Phase 9: Reporting, Dashboards & Security Review

This phase focuses on analyzing data with reports & dashboards and ensuring secure access control through Salesforce's layered security model.

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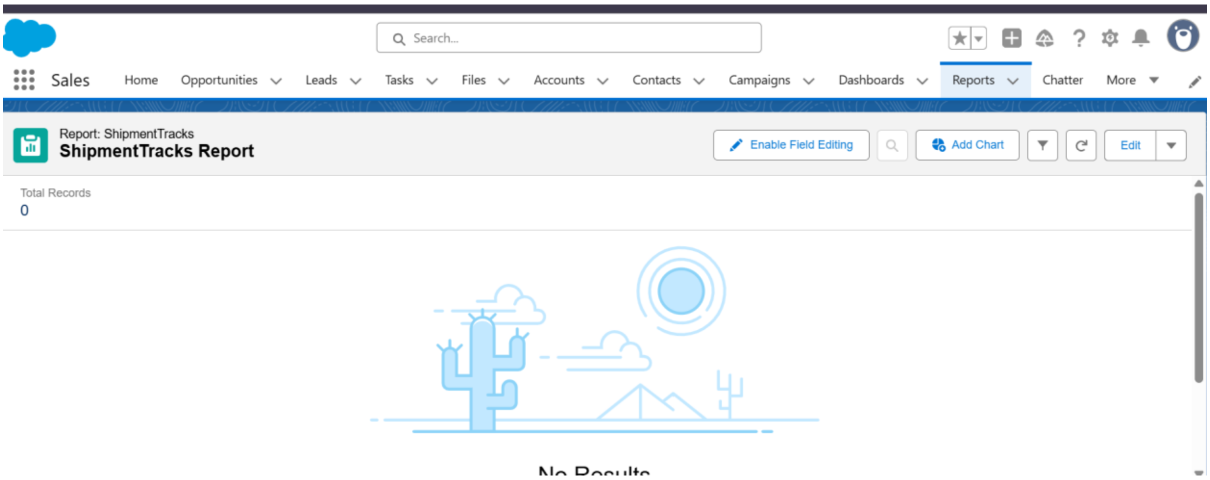
1. Reports (Tabular, Summary, Matrix, Joined)

Purpose: To analyze and present data.

1. Go to Reports → New Report.
2. Select object (shipment tracks)
3. Choose report format
4. Add filters, groupings, and fields.
5. Save & Run.



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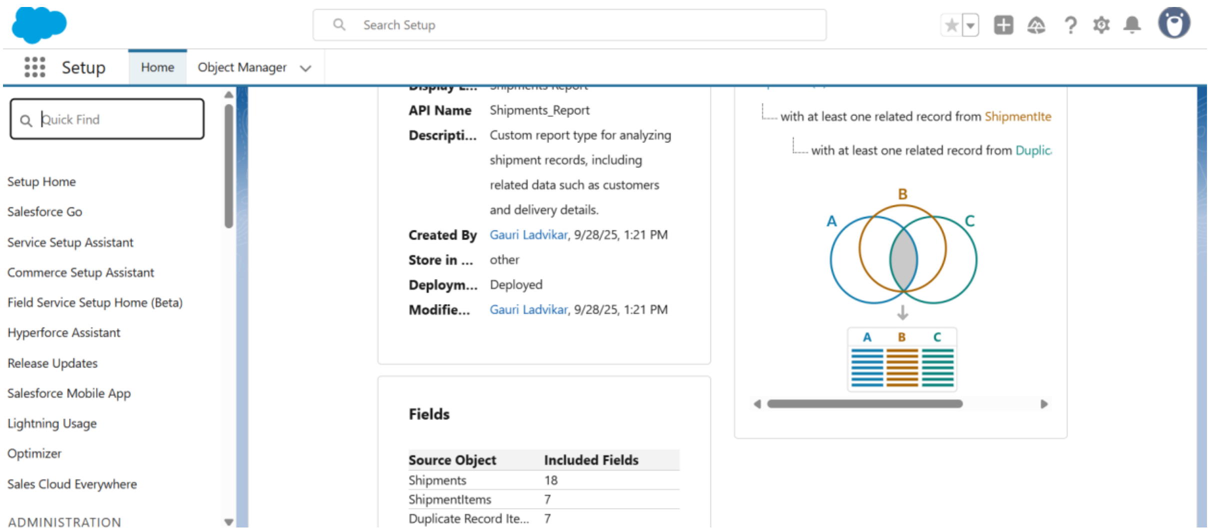
2. Report Types

Purpose: Define which objects and fields are available in a report.
Steps:

1. Setup → Report Types → New Custom Report Type.
2. Primary Object = Shipment__c.
3. Add related object.
4. Deploy for use.



