within the Salesforce org.

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2. Part 1: Business Analytics - Reports & Dashboards

Purpose: The primary goal of business analytics is to convert raw data into actionable insights. For a salon, this means understanding revenue streams, staff performance, and daily operations to improve efficiency and profitability.

2.1 Custom Report Type: `Clients with Appointments`

- **Action:** A new custom report type was created with `Contact` (Client) as the primary object and `Appointments` as the related object.
- **Purpose:** Standard reports could not link Clients and their Appointments together. This custom report type was essential to build reports that answer critical business questions like, "Which services are our top clients booking?"

2.2 Report Suite Development

Purpose: A suite of three distinct reports was developed to meet the needs of different roles within the salon, from the front-desk receptionist to the owner.
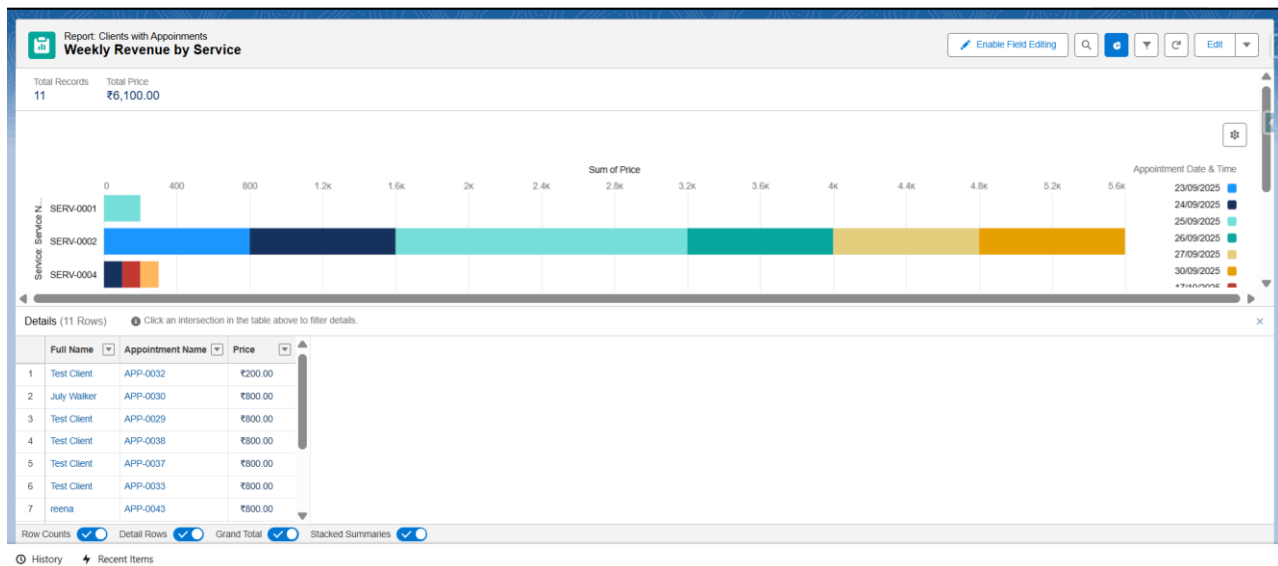
- **Report 1: `Today's Appointments List` (Tabular Report)**
    - **Action:** A simple tabular report was created showing key appointment details. It was filtered to only show records where the `Appointment Date & Time` is `TODAY`.
    - **Purpose:** To provide the receptionist with a clean, scannable "day sheet" of all scheduled appointments, improving front-desk organization and client check-in.

Report: Clients with Appointments
Today's Appointments List

Total Records
1

	Full Name	Appointment Name	Service: Service Name	Stylist: Full Name
1	Test Client	APP-0033	SERV-0002	Archana Mishra

