Phase 9: Reporting, Dashboards & Security Review

Executive Summary

In this phase, we converted the raw travel booking and package data into actionable intelligence through reports and dashboards. We also conducted a security review to ensure that sensitive customer and booking data is protected.

The objective was two fold:

1. Provide managers and travel agents with real-time visibility into booking trends, package availability, and customer activity.

2. Strengthen the org's security posture with strict access controls, session policies, and audit monitoring.

Reports (Tabular, Summary, Matrix, Joined)

1. Tabular Report – All Bookings

- **Navigation:** App Launcher → Reports → New Report

- **Report Type:** Bookings with Travel Package

- **Fields:** Contact Name, Travel Package, Booking Date, Number of Seats

- **Purpose:** Flat list for exporting raw booking data for operational reviews or audits.
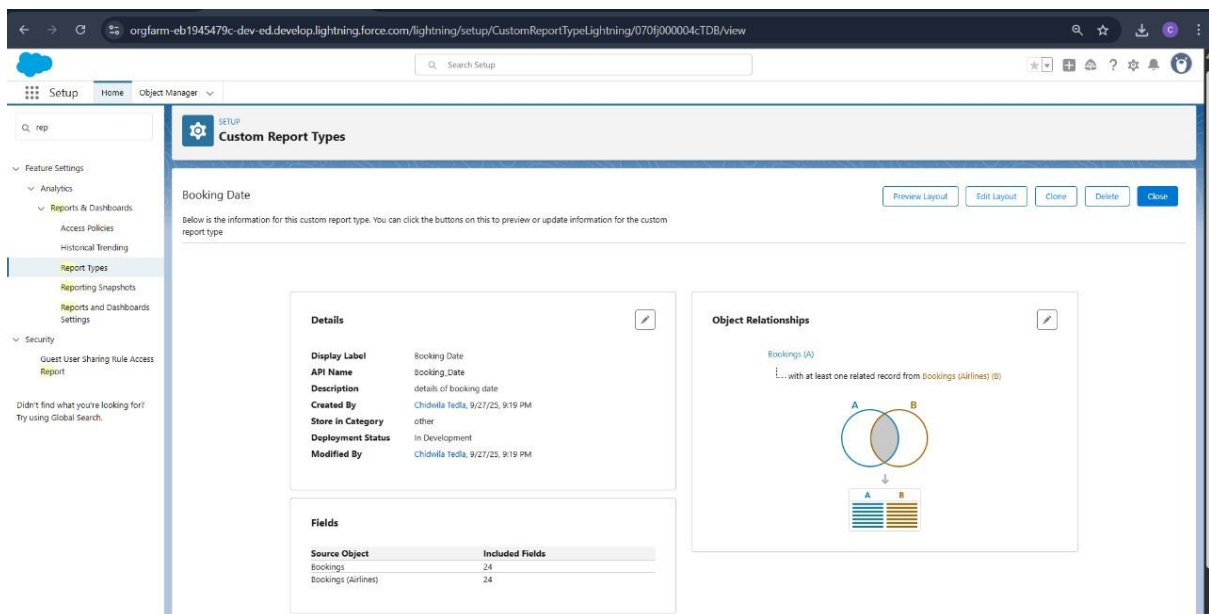
Summary Report – Bookings by Travel Package

- **Navigation:** App Launcher → Reports → New Report

- **Report Type:** Bookings with Travel Package

- **Fields:** Travel Package, Contact Name, Number of Seats

- **Grouping:** Group by Travel Package

- **Purpose:** Shows total bookings per travel package to monitor popularity and availability.