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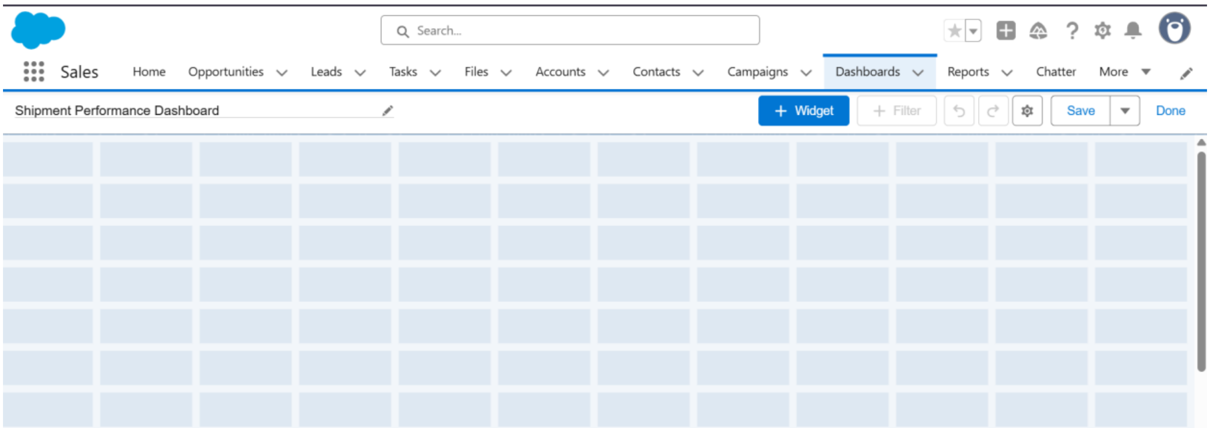
3. Dashboards

Purpose: Visual display of reports for KPIs.
Steps:

1. Go to Dashboards → New Dashboard.
2. Add components (charts, tables, metrics).
3. Link each component to a report.
4. Save & refresh.



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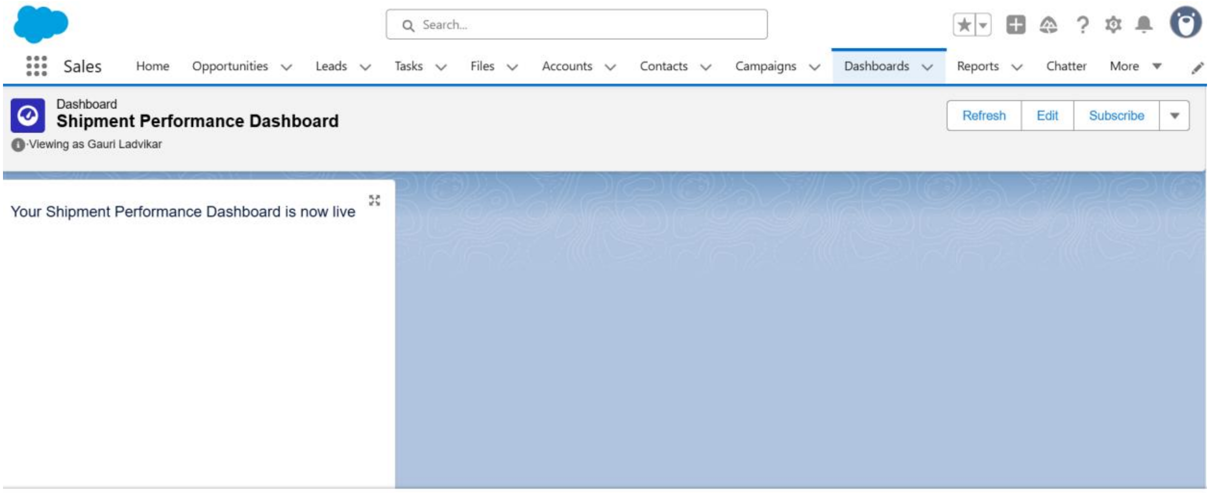
4. Dynamic Dashboards

Purpose: Dashboard shows data as per the logged-in user's access.
Steps:

1. Edit Dashboard → View Dashboard As → "Run as Logged-in User".
2. Save & Share.
   Use Case: Logistics Manager sees all shipments, while Agent sees only their own.