- **Report 2: `Appointments by Stylist This Week` (Summary Report)**
  - **Action:** A summary report was created by grouping records by `Stylist: Name` and filtering for the current week. A Bar Chart was added for visualization.
  - **Purpose:** To allow the salon owner to visually track and compare stylist workload and productivity on a weekly basis, aiding in resource management and performance reviews.
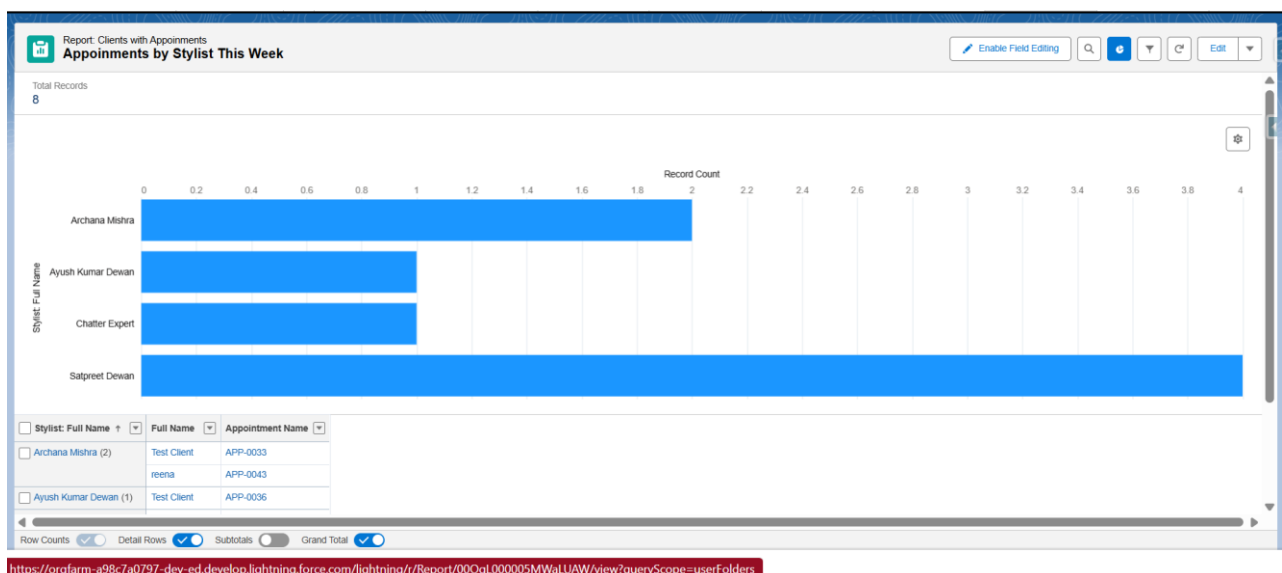

- **Report 3: `Weekly Revenue by Service` (Matrix Report)**
  - **Action:** A matrix (pivot-style) report was built with `Service: Service Name` as the row grouping and `Appointment Date & Time` (by Calendar Week) as the column grouping. The `Price` field was summarized by `Sum`.
  - **Purpose:** To provide a powerful financial overview of which services are the most profitable over time. This insight is crucial for making strategic decisions about marketing, pricing adjustments, and which services to promote.

Report: Clients with Appointments
Weekly Revenue by Service

Total Records	Total Price	
11	₹6,100.00	

Details (11 Rows) Click an intersection in the table above to filter details.

	Full Name	Appointment Name	Price
1	Test Client	APP-0032	₹200.00
2	July Walker	APP-0030	₹800.00
3	Test Client	APP-0029	₹800.00
4	Test Client	APP-0038	₹800.00
5	Test Client	APP-0037	₹800.00
6	Test Client	APP-0033	₹800.00
7	reena	APP-0043	₹800.00

Row Counts Detail Rows Grand Total Stacked Summaries

History   Recent Items

2.3 Executive Dashboard: `Salon Performance Dashboard`

Purpose: To consolidate the most important metrics from the reports into a single, high-level command center for the salon owner, enabling at-a-glance understanding of the business's health.