Matrix Report – Booking Status Matrix

- **Navigation:** App Launcher → Reports → New Report

- **Report Type:** Bookings with Travel Package

- **Fields:** contacts,accounts

Dashboards

1. TourEase Dashboard

- **Navigation:** App Launcher → Dashboards → New Dashboard

- **Components:**

  o Donut Chart: Bookings by Travel Package

  o Metric: Record count

  o Gauge: Remaining Seats per Package

- **Purpose:** Provides visual insights into package popularity, occupancy, and real-time booking activity.
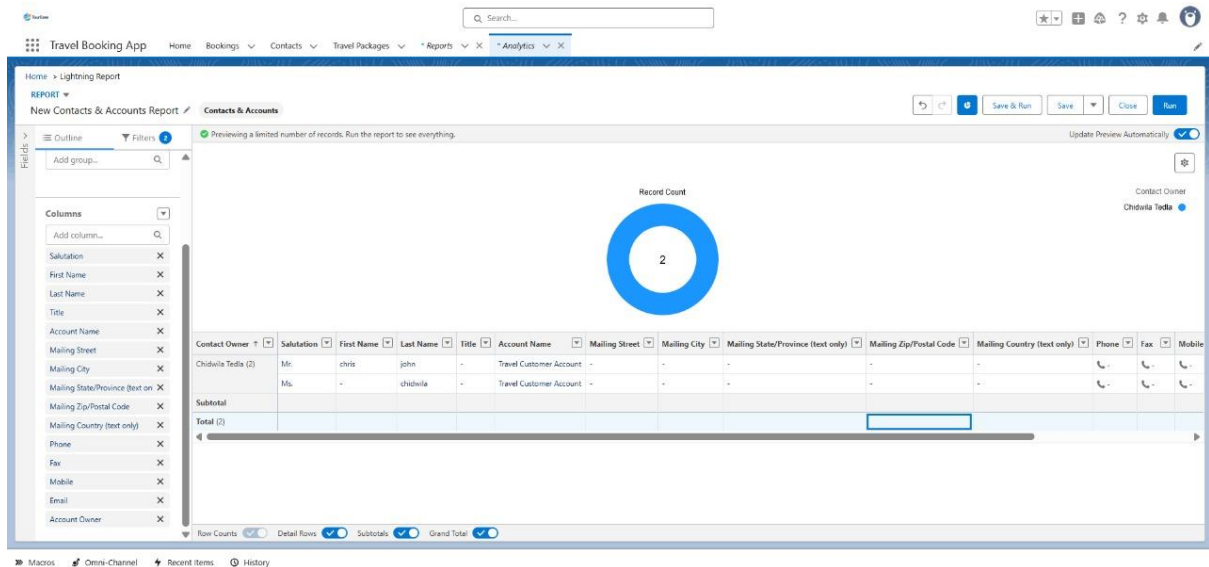

2. Dynamic Dashboards

- **Setup:** Dashboard Properties → Run as Logged-in User

- **Purpose:** Travel agents see only their own bookings, while managers see all bookings across the organization.

## 3.Security Review

1. Sharing Settings

- **Configuration:** Setup → Security → Sharing Settings

- **Object Settings:**

  o   Travel Package → Public Read Only

  o   Booking → Private

- **Purpose:** Ensures that sensitive booking data is only visible to relevant users while packages remain visible to all users.
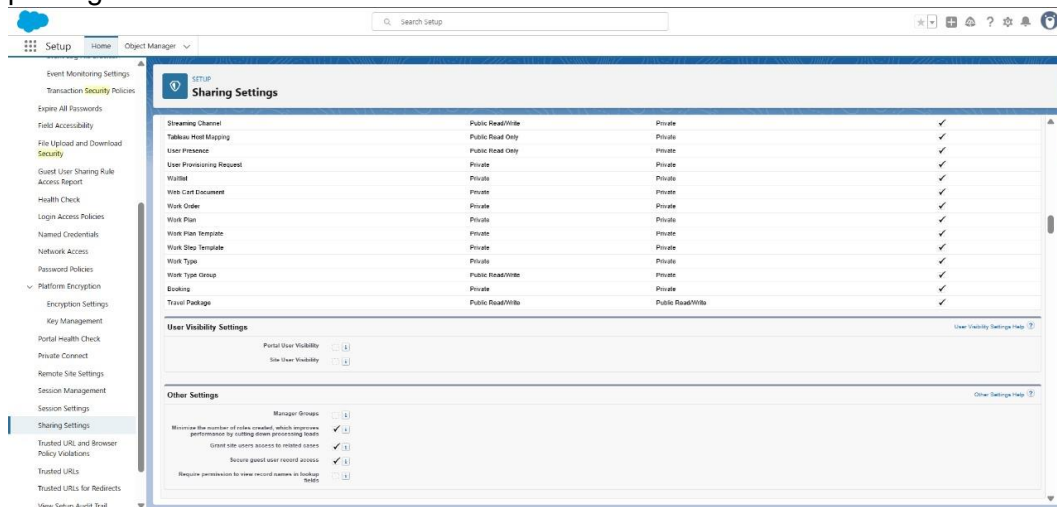

