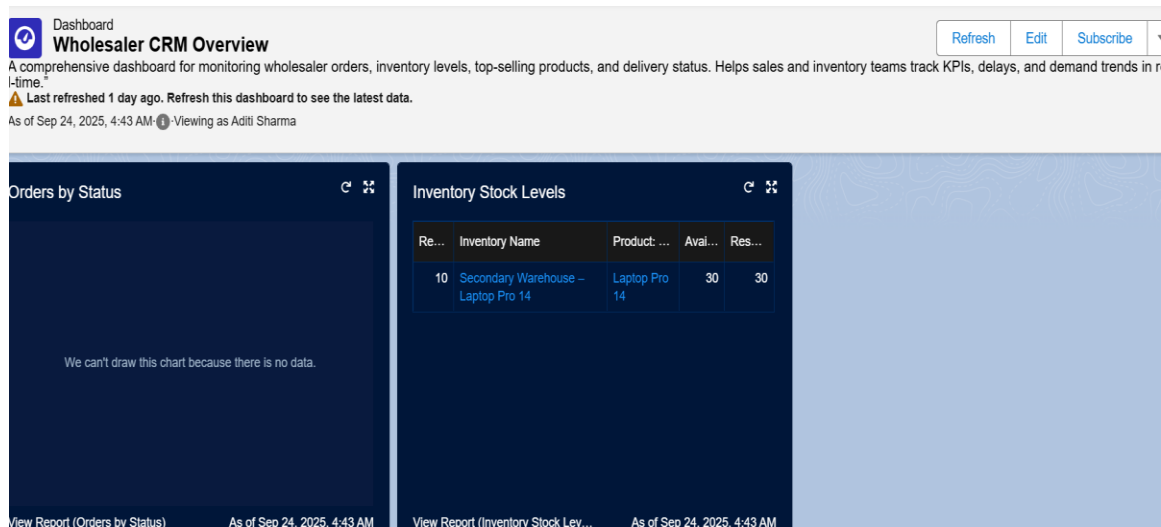


# Phase 9: Reporting, Dashboards & Security Review

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## 1. Dashboards

- Created dashboards for Retailer, Operations, and Sales teams.
- Used charts (bar, line, donut) and gauge components for KPIs.
- Configured dynamic dashboards so each role sees relevant data.
- Scheduled refresh for daily/weekly updates.



## 2. Reports

- Built tabular, summary, and matrix reports for different use cases.
- Key reports: Pending Orders, Top-Selling Products, Delayed Deliveries.
- Added filters (status, date, retailer) for flexible analysis.
- Scheduled automatic report delivery to stakeholders.

The screenshot shows the 'SmartOrder Hub' interface with the 'Reports' tab selected. The 'Recent' section displays a list of 5 items. The left sidebar shows navigation options for Reports and Folders. The main table lists reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed.

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/10/2025, 1:22 PM	
Delayed Orders		Wholesaler CRM Reports	Aditi Sharma	9/24/2025, 3:38 AM	
Orders by Status		Wholesaler CRM Reports	Aditi Sharma	9/24/2025, 3:11 AM	
Inventory Stock Levels		Wholesaler CRM Reports	Aditi Sharma	9/24/2025, 3:33 AM	
Top Selling Products		Wholesaler CRM Reports	Aditi Sharma	9/24/2025, 3:21 AM	

### 3. Sharing Settings

- Set Org-Wide Defaults: Orders = Private, Products = Read-Only, Inventory = Restricted.
- Applied role-based sharing (Retailer, Sales, Ops, Finance).
- Retailers can only view their own orders.
- Managers can see their team's data.


The screenshot shows the 'Sharing Settings' page under the 'SETUP' tab. It includes a warning message about sharing operations, a dropdown to manage settings for 'All Objects', and a table for 'Organization-Wide Defaults'.

**Organization-Wide Defaults**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓

## 4. Public Groups

- Created groups for Sales, Operations, and Finance.
- Used groups in sharing rules to simplify access control.
- Assigned dashboards and reports to public groups.
- Groups used to manage folder permissions.

 **Public Groups**

### Public Groups

[Help for this Page](#)

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.


View: All | [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Label ↑	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	All_Sales_Users	All_Sales_Users	Sharma, Aditi	9/25/2025, 12:59 PM

## 5. Field-Level Security

- Restricted payment fields to Finance only.
- Internal comments visible to Sales team only.
- Inventory cost fields hidden from Retailers.
- Applied field security via profiles and permission sets.


SETUP

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Set Field-Level Security
[Help for this Page](#)

## Reserved Quantity

Save

Cancel


Field Label	Reserved Quantity
Data Type	Number(18, 0)

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 6. Session Settings & IP Address

- Configured session timeout to 30–60 minutes.
- Enforced Multi-Factor Authentication (MFA) for internal users.
- Restricted login IP ranges for sensitive users.
- Enabled login history to track unusual login attempts.


SETUP

## Session Settings

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


SETUP

## Network Access

The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted network access salesforce.com without having to activate their computers.

Trusted IP Ranges			
Action	Start IP Address	End IP Address	Description
<a href="#">Edit</a>   <a href="#">Del</a>	192.168.0.1	192.168.0.255	
<a href="#">Edit</a>   <a href="#">Del</a>	192.168.1.1	192.168.1.255	ERP Integration Range.