- **Action:** A new dashboard was created and the three reports were added as components: the stylist report as a **Bar Chart**, the revenue report as a **Chart**, and the daily appointments list as a **Lightning Table**.
- **Purpose:** Each component was chosen to represent its data in the most effective way— charts for visual comparison and trends, and a table for detailed lists. The dashboard was then added to the **Salon Console Home Page** so it's the first thing the owner sees when they log in.
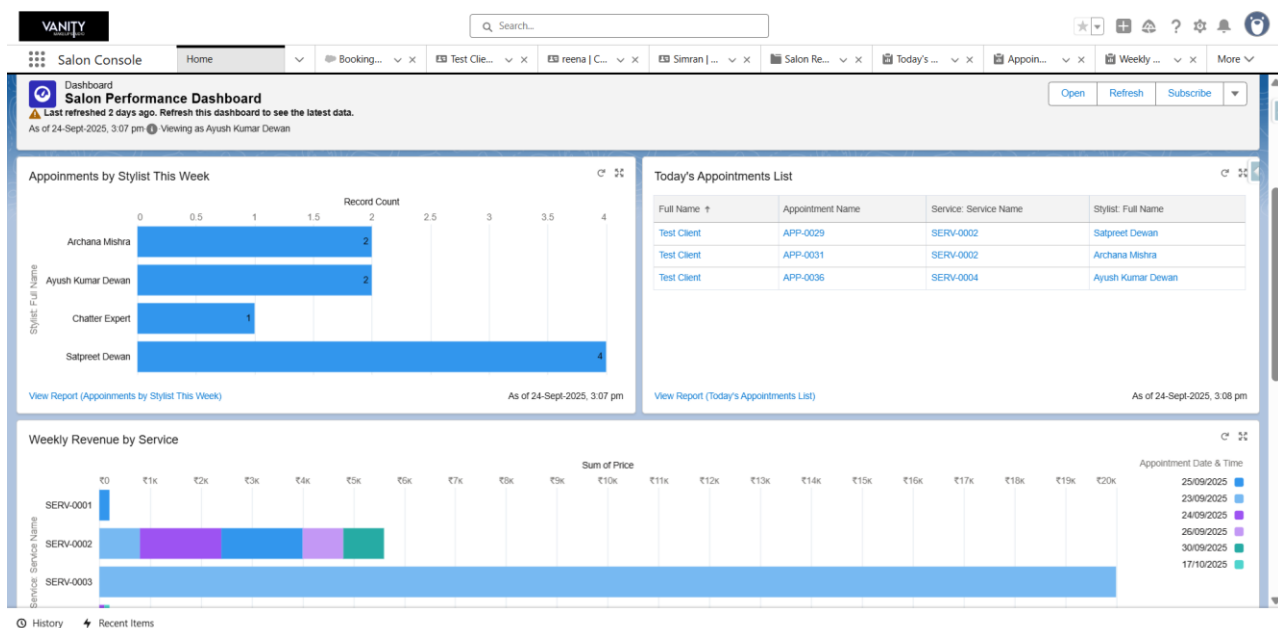
3. Part 2: Application & Data Security

Purpose: To implement a robust security model that protects sensitive data and ensures users only have access to the information and functions necessary for their roles.

3.1 Field Level Security (FLS)

- **Action:** The `Stylist` profile was modified. Access to the `Price` field on the `Appointment` object was set to **Read-Only**.
- **Purpose:** To enforce a key business rule. This prevents stylists from modifying the price of a service, ensuring financial data integrity and consistent pricing for all clients.

3.2 Login Access Control

- **Action:** A **Login IP Range** was configured for the `Receptionist` profile, restricting access to a specific, trusted IP address.
- **Purpose:** To add a critical layer of physical security. This ensures that the receptionist's account can only be accessed from the salon's physical location, protecting against unauthorized access even if a user's password were to be compromised.

3.3 Session Security

- **Action:** The org's **Session Timeout** settings were reviewed. The recommendation was made to reduce the timeout from the default 2 hours to a shorter duration, such as 30 or 60 minutes.
- **Purpose:** To minimize the risk of an unattended, logged-in session on a public-facing computer at the reception desk. A shorter timeout automatically logs out inactive users, securing the system.

Session Settings

Help for this Page ❓

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value 　[2 hours ▾]

☐ Disable session timeout warning popup
☑ Force logout on session timeout

Session Settings

☐ Lock sessions to the IP address from which they originated
☑ Lock sessions to the domain in which they were first used
☐ Terminate all of a user's sessions when an admin resets that user's password ⓘ
☑ Force relogin after Login-As-User
☐ Require HttpOnly attribute
☐ Use POST requests for cross-domain sessions
☐ Enforce login IP ranges on every request ⓘ
☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED

AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

Caching

☑ Enable caching and autocomplete on login page
☑ Enable secure and persistent browser caching to improve performance
☑ Enable user switching
☐ Remember me until logout