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5. Profiles

Purpose: Define what users can do in Salesforce (object-level & system permissions).
Steps:

1. Setup → Profiles.
2. Clone Standard Profile.
3. Assign object permissions.
4. Assign profile to users.

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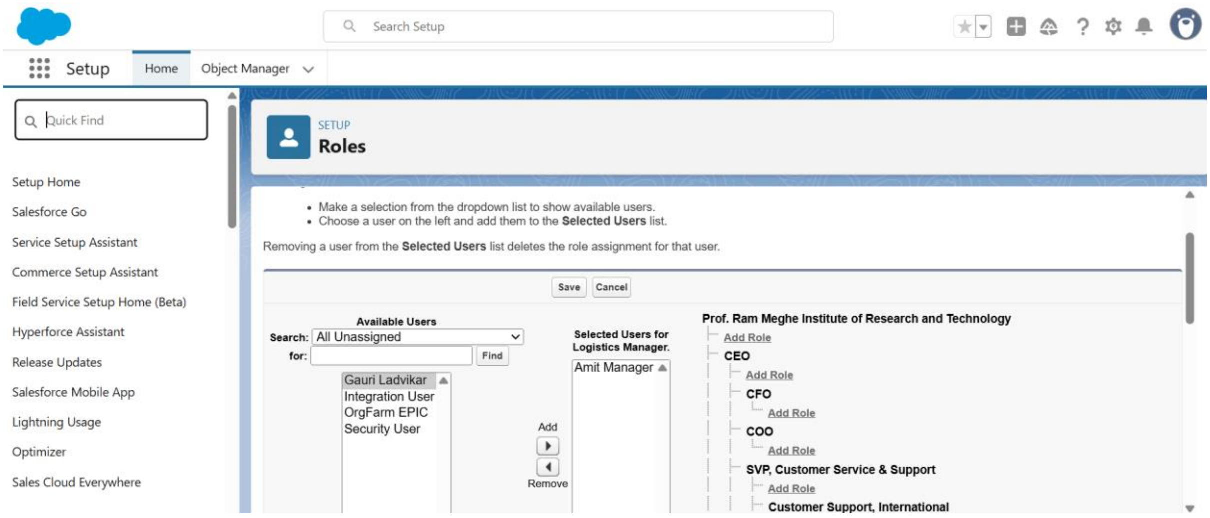
6. Roles

Purpose: Define data visibility in hierarchy (who can see whose records).
Steps:

1. Setup → Roles → Set Up Roles.
2. Create Role = Logistics Manager.
3. Assign users under roles.



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7. Users

Steps:

1. Setup → Users → New User.
2. Fill details (Name, Email, Username).
3. Assign Role + Profile.
4. Save & send login email.

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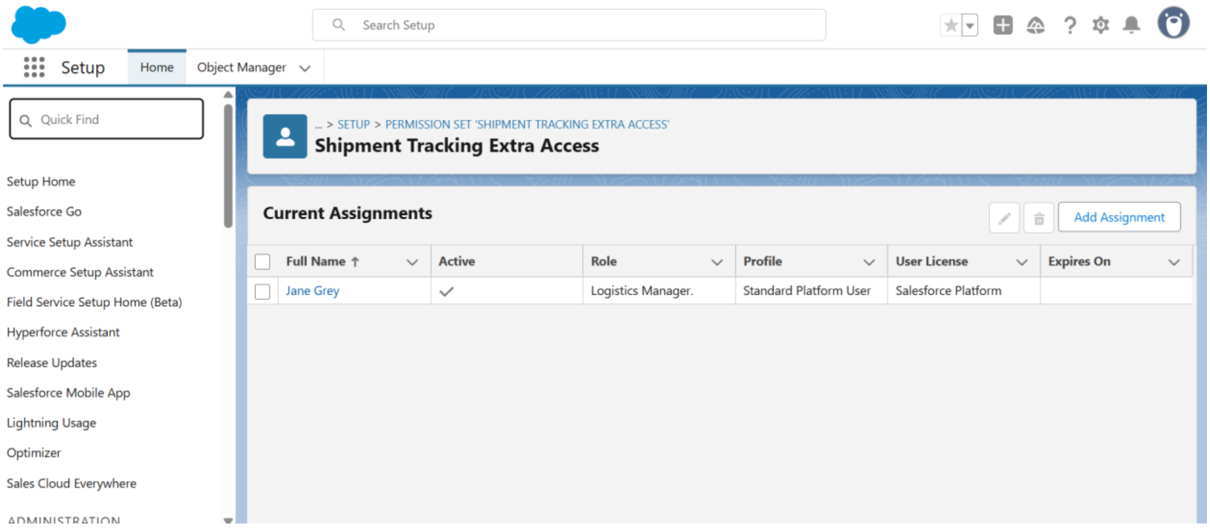
8. Permission Sets