2. Field-Level Security

- **Configuration:** Object Manager → Travel Package → Fields → Price__c → Set Field-Level Security

- **Purpose:** Ensures sensitive fields, such as package price, are visible only to Admins.
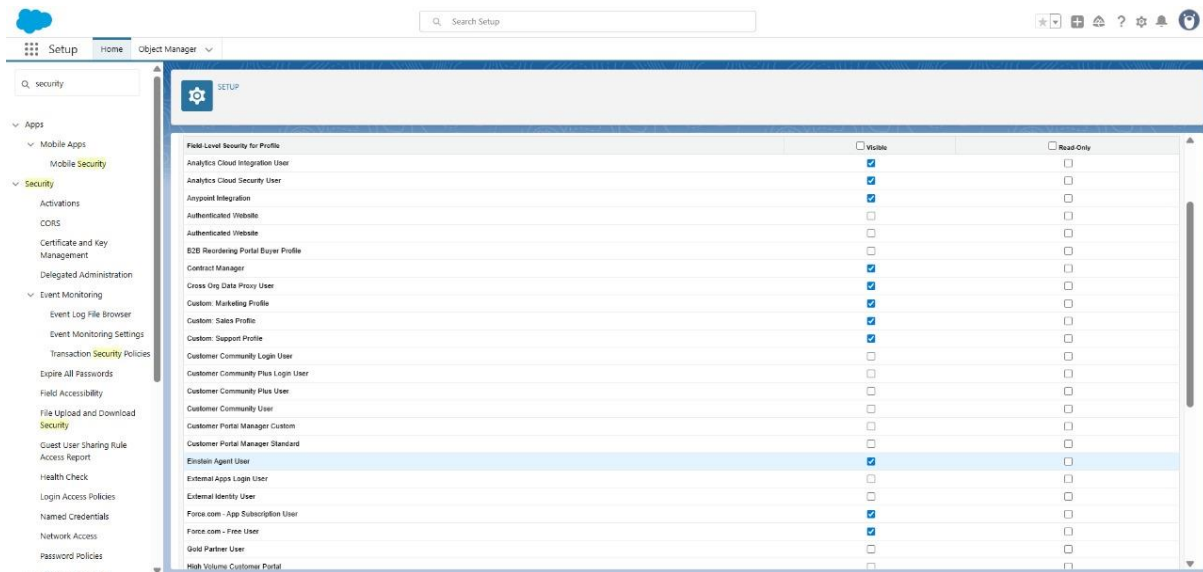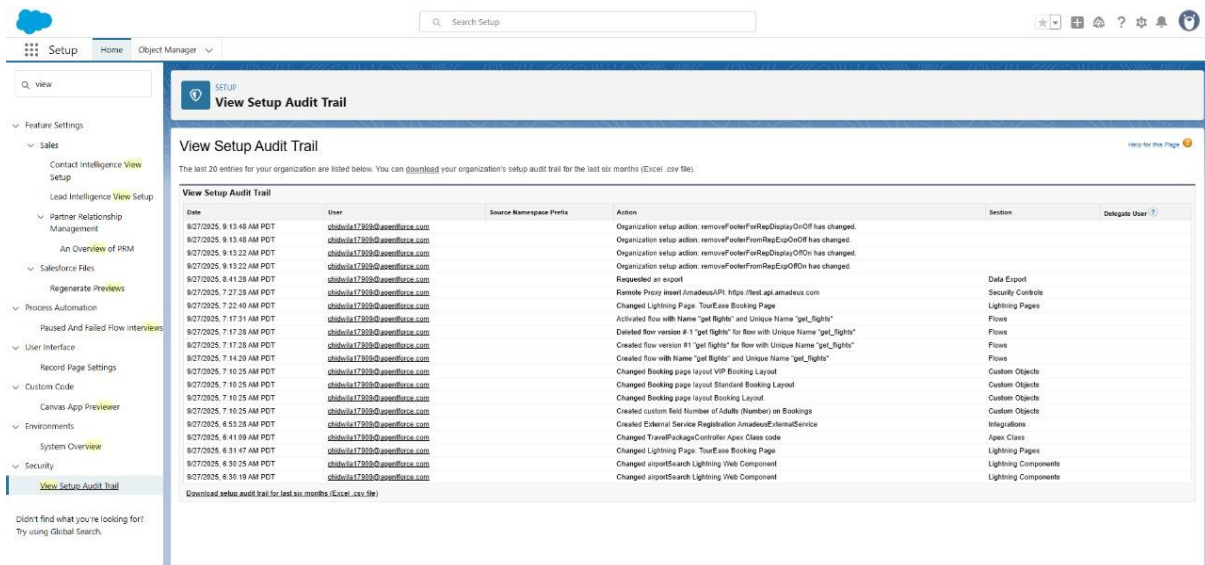