Purpose: Give extra permissions to users without changing their profile.
Steps:

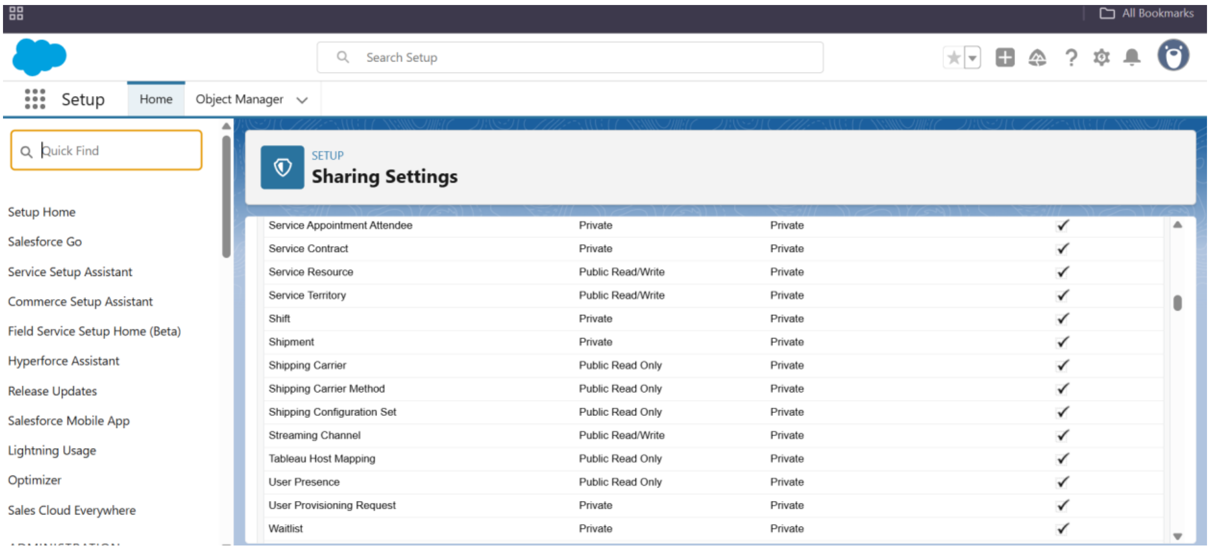
1. Setup → Permission Sets → New.
2. Add object/field permissions.
3. Assign to specific users.