3. Session Settings

- **Configuration:** Setup → Security → Session Settings

- **Settings:** Session timeout = 30 minutes, HTTPS required

- **Purpose:** Enforces secure sessions and protects user data.
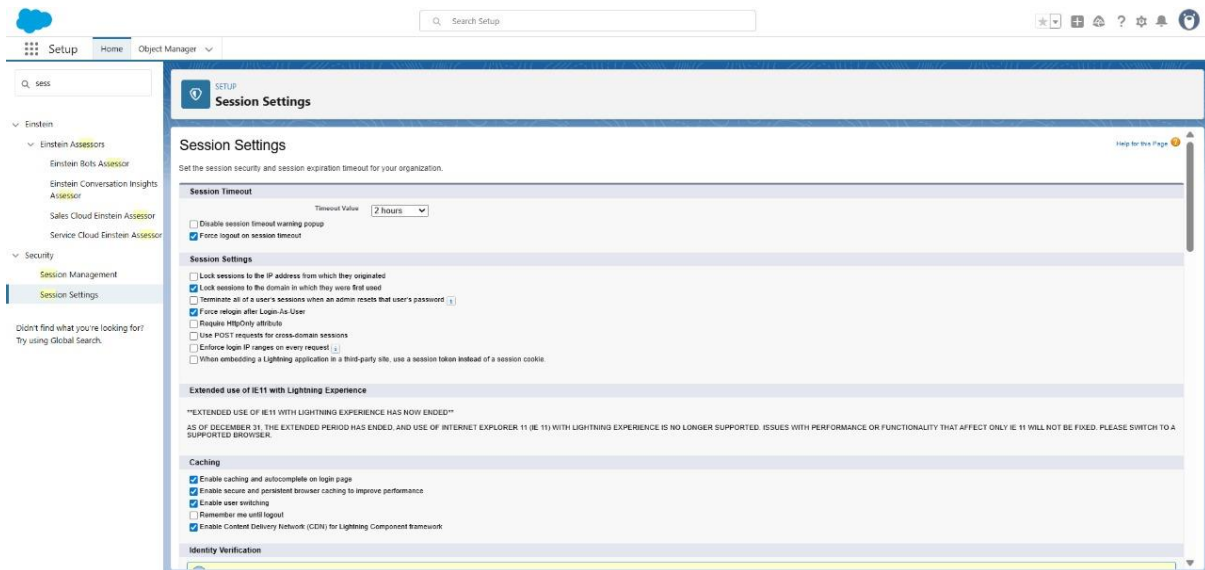
4. Audit Trail

- **Configuration:** Setup → Security → View Setup Audit Trail

- **Purpose:** Tracks changes to Travel Package and Booking records for compliance and security monitoring.

Conclusion:

In Phase 9, the TourEase project focused on integrating external APIs and services to enhance the travel booking experience. By using named credentials, callouts, platform events, and change data capture, the system can securely fetch real-time data, synchronize records, and respond to external changes efficiently. This phase demonstrates how leveraging Salesforce's integration capabilities ensures seamless connectivity, up-to-date information, and a more dynamic, responsive application for both users and administrators.