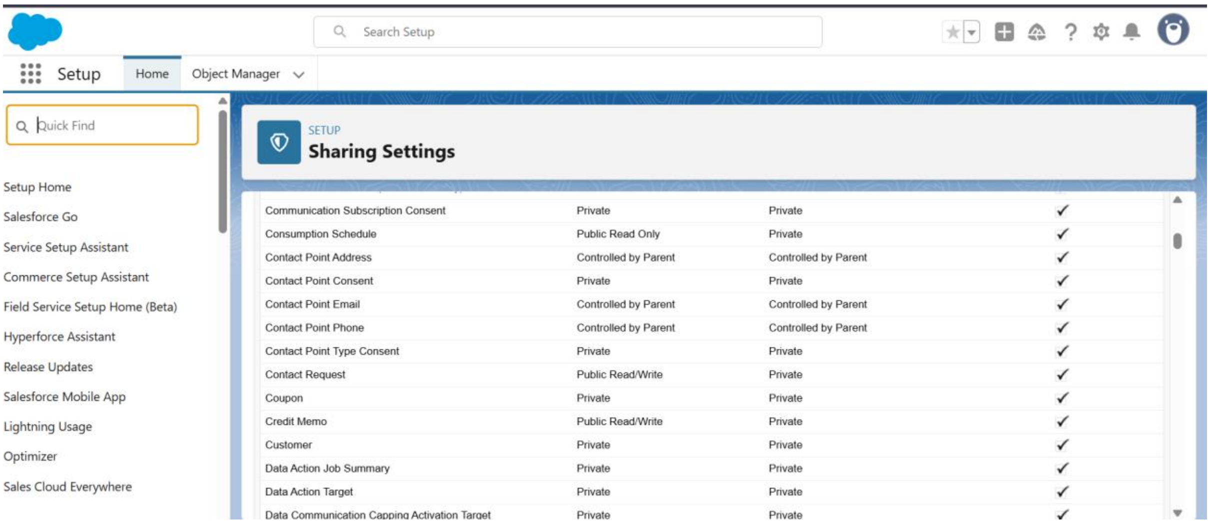


9. OWD (Organization-Wide Defaults)

Purpose: Set baseline record access.
Steps:

1. Setup → Sharing Settings → OWD.
2. Example:
   - Shipment__c = Private.
   - Customer__c = Controlled by Parent.
3. Save.

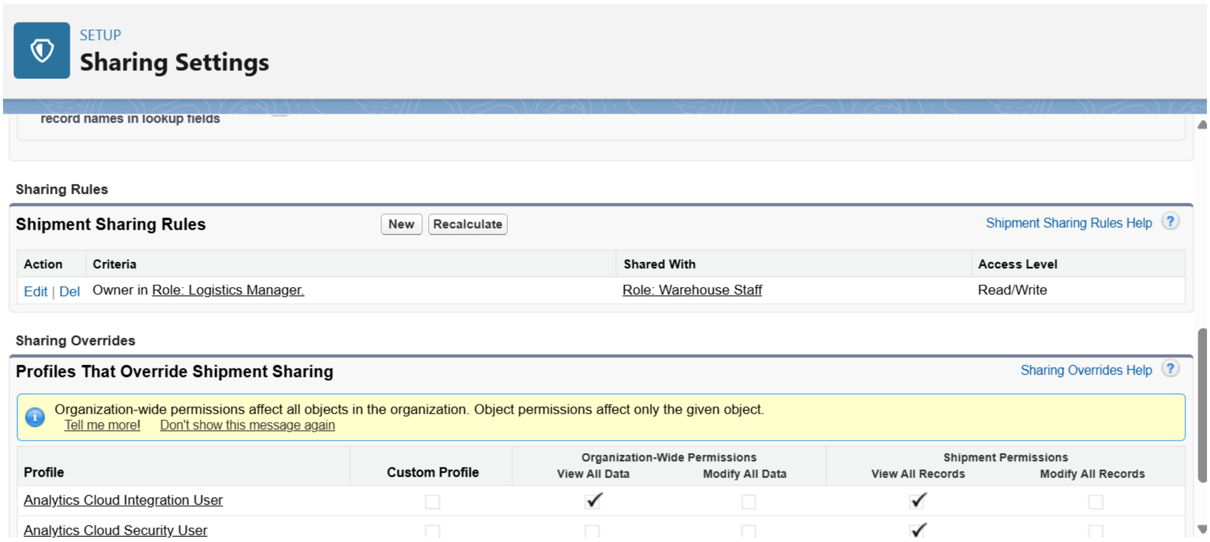




10. Sharing Rules

Purpose: Open access for groups of users beyond OWD.
Steps:

1. Setup → Sharing Settings → New Sharing Rule.
2. Select Object = Shipment__c.
3. Criteria: Region = West → Share with Role: West Manager.
4. Save.



11. Sharing Settings

- Used to configure OWD, Sharing Rules, and Manual Sharing.
- Defines how records are shared across org.

12. Field Level Security (FLS)

Purpose: Control visibility of individual fields.
Steps:

1. Setup → Object Manager → Shipment__c → Fields.
2. Click Field → Set Field-Level Security.

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13. Session Settings

Purpose: Configure login/session policies.
Steps:

1. Setup → Session Settings.
2. Enable session timeout.
3. Restrict concurrent logins.
4. Enable forced logout after inactivity.

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14. Login IP Ranges

Purpose: Restrict logins to trusted IP ranges.
Steps:

1. Setup → Profiles → Select Profile.
2. Set Login IP Ranges (e.g., office network).
3. Save.

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15. Audit Trail

Purpose: Track configuration changes.
Steps:

1. Setup → View Setup Audit Trail.
2. Review last 6 months of changes.
3. Export for compliance if